

Bullet Report

FEBRUARY
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The Bullet Report presents recent activity and timely information from most, if not all, Boston Consortium groups including: Arts, Benefits, Board of Directors, Chief Information Officers, Controllers, Employment Managers, Environmental Health and Safety, Facilities, Health Services, Human Resources, IT Training, IT User Services, Labor and Employee Relations, Organizational Development and Training, Public Safety, Purchasing, Risk Management, Sponsored Research, Telecommunications, and Special Initiatives.



THE BOSTON CONSORTIUM
FOR HIGHER EDUCATION

The Boston Consortium for Higher Education's (TBC) mission is to create a collaborative environment that inspires its member colleges and universities in the development and practical implementation of innovative cost management and quality improvement ideas.

Babson College
Bentley College
Berklee College of Music
Boston College
Boston University
Brandeis University
Harvard University
MIT
Northeastern University
Olin College
Tufts University
Wellesley College
Wheaton College

• Internal Audit Co-Source Initiative

Seven schools have been exploring a collaborative solution to internal audit. Interviews have been completed and the findings have been consolidated into three possible options for implementing a pilot. On March 4, Babson, Bentley, Berklee, Brandeis, Olin, Wheaton, and Wellesley meet to hear the collective recommendation of the Resources Audit Solutions (RAS) staff. If there is consensus on an approach, the final details will be resolved and this eighteen-month effort will become a functioning pilot.

The history of this effort dates back to 2001, when the CFOs of the interested schools agreed to support a grant request to the Mellon Foundation for three initial investigations: Risk Management, Internal Audit and Legal Services. Mellon awarded the grant in 2001 for \$225,000 over three years, with the understanding that the schools' financial risk for such an effort might be lessened. Thus, each active school made annual contributions to offset the pilot cost.

The first stage of this effort, the Risk Management pilot, has thus far been successful, with the third and final year of the pilot about to begin. At the end of the third year, a decision will be made by the schools to assume the full cost of that operation based on its value and effectiveness. Mellon dollars assumed half of the cost the first year, about 35% the second, and 20% the third. The approach for Internal Audit services may follow that pattern.

It is important to recall that the genesis of co-sourcing actually dates back before the Mellon Grant. CFOs from among these schools and other members identified 22 areas that could provide improvements and cost saving/avoidance by collective action. Copies of that summary of items and the considerations of institutional barriers date back to 2000, but can be forwarded to those interested.

Continued



- **Internal Audit Co-Source Initiative—*Continued***

Moreover, Mellon was made aware in the beginning that indications of success in this effort would precipitate a follow-up request for support of other areas of co-sourced activity. The board of the Consortium will soon need to consider the next focus. To be sure, the time limitations for completion of this effort by June 30 have implications for the next grant submission. TBC has already informed Mellon that the third component of this effort, sharing of certain low-level legal services, will not be completed within that deadline, but will be rolled into the next effort should Mellon once again provide financial support.

Co-sourcing has the ability to “raise the bar” for those institutions that have not previously invested discrete human resources in Risk or Internal Audit services. From the beginning, there was a realization that implementing these efforts would reflect an increase in cost. However, implementation also provides a discrete service at the lowest cost possible with expectations of savings via scale and centralized policy development. With impending state legislation for a Massachusetts based Sarbanes-Oxley Act, it may prove to be a prescient action.

- **IT User Services**

We are pleased to announce the formation of a new Community of Practice. This new group resulted from the requests of several User Service Professionals seeking to share and learn from each other. In December, the group gathered to meet and to explore common issues and challenges. The lively discussion and participation helped to target several common issues to be addressed at future meetings. At its second meeting in January, the group reviewed and ordered critical issues and agreed to explore Service Level Agreements. In February, the group shared service agreements already in use. The discussion facilitated the process for schools developing new SLAs. Future topics include understanding the implications of “blended groups” for IT services, and reviewing Student Support policies on each campus.

Next Meeting: March 11

- **Emergency Preparedness Series**

On March 18, the next program in the series will focus on Communications. Joe Griffin of Harvard University will present a demonstration of the Harvard Emergency Communications system. Also, Steven Morash of BEMA will give an overview of the City of Boston’s emergency communications system. Details for the meeting, complete agenda, and registration information will be posted on the web soon.

• Transitions Faculty Retirement Program Underway

Discussions between the Chief Human Resource Officers have led to an interesting pilot program to assist faculty in exploring alternatives for their retirement. Boston College, Babson College and Northeastern University have initiated this effort with support from the Davis Educational Foundation. The first dinner meeting was on February 5 at Henderson House.

Deans of Faculty from the pilot schools reviewed the concept and are enthusiastic, as are the participants. The Consortium and the pilot schools have created a plan with New Directions Inc. The idea has wonderful symmetry with the Mellon Emeriti Program, which provides a basis for health-care benefits. The program consists of four group sessions augmented with personalized assessments and planning from New Directions.

If this project is successful, other schools have expressed interest in joining the pilot. It is possible that this could be a role model for other colleges and universities, as no evidence of other such efforts has been found. Additional grant support has been explored. Those interested in learning more should contact Frank Aubuchon, Kater Pendergast or Bob Lewis.

• Society of Organizational Learning Greenhouse

On January 14, Mark Braun and Bill Gasper from BU Medical Campus, Jim Kreinbring from BC, Pattie Orr from Wellesley, Vicky Sirianni from MIT, and Phil DiChiara, Jon Raelin and Joe Raelin presented at the 4th annual Society for Organizational Learning Greenhouse conference at Boston College. The group shared its collective experience of working on a leaderful learning team. They received tremendous feedback from the audience and plan to present at another conference in the future. A representative from the Systems Thinker suggested they write an article on their experience. They are pleased to announce that “Stimulating Leaderful Change in a Senior Management Network” now can be accessed electronically. For log-in information for The Systems Thinker e-journal (which you may have from last fall’s retreat) or hard copy, please e-mail sandersen@babson.edu.

• Benefits

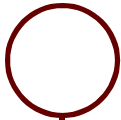
Members of the Benefits group continue to meet to share best practices and to update on a variety of benefit issues. Topics include: Deferred Compensation, Emeriti Health Plans, and Long Term Care. At the next meeting, a speaker from Fidelity will lead the group through a discussion on the impact to employers of the new Medicare law as well as the proposed same-sex marriage changes to State law.

Next Meeting: March 2

• Controllers

At the December quarterly meeting, PWC presented a session on Sales Tax issues to the group. The well-attended meeting addressed concerns as schools engage in activities outside of Massachusetts. Members were asked to forward questions prior to the meeting to be certain everyone’s questions were addressed.

Next Meeting: April TBD



• The Training Collaborative

The TC group met with the training consultants to debrief on last season's Supervisor Training workshop. The feedback from the attendees was good and the group is looking to fine-tune the training material prior to offering it again to member schools. An attendee half-day discussion and debrief of the program in March will guide any revision to the product.

Next Meeting: March 4

• Sponsored Research

The Sponsored Research group met to discuss next steps and conduct some strategic planning for the group. Several options are on the table including: training for researchers at member schools; exploration of Responsible Conduct in Research, and the feasibility of a grant application for this; project planning for Web-based training; and further discussion regarding the sponsoring of NCURA conferences. An e-mail survey was distributed to the group to help establish interests and initiatives for the future. Recently, six schools have made the decision to purchase the NCURA Video Workshop Series.

Next Meeting: TBD

• OD&T

The Organizational Development and Training group met on December 12 at Berklee College of Music. The meeting focused on 360 degree assessment. Each of the schools attending — Berklee, BU, Harvard, Harvard Medical School, Northeastern, and Tufts — shared their current practices along with feedback on strengths and weaknesses of their approaches. Several interesting ideas on possible collaboration emerged from the meeting. Robert Amelio from Harvard Medical School suggested we have a dialogue on the future of training and development and how it may impact our group and profession.

Next Meeting: March 8

• Project Facilitators Network

The PFN had a wonderful opportunity to apply some work-based learning approaches in helping Jo Ayoub plan, design and facilitate the November TBC retreat. The group met on January 29 to determine next steps, and there are a lot of exciting possibilities. The group may explore designing some form of a facilitator knowledge management system which would offer members access to tools, techniques, exercises, notes, etc. More to come in future Bullet Reports.

• Risk Management

The Risk Management Group met on January 21 to jump start the New Year. This was the first formal meeting of risk leaders in quite some time and the morning breakfast setting provided a good exchange of ideas.

Attendees were given brief Consortium program updates from Phil DiChiara and June Kevorkian. Ed Frackiewicz shared his insights on the progress of the Co-Sourced Risk Management program and Brian Burns (Northeastern), the newest Consortium risk management leader, was introduced to the group.

In the future, the group hopes to coordinate quarterly meetings by dedicating some time to meet at all mutual external risk management opportunities. Members who would like to be added to the risk management community practices mailing list should send address and e-mail information to Sharman Andersen (sandersen@babson.edu).

• IT Training

In September, ITTG decided on its yearly meeting schedule (locations to rotate among our schools). The desire is to have meetings that include both working sessions for our projects as well as learning opportunities for ITTG members to gather more information about topics IT trainers and managers need to deal with in the current environment.

In December, ITTG met at the Babson Executive Ed Center where the group spent the morning reviewing our requests to Element K (our vendor partner for web-based training) for enhancements to Knowledge Hub and the new authoring environment. There were progress reports from those schools that had begun to use the authoring tool. Over lunch, the group met with the representative from New Horizons (the live computer training vendor partner) and members of the newly formed User Services/Help Desk Group. Hope Tillman, Director of Babson Libraries, presented the informative afternoon session on Copyright Issues, followed by a valuable Q&A session.

The February meeting was at Waul House, the IT headquarters on the Boston College campus. The morning session focused on learning more about what it would take to establish a site within Element K for courses we develop ourselves. The group began planning for the possible development of two courses. Over lunch, there was a preview of a course developed at the BU Medical College, using Element K. The afternoon was spent with 3 experts on instructional design for the Web:

- Domenic Scenci, Director of the Educational Media Center, BUMC
- Katie Livingston Vale, Manager, Educational Design and Development, MIT Academic Media Production Services
- Jeanne Po, Graduate Web Assistant for Beth Clark, Associate Director of Instructional Technology Services, Boston College

The next meeting will include a tour of the MIT Usability Lab, providing members an opportunity to learn more about usability testing.

Next Meeting: April 5



• **HIPAA, Gramm-Leach-Bliley, and FERPA Program**

In December, TBC presented a program by members of Palmer & Dodge to update schools of the impact of privacy legislation on higher education. There were participants from Babson, Tufts, Wellesley, Brandeis, Berklee, Olin, Wheaton, Wellesley, Boston College, and RISD. Many schools attended with multidisciplinary teams.

Mark Schreiber, cochair of the firm's Privacy Group and partner in the Labor & Employment Department, and his four other panel members, addressed the complex issues surrounding the legislation and provided ample opportunity for discussion.

• **Professional Development Series**

The fall program began with the Training Collaborative's Administrative Assistant Development Program, which had 22 participants. The four-week program ended on February 5.

Registrations continue to grow for upcoming programs. You can view the Professional Development Calendar and remaining course offerings on our Web site: www.boston-consortium.org.

• **New Labor Relations Group Formed**

The Chief Human Resource Officers created a group to share issues about labor relations. Eloise McGaw at Wellesley College initiated and hosted the first session on February 27. Hilary Murray will act as the Consortium facilitator for this group. Those interested in participating should e-mail Hilary at hilary.dan@verizon.net.

• **Campus Police Information Network—CPIN**

Many of our public safety officers have attended CPIN training and know the value of training and working with their peers across college and university campuses. The Boston Consortium will partner with CPIN to aid in supporting and strengthening those relationships by facilitating the exchange of information, training, and communication. The Consortium will assist by creating a membership database and e-mail listserve, and will facilitate the presentation of training sessions.

CPIN is an information sharing and intelligence gathering network of Campus Law Enforcement Agencies that possess police powers. Many Consortium School officers are members of the CPIN Board, including Michael Assad from MIT and John Jackson from Babson; both of whom assisted in creating the CPIN - TBC collaboration.

CPIN is designed to provide training and facilitate cooperation among Campus Law Enforcement Agencies with the goal of improving their ability to prevent and prepare for criminal acts.

• Joint CFO/CHRO Meeting

The tradition of a joint CFO/CHRO meeting to discuss health-care issues continues with the groups having met at Endicott House on January 22. Rick Lord, CEO of Associated Industries of Massachusetts, and Dr. David Chin, partner at PricewaterhouseCoopers, shared their assessments of the current environment and where it might lead. For the past three years, health-care benefit costs have risen, on an average, over 10 percent per year. These major increases, combined with prior year endowment losses, are part of the reason for the economic constraints that many within higher education are facing. Massachusetts employers surveyed by AIM reflect an increasing co-payment structure and increased activity in consumer driven health care is likely.

Chin and Lord addressed the potential impact of Medicare reforms including creation of Health Savings Accounts. Copies of their presentations were distributed via e-mail to those in attendance, and are available by contacting Sharman Andersen (sandersen@babson.edu).

• Visit to Mellon Foundation

Managing Director Phil DiChiara met with Andrew W. Mellon Foundation Vice President Dr. Mary McPherson in late January to share the Consortium's short and medium term agenda. The Mellon Foundation was integral to the establishment of TBC, and made the initial grant to Will Reed, Peter McKenzie, Tom McGurty, and Glenn Strehle back in 1996. Some may recall when our name was The Mellon Boston Consortium, during the early days when we were experimenting with ideas and methods to meet our mission.

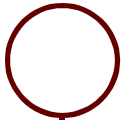
DiChiara shared with Dr. McPherson our co-sourcing agenda for the next several years, with hope that our efforts would again qualify for support. Much of the conversation also addressed the long-term challenges that all of higher education faces, and how consortia can provide a long-term view that is sometimes absent in the increasingly busy day of senior administrators. The consortia of the nation provide a vehicle for projects that might otherwise be ignored because of their long lead time, and ROI or hurdle rates that are longer than six months.

Dr. McPherson stated that she would be pleased to review a proposal for additional support of new co-sourcing initiatives.

• Telecommunications

The Telecom group members have been meeting regularly to discuss the challenges they face on campus as they meet the needs of students, staff, and faculty. From the proliferation of cell phones and wireless devices to the complexities of vendor billing and service contracts, the group has tackled these issues through sharing resources and solutions. They have also had presentations from selected vendors in an effort to keep abreast of the latest offerings as they strive for efficiencies of service and cost. In addition, the group is exploring a basic data training program for staff members. Their next meeting will explore the "follow me" technologies that are increasingly requested by faculty and staff.

Next Meeting: March 29



• Purchasing

MHEC and TBC Approach Rhode Island Purchasing Professionals

From the beginning of the Consortium in 1998, the Massachusetts Higher Education (Purchasing) Consortium and TBC have worked together. Today, 12 of the 13 members are also members of MHEC, and we have a permanent board position in that organization, with Chris Swezey of Babson holding that role. MHEC volumes exceeded \$150,000,000 and all of Jake Bishop's 70 plus members have benefited. It has been a win-win situation.

The two organizations have teamed up again to determine if colleagues in Rhode Island might add their collective volume to MHEC. While there are several legal obstacles, there appears to be interest. Purchasing professionals Gerry Inman of the Rhode Island School of Design (RISD) and Ken Carlson of Brown University are working with us to determine if a Rhode Island group might be established. Representatives from the national purchasing groups, NAEB and the E&I Cooperative, have been invited to contribute to the planned discussion.

With the pace of technological change increasing, the multimillion-dollar purchasing "solutions" of the '90s are giving way to less costly approaches. Our work with OrgSupply is an example. Yet there is still a major obstacle, experienced within even that e-procurement application. Much work must be done to convince the vendors that it is in their interest to commit the resources to fully electronic exchange. That is a process that is best influenced by collective activity. Firms like Staples and Grainger have been at the forefront of the effort, but most have resisted the change as it impacts their costs and, therefore, their profitability. True, EDI is a tried and true means for those who employ it, but the next generation of systems must deal with associated transaction costs.

• Employment

The Employment group has been meeting regularly to strategize for the second phase of the Shared Recruiting project. Nine member schools have made financial contributions towards this phase, and another institution is looking to support the initiative through technical maintenance of the Web site. The group is currently investigating non-traditional search methods for the recruitment of minority candidates, including identifying affinity groups, and researching ethnic professional and alumni organizations.

Next Meeting: March 24