

Bullet Report

OCTOBER
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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; Organization, 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

● "Data, Dialogue, and Decision Making:" Conference Attracts 300

A year after the tragedies of 9/11, the Boston Consortium and the Association of Independent Colleges and Universities in Massachusetts (AICUM) worked with the state's three other consortia to address a new scale of emergency. Two keynote presentations set the stage for a series of ongoing sessions to insure that our members adopt the best practices possible and establish informal pacts of mutual support.

More than 50 schools participated in the October conference, and every key discipline was represented, including Chief Financial Officers, Vice Presidents for Human Resources, Chiefs of Public Safety, Directors of Environmental Health and Safety, Deans of Student Services, and Chief Facility Officers. Also present were representatives from the Secret Service Anti-Terrorism Unit on Electronic Crimes.

John Curry, Executive Vice President at MIT, shared his experiences at UCLA during the 1994 earthquakes. The social upheaval subsequent to the Rodney King trial also had a major impact on UCLA. "The emergency you prepare for is not necessarily the one you get," cautioned Curry.

Marilyn McMillan, Chief Information Technology Officer at NYU, discussed the university-wide impact of 9/11. "The ability to pinch hit in a emergency has to be part of everyone's skill set," McMillan said. "Don't expect things to get back to the familiar normal anytime soon."

Breakout sessions and large group conversation were led by Joanne Ayoub, an expert facilitator. "The conference was designed to be a catalyst for future action. Communication across the consortia will insure that we remain linked and that best practices are shared, to insure that our schools are not intimidated by the enormity of planning," noted Phil DiChiara, TBC Managing Director. Follow-up has begun, and the post-session suggestion that we meet again in a year is under consideration.

This effort was the first state-wide, higher education event of its kind in the country. "As a leader in higher education, this state can raise the bar for emergency preparation among colleges," noted Clare Cotton, AICUM President and Boston Consortium Board Member. The fact that essentially all schools have adequate internal disaster plans does not address the new reality of regional disasters. As long as we communicate routinely on these matters, we will be prepared as we contend with the unknown nature of emergencies.

If you would like a copy of our Learning History on the conference, please email your request to tbcinfo@babson.edu.



- **Co-Sourced Risk Management Program Builds Consensus**

As the year-end approaches, the Risk Management Advisory Group is fast planning its efforts to develop a member or group purchasing model for property and casualty insurance.

The process began in late May when Ed Frackiewicz was hired as the first shared Director of Risk Management for the Consortium. The founding Risk Management Advisory Group members include Brandeis University, Berklee College of Music, the F.W. Olin College of Engineering, Wheaton College, and Wellesley College.

The goal of this partnership is to design, create, or reinvent innovative expense management improvements for the purchase of each college's insurance program. This summer provided an opportunity for the Director to conduct an initial risk assessment at each campus with activities that included monthly group meetings; introductions and interviews with key college leaders; consultations with incumbent insurance brokers and underwriters; insurance policy reviews, and benchmark participation with other Higher Education Risk Management Groups.

The group is currently studying the results of this assessment to build consensus and develop a plan that will satisfy the needs of each institution. In order to design our group purchasing model and best position our renewal efforts, we will,

- Create best-practice benchmarks
- Integrate those standards into our shared service expectations
- Communicate those expectations into measurable deliverables from our risk management partners
- Improve the use of technology

Inquiries or comments may be directed to:

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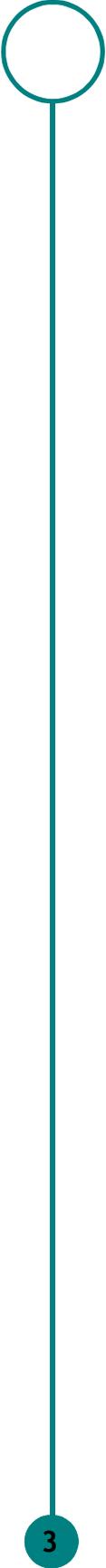
Next Meeting: December 12, 2002

- **2003 Contact Book**

After an extensive effort to update contact information, The Consortium has completed the 2003 Contact Book. Copies are available for distribution at group meetings or as requested by consortium members. Please email Sharman at sandersen@babson.edu to order a book or to request edits or additions.

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- **Fall Professional Development Series Registered 123 Students**

This fall the Professional Development Series provided training for more than 123 participants from 14 colleges. The series continues to grow. The outstanding faculty, pertinent course material, and active participants all contribute to the success. Participant feedback, including evaluations, continues to help us to develop and redesign the courses. Thank you for helping make this program a success.

- **Professional Development Series Winter 2003 Program**

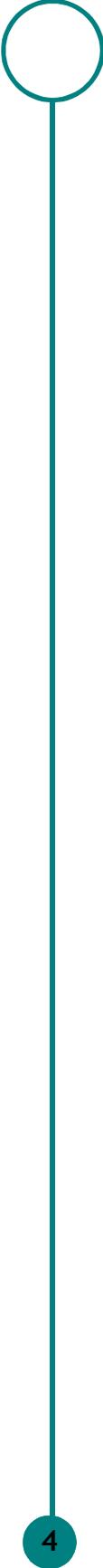
The Winter 2003 Professional Development Series program brochures will be available for distribution the beginning of January. The brochure will also be posted on the web site at that time. Whenever possible, we request that you register online at www.boston-consortium.org. Please check with your HR office for your school's registration policy.

There will be several new opportunities for development. The IT Training Group has instituted a Learning Exchange Program in addition to ongoing Element K training. There will be a new program for supervisors managing in a union environment and a new version of our pilot program on understanding budgets. Project Management Essentials has been redesigned and will be a two-part program. To complement last fall's writing programs, we are offering an in-depth grammar course. There will also be another session of the over-subscribed Managing Student Workers. Active Listening will be offered as a full one-day program at CEE, as well as the two half-day sessions at the MIT Professional Learning Center. MIT continues to offer Consortium members the opportunity to attend its programs.

The Training Collaborative will be offering the popular Administrative Assistant Certification Program and the Supervisor Certification Program. Please contact your HR department to see if your school participates in these programs.

The Boston Consortium will also be offering several unique training opportunities during the course of the year, including a program on Leadership and Influence Without Authority by Professor Allan Cohen, a recognized expert in the field. Watch your emails for information regarding these opportunities.

The Consortium is a resource to assist you in meeting your training needs, whether for yourself or your staff. We welcome the opportunity to partner with you to create relevant and timely training programs as part of the Professional Development Series at the Center for Executive Education or at your own institution. Please contact June Kevorkian at jkevorkian@babson.edu or 781-239-4450 for details.



- **NACUBO Web Conference: Leading Toward Financial Health**

On October 23, The Boston Consortium hosted the NACUBO web conference, “Leading Toward Financial Health: Small Colleges Facing Large Challenges.”

Smaller colleges face a new operating climate due to the unstable economy, market demands, tuition increases, and new forms of competition in the educational marketplace. The conference provided a forum for understanding these challenges and learning effective strategies through the experiences of two colleges that successfully overcame grave financial situations.

The conference was moderated by Michael McPherson of Macalester College, an authority on higher education financing. Michael Townsley, author of *The Small College Guide to Financial Health: Beating the Odds* was a presenter.

Consortium members David Hornfischer and Rich Vigdor from Berklee College of Music, Rachel Weinstock from Olin College, Maureen Murphy from Brandeis, Jeanne Finlayson from Wheaton, Phil DiChiara and June Kevorkian from the Consortium, and consultants Ken Farbstein and Bruce Osterling were joined by Donna Guertin from Bay Path College, and Susan Davy and Robert Low from the New England Conservatory. Following lunch at the Center for Executive Education at Babson, participants joined the web conference. The Consortium post-conference discussion focused on similar and unique challenges each institution faces. The opportunity to have this collaborative experience enhanced the value of the web conference.

- **Babson Center for Information Management Studies (CIMS) and The Boston Consortium to Co-sponsor a Joint Session for Information Technology and Financial Officers**

Knowledge Management is a recognized discipline, but few administrators have come to grips with the breadth of impact that it can have upon the operation of an organization. KM is the intellectual property, ideas, and accrued experience of the organization and its staff. Recent interest focuses on creating better information technology systems so that one part of the company can know what the other is doing. Some aspects of KM are cultural, getting people to generate and share ideas. The added value comes when the systems and subsystems of people and technology become aligned. Ideas are nurtured and costs are lowered. However, new investments in information technology are threatened by the current economic climate. How can colleges confront this paradox?

In late March or early April, the Consortium, in cooperation with CIMS, has arranged for two preeminent authors on Knowledge Management to join us for a dinner and discussion session. Thomas Davenport, Director of the Accenture Institute for Strategic Change and Babson Distinguished Professor of IT, and Larry Prusak, Executive Director, and Managing Principal of the IBM Global Services, will present their new book, *What's the Big Idea*, to be published this winter by Harvard Business School Press. Joining Tom and Larry will be several executives from industry, which promises to make this a very exciting event.

Kavin Moody, Executive Director of CIMS, and Phil DiChiara, Managing Director of TBC, are coordinating this dynamic program. Details will follow shortly.

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- **Mellon Retirement Project Identifies the Boston Consortium for Regional Briefing**

Faculty retirement continues to present challenges, especially in the area of retirement health care benefits. As part of a national effort to address the problem, Kater Pendergast, Vice President and Chief of Human Resources at Northeastern University, is a member of the Steering Committee, underwritten by a Mellon Foundation grant. The Regional Briefing, co-sponsored by the Consortium, will be held at Northeastern's Henderson House on Friday January 31, 2003, from 9:00am to 1:00pm, including a continental breakfast and lunch. The Briefing is designed for Fiscal Officers, Human Resource professionals, and Provosts.

Please consider attending or sending a representative to this event. It will be important to understand both the process and the potential to create a solution for a difficult problem. We will forward more information via email.

- **Founding Board Members Meet as Emeritus Group**

Though the Boston Consortium dates back just eight years, there are now only two Board members who were part of the founding group: Chairman Peter McKenzie and Treasurer Tom McGurty. For an organization based on trust and relationships, it is appropriate to periodically convene and counsel with our past colleagues, who remain current friends and ongoing advisers. Plans for an Emeritus Group developed over the summer, in part as a response to past chairman Will Reed, who wanted an active retirement.

On the evening of November 21, the current Board happily welcomed back Glenn Strehle from MIT, Ed Merck from Wheaton, Joanne Yestramski from Bentley, John Eldert from Babson, and Will Reed from Wellesley. It was a great event, with a variety of lively discussions over cocktails and dinner.

Peter McKenzie commented upon our need to continually attract grant funds for the growing number of projects and ideas that are coming across the table. The Emeritus members offered assistance and suggestions about how to capitalize on the substantial network of our members. Ed Merck commented how pleased he was to see that the candor of the conversations and the trust among members had grown, beyond even the expectations of the earliest members. Reminding us how we can be a resource to each other, Peter McKenzie noted that TBC had been established during a time of growing financial strength, with the understanding that more difficult times were inevitable. As we face precisely those times today, we have in place a forum for best practices and shared cost arrangements. Any doubts in 1995 about the value of a consortium are now laid to rest. Remembering the stories and even the struggles keeps us focused. We must continue to develop this tool known at The Boston Consortium.

We look forward to the next Emeritus Dinner and promise to leave plenty of time for conversation!



- **Benefits**

The Benefits group last met in October 2002 and discussed the upcoming Benefits review at Wheaton and Bentley. They discussed the composition of the committees involved and the scope of the proposed reviews.

Following information regarding a departmental downsizing at Bentley, it was suggested that a representative discuss the situation with Babson. The Employment Manager at Babson was instrumental in the development of a Resume Bank shared with other TBC schools (resulting in several hires).

The group then discussed HIPAA and lamented the conflicting advice and guidelines given regarding the filing of extensions. Following the offer of two members to research and provide accurate information, the group agreed to make HIPAA an agenda item again in January.

The group also discussed Health Insurance renewals and Retirement Contributions.

Next meeting: January TBD

- **Environmental Health and Safety**

At a recent meeting, the EHS Group identified 14 possible topics for its Next Big Thing. The group then chose emergency preparedness and a course on Indoor Air Quality as the top priorities. A lesser priority may be the development of a radiation safety program.

The initial product of the work in emergency preparedness will be an inventory of sources of 18 types of emergency equipment (ranging from biological air sampling equipment to bottled water) that are available across TBC schools. For each item, the list will name the number available, the exact location, the key contact person's phone numbers, etc.

The topics for the January meeting will include the review of the first draft of the joint inventory of disaster equipment, setting objectives for a course on Indoor Air Quality, and a discussion of a radiation safety program.

Next meeting: January 3

- **Organizational Development & Training**

At the next Organizational Development and Training Group meeting, Babson College will share its experience with determining and revisiting mission and core values. Each of the participating institutions will share its approach to this topic. Other topics, which will be covered at future meetings, include Competency Model Applications and 360-degree assessment. The group is also working to design a program with Professor Allan Cohen on leadership, and influence without authority.

Next meeting: January TBD at Babson College

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• IT Training Group

The IT Training Group has had a busy fall schedule. In addition to regular meetings, ITTG members have taken on responsibility for a number of collaborative projects. Several members of the IT Training Group put their facilitation training to use as facilitators at the emergency preparedness workshop this fall. They made a valuable contribution to the success of the group work. They have also presented at conferences, met with the Consortium Board of Directors and refined ongoing projects such as the development of a core competencies model.

This fall, at the CUPA conference of HR professionals in Higher Education in Toronto, Canada, three members of the IT Training group presented “Harnessing Technology to Empower Learners,” several stories about the positive impact of web-based learning at three very different institutions. Doreen Nicastro of the BU Medical Campus, Colleen Wheeler of Wheaton College, and Josh Wilson of Tufts University shared ways in which web-based learning had empowered learners and allowed them to work more effectively. If you would like a copy of the presentation, please send an email to tbcinfo@babson.edu.

An IT subgroup, working on Collaborative Tools, has been evaluating Web-based collaboration solutions. The group hopes to offer the community an interactive environment that will permit live collaboration without the burden of travel. These resources will provide capabilities that supplement existing Web-based learning resources already in use at our institutions. These tools allow for better communication and improved relationships, as well as enriching both teaching and learning.

The IT Training Group selected three new vendor partners, to broaden the range of applications and operating systems training we can provide to our communities. These new partners are: American Graphics Institute, ComputerImages, and Glow Training. We continue to use New Horizons and Pinnacle Training as our preferred vendor partners, and we met with our account representatives from these two companies at our fall meeting to refine our working relationships.

The ITTG reviewed the past year's collective experience with Web-based learning from Element K. They discussed the challenges and strategies for migration to KnowledgeHub, Element K's next-generation learning interface and back-end system with company representatives. It is anticipated that KnowledgeHub will enable people to integrate learning resources in different formats and in more effective and flexible ways. In addition, it will allow ITTG members to create development paths that offer individualized guidance for learners at our institutions.

Tufts and Wheaton led the migration to KnowledgeHub. They will share insights gained in the process. Other schools will schedule migration dates in the coming months.

Upcoming topics for the group will include continued exploration of collaborative tools as well as maintenance of our vendor relationships for classroom training and web-based learning. In an effort to encourage participation by members from all 13 institutions, the group plans to assess the needs of its members during the January meeting and develop a list of new projects for the coming months.

Next meeting: January 6 at MIT



• Telecommunications

The group's 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.

Best practices and common practices: A survey of TBC schools' telecom services to students was performed recently. The results portrayed the emerging new model of telecom services (results available on request).

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

Changes in the industry: The Telecom Group has two primary concerns: financial instability among the telecom carriers they rely on, and the rising net costs to the schools of their telecom services to students.

Two executives from Verizon described trends in the industry at the last meeting, and identified the increasing concentration in the industry, likely leading to future price increases. Additional guest speakers are being sought for future meetings.

The Telecom Group will report on these concerns and the results of a survey of telecom services for students to the Board in December.

Next meeting: February 3

• 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: At the November 15 meeting, we compared school policies on sign-offs and representations about the accuracy of audits. We identified that the common practice is for the Controller to revise the letter, often nine pages long and prepared by the auditor, before signing it.

Discussion focused on appropriately spending restricted funds according to donors' preferences, and being able to explain it to donors. Members discussed the specific ways they restrict funds. They also discussed the independence of auditors in light of the consulting work they perform for schools. The group developed a rough continuum of the use of auditors for consulting work.

Examples of discussion of oncoming changes: Much of the discussion at the last meeting focused on the new requirements about auditors from the recent Sarbanes-Oxley legislation and the U.S. General Accounting Office.

In their future exchanges, we anticipate the members will discuss the transition from the use of shadow systems (parallel systems for financial management and accounting) toward project-oriented accounting, and combining accounting and financial reporting into a single system. Of course, members will discuss the significant trade-offs involved.

Next meeting: January 31

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- **The Training Collaborative**

Following a successful fall season for the Professional Development Series, The Training Collaborative met in October to hold a mini-retreat before moving ahead to plan the winter series. The primary reason for the retreat was to reevaluate the goals and objectives of the TC, and to establish some guidelines for future direction and growth.

The group agreed that the primary purpose of the TC is to provide consistent, timely, and meaningful training for their employees. To this end, the TC has carefully monitored and approved of the Supervisor Certification Program, and the Administrative Assistant Development Program.

The group decided to request a new layout of the Professional Development Series to delineate the TC workshops more distinctly. Following a meeting with staff from TBC to discuss these issues, the winter PDS will provide a clearer picture of the multiple training workshops available to member schools, and the sponsoring parties for each workshop.

Next meeting: TBD

- **Sponsored Research**

The Sponsored Research group met in October to review the NCURA conference on Fundamentals of Sponsored Research held in June of this year. The group agreed that the three-day conference held at Boston University's School of Management was a huge success, and warranted a repeat performance in 2003.

The group also discussed the merits of holding a concurrent training program for more experienced practitioners. Further discussion will take place at the group's next meeting.

A sub-group has been meeting on a regular basis to develop a comprehensive, modular training program for the use of member schools as needed. The sub-group is gathering and reviewing case study material for applicability.

At the last meeting, the group voted to form a regular round-table group who will meet regularly to discuss pertinent issues.

On December 6, the group met and a decision was made on the number of attendees from each institution who would attend the NCURA conference in April. The group also voted to choose a different date for the SPA II training and will be looking at either late April, May, or October as possible dates.

Next meeting: A roundtable discussion in January TBD

- **Public Safety Officers**

After their late summer meeting, the public safety officers continued to be an asset in the planning of Data, Dialogue, Decision Making: Disaster Planning for Higher Education. Their participation contributed to the success of this workshop. Scheduling conflicts caused the cancellation of the November meeting. The group will meet again in January to continue with the disaster planning dialogue and plans for creating training for public safety officers.

Next meeting: January TBD at the Center for Executive Education at Babson



- **Purchasing Group and Facility Managers to Meet in January**

The e-Procurement Pilot at Harvard and the status of the MassHEFA PowerOptions contract for Energy are two major topics that will be discussed in January.

Five years ago, the deregulation of electrical energy prompted MassHEFA to form PowerOptions, and establish a shared entity for group purchasing of power. Three and five year contracts were established, and given state-mandated reductions of a minimum of 10%, participants benefited from reduced cost. Sadly, those schools that chose three year contracts, attractive arrangements in 1998, have since experienced equally dramatic increases in cost. The end of the five-year contract promises the same. Schools are struggling to respond in what has become a difficult economic environment where double digit health benefit costs, plus reduced endowment income has made expense control essential.

Russ Silva, Director of the PowerOptions program will speak to these groups in late January. A collective contract price should be in place by then. It is important that the decision-makers from our member schools be up-to-date in understanding such a contract, and the options they may have collaboratively should no contract be in place.

Diane Devlin of Harvard and Kurt Sollod of OrgSupply will update the Purchasing executives on the progress of the Harvard-Tufts-Boston University shared e-Procurement Pilot. Incoming Board member Mike Barricelli, Controller at Harvard, reports that feedback has been positive. The group will also discuss the timing of implementation at Tufts and BU.

Next meeting: January TBD

- **Employment Managers**

The Employment Managers group continues to gather momentum with the Shared Recruiting initiative. The group held several meetings this fall with representatives from TMP Worldwide to discuss details of the proposed micro site and associated media plan. Print advertisement will be placed in *Boston* magazine in high volume issues in the upcoming year. The group is also seeking a strong presence in diversity publications and web sites and will have assistance from TMP in selecting those resources.

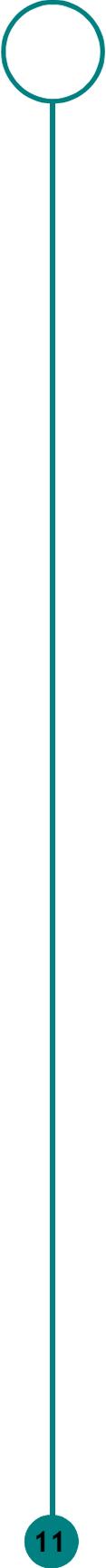
The Employment Managers group last met on November 13 and held a marathon session from 3:30 to 8:00 PM. After dinner at the Endicott House, the group held a brainstorming session to review “hot issues” on which to focus in 2003.

At the December 6 meeting, we welcomed a new member, Robert Martinez from MIT. The group discussed various diversity sites for use in their shared recruiting project, and Robert shared data that he has gathered regarding specific diversity sites. The group agreed to go ahead with the signing of the contract with TMP Worldwide and also agreed to include all 13 school names on the web site and in ads.

Next meeting: January 14 at 2:30

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- **Polly Price Steps Down from the Board of Directors**

Since 1998, our friend and colleague Polly Price has ably held Harvard University's seat on the Consortium Board of Directors. When the Consortium was in its early years, still finding its niche, Polly played an important role in defining our vision. She has an understanding and appreciation for the role of behavior in creating positive change. We could count on her to speak forcefully about our collective opportunities. Phil DiChiara recalls that Polly insisted that the Chief Human Resource Officers should meet routinely; she made it her objective to see that senior HR executives met regularly. Previously, the CHRO group had only met intermittently. Her personal commitment resulted in the creation of our present meeting format.

At the first Consortium retreat in June of 1998, Polly set the stage for what would later become the Professional Development Series. She argued that there were services that many of the schools could share. She identified the need to bring HR specialists to the consortium. Because of her initiative, we have created several communities of practice that continue to bear fruit, including the effort to develop a shared understanding of the complex health-care benefit programs. Polly also initiated our ongoing relationship with David Chin of PricewaterhouseCoopers.

We will miss Polly's strong presence on the Board. Though she is stepping down, we are grateful that she will continue to be active within the Consortium and particularly with the CHRO group. She will also be available to offer advice to the growing number of groups and initiatives in the Consortium.

We welcome Mike Barricelli, Harvard University's Controller, who will become a member of the Board effective January 2003.

Thanks Polly. You are a trusted colleague and friend to all of us at The Boston Consortium!