



## Assessment Firm Membership

*For businesses that evaluate service provider controls*

Firms that outsource data processes and services require operating efficiencies and cost savings. At the same time, outsourcers must carefully evaluate the controls their service provider partners have in place. Assessment firms play an important role in this process, conducting detailed evaluations on service provider controls for security, privacy and business continuity.

Under the direction and management of The Santa Fe Group ([www.santa-fe-group.com](http://www.santa-fe-group.com)), the Shared Assessments Program ([www.sharedassessments.org](http://www.sharedassessments.org)) has streamlined and standardized the service provider evaluation process, helping organizations of all sizes realize important efficiencies and cost savings. Assessment firms incorporate the Shared Assessments tools into client assessments through Assessment Firm membership.

The Shared Assessments Program was created by six leading financial institutions in conjunction with the Big 4 accounting firms to inject efficiency, consistency, cost savings and common sense into the service provider assessment process. The Santa Fe Group manages the Shared Assessments Program as an independent, industry-driven standard.

## Shared Assessments Adoption

Assessment firms that adopt the Shared Assessments standards are able to conduct faster, more efficient and less costly service provider assessments for their clients while improving the rigor of their evaluations.

Assessment firms that use the Shared Assessments standards gain:

- **Efficiencies and Cost Savings** through industry-standard assessment tools: the Standardized Information Gathering (SIG) Questionnaire and Agreed Upon Procedures (AUP)
- **More Comprehensive Assessments** that raise the bar on security, privacy and business continuity through increased rigor and industry-standard guidelines

Our Shared Assessments membership helps us work more effectively with clients, streamlining vendor management processes and ensuring a rigorous evaluation process.

— Ken Peterson, CEO, Churchill & Harriman

## Benefits of Assessment Firm Membership

Assessment Firms are our anchor members and, with Industry and Service Provider members, work corroboratively as industry leaders, contributing to the development of the Shared Assessments tools. As participants in a global community of leaders in information security, privacy, business continuity and risk management, Assessment Firm members gain opportunities for brand visibility, collaboration and professional development.

In addition, Assessment Firm members receive these important benefits:

### Community

- Opportunities to shape and refine Shared Assessments' industry-standard tools: the Standardized Information Gathering (SIG) Questionnaire and Agreed Upon Procedures (AUP)
- Access to members-only working group meetings and events with key industry thought leaders and knowledge experts to learn about the latest developments in vendor management and regulatory compliance
- Two complimentary seats at the Shared Assessments Member Roundtable, where members network with peers and discuss strategic outsourcing issues and trends
- Member discounts on registration for the Shared Assessments Summit, an annual day-and-a-half in-person forum providing expertise on the outsourcing landscape, regulator insights and updates on global trends
- Five annual complimentary registrations at webinars by The Santa Fe Group

### Leadership

- Opportunities to develop and demonstrate organizational leadership by serving on or chairing the Shared Assessments Technical Development Committee as a Technical Adviser\*

- Opportunities to foster employee growth and build organizational expertise by participating in working groups, including the Shared Assessments Technical Development Committee
- Participation in members-only content development groups that author whitepapers and present webinars

### Visibility

- Reputational and brand visibility as a member of a global community of risk management leaders
- Your company name and logo prominently displayed on the Shared Assessments website ([www.sharedassessments.org](http://www.sharedassessments.org)), in promotional materials, and at Shared Assessments events
- International recognition for making rigorous information security processes integral to your organization's business model
- Opportunities to comment on media stories related to outsourcing and vendor risk management
- Member discounts on sponsorships and exhibitorships at the Shared Assessments Summit, an annual day-and-a-half in-person forum providing expertise on the outsourcing landscape, regulator insights, and updates on global trends
- Member discounts on sponsorships, exhibitorships and registration for public events presented by The Santa Fe Group
- Online advertising opportunities through the Shared Assessments website ([www.sharedassessments.org](http://www.sharedassessments.org))

### Resources

Assessment Firm members gain access to these members-only resources:

- Membership directory
- Training calls
- Marketing Toolkit for members
- Member newsletter
- Member email updates
- Survey results and adoption statistics

### Membership Dues

Assessment Firm membership annual dues are based on market capital. Non-public firm membership fees are based on annual global revenue.

Market Capital	Annual Membership
\$2B +	\$15K
Under \$2B	\$10K

To learn more about how your company can benefit from Shared Assessments Program membership, contact **Michele Edson, 831-637-1879** or [michele@santa-fe-group.com](mailto:michele@santa-fe-group.com).

For more information about Shared Assessments, visit our website at [www.sharedassessments.org](http://www.sharedassessments.org).

*\*Technical Adviser status is available to CPA firms only and is subject to nomination.*

**We saw membership as an opportunity to join an effort that is helping to raise the bar on information security.**

— Scott Brown, Financial Services Program Manager,  
Iron Mountain