

Bullet Report

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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
Rhode Island School of Design
Tufts University
Wellesley College
Wheaton College

• TBC Co-Source Initiatives

IA Internal Audit Co-Source Initiative

The Internal Audit Co-Source Initiative has come to fruition with member schools Babson, Brandeis, Berklee, Olin, Wellesley and Wheaton selecting Grant Thornton as their collaborative Internal Audit service provider. Maureen Murphy, AVP of Financial Management and University Controller at Brandeis, has been appointed chair of the group.

With seed money from the Mellon Foundation providing stimulus for the inaugural year, each institution has committed to two dedicated audits over an 18-month term with the Grant Thornton engagement team. The team will work with each school in the development of a mutually acceptable audit plan. Once completed, the results of this project are expected to be integrated or shared with the audit committee at each member school.

At the same time, the schools will work together wherever possible to share information and provide the Grant Thornton development team data for the development of a Common Higher Education Risk Model in which business cycles like Governance, Payroll, Treasury and IT can be measured and compared in a risk analysis matrix by risk type, risk weight and controls found to be in place. The design of the Internal Audit Co-Source Initiative will be one of continuous improvement and will touch virtually every aspect of a college's operations in an effort to improve efficiencies and reduce financial risk.

The next group meeting will be March 30 at 8:30 AM in Curie House on the Olin campus. Inquiries may be directed to Maureen Murphy at mmurphy@brandeis.edu or Ed Frackiewicz, ARM, TBC Director Co-Source Risk Management, at edward.frackiewicz@olin.edu.

Risk Management Program Welcomes Bentley College as its Newest Member

Bentley College accepted an invitation to join The Co-Sourced Risk Management



- **Co-Source Initiatives (continued)**

Fiscal year 2004, marked the second anniversary of the Shared Risk Management Program. As in our first year, most insurance policies were individually underwritten for each institution with our group purchasing power leveraged to acquire improved coverage terms and premium reductions. The insurance marketplace has been subject to many uncertainties and challenges during this period. Our initial underwriting risk partner, the Royal Sun Alliance Insurance Company, announced its withdrawal from the U.S. market in the fall of 2003. The Travelers Insurance Company subsequently purchased the renewal rights to our policies from the Royal, and then the St. Paul Insurance Company finalized their acquisition of the Travelers. We successfully addressed these events and look favorably to this new relationship with St. Paul Travelers Insurance Company.

Program opportunities to be addressed in 2005 include continuing work on Best Practice benchmarks, developing alternative risk financing alternatives, technology enhancements and exploring enterprise risk modeling.

Inquiries or comments may be directed to Ed Frackiewicz at edward.frackiewicz@olin.edu.

- **Emergency Planning**

Member schools attended a December meeting sponsored by NEDRIX that addressed the need to create a more integrated and collaborative relationship among the business continuity, security and emergency management disciplines. Presentations from this program are online at www.nedrix.com.

The New England Electronic Crimes Task Force held their quarterly meeting at Babson College. Identity Theft was the topic. There was a presentation by Dartmouth College on steps they have taken to help secure identities. Mark Franklin , PKI Project Leader, is available as a resource.

On March 1, BEMA will conduct a Tabletop Exercise for the Consortium. Member schools will also report on simulations they have conducted on their campuses. Complete details for the program are on the web www.boston-consortium.org/events. This will be an opportunity to participate in a simulation and share best practices for running an exercise on your own campus.

• Career Center Directors

On February 4, Career Center Directors from Babson, Bentley, BC, Brandeis, Harvard, and Tufts met at the Babson Executive Conference Center. Directors from Northeastern, MIT, Berklee, BU, and Wellesley are interested in participating as well.

This new group had an opportunity to learn about the design of each school's career center. Through large and small group work, they identified a series of internal and external challenges. At future meetings, they will be refining the list and exploring strategies to meet these challenges and share best practices.

Next Meeting: March date TBD

• Professional Development Series

This past fall and winter, 213 participants, representing every member school, attended programs offered through the Professional Development Series. Thank you for your participation and feedback.

We are pleased to announce that Babson College has joined MIT and Harvard in opening programs to Consortium members. Babson's first offering will be a leadership program. Please go online to learn more about this newest addition to our offerings as well as the entire Spring 2005 calendar — www.boston-consortium.org/professional_development.

Your comments are always welcome and help us assess courses and instructors as we plan for the future. Please e-mail your comments to June Kevorkian at jkevorkian@boston-consortium.org.

• Benefits

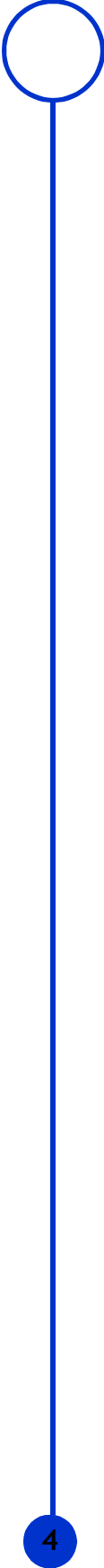
The Benefits group last met in November to exchange information on current benefit issues and the impact of regulatory changes. Topics included the complexity around FLSA changes, Flexible Spending Accounts, changes around Tuition Remission (for one school), a teleconference by TIAA CREF, plan changes on medical coverage, and discussion on Emeriti issues. Also, same-sex marriage and the ensuing benefits and tax implications continues to be discussed.

Members then listened to a presentation by CNA on Group Long Term Care and a Buy-Up opportunity. This is offered on the third anniversary to current insured members. Schools currently in the plan are Brandeis, Wheaton, Wellesley, Bentley, Tufts, Babson, and Olin. Not all of these member schools have reached the third-year anniversary.

The group will meet on February 8 in Curie House.

• Joint Telecommunications/Controllers

In December, the Telecom group and Controllers met to discuss cell phone policies. Telecom members completed a survey detailing the often complex issues surrounding distribution, carriers, billing, and tracking of cell phones for administration and staff. This information will help controllers when assessing cell phones as compensation.



- **The Training Collaborative**

The Training Collaborative continues to meet and discuss the training options that are currently available as well as potential workshops to add to the offering.

Following a meeting in the fall, the group distributed a survey to the attendees of the workshops offered through the TC during 2004. The group then met to discuss the findings and determine which workshops should be repeated, which needed some revision/changes, and what new workshops could be reviewed for addition. An in-house training tracking system currently in use at Babson was reviewed by the group and deemed useful for monitoring, tracking and reporting all employees training, as well as providing reminders for mandatory training and regulatory updates. The system is linked to the HRIS system.

At its next meeting in April, the group plans to have a demonstration of the DiSC Classic, a research-based assessment tool, to determine applicability for future workshop use.

- **Sponsored Research**

In past meetings, the Sponsored Research group determined several areas of focus for the future. These include compliance issues, time and effort reporting, cost sharing, balancing compliance and customer service, and web-based training modules.

On January 19, members attended the program, “Influence without Authority” by Allan Cohen of Babson College. This program gives members additional tools as they help faculty meet compliance requirements.

Next Meeting: March TBD

- **OD&T**

The Organizational Development and Training Group held a meeting at MIT on Monday, January 31, with members from BU, Harvard, MIT, Northeastern and Tufts. The focus of the meeting was the relationship between Organizational Development and Human Resources on our campuses in terms of challenges and opportunities. It was a dynamic meeting.

Discussion will be continued at the next meeting, which will be held at the Boston Consortium’s new office in Curie House on the Olin College campus.

• IT Training

During the summer, the IT Training Group conducted a Web-based survey of our membership to best determine meeting times and topics for the coming year. Based on those results, ITTG held three successful fall meetings and three remaining meetings are planned for the winter/spring. During the summer, the group also began a project to evaluate a Web-based conferencing tool called ASAP, a product of Convoq, Inc. (www.convoq.com).

In September, we met at Tufts with our account representative from Element K to begin discussions of our TBC/EK agreement renewal. We also reviewed the survey results and determined the top four subject areas where we plan to focus our energies over the coming year. In October, we met at Bentley with the CEO and Higher Ed marketing manager from Element K to present our higher education needs for the future of their products.

Just recently, Element K featured the work of Boston University Medical College's IT Training Group member Frank Furnari on their Web site. Frank is working with BUMC faculty to publish their own Web-based courses. You can read more about this at <http://elementkparticipation.com/e%2Dnewsletter/>.

The October meeting also featured an impressive demo of ASAP. The project to evaluate ASAP continues and has expanded to include organizations in the Ocean State Higher Education Economic Development and Administrative Network. OSHEAN (www.oshean.org) is a consortium of nonprofit organizations that was formed to foster the development of a communications infrastructure for Rhode Island's research, educational, and public service community. Wheaton is a member of OSHEAN.

In November, we were joined by the User Services group for a Network Security day with presentations by security experts from Olin, BC, and MIT. Both groups found the panel discussions and poster sessions practical and informative.

Future meetings are planned for March, April and June, with an emphasis on Communications Strategies at the April meeting.

• IT User Services

At the last IT User Services meeting, the group focused on inventory tracking. Sue Morgado of Wheaton College presented a live demo of Wheaton's inventory tracking system. Members discussed their individual tools for tracking inventory and reviewed best practices that could be incorporated into systems.

Next Meeting: February 10.



• Faculty Transitions

In January 2004, plans were completed to launch an innovative program designed to help faculty, academic leaders, and Human Resource professionals find new ways to talk about transition and retirement planning. A year later, these efforts are well underway and we are planning our third such offering. The curriculum incorporates the suggestions offered by initial faculty participants, while the participation of new institutions is a sign that a broad-based need is being addressed.

One participant commented that “I had actually completed my retirement paperwork, but then withdrew it. I was scared that I didn’t know what I’d do. I’m now leaving at the end of this year. The Faculty Transitions program helped me develop a plan for my time that I’m actually excited about.”

Our experience to date might best be viewed in both long- and short-term perspective:

- Looking out over several years, the transitions program is gaining faculty support; this adoption by faculty could in turn give academic and administration leaders a new vehicle, one embraced by faculty, for surfacing retirement conversations within the faculty.
- In the near term it is now known when specific salaries will free up, thereby enabling more informed budgeting and planning of investments needed to attract new faculty to strategic departments and programs. The decisions made by the first cohort have already resulted in the identification of approximately \$600,000 of salary that will not be spent and may be saved or redistributed.

For further information, contact Phil DiChiara (pdichiara@boston-consortium.org) or the co-directors of this pilot, Frank Aubuchon (aubuchon@babson.edu) and Scott Randall (sdrandall@comcast.net).

• Purchasing

Print and Publication Costs Discussed

The Purchasing Managers from across the Consortium membership, plus several colleagues from Rhode Island including Brown University and Providence College, met at the Babson Executive Conference Center in November for a discussion of print costs. Several schools explained their approach, which ranged from highly centralized to overwhelmingly decentralized and beyond the normal span of control of the purchasing function. The search for a single best practice was impractical as culture and organizational structure has created a wide variety of answers to “what works best?”

While sharing information among one another was valuable, the primary conclusion of the discussion was that the primary decision maker is often not the Purchasing Department. Suggestions were made to convene a dialog with marketing managers, publication offices, and other departments that heavily influence the buying decision. Such a date will be announced as a working list of names is created.

• **Controllers**

The controllers group has discussed a variety of issues that confront our institutions. Travel guidelines, domestic and international; payroll functions; and the impact of the Patriot Act on several areas including student loans, housing, and fund raising.

At the next meeting, the group will have a presentation to further address compliance with The Patriot Act and OFAC regulations

Next Meeting: TBD

• **Employment Managers**

After more than six months of preparation, the Employment Managers Group held its first cooperative Diversity Career Fair on October 20, 2004. Most of the Consortium schools participated and the event was hosted by Babson College.

More than 350 applicants attended the event which, in addition to offering opportunities for attendees to talk to HR representatives from each school, hosted panel discussions on the benefits of working in higher education and the value of professional organizations.

The event was deemed successful, and the group continues to monitor results from the fair. A survey was distributed to attendees, and the Employment group will use the responses as they plan the second career fair in either late spring or early summer of 2005.

The group plans to work cooperatively with professional organizations to build an ongoing relationship and partner in future endeavors, and is exploring ways to share the financial burden of future events with external organizations and schools.

Next meeting is scheduled for February 8.

• **Telecommunications**

At the last meeting of the Telecommunications group, members reviewed the latest issues impacting their campuses. Cell phone reception on campus, number mobility and speed of transfer should a school choose to change providers, and the rumors re cell phone directories. In addition, members discussed the variety of CATV options on campus and the pros and cons of offering this service.

At the next meeting, Vin Kasabian of Liberty Mutual will make a presentation on Future Trends in the Telecom Industry.

Next Meeting: February 14

• Vogt Fellowship Program

The inaugural Susan Vogt Fellows, their sponsors and coaches gathered at a reception hosted by Wellesley College President Diana Chapman Walsh at her home on September 29. “There could not be a more fitting and suitable memorial to Susan Vogt. It is almost as though she is here with us. She loved learning new things, she loved connecting with new people, exploring new ideas, and she loved the Consortium,” said President Walsh to the assembled guests.

The program honors the remarkable work and spirit of the late Susan Vogt, vice president of finance and treasurer at Wellesley College from 2000 through fall 2003, and continues her legacy by connecting, developing, and supporting emerging leaders within the Consortium.

In its first year, 14 fellows from nine Consortium schools were selected based on their leadership positions and their ability to affect meaningful change at their schools. They are participating in a leadership development series facilitated by Joe Raelin, Asa Knowles Chair of Practice-Oriented Education at Northeastern University. Fellows are sharpening their leadership skills with the support from their sponsors as each fellow works on a strategic project for his or her home institution. Each fellow has been assigned a coach from another institution to provide guidance, mentoring, and leadership support.

2004-05 Vogt fellows (in bold) and their sponsors

Babson College	Katherine Price and Mary Rose
Berklee College of Music	Eileen Knight and Nancy Eagen Janet Chwalibog and Karen Zorn
Boston College	Paulette Durrett and Cheryl Presley Sidney Holloway and Leo Sullivan
Boston University	George Snowdon and Michael Donovan
Harvard University	Robert Amelio and Mary Dupont Heidi Conway and Regina Perris Elaine Pridham and William Murphy, Karen Davis
MIT	Barbara Peacock-Coady and Margaret Ann Gray Anne Whealan and James Wallace
Northeastern University	Maureen Joyce and William Kneeland, Laurence Mucciolo
Olin College	Scott Slaboden and Stephen Hannabury
Wellesley College	Catherine Salop and Diana Chapman Walsh, Patricia Byrne

Boston Consortium Board Member and Liaison to the Vogt Advisory Board

Wheaton College **Rick Wallick**

Vogt Advisory Board

Boston Consortium	Phil DiChiara
Boston University	Mark Braun
Northeastern University	Joe Raelin
Wellesley College	Pattie Orr
Wheaton College	Colleen Wheeler

— Mary Ann Hill, Director
Public Information and Government Relations
Wellesley College