

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; 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

• Consortium Co-Sponsors Emergency Planning Conference

As part of our ongoing emergency preparedness planning, the EPA, The Boston Consortium, FEMA, and Harvard University co-sponsored *Emergency Management Tools for Colleges and Universities* on October 30, 2003, at the Sheraton Framingham.

Over 300 participants from 100 Colleges and Universities throughout New England, as well as some from as far away as Indiana and Louisiana, participated. The program featured a keynote presentation by Jim Hall of FEMA on NIMS, the National Incident Management System. The remainder of the agenda included breakout sessions on many topics identified by our groups at our emergency planning series. These included Red Cross Sheltering, US Secret Service, First Responders, Simulation Exercises, Facing the Media, Dealing with Bomb Threats, the experience at Yale University, Physical Security, and CEAS, the emergency credential program for the City of Boston. In addition, three Consortium schools, Harvard, MIT, and BU shared their emergency plans. Representatives from FEMA, MEMA, and BEMA provided an overview of federal, state, and local roles in emergency situations. We were fortunate to have outstanding presenters who shared their expertise. Presenters and participants took time from their crowded schedules to address the emergency planning issues vital to the security of every campus.

Although the information is sobering and the task can seem overwhelming, initial response from participants reflects the need and desire for continued training. They expressed comfort in being able to collectively address these difficult topics and learn from each other's experiences.

Next steps will include posting the meeting presentations on the Consortium web site, www.boston-consortium.org. This will be completed over the next few weeks. Peggy Bagnoli of the EPA, who worked tirelessly on this program, will be forwarding information regarding upcoming EPA initiatives. The Consortium will continue to present workshops as part of our Emergency Planning Series. These will focus on the many areas of interest identified by participants. Tabletop and simulation exercises and better preparing to face the media are just two topics to be addressed in upcoming 2004 workshops. We will also continue to partner with appropriate agencies to broker the knowledge, expertise, and experience that are available.



• Internal Audit

The Co-Sourced Internal Audit analysis being conducted by Resource Audit Solution (RAS) is well underway with five of the seven co-sourcing schools either substantially complete or shortly underway.

This portion of the Mellon Foundation supported effort will permit the participants to assess what internal audit services might be shared, what should be part of a shared menu from the selected firm, and whether to proceed to the final step. This step is a two-year pilot that will live-test the approach that best serves the participant schools. With an expectation that the interviews with key staff at Babson, Bentley, Brandeis, Berklee, Olin, Wheaton, and Wellesley will be completed by the end of the year, a January meeting will be set up for RAS to present their findings and their recommendations as to various approaches.

In trying to find practical expertise to guide our decision-making, RAS was selected in part because of its successful alpha test at Wellesley College. RAS is not a consultant, but a vendor of this and other finance-oriented services. TBC participants have no obligation to follow up collectively (or individually) with RAS. If a school decides to implement the pilot, RAS would submit a proposal, but is not guaranteed the contract. This unusual approach allowed the Consortium to take advantage of the real-world expertise of a firm, and avoid high-cost consulting fees. RAS believes that it, too, benefits from this approach, although the work they are doing for us is a financial break-even. They hope that they can distinguish themselves during the analytical stage.

This form of partnering has been used before to great advantage, and it extends our grant funds. Few firms are truly willing to create a new product for a limited number of clients, but the collective leverage of our schools permits such risk taking on the part of vendors with whom we choose to work. We are that attractive a client.

The third and final portion of the Mellon grant is the legal co-source effort, and Attorney John Joseph Smith will begin interviewing participants for this effort beginning in early December.

• Endowment Survey Best Practices

Over the past several months we have been talking with Glenn Strehle (former CFO at MIT) and Fred Rogers (former CFO at Cornell) about analyzing debt and endowment issues across the membership.

We have accepted a revised proposal from Campus Business Advisors (CBA) and commissioned the work. The cost is fixed, so there is no contribution required from the schools.

CBA will document and compare the practices and outcomes of the Consortium member institutions regarding their strategy and management of endowment and debt as two principal contributors to academic strength and vitality. The analysis will assist the Consortium member institutions in identifying Best Practices among themselves and will further their own ability to adopt and utilize Best Practices as they are applicable to each institution.

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• Co-Sourced Risk Management Program

The Co-sourced Risk Management program participants selected the July 1, 2003, property and casualty insurance renewal process as the first strategic step to identify cost savings and program improvements.

Through the efforts of Acordia, our first co-sourced insurance broker, the group was successful in creating a discounted purchase of several lines of insurance coverage common to all institutions. The discounts and savings varied by school but produced total program savings in excess of \$400,000 when judged against the costs of purchasing the same insurance individually by institution.

In addition to the expense savings, each insurance policy type was written by the same carrier with a common policy form that was then modified specifically by endorsement for each member school. The impact and leverage of our combined purchase power allowed insurance carriers to offer coverage enhancements not previously available to the individual institutional buyer.

The insurance purchase piece addressed the risk financing step in our co-sourced insurance purchase model. Ongoing risk management efforts such as conducting loss control visits to each school with our new underwriting partners, working with safety committees, and developing common Best Practice benchmarks for each school will keep the group busy through year end.

Inquiries or comments may be directed to Ed Frackiewicz, ARM, TBC Director Co-sourced Risk Management , at (781) 292-2408 or edward.frackiewicz@olin.edu.

Next Meeting: December 11, 2003

• Facilities Workshop

The Consortium and Sightlines co-sponsored a day of dialogue and debate on November 13, 2003. Members of the Facilities and EH&S group participated in the workshop which focused on new regulations, tightening budgets, and emerging priorities that frequently include major re-ordering of an organization's management structure.

Joyce Hatch, Vice Chancellor of Administration and Finance at UMass-Amherst, discussed the financial aspects of a limited budget, and Russ Sylva shared the details of the PowerOptions contract. Also, Dave Kadamus and Cheryl Miller from Sightlines spoke about the emerging problems learned from clients across the Northeast. As well, the Board of the Consortium has been interested in learning about the new world that facilities professionals face in light of homeland security issues, and we dissected budget constraints at other colleges to see if anyone had a better answer.

• Controllers

The Controllers continue to meet quarterly. This past September the group discussed Audits, Sales Taxes, Foreign employment and Supplemental systems. At the December meeting at Henderson House, PWC staff will make a presentation and answer questions on Sales Tax issues.

Next Meeting: December 2, 2003



• Telecommunications

This fall the Telecom group has been reviewing the challenges to their departments from the ever increasing use of cell phones on campus. They continue to serve as a resource to each other as they share best practices. In October the group was fortunate to have Mary Bromfield from Brandeis report on the success and challenges of the Brandeis Voiceover IP implementation.

The group also had a presentation from CellularLD. Gavin Macomber provided an overview of cellular long distance options for international students.

Upcoming areas of interest include exploring possible training Consortium-wide training for Telecommunications staff, and presentations on web, audio, and video conferencing.

The group meets again on December 1, 2003

• Public Safety

The Consortium has participated in public/private partnerships to forward information to our Public Safety group. Of note are:

ATAC: Anti-Terrorism Action Committee, formerly ATTf, headed by Mike Riciutti of the US Attorney's office. Public Safety chiefs received a copy of the annual review meeting attended by TBC. In addition to attending focus meetings, we receive weekly and monthly updates that are forwarded to our group.

CEAS: Corporate Emergency Access System is a credentialing protocol that will impact higher education institutions in the event of an emergency in the city of Boston. June Kevorkian from TBC and Jerry Isaacson from MIT have been part of the advisory board working to address the unique issues for higher ed.

CPIN: Campus Police Information Network, under the organization of Mike Assad at MIT, links information for campus police offices. Please let us know if you would like more information.

The next meeting will be scheduled in early 2004

• www.boston-consortium.org: Check out our new look

After an RFP and presentations, our design team, Josh Wilson from Tufts, Doreen Nicastro from BUMC, Colleen Wheeler from Wheaton, and June Kevorkian from TBC, selected Boston Web Design for our redesign. We have been very pleased with their understanding of the Consortium and our needs. Over the next several weeks, we will prepare our intranet to facilitate group communication, document sharing, and scheduling. We welcome your thoughts. Please e-mail us at tbcinfo@babson.edu.

Why orange? ... It is not a Consortium school color.

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• **Benefits**

The Benefits group met this month to hear a presentation by a representative from MetLife on a new benefit; the MetLaw Premier Legal Plan. This affordable plan offers participating institutional employees the option of full legal representation for a wide range of services including: Estate Planning Documents, Family Law, Document Review and Preparation, Immigration Assistance, Real Estate matters, and Defense of Civil Lawsuits. The cost to employees is from \$15.00 to \$16.50 per month and is managed through payroll deduction. Once enrolled, employees remain in the plan for one year.

Next meeting: December 2, 2003.

• **NERCOMP**

We are pleased to announce that the Consortium and the board of directors of the New England Regional Computer Professionals group are exploring opportunities to utilize the Consortium Leadership Series and PDS to meet the needs of their key managers.

On November 19th at Worcester Polytechnic Institute, there will be a NERCOMP Workshop titled Collaboration: Cost, Benefits and Real-life Stories. The agenda includes presentations by Mary Rose, Vice President of Administration and CIO, Babson College; Joanne Kossuth, Chief Information Officer, Olin College; and Tom McAuley, Director of IT&S, Wheaton College.

• **Employment Managers**

The Employment group continues to meet on a regular basis to monitor the success of the Shared Recruiting project. Members agree that given the sluggish economy and slow hiring situation, the project is off to a sound start. We are now entering the second phase of the project with the hope that the infrastructure is in place to support a resurgence in hiring. The group continues to use diversity as the principle driver for the project and is currently investigating some nonconventional advertising mediums. Members are planning Consortium member job fairs to rotate between the participating schools.

TMP reports growing interest from external institutions in the project and the group's work.

Next meeting: December 9, 2003


• **www.jobsinhighered.org**

Be sure to explore this innovative site. As a result of an outstanding collaborative effort, the Employment Managers have launched a web site that focuses on careers in higher ed and lists job opportunities at all Consortium schools as well as testimonials from employees at the campuses.

• **Sponsored Research**

Due to pressing government regulatory deadlines that several of the member schools found themselves under, the three-day NCURA, SPA II training that had been arranged for senior members of the Sponsored Research group in late September had to be postponed. The group should reconvene shortly to discuss the option of rescheduling the conference in the spring. The group held a Round Table session at Olin College to share information and hear about Northeastern's Purchasing Card process.

Next meeting: December 12, 2003



• Professional Development: 2003 Programs Completed

This year, more than 300 participants attended programs and courses offered by the Consortium. A new course offered was the MBTI qualifier training program, which was attended by 21 participants. Attendees have asked for additional training in application of the MBTI. TBC hopes to offer this training in the near future.

Writing for the Web, another new course, was over-subscribed in August; therefore, it was presented again this fall. Attendees gave it strong recommendations. Instructor Rob McKean helped everyone meet the unique challenges of preparing materials for the web.

The Training Collaborative developed a new certification program, Successful Management: What every supervisor wants to know. After an RFP and interviews, the group designed an updated program for supervisors offered this fall. The program received great evaluations and will be offered again later in 2004. Learn more about the new program on the web under Professional Development/Supervisor Certification Program or from your HR office.

On December 11th, we will present an update by Palmer & Dodge on HIPAA, GLB, and Privacy Regulations. In the winter 2004 program, we will be offering the Training Collaborative's popular Administrative Development Program. We plan to offer Advanced Financial Management skills with Howard Teibel, and Beyond the Legal Primer with Kathleen Rogers, legal counsel for Simmons College. The complete program offerings will be posted on the web. Your school will receive copies of our Program Calendar in December.

• The Training Collaborative

The Training Collaborative has worked over the summer to identify an outside consulting firm to develop and deliver a revised and improved version of the Supervisory Training series, now called Successful Management: What every supervisor wants to know.

Together with the consultants, TC members explored and debated the pertinent components of supervision and focused on the unique issues inherent to higher education that participants are likely to encounter in their role as supervisor.

The series has been broken down into a three-day series using a cohort group of participants who should benefit from the comprehensive workshop and from the exchange of ideas with each other. A follow-up session will be arranged in the New Year for participants to meet and discuss their experiences with the training material and with the ideas that have been generated.

• IT User Services and Help Desk Professionals to Meet

Several IT professionals from User Services and Help Desks have asked to meet with their Consortium peers. This December we will host a morning program to explore the common challenges and success that these IT professionals face. We will then join the IT Training group at lunch. The meeting will take place at the Center for Executive Education. If you are interested in participating or know of a colleague who may be interested, please email jkevorkian@babson.edu for details.

Next Meeting: December 8, 2003

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• IT Training

The IT Training Group continues to meet regularly. In September the group met for lunch at Henderson House to thank Jeanne Cavanaugh for her outstanding contribution to the Consortium, and ITTG in particular. Jeanne is retiring from her position at MIT, but we are fortunate that she has accepted the opportunity to consult for the Consortium as facilitator for ITTG. We look forward to having her as part of the Consortium.

Last month, 20 members met for a two-part meeting at Harvard's beautiful training facility in Harvard Square. The group met with Element K representatives. They discussed the financial state of EK, vendor partnerships, upcoming new courses, state of the Spark model, authorization/access keys, authoring tool, and libraries. The afternoon session featured Marsha Sanders from MIT on the topic of marketing and communications. Many IT Training members share the difficult challenge of increasing enrollment for students, faculty, and staff. Marsha shared her expertise and provided some good ideas and best practices.

Future meetings will focus on creating guidelines for authoring courses with Element K. Hope Tillman from the Babson College Library will make a presentation on copyright issues and regulations at the next meeting.

Next meeting: December 8, 2003, at The Center for Executive Education at Babson College

• OD&T

Unfortunately, many last-minute conflicts resulted in the canceling of our last meeting. Frank Medlar at the Berklee College of Music will host the next meeting. The group will discuss 360-degree assessment with seven or eight schools sharing their best practices.

Next meeting: December 12, 2003

• PFN (Project Facilitators Network)

Many of the PFN group are involved in the planning and the design of the November 21 Consortium retreat. The group conducted interviews with over two dozen Consortium members to assess their needs. PFN members worked with Jo Ayoub, utilizing work-based learning principles in the planning, to help with the design and to learn how to design a comprehensive retreat as part of the process. The group met on November 13th at the home of Doreen Nicastro for a meeting and to fine-tune last-minute details for the retreat.

• EH&S

Last month, the EH&S group met with Shai Morris of the EPA Colleges and University Sector. She presented EPA plans for a "green campus" program and sought input from our members on the implementation of such an initiative. Peter Schneider from Boston University is a member of the planning Committee.

EH&S members have been active in our Emergency Prep series. In addition to their participation at programs, they continue to be resources for best practices. Peter Schneider, Bill Van Schalkwyk from MIT, and Joe Griffin from Harvard presented a break out session at Emergency Tools for Universities and Colleges. Their presentations will be posted on the web.



FOR OUR COLLEAGUE AND FRIEND, SUSAN VOGT

Over the years, the Bullet Report has conveyed good wishes and farewells to several friends who have retired or gone on to new challenges. I never imagined that its pages would need to convey a final farewell. It has been two weeks since Susan died. It is difficult to accept that she will not be sliding into her seat at a board meeting, with her gentle smile and enthusiasm, to tackle the agenda at hand.

Through the Bullet, we keep our participants aware of activities across the groups and communities of practice that are the Consortium. This report contains two initiatives, Risk Management and Internal Audit, both of which developed because of Susan's leadership. As a member of the Consortium Board, a colleague, and a friend, Susan was upbeat, curious, and committed to affirmative change. Her quiet smile and gentle glance gave but a small glimpse of the persuasive power she had to make good things happen. Susan made a major contribution to the Consortium and will be an integral part of its fabric forever.

We will remember her as a very special friend of the Consortium and, according to her wishes, will make a donation to support students in financial need. We extend our most sincere condolences to everyone whose life was touched by Susan.

Phil DiChiara