

Bullet Report

JANUARY
FEBRUARY
MARCH
2003

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, Organizational Development and Training, Public Safety; Purchasing, Risk Management, Sponsored Research, Telecommunications, Treasurers, 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

• Why a Consortium ? — Phil DiChiara

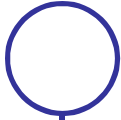
As the Boston Consortium for Higher Education approaches its fifth year of incorporation, almost 600 managers and administrators have participated in its activities. Though we are too young to be considered an established entity, a review of accomplishments suggests that there is something happening between our members that is highly valued, or we would not have so many diverse projects or activities occurring.

When Will Reed, Peter McKenzie and Glenn Strehle started meeting over breakfast in 1996, they believed that there was too much redundancy across the back-room operations and too little cooperation to aid in the identification of best practices. Could we find economies of scale? What could we learn from each other? Would the creation of a consortium lead us to shared operations? Or, would the need for individual autonomy overpower the benefits of shared resources?

From our beginning, I have sensed there is a belief shared by many – despite the depth of resources, both financial and intellectual, that our members hold as *individual* institutions – that we could achieve greater accomplishments if we worked together. Will Reed envisioned an extraordinary consortium that would be governed by enlightened self-interest. Altruism is not adequate to hold together an organization committed to creating substantive changes in process and relationships. We need to employ a pragmatic approach based upon understood principles of human behavior. Our approach is one of establishing a forum for discussion, believing that discussion leads to relationships and ultimately to trust. Opportunity comes from trust. We now have evidence that these beliefs are working.

Work is primarily a social activity, and learning is believed to be enhanced in the company of others with similar interests, but dissimilar approaches. We have had the privilege of working with managers and administrators who are knowledge workers. Teamwork within our schools is a reality. As we create true communities of practice out of our discipline-based groups, we try to utilize action or work-based learning. Joe Raelin, our Consortium thought leader, has helped us see that leadership capacity must be developed at every level of employee.

Why a consortium? We allow our members to see past the veil of institutional culture and discover the similarities we share. By providing a safe space for projects that might be perceived as risky for an individual manager to engage at an individual school, we aid in creating an environment where intractable operational problems are not seen as insurmountable. If we envision it, we can solve it.



• Public Safety – Preparing for Protest

The public safety chiefs met in late January for follow-up to their emergency plans. There was a review of progress as well as roadblocks to planning. Of concern was the impact that the then impending war might have on students and public safety officers. Of top concern was the ability to protect students. Many of the public safety officers have never been exposed to campus unrest and demonstrations as experienced in the '60s. With guidance from the public safety chiefs, the Consortium created *Preparing for Protest: Managing the Challenges of Campus Unrest*. Fifty participants from more than 21 schools gathered at the Center for Executive Education at Babson to meet with Norman Berkowitz, Ph.D., Associate Professor of Psychology at Boston College; Mary Jo Harris, Legal Adviser to The Boston Police Department; Sarah Wunsch, Staff Attorney for the American Civil Liberties Union; Eleanor Sinnott, Chief Legal Counsel for The Massachusetts State Police; Lieutenant Robert O'Toole, Commander, Special Operations Division with The Boston Police Department; and John DiFava, MIT Chief of Police, former Colonel/Superintendent of the Massachusetts State Police.

The afternoon session included an overview of the dynamics of a protest group and their impact on public safety officers, legal issues including Rights of Assembly, tactical training and techniques for crowd control, and understanding the impact of actions on the institution and the entire campus community. Presentations were followed by focused discussions and Q&A on such issues as sit-ins in the President's office, disruption of classes, preparing the campus community for what they would encounter, dealing with media coverage, protecting the students on and off campus, and receiving aid from local or state authorities.

We are working on a Learning History to capture the lessons learned and questions that need to be addressed by both administration and campus security.

• Benefits

Members of the Benefits group continue to meet specifically to provide group updates and information on various regulatory matters associated with their discipline. Consultants from Buck made a recent presentation on the changing Health Insurance Portability and Accountability Act of 1996 (HIPAA) regulations, which focus on Privacy Rules for employers and covered entities. The presentation provided essential information, a process for compliance, and a project plan for Consortium members to access.

Some members of the Benefits group recently attended a meeting held by AIM and Patient Choice Healthcare Inc. This was a follow-up meeting to a session held a year ago at which Patient Choice introduced its product. At this meeting, the company provided information on provider networks and cost of the product.

Plans are under way for a future meeting which will provide expert advice from consultants on proposed changes with regulations governing TIAA-CREF which could impact our member institutions.

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- **Employment Managers**
www.jobsinhighered.org is Live!

After two years of meetings and concentrated discussion, the Employment Group is now on the verge of launching Phase I of the Shared Recruiting project. Meetings have intensified since the beginning of the year as the group met regularly with representatives of TMP Worldwide to debate the various components of the project. Decisions ranged from choosing the URL for the Web site; finessing the precise copy to be used on the Web pages of the Microsite; deciding which institutional photographs to use; obtaining testimonials from current employees; choosing “Hot Jobs” to act as drivers for each school’s Home Page; and the upkeep of the Web site. An essential issue throughout the project has been the aim to keep the project focused on diversity recruiting sites.

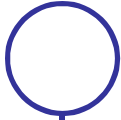
The team has worked hard and well together, and the project has bonded the group in a profound and exciting way. Members voice the desire to use the experience as a case study for future professional HR conferences. Donna Star from TMP has discussed the initiative in a nationwide presentation on her team’s first experience of working with a Consortium. The group held a lunch launch party for the project on April 8.

- **Environmental Health & Safety**

The EH&S Group had chosen emergency preparedness and a course on Indoor Air Quality as its top priorities, and the group is delivering on them. The Emergency Preparedness Workshop Series, which will begin May 7, is described below. In collaboration with Facilities directors, the EH&S Group is developing a half-day pilot seminar on Indoor Air Quality, subtitled “Odors, Floods and Molds, and How to Prevent Them,” for late April.

As planned, the EH&S Group developed, as the initial product of its work in emergency preparedness, an inventory of sources of 18 types of emergency equipment (ranging from biological air sampling equipment to water, bottled) that are available across TBC schools. For each item, the list names the number available, the exact location, the key contact person’s phone numbers, etc. The first draft of this inventory has been made available to the core Emergency Preparedness group; an electronic version will be available soon on the Consortium intranet. For a copy now, contact Ken Farbstein.

The topics for the next meeting will include an evaluation of the pilot program on Indoor Air Quality and a discussion of a radiation safety program.



● Project Facilitators Network

The Project Facilitators Network held a reunion in January at the home of Doreen Nicaastro with over half of the members in attendance. Everyone had a wonderful time, and the group discussed its future direction. It was agreed that they would hold a “facilitation skills refresher” on April 23rd at Babson College. A design team was formed to plan the day, and the team has used www.picturetalk.com, a web conferencing tool, to plan the day, which has been a positive experience for everyone, even the “low techie” folks.

● The Training Collaborative

Members of the Training Collaborative met to debrief on the winter session of the Professional Development series and to plan for the Spring/Summer session. Feedback from the participants of the Administrative Assistant Development series was uniformly positive and the decision was made to repeat the series in the upcoming session.

The TC made the decision to run the next Supervisor’s Certificate program in the Fall with a cohort group. Discussion centered on the core components needed for this training, and the group decided to send an RFP to various training consultants to evaluate response and to determine which consulting group to use. Value is seen to having continuity of trainers and crossover between components.

Work continues on the PDS brochure in order to expand training offerings and ensure maximum participation from member schools.

● Telecommunications

The group’s two key functions are to share information on best practices, for possible use by other schools, and to share information on broad trends, to enable members to plan appropriately.

Changes in the industry

With the increasing concentration of vendors in the industry comes a greater dependence on the remaining vendors. In his presentation to the Telecom Group at a recent meeting, Paul Vasington, head of the Massachusetts Department of Telecommunications and Energy, warned of the likelihood of an impending strike by Verizon employees this summer. The group will discuss how to plan for this, and will hear two presentations on prepaid calling cards at its April 14 meeting.

Best practices and common practices

At a future meeting, the group will discuss the terms and conditions of contracts, where appropriate, especially in the area of customer service.

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• Sponsored Research

The Sponsored Research Group has used the group meetings to plan another NCURA conference for all member schools for April 14-16, 2003.

The success of last year's conference indicates the need for few changes to the content and format of the conference. The site and numbers of attendees will remain the same as last year, namely, Boston University School of Management and a maximum of 75 attendees. Given the large waiting list of employees for the 2002 conference, it is hoped that this year we will be able to accommodate most people. Certain price increases have driven overall conference costs up slightly, but the group agrees that the convenience of having the conference in Boston eliminates travel expense and provides opportunities for attendance for employees who might not otherwise be able to attend.

The group has discussed the merits of sponsoring a conference geared towards the more experienced practitioner and preliminary investigations are underway to determine the feasibility of this idea. Additionally, continuing sub-group activity has taken place on the development of Web-based training components.

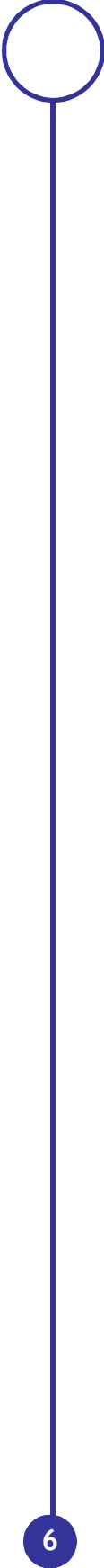
Several group members got together at Boston College in January at a Round Table forum. The group decided that quarterly meetings of this type could provide opportunities for an overview of Sponsored Research related development, give a broad-brush approach to refining overall SR philosophy, and provide an opportunity for group discussion on work-related challenges and governmental changes in process.

• Organizational Development & Training

The Organizational Development and Training Group held a meeting in March at MIT focusing on the issue of "core competencies." Members from Babson, Berklee, Boston College, Boston University, Harvard, Tufts, and MIT shared their current practices, and there will be some information sharing among the group. The next meeting will be on May 16 at the Berklee College of Music and will focus on 360-degree feedback

• Emergency Preparedness Workshops

This unique interdisciplinary group will commence on Wednesday, May 7, at 8 AM to noon, at a TBC location to be determined. The group has an ambitious, time-limited mission: to create and revise emergency prevention, response and recovery plans before the start of the 2003-4 academic year. Ken Farbstein will lead the group through a series of six half-day meetings that are open to interdisciplinary TBC school teams and related municipal employees.



- **Co-Sourced Risk Management Program Selects Acordia as Insurance Broker**

In December 2002 the Co-sourced Risk Management Program approved a competitive process designed to select one common insurance broker. This collaborative agreement was the first step in establishing improved fiscal control for one budget line item of risk management expense common to each institution.

A ten-question Request for Proposal was distributed at a breakfast meeting to ten leading Boston-area insurance brokerage firms. The interest in our opportunity was overwhelmingly positive. Seven firms prepared comprehensive proposals, and Brewer & Lord Insurance, Aon Risk Services, Marsh USA, Fred C. Church, and Acordia were invited back to participate in oral presentations.

After two months of thoughtful questioning and analysis, Acordia was unanimously selected as the first Co-sourced Risk Management Program insurance broker. The process identified many proposed efficiencies and confirmed a minimum annual broker fee expense saving of approximately \$60,000 for each of the next three years.

A collaborative underwriting submission has been completed and a two-tiered insurance renewal marketing strategy has been established to maximize each school's renewal options. This underwriting plan is expected to generate additional expense savings across targeted insurance lines by:

- Leveraging our strong brand name
- Promotion of our best-practice risk management policies
- Maximizing our collaborative exemplary claims (loss) experience

Inquiries or comments may be directed to:

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Next Meeting: April 2003 - To Be Determined

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• IT Training

IT Training has continued to meet on a monthly basis at MIT. Recent activities have included review of vendor contracts and pricing, addition of new vendor relationships, and the migration of schools to Knowledge Hub.

A significant accomplishment has been the completion of IT Core Competencies. The IT training group invited the Training Collaborative to lunch at the Center for Executive Education to review the competencies. Both groups will continue to collaborate at a second joint meeting in June.

Members of the IT group continue to investigate collaborative online tools and have incorporated their testing in a variety of TBC projects, including the Consortium web redesign and the Project Facilitators Network.

• Controllers

The group currently has two primary functions: to identify and describe best practices among the schools for possible use by other schools, and to identify and describe broad changes that are likely to help members plan for them.

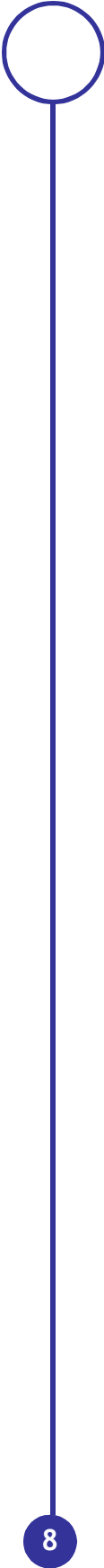
Examples of identification of best practices

The Controllers discussed the common taxation issues that schools face and how they set fees for auditors. A somewhat informal survey among schools on pricing strategies for audit services is underway; findings may be reported when the Controllers meet in May.

Examples of discussion of oncoming changes

The recent large corporate accounting debacles have prompted the new SAS 99 requirements that auditors actively look for fraud. The Controllers learned about the implications of these new requirements in a presentation by experts from PricewaterhouseCoopers at the March meeting.

In their May meeting, the Controllers will discuss the implications of the Sarbanes-Oxley Act, and of new FTC rules about customer information, as well as their experience with change efforts at their schools. The group will base these discussions on certain journal articles that Controllers selected. In effect, this will allow a pilot test of the usefulness of this “journal club” function to the group.



E-Procurement Pilot: Harvard and Tufts Approach Implementation

In January, the Purchasing Community met at the Center for Executive Education to hear how the Pilot implementation of the OrgSupply application was progressing. Bill Hoyt and Diane Devlin of Harvard detailed the process they have followed, and how they recruited IT and senior management support. Bill Valentine and Paul Page of Tufts similarly shared their experiences. Of interest to all were reports of vendor pricing concessions. Such concessions were anticipated during the discussions last summer, though process cost reductions were considered the most likely immediate advantage. In another example, simply implementing the application had resulted in discovery of pricing practices among some vendors. One vendor of professional services had offered pricing across a range of cost, but routinely billed at highest cost. Needless to say, this situation was addressed. Harvard and Tufts are hoping to go into a full, live process in February. Boston University is also queued up to participate in this effort.

The Consortium utilized \$90,000 in Davis Grant funds to underwrite this effort. Cost to each school was approximately \$15,000, with some modest additional cost to customize the “front end” of the application. Other member schools may participate in this same arrangement, through July of 2003, though it is understood that schools with less procurement scale than the initial three would wish to see the application in place before deciding to move ahead, as the ROI for other schools may not be as attractive.

Bill Hoyt, Bill Valentine, and Paul Page agreed to keep the purchasing group posted, and Peter Bythewood of Boston University will soon know if BU can proceed next.

Facilities Group and Purchasing Group Learn of New Power Contract

Russ Sylva, general manager of the PowerOptions Program at Mass HEFA, presented the current state of negotiations with power providers. When first implemented as a result of deregulation by the state in 1997, the PowerOptions contract was the de facto standard among all not-for-profit institutions. With the end of the five-year contracts at hand, and the experience of those who accepted three-year terms in 1998, there have been major cost increases. These increases may continue unless Sylva and his team can create an alternative. The news is positive, Sylva said, but the vendors have become very conservative, having been negatively impacted by the last contract cycle. Thus, the new contracts have several, complex options that can have a major impact on cost. Offering to further assist once the contract is signed, Sylva and his team have made themselves available to Consortium schools should the schools wish to meet and discuss the advantages and disadvantages to each approach and assess the level of risk and management that each may accept on behalf of their institutions.

Also presenting at that meeting was Jack Price of Northeastern University’s Environmental Health and Safety department. With colleagues Peter Schneider of BU and Lou DiBerardinis of MIT, the issues of facility managers and EH&S intersected with a recommendation that Consortium schools share in the creation and use of a workshop on Mold, Mildew and Odors. Indoor air quality issues (IAQ) have the potential, Price said, to become the asbestos of the 2000 decade.