

Bullet Report

JANUARY
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 & Safety; Facilities; Health Services; Human Resources; IT Training; Organization, Development & Training; 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 Board of Directors Supports Phase II Development of Return on Physical Assets (ROPASM) Model

- At December 2001's Board Meeting, Dave Kadamus of Sightlines updated the group on the past year's activities re: Sightlines' Return On Physical Assets (ROPASM) model. The use of ROPASM methodology for credibly documenting the facilities management function and then defining strategic and tactical plans for future actions has been proven useful at over 25 campuses, including over 80 million square feet of space and nearly 2,000 buildings. Of the Consortium's 13 members, 10 schools' data collection processes will be completed by the end of March. Many other colleges and universities also took part in the data collection process including the Ivy Plus Group, Cornell, University of Chicago, Princeton, University of Maine, University of Carolina, and two other consortia.

Following Dave Kadamus' presentation, the Consortium Board approved a proposal to support phase II development of the Sightlines web-based facilities database. This proprietary performance measurement tool is instantly accessible to campuses through the Sightlines' member web site and is designed to provide information that will support Board-level strategic investment decisions including:

- A facilities management database offering a unique and useful database of longitudinal and comparative measurement tools;
- An independent assessment of facilities services that includes a process review, site inspection, and customer survey;
- Management tools that highlight improvement opportunities and provide insight as to the long term capital and service implications of actions taken;
- An interactive web-based tool to share experience, monitor progress and compare performance.

For more information, visit www.sightlinesllc.com, or contact Phil DiChiara at 781.239.4615 or dichiara@babson.edu.



Consortium Sponsors Leadership Development Opportunities for its Members

• **'Breakfast with Joe' Series**

Fourteen senior-level administrators from Consortium member schools recently concluded a series of five leadership workshops with Dr. Joe Raelin, Professor at Boston College's Wallace E. Carroll School of Management. The group explored and experimented with new models of leadership including:

- How and when to make leadership a shared and effective experience;
- How to become more aware of their own and others' assumptions and practices about leadership;
- How to better appreciate their own capabilities and limitations in leadership; and
- How to narrow the gap between espoused theories of leadership and their actual practice.

The "Breakfast with Joe" series is part the Consortium's strategy to share knowledge, build community, and support our members' efforts to create effective change on their campuses. Feedback has been so positive that the series will be extended into spring 2002.

• **Project Facilitation Network II**

Last spring, the Boston Consortium in collaboration with Interaction Associates in Cambridge, launched the Project Facilitation Network, a new program designed to provide Consortium participants with meeting facilitation skills. The Consortium is pleased to once again offer this opportunity to ten individuals in 2002. Training involves spending three consecutive days at Interaction Associates office in Harvard Square. Participants will learn and practice methods for overcoming obstacles to communication, reconciling differences, making decisions, and implementing solutions in a timely fashion.

If you are interested in participating in the Consortium's Project Facilitation Network II this spring, please contact Phil DiChiara at dichiara@babson.edu or call 781.239.4615.

For specific information on the training, visit www.interactionassociates.com

Do you need help planning a major meeting or event?

Are you looking for an experienced meeting facilitator?

Last year's Project Facilitation Network participants are available to facilitate your meetings and/or to help 'behind-the-scenes' with the planning/design of a meeting. Members of this group have put their skills to use in planning a variety of meetings at many Consortium schools on topics such as customer service, strategic planning, disaster planning, distance education, and process improvement, among others.

Group members are able and willing to help in any way that would be of value to Consortium schools in improving the quality and effectiveness of their meetings.

For more information, please contact Mark Braun at mbraun@bu.edu.

Shared Services Effort Update

- During the past two months, the Risk Management Advisory Group has advanced its search for a Shared Risk Manager. The Shared Risk Manager will manage a newly-created shared risk management program at Babson College, Bentley College, Berklee College of Music, Brandeis University, Olin College of Engineering, Wellesley College, and Wheaton College. The Consortium schools participating in the program have made significant investments of time and resources in developing this role during the past year. They seek to create a systematic and coordinated approach to risk management, which will enhance college activities and produce a high-quality and healthy environment for students, faculty, staff, and visitors. By sharing this role, the schools hope to gain efficiencies and increased access to valuable information. Over 70 applicants applied for the position. The group narrowed the applicant pool to the top five candidates and will interview these individuals in February.

On April 29, the Chief Financial Officers of the schools participating in the Shared Services effort will hold a “Shared Services Summit” to advance plans for the legal and selected internal audit services. The schools are evaluating what audit and legal services they would like the shared effort to offer – focusing on creating a continuum of services emanating from the shared risk management foundation. The summit will include guest speakers from University of Pennsylvania, United Educators, Commonfund and the Association of Governing Boards.

Academic Village Feasibility Study Results

- On January 28, representatives from Boston College, Bentley College, Boston University, Northeastern University, and Tufts University met with Jack Kendrick to hear Southwest Securities’ proposal for the second phase of the Academic Village feasibility study. The group initiated this effort a year ago to address the significant shortage of graduate student housing in the Boston area. At the meeting, John Augustine of Lehman Brothers and group participants discussed concerns related to the shared entity’s ability to remain off balance sheet. Although proposed ownership would be separate from the schools (but related to the Consortium), it was determined that rating agencies such as Moody’s and Standard and Poor’s would view individual schools as ultimately at risk. Therefore, the schools decided that significant financing complexities make this approach unworkable at this time.

There was agreement that much was learned from the feasibility study process. It is hoped that the information gained will pay a dividend in the future. For example, it is possible that if certain external circumstances change a successful shared model might be feasible. The group appreciates and acknowledges the thorough and thoughtful work completed by Jack Kendrick and Christine Freidberg of Southwest Securities.

Public Safety Officers Meet for First Time

- On January 23, Public Safety Officers from Consortium schools met at MIT’s Endicott House. John DiFava, MIT’s new Director of Public Safety and former head of the Massachusetts State Police, spoke to the group about his recent experiences at Boston’s Logan Airport. Although it was their first-ever Consortium meeting, there was a ‘sense of community’ at the event given existing, long-standing relationships within the public safety field. Meeting participants agreed that it was important to continue to meet and connect (under the auspices of the Consortium) to augment their involvement with their other peer professional organizations. The group decided to create a listserv to share information and agreed to assist with planning a session on crisis preparation and management for Consortium members. A follow-up session is planned for Spring 2002.

Next meeting: TBD, Spring 2002



OD&T Discuss Performance Management Systems

- Members of the Organization Development and Training group met in February to share information about their individual performance management systems. Representatives from Babson College, Boston University, Brandeis University, Harvard University, MIT, Tufts University, and Wellesley College provided overviews of their programs. Group members found that the schools have a lot more in common than they anticipated. At their next meeting, participants will discuss different approaches for starting a performance management programs including methods to engage faculty, how to increase effectiveness, and how to decrease bureaucratic barriers.

Next meeting: April 30, 3:00 pm at Babson College

Employment Managers Pursue Joint Advertising

- At January's Chief Human Resource Officer meeting, Employment Managers from Babson College, Boston College, Brandeis University, and Wellesley College presented their plan to launch a joint recruitment ad campaign, which includes sharing print media advertising costs while retaining individual brand name of each institution. The ads are designed to attract greater diversity as well as build awareness from applicants who may not have considered higher education as a career. CHROs expressed support for the Employment Managers proposal. A thorough business plan will be prepared over the next several weeks.

Next Meeting: February 19, 2:00 at The Boston Consortium

Sponsored Research to Offer NCURA Fundamentals Course and Specialized Training

- The Sponsored Research Group will offer a Boston-based NCURA Fundamentals course on June 10, 11 & 12, 2002 at Boston University's School of Management. Given the significant unmet need for local training, the group approached NCURA to see if they might be willing bring intro-level training for grants administrators to Boston. The session will accommodate up to 70 professionals from Consortium member schools. A subcommittee of the full Sponsored Research group also has been advancing plans for intermediate and advanced level training in the financial management area. The subcommittee developed a list of potential training areas and began with creating a training module on Cost Principles and Audit Issues. This session will provide intermediate level administrators with a general overview of the grants administration process including goals and shared responsibilities, and an in depth overview of A-21; direct and indirect costs; allowability of costs; cost accounting standards; and audits. The group plans to launch this training series in fall 2002.

Next meeting: February 27, 2:30 pm at The Boston Consortium

Benefits Managers Get 'Up to Speed' on Important Recent Developments

- February's meeting of the Benefits Managers was practically 'standing room only'. Representatives from all Consortium member schools participated in a discussion about HIPAA — new rules regarding the privacy of employees' health information with Holly Rubenstein, Attorney, and Joan Cunnick, Associate, from OFJ/Hobbs Group. This topic was followed by a presentation by Tom Peller, Vice President of Business Compliance at Fidelity regarding new tax laws related to retirement plans.

Next meeting: March 12, PricewaterhouseCoopers Educational Session, time and location TBA

Additional Meetings

Controllers, April 2002, time and location TBA

Environmental, Health & Safety, February 25, 9:30 am at MIT

Purchasing, March/April 2002, time and location TBA

Treasurers, April 2002, time and location TBA



Chief Human Resource Officers Focus on Ideas for Controlling Healthcare Benefit Costs

- Following up on their November 2001 meeting, Chief Human Resource Officers (CHRO) met on January 24 to pick up on their discussion re: educating and sharing information related to controlling healthcare benefit costs. The schools hired PricewaterhouseCoopers (PWC) to extend data collection and analysis completed during the 2000 Pharmacy Benefits Carve Out Study. Dr. David Chin and Mary Gore of the Boston Health and Welfare group of the Global Healthcare Solutions practice of PricewaterhouseCoopers LLP plan to present their findings at an educational session with Chief Financial Officers, CHRO and Benefits Managers on March 12 (time and location TBA).

Phil DiChiara shared material on a new trend of ‘direct physician group contracting’ from PatientChoice, a consultant firm working with the Associated Industries of Massachusetts (AIM) and Association of Independent Colleges and Universities of Massachusetts (AICUM). AIM is considering whether to publicly endorse and support physician groups contracts as another alternative to traditional managed care offerings. Direct physician contracting is currently used by 3M, Honeywell, Target, and the University of Minnesota. AIM believes the New England region also may be responsive to such an approach. PWC plans to include more information on this type of approach at the educational session with CFO, CHRO and Benefits Managers.

Next meeting: February 28, 5:00 pm at Brandeis University

Telecommunications Group Discusses Implications of Cell Phones

- Telecommunications Group members met in February to exchange views and information re: strategies to deal with the implications of increasing cell phone usage including 911 issues and decreasing dorm room and pay phone service. In late February, ten individuals from Consortium member schools’ Telecom departments will participate in intro-level telecom training session with Verizon. The session will provide participants with a solid foundation in the fundamentals for telecommunications and introduce them to today’s emerging telecommunications issues.

Next meeting: April 1, 9:00 at The Boston Consortium

Arts Managers Meet at Harvard University’s Office for the Arts

- Cathy McCormick, Director of Programs, at Harvard University’s Office for the Arts, hosted February’s meeting of the Arts Managers Group. Representatives from Babson College, Berklee College of Music, Brandeis University, MIT, Olin College, and Suffolk University shared their ‘wish lists’ for the coming year. Some examples include finishing facilities renovations, increasing coordination and awareness of arts programs, and upgrading operational and financial management systems and processes. Group members also discussed ideas for collaboration such as offering ticket discounts across schools. The group plans to meet in June 2002 for a ‘visual arts tour’ at MIT.

Next Meeting: June 2002, time TBA, at MIT

Training Collaborative Plans Next Phase of Management Development Series

- The Training Collaborative group meets in February to discuss and decide plan for summer 2002’s Management Development Series offerings including: selecting courses; identifying audiences; developing ‘behavioral descriptions’ for each; and refining marketing materials. The group also plans to discuss plans for fall 2002 including taking Consortium training programs to the ‘next level’, i.e., creating an integrated package for middle managers; increasing marketing efforts; and incorporating a new Administrative Assistants’ Training Program. The program has had such great success and response, the Consortium is exploring alternative space arrangements to accommodate for break out rooms and enhanced training functionality.

Next meeting: February 13, 2:00 pm at The Boston Consortium

IT Trainers Evaluate Web and Classroom-based Training

- IT Trainers met at Wellesley College on January 30 to review and discuss next steps with Element K. The Consortium's contract with Element K expires summer 2002; Element K recently submitted a response to the RFP for going forward. Among the issues addressed were whether the schools should continue to exclusively use Element K, or if they should open up to other vendors to diversify their offerings and meet individual requirements. After careful review of Element K's performance, as well as its competitors' service offerings, members agreed to extend Element K's contract. With support from the Consortium, the group purchased research from Brandon Hall to assist with their review process.

In the classroom-based computer-training arena, the IT Trainers plan to continue partnerships with their two preferred vendors: Pinnacle and New Horizons. Between July 1, 1999 and December 31, 2001, the schools participating in the Consortium partnership cumulatively spent \$688,503 on training programs with these two vendors. Cumulative savings during this period – as a result of leveraging the collective buying power of the schools and negotiating a favorable price point – was \$550,003 or a 44% reduction of cost.

Next meeting: March 4, 2:00 pm at The Boston Consortium

Board of Directors Focuses on Risk Management Considerations

- At January's Board meeting, Leta Finch and Jane Dickerson of Marsh presented an overview of the current insurance and risk environment, which has experienced unprecedented challenges leading up to and since the tragedy of September 11. Meeting participants discussed their biggest concerns, which included preparing adequate responses to computer sabotage; managing increasing insurance costs; preventing fires in residence halls; and avoiding loss of reputation due to unforeseen challenges. Ms. Finch summarized the current insurance company's view of assessing potential risks on campuses. With the market outlook looking bleak, everybody is in the same situation with premiums going up and some underwriters refusing to cover risks. This situation existed before, but concerns about risks on campuses have increased substantially since September 11. Ms. Finch suggested that the schools be more proactive in relationships with carriers by reassuring them that their campuses are safe. The Board plans to discuss these issues further as the schools' develop individual action plans for effective risk management.

Next meetings: February 14, 7:30 am at The Boston Consortium; March 14, 7:30 am at The Boston Consortium

Joanna Hilliard Joins Consortium Staff

- Please join us in welcoming Joanna Hilliard to the Consortium in the role of Administrative Assistant. Jo brings a wealth of experience from GTE, Visidyne and the Automation Partnership where her responsibilities included office management, database management, research, meeting planning, and presentation creation. Joanna will be working closely with Phil DiChiara in the areas of Board management, events planning, and assisting with group planning and meetings. Joanna resides in Holliston, Massachusetts. To contact Joanna, call 781.239.4401 or email jhilliard@babson.edu.

Learning History Published "IT Trainers: Collaboration In Action"

In February 2002, IT Trainers released Part 1 of their history of working together. "IT Trainers: Collaboration In Action" presents the early history of the group's collective work and details how group members discovered solutions to address common challenges to improve quality and increase cost-effectiveness of classroom-based computer training on their individual campuses.

Part 2 of their history (to be released spring 2002) will detail the next phase of their collaborative efforts including exploration and experimentation with web-based training tools, distance education, and learning management systems. For copies of Consortium Learning Histories, contact Laura Cannata: 781.239.4463 or lcannata@babson.edu.

MANAGEMENT DEVELOPMENT SERIES

The Boston Consortium is pleased to offer a variety of opportunities for higher education employees to broaden their knowledge, develop new networks and increase their professional skills. We are ceaselessly on the lookout for ways to provide our members with high quality, valuable professional development experiences. Please call us at 781.239.4461 if you have any ideas or suggestions for new workshops. Workshops are held at MIT's Professional Learning Center (MIT) in Cambridge and at The Boston Consortium (TBC) in Wellesley.

To register, complete the form on the next page, or register online at the address below.

February

2/26 Meetings That Work, 9-3

Location

TBC

March

3/6 The Art of Appreciative Listening and Inquiry, 9-1

TBC

3/6 Communicating in Difficult Situations, 9-4

MIT

3/6, 13 & 20 Scientific and Technical Writing, 9-4

MIT

3/7 Assertive Communication, 9-12 **full**

MIT

3/11 & 12 Active Listening, 9-12

MIT

3/20 Improving Leadership Effectiveness, 9-4 **nearly full; sign up today!**

TBC

3/20 & 27, Making Career Choices, 9-12

MIT

4/10 & 17

3/26 Dealing with Difficult People, 9-4

TBC

April

4/3 Conflict Resolution, 9-4:30

TBC

4/19 Communication Skills for Customer Service, 9-3:30

MIT

4/23 Team Organization and Development, 1-5

MIT

4/25 & 26 Building High Performance Teams, 9-4

MIT

4/30 The Art of Coaching for Strong Performance, 9-4:30

TBC

May

5/2 & 3 Preparing Competitive Research Proposals, 9-4

MIT

5/7 & 9 Transitioning to Management, 9-12

MIT

5/15 Mediation Skills, 9-4

TBC

Here's a sampling of feedback received from workshop participants

Art of Appreciative Listening & Inquiry

The interaction with the instructor and other participants was terrific. I learned as much from the instruction as (I did) from the in class dialogue.

Improving Leadership Effectiveness

The instructor demonstrated his knowledge of college and university environments and issues, and provided me with helpful ideas and insights.

Conflict Resolution

This program was very useful. I will implement what I learned into my daily work life.

For more information on workshops visit www.boston-consortium.org/sub_gro_hum_man.shtml or call 781.239.4461.

www.boston-consortium.org

Workshop Registration Form

Name _____

Title _____

School _____

Address _____

City _____

State _____

Zip _____

Phone _____

Email _____

Please register me for the following workshops:

Workshop _____

Date _____

Location _____

Amount _____

Registrations and cancellations must be received two weeks before the class. Invoices will be mailed to you at that time and payment will be expected unless we fill your seat in the class. Payment is by check only; prepayment is not necessary to attend the course.

Weather Cancellation Policy: If, due to inclement weather, classes on the Babson College campus are cancelled, then the workshops held at The Boston Consortium are cancelled. If, due to inclement weather, classes at MIT are cancelled, the workshops held at MIT are cancelled.

MIT offers Professional Development courses to MIT employees at no charge. If you are an MIT employee and wish to enroll in an upcoming course, please register through the MIT Training web site: <http://web.mit.edu/personnel/www/training>.

If you have any questions please call 781.239.4461.

Directions & Parking

The Boston Consortium - 150 Great Plain Avenue/Route 135, Wellesley, MA

Follow Route 128 to Exit 19 (Highland Avenue/Needham). Follow Highland Avenue to Needham Center.

Turn right onto Route 135 West (Great Plain Avenue). As you cross into Wellesley, turn right at the sign/driveway for Boston Sports Clubs and the Babson Skating Rink. (If you come to a rotary, you have gone too far.) Park in the lot and enter the Babson Skating Rink. Proceed through the doors into the rink. The Boston Consortium is located on the second floor on your left.

MIT Professional Learning Center - 301 Vassar Street, Building W89, Cambridge, MA.

Visit <http://web.mit.edu/learningcenter/www/> and <http://web.mit.edu/map.html> for driving and public transportation directions, and a map. The closest parking for visitors: Hyatt Regency Hotel, 575 Memorial Drive, Cambridge.



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