

The APQC OSBC offline data collection tool is intended to facilitate data collection for organizations that are unable to use the existing online data collection tools. The offline data collection tool can be saved, worked offline, and even passed amongst various people in order to facilitate data collection. Once the appropriate data are collected, the data are either submitted online using the online tool or sent to the appropriate OSBC Researcher for data entry.

The offline data collection tool is based on a Microsoft Excel document. Its content should be identical to the online version of the data collection instrument for a survey.

Steps necessary to complete the offline collection tool:

1. To begin, download the offline collection tool from the OSBC website.
2. Complete the Demographic Information section for your business entity. For more information, see the OSBC Demographics Standards.
3. Indicate your acceptance of the terms and conditions by placing an "X" in the appropriate box of the terms and conditions question.
4. Review and/or print out the survey, scope and definitions documents.
5. Divide the benchmarking survey into manageable mini-projects to collect the data and to distribute specific questions to other internal resources.
6. Assign team members areas for completion and due dates. The data collection template provides a quick checklist for you to track completion of team members.
7. Hold a kick-off internal team meeting to review the project and ensure understanding.
8. Gather the data required. You may either complete the data input in multiple sessions or compile the information offline and submit at one time.
9. Submit the data to APQC using the online survey tool or directly to the OSBC via email, fax, or postal mail.

To submit the survey using the online survey tool, simply navigate to the survey on the OSBC website. Then transcribe the data from the offline tool into the online tool. You'll be required to agree to the terms and conditions before you will be able to submit the data. This is the preferred method of submitting data.

To submit the survey via email, send the completed survey as an attachment to osbc@apqc.org. In the body of the email, include a statement indicating your acceptance of the terms and conditions, available at the end of this document.

To submit the survey via fax, send the completed survey to +1 (713) 681-8578 with a cover page addressed to the OSBC. The body of the cover page must include a statement indicating your acceptance of the terms and conditions, located at the end of this document.

To submit the survey via postal mail, be sure to indicate your acceptance of the terms and conditions by placing an "X" in the appropriate box of the terms and conditions question on the first page of the survey. Send the completed survey to: APQC ATTN:OSBC, 123 N. Post Oak Ln., Houston, TX, 77024.

Remember: APQC offers an OSBC Help Desk to answer any questions you or your team may have regarding specific survey questions or the research process. Please contact our team via phone 800-776-9676 or e-mail OSBC@apqc.org.

TERMS AND CONDITIONS

Terms of Use and Notices For APQC's OSBC Database

1. APQC's Open Standards Benchmarking CollaborativeSM ("OSBC") database consists of surveys, databases and data reports collected through APQC's web site and Knowledge Sharing NetworkTM ("KSN") (collectively, the "OSBC Database"). As a condition to accessing the OSBC Database, you agree to provide accurate survey information as requested by APQC. Your organization will own your specific data submitted to APQC. APQC will own the OSBC Database and any other information disclosed by APQC to your organization. APQC reserves the right to deny or limit privileges to the OSBC Database to any user without notice. You represent that you are an "employee" and have authorization from your organization to bind the organization to these terms and conditions, to provide the information as requested by the APQC Web sites and to respond to surveys presented therein. For purposes of these terms of use, "you" means you and your organization. An "employee" is defined as a person employed full-time or part-time with non-temporary status for an organization. You must be eligible to receive a W-2 tax form or international equivalent from the organization you list as your employer while accessing the OSBC Database. OSBC Database users are not allowed at any time to represent and/or provide data for any other organization than their employer, unless a user has written permission from the organization. In the event a consultant or vendor is working on behalf of another organization, the consultant or vendor must have an employee of that organization provide and verify the data submitted to the OSBC Database.

2. Company-specific data entered by you to complete each survey and submitted to APQC is confidential and subject to APQC's privacy policy. The OSBC Database and any other information disclosed by APQC to you is confidential. The data collected and maintained in the OSBC Database by any such survey shall be owned by APQC and may be used by APQC in any manner subject to APQC's privacy policy. Information provided to APQC via the OSBC surveys will be used in accordance with the Benchmarking Code of Conduct.

3. The OSBC Database is intended to support the understanding, assessment, measurement, and change of the internal processes within organizations. You may use the OSBC Database only on an individual, limited, non-commercial, and personal basis. Except as may be provided by special agreement between you and APQC, you may not modify, copy, distribute, transmit, display, perform, reproduce, publish, license, create derivative works from, transfer, or sell any surveys, data, information, products, or services obtained from the OSBC Database. Without the advance, expressed written permission of APQC, you may not use the OSBC Database in any commercial manner. You acknowledge that violation of this provision would cause irreparable harm to APQC not adequately compensable by monetary damages and, in addition to other relief, you agree that APQC may seek injunctive relief without necessity of posting bond to prevent any actual or threatened violation of this term.

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6. APQC's liability for damages to you for any cause regardless of the form of any claim or action shall not exceed the fees actually paid by you (if any) during the term of this agreement.

7. You agree that APQC may list your organization name as a participant of the OSBC Database program it provides to customers and prospective customers.

8. APQC may change these terms and conditions at any time by notifying you of any changes.

9. All contents of the OSBC Database and KSN are: Copyright(c) 1994, 1995, 1996, 1997, 1998, 1999, 2000, 2001, 2002, 2003, 2004, 2005 APQC and/or its suppliers, 123 North Post Oak Lane, Houston, Texas 77024 U.S.A. All rights reserved. TRADEMARKS: American Productivity & Quality Center, APQC, the OSBC Database, Knowledge Sharing Network, KSN™, and/or other APQC products and services may also be either trademarks or registered trademarks of APQC. Any rights not expressly granted herein are reserved. The copyright laws of the United States restrict the copying, including photocopying, of copyrighted materials, which include most books, magazines, newspapers, newsletters, other periodicals, and training materials, in either hard copy or electronic versions. REPRODUCTION OF COPYRIGHTED WORKS WITHOUT THE PERMISSION OF THE COPYRIGHT HOLDER IS GENERALLY PROHIBITED BY FEDERAL LAW. VIOLATIONS CAN RESULT IN CIVIL LIABILITY, INCLUDING ACTUAL DAMAGES, ATTORNEYS FEES, AND/OR STATUTORY DAMAGES, OF UP TO 100,000 USD PER INCIDENT, AND/OR CRIMINAL PENALTIES.

10. You hereby release and hold harmless APQC, its officers, directors, agents, consultants, contractors and employees from any and all claims, actions, injunctive relief, or causes of action for damages relating in way to use of information comprising the OSBC Database.

11. You agree that any dispute regarding this agreement will be resolved only in the State or federal courts located in Harris County, Texas.

OSBC DATABASE PRIVACY AND PROTECTION OF PERSONAL INFORMATION

Please refer to APQC's privacy statement located on APQC's Web site www.apqc.org for disclosures relating to the collection and use of your personal information.

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