

Associated Colleges of the South
Report to the Robert W. Woodruff Foundation
New Initiatives in Cost Containment
December 31, 2001

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I. Introduction

The Associated Colleges of the South is pleased to present this second year report on the activities made possible by the Robert W. Woodruff Foundation grant in May 2000. This report covers the twelve-month period ending December 2001. A financial summary is included in the Appendix.

The past year was an active one, with ACS building on the programmatic foundations that were established in 2000. For example, Summer Technology Workshops increased their offerings from five to seven. Joint Purchasing increased consortial contracts from three to seven, and the collaborative program in Latin American Studies is developing four project threads.

II. Organization and Structure of the Grant Program

During the past year the ACS presidents and academic deans continued to provide general supervision and oversight for grant-related projects and programs. The academic deans reviewed programs funded through the Robert W. Woodruff Grant at their meetings in May and October 2001. Oral reports at their meetings and written reports between meetings kept both groups current with program activities and plans. As always, the presidents, chief academic officers, as well as those involved in the individual programs and projects are deeply appreciative of the Foundation's interest in and support of the Associated Colleges of the South.

Each program/project continued to work closely with an organizing program committee, that provides policy guidance, and with ACS staff. Each of the virtual academic departments worked closely with a faculty committee. The ACS technology program committee, consisting of faculty and instructional technology staff, organized collaborative workshops for faculty and staff. Chief purchasing officers on each campus coordinated the Joint Purchasing effort. The chief financial officers coordinated the financial benchmarking and technology initiatives. And a small group of admissions directors continued to design and share information on technology issues of interest with their counterparts at all ACS institutions. In addition, all of the groups funded through this grant are charged with the responsibility of insuring that the projects are faithfully managed, that they meet the objectives originally outlined, and that they are carefully evaluated.

III. The Program Initiative - Cost Containment on the ACS Campuses

The following is a discussion of the programs made possible by the Foundation grant. Initiatives in the category of academic collaboration are presented first, followed by administrative collaborative efforts. Each section was written by the responsible ACS staff member in cooperation with members of the respective program committees.

A Academic Collaboration

1. Collaborative Effort in Languages ("ALIANCO")

ALIANCO (Allied Languages in a Networked Collaboration Online; also Esperanto for "alliance") is a collaboration among the approximately 200 ACS modern language faculty members of the Associated Colleges of the South. Its mission is to develop strategic planning for technology in the modern languages and to sponsor focused projects and collaborative courses in modern languages. Particular attention is given to the less commonly taught modern languages and small language programs that face the challenge of offering a full four-year program to majors and minors. At the same time, ALIANCO works to assist faculty in the more commonly taught languages to share resources and better accomplish the goals of courses strained by over-enrollment. ALIANCO also seeks to help its members face the difficulty now encountered by all disciplines, that of how to help students navigate the ever-rising tide of cultural information available electronically.

a. Meeting Report April 20-22, 2001

Eighteen participants from eleven ACS institutions, including language faculty, language lab directors, and two ACS staff members, met at the University of Richmond on April 4, 2001, to design projects under the three-year initiative. In a general session, participants presented ideas and projects already underway on their campuses. Next, two representatives from the Center for Educational Technology at Middlebury College, Maciej Ceglowski and Jamie Carroll, demonstrated Prometheus, a courseware system designed to support foreign language instruction. This was followed by a "brainstorming" session, during which the participants proposed three potential projects:

- a Russian inter-institutional collaboration course entitled "Russian Mosaic"
- a web-based media archive for language teaching
- a self-paced on-line course targeted for remedial/review use in Spanish and/or French.

Participants then divided into three smaller groups to further develop these ideas and plan a workshop at the ACS Technology Center on the Southwestern University campus from August 1-5, 2001. They agreed to replace the interim steering committee with a formal program committee, comprised of one representative per ACS institution, which was operative by the end of the fall 2001 term.

Following this meeting, the website (<http://www.colleges.org/~alianco>) was remodeled and expanded; a report was posted from the meeting; and email lists/WebBoard conferences were created for each project, in order to facilitate further planning.

b. August 1-5, 2001 Workshop

Ten ALIANCO participants (representing four schools, two languages and Information Technology specialists) met for two days to continue planning for the Archive and the on-line course projects. Over the course of the meeting, the participants decided to postpone development of the self-paced on-line course in order to focus on the archive project conceived last spring. This decision was based primarily on the fact that so many faculty and students already had begun to utilize digitized and Internet materials. It was determined that there was a clear and pressing need for coherent and accurate sources of materials for students and teachers to consult. Secondly, it was noted that great benefit could be derived from sharing on-line the sophisticated multimedia projects now being generated by ACS faculty and their students, because these are materials that cannot easily or cost-effectively be published by traditional methods. After examining media archives and projects already developed on-line by language faculty, this ALIANCO group developed a "model" of an archive and its on-line interface.

On the third day the ACS participants were joined by seven members of Global Partners (representing four schools and two more languages from the Great Lakes Colleges Association and Associated Colleges of the Midwest) along with a staff member from the Center for Educational Technology at Middlebury College. Subsequent presentations of other multi-media projects created by Global Partners and CET led to discussion of how a central archive might benefit the institutions of the tri-consortium (ACM, ACS and GLCA) as well as other potential collaborators. Additional suggestions were made, and by the end of the third day the joint group had arrived at the following description of its mission and content:

"A web-based media archive will be created to provide access to copyright-free peer-reviewed media for scholars and students alike from a number of disciplines, but especially for language instructors at the college and secondary level. The goal is to increase through collaboration the quantity of high-quality materials available by supplying assistance for their production as well as a public venue for their display. The project will be a collaboration of institutional consortia: the Associated Colleges of the South (specifically, the ALIANCO Modern Language Alliance), the Associated Colleges of the Midwest (ACM) and the Great Lakes Colleges Association (GLCA), which together with ACS form the Global Partners Project. A fourth partner in this enterprise is the Center for Educational Technology at Middlebury (CET)."

To address the building and management of the archive, two task groups were formed: one to recommend specialists for the design and implementation of the database and interface, and another to draft guidelines for submissions and suggest members for the editorial board. Additionally, the group decided that an on-line survey would be useful for determining interest and promoting the archive, as well as for collecting specific input on how it might function.

c. *Archive Project*

A survey of more than 400 modern language faculty members was completed in October, with a response rate of over 25%. The survey asked detailed questions about faculty members' use of images in their courses and their interest in contributing images to a collaborative database of media. The faculty members also were asked to evaluate two prototype media databases in use at CET and at Washington and Lee University. A brief summary of the survey results follows:

- 115 responses. Faculty in ACS and Global Partners Most frequent represented: Spanish, 40; French 29; German, 21; Russian, 14. Other languages represented: Arabic, Chinese, Greek, Latin, Italian, Hungarian, Japanese
- 103 (90 percent) agreed with the statement "Images play an important part in my teaching."
- 57 have slide image collections; of those, 49 said they would share their collections
- Sample comments:
 "Great idea! Nothing's more frustrating than wasting time surfing the Internet in search of one perfect image for a presentation."
 "Fantastic idea. Thank you for spearheading such an important task."
 "Good organization and the highest quality possible. Please reject images that do not meet the quality standards because it is far better to have fewer images, but to know that in going to this database, we will get quality work."

Based on the recommendations of the project task group, a seven-member *Archive Design Team* was assembled in November to oversee the project. Members will serve renewable one-year terms, represent both the ACS and Global Partners consortia, and have expertise in database design and management, project management, librarianship, instructional technology, and modern language scholarship and pedagogy. The team will confer by phone and email to create an agenda for a face-to-face meeting in January 2002. The agenda will include discussion of technical issues, programming needs, coordination between schools, ownership issues, and necessary resources. The team will be using the data collected from the on-line survey to determine what materials currently are available and what needs should be addressed. The project design team includes two ACS-related faculty:

Jeff Overholtzer is the *Archive Project Coordinator/IT Specialist*. Jeff is the director of technology education at Washington and Lee University. His background is in journalism (as practitioner and college teacher), with a focus on the influence of technology. He has led numerous grant and other programs focusing on teaching and technology, including a regional seminar on use of the Web in teaching foreign languages and cultures, an information fluency program, and the Washington & Lee University "Teaching, Technology and Learning Roundtable." Overholtzer's homepage may be found at: <http://wlu.edu/~joverhol>

Jeff Barnett is the *Archive Content Specialist for Spanish*. He is an Associate Professor of Romance Languages at Washington and Lee University. He also is the editor of Vistas, a Web-based image database of Spanish-American images and director of Program for Education in Global Stewardship. Barnett's homepage is: <http://home.wlu.edu/~barnettj/>

In addition, the editorial task force has created guidelines for the *Archive Editorial Board*, and their next task will be that of recommending and recruiting members.

d. *Russian Mosaic Collaborative*.

In a conference call on October 31, a core team of three Russian language faculty members (from Rollins College, Trinity University and Rhodes College) discussed further course planning. They decided to hold a workshop session June 27-30, 2002, in order to launch the course in the spring of 2003. The overarching goal of this one/two hour collaborative course is to provide a significant overview of Russian culture and language that would expose students to the culture. Another goal is to increase enrollment in language courses. A two credit-hour summer

study-travel program in Russia (with a paper required) will follow the course. The program also could be part of a Language Across the Curriculum program. Culture, history, art, literature, folklore, and music would be the basis for units, with a language component (alphabet, phrases, comparison with English) running through the course. A draft syllabus has been created and will be followed by the creation of a model website prior to the planning session.

In 2001, ALIANCO made excellent progress in furthering the ACS goal of delivering quality liberal arts education by collaboratively creating resources that would be too costly or too time-consuming for any one institution to sustain. We are heartened by the level of response to our survey, because we feel it provides a clear mandate for the archive project in particular, as well as the need for collaboration to enable faculty to share existing resources in an efficient and cost effective manner.

2. Collaborative Effort and Program in Latin American Studies

Following the formation of the Latin American Studies (LAS) advisory planning group last year, a number of productive exchanges have taken place, and there are currently several project threads being developed. The planning group consists of academics, from a variety of disciplines, who focus their work on Latin American Studies. This diversity helps to ensure varied perspectives on LAS; thus, the group's discussions have been particularly wide-ranging and stimulating. Exchanges are facilitated through an ACS maintained and facilitated email list created specifically for this group.

On April 6, 2001, the group met face to face at the ACS Latin American Studies Symposium, which is held annually at Birmingham-Southern College. During this meeting the group identified three categories of cooperative efforts and a number of possible projects within each category (see Appendix B). Throughout the summer the group continued to exchange information on the current state of LAS on each campus and overlapping interests and needs. On September 28, the group met again via a conference call and made detailed plans in four areas:

a. Purchase of electronic books (e-books).

Agreement was quickly reached that more LAS library resources are needed on many of the ACS campuses. Since ACS already has in place an agreement with an e-book vendor, many e-books already are available to our institutions, but they are not necessarily LAS related. To address this concern, a list of LAS publications was obtained from the e-book vendor, and the group is deciding which collection of books will best serve our campuses. These will be purchased in early 2002 and will be available for the spring semester. In addition, a joint agreement with HAPI, Hispanic American Periodicals Index, is being explored. This resource currently is not available on most of our campuses and would be an ideal addition, especially since it indexes LAS resources in a full range of disciplines.

b. LAS Webpage and Webboard

An LAS webpage has been designed and incorporated within the ACS website. In addition, an LAS webboard also has been created. Links will be created to each of our individual institution programs on the webpage, and announcements concerning LAS programs on individual campuses will be posted here. In particular, this will bring increased visibility to the annual LAS symposium and encourage wider participation.

c. Exploration of Cuban connections

From December 14 to 21, five members of the planning group visited Havana, with the primary focus of establishing contacts with members of the artistic community within Cuba and on bringing a touring exhibit to our campuses. Each campus will be encouraged to develop activities around the visit of the exhibit. News and opportunities surrounding these activities will be disseminated via the webpage and webboard.

During the visit to Havana, contacts also were made with Cubanos por la Paz (a non-governmental organization with some connections to the University of Havana), Instituto Superior de Arte (ISA), an important art school in Havana, and a number of private artists. These contacts will be further developed in the coming year.

d. Pilot Student Interviewing Project

In cooperation with a colleague at another institution, one member of the LAS Advisory Planning Group is designing a pilot interviewing project. Students will be given guided instruction on interviewing and will be asked to interview latinos/latinas in their immediate community. These interviews will be digitally recorded and then edited and posted on the LAS webboard. They will be available for pedagogical use at all of our institutions. This project will be implemented in spring 2002.

3. Technology Workshops

Thanks to funding from the Woodruff Foundation, ACS was able to offer five technology workshops to consortium faculty and staff in summer 2001. The topics were selected based on the interests and needs of faculty and staff and on proposals we solicited from our members. All were held at the ACS Technology Center, located at member institution Southwestern University (Georgetown, TX), which serves as a hub for consorcial technology activities. Here is a brief report on each of the five workshops:

a. Digital Video

"Using Digital Video for Teaching and Learning, " June 19-24, 2001, was led by Dick House (Wabash College) and consultant David Kenney. This workshop focused on pedagogical uses of video, videography, project planning and techniques for digitizing video for classroom use. Questions addressed by the workshop leaders included:

- What are the viable uses for digital video in the classroom? (e.g., sessions and presentations, projects created by faculty to enhance course presentation,

projects created by students as part of course content assignments, electronic portfolios for students)

- What are the practical considerations for shooting and editing digital video?
- How can participants continue to communicate and share results of both the workshop and future projects done on home campuses?

Fifteen faculty and staff members from eleven institutions attended this workshop. They represented a wide variety of disciplines and departments, including the humanities, the social sciences, the natural sciences and a student affairs staff member. Each participant or team of participants planned a project in advance, which they began (and in some cases completed) during the workshop. Projects included an examination of contemporary depictions of Jesus (by a religion professor) and a demonstration of gravitational force (by a physics professor).

Digital video continues to be the most-requested workshop topic at ACS and an area in which there is much demand for instructional technology consulting services, perhaps as a result of evidence suggesting that many contemporary students learn more effectively using multimedia resources. Since faculty who participated in this workshop were eager to continue to improve their skills, as well as have dedicated time to devote to labor-intensive video projects, ACS will continue to offer workshops and other resources in this area.

b. Web Site Development

"Web Site Development with Macromedia Tools and JavaScript" was led by Jim Purser (Millsaps College) and Kevin Treu (Furman University), from June 28-July 3, 2001. This workshop was designed for faculty who

- had some experience developing web resources for teaching
- needed to learn intermediate and advanced techniques to enhance and improve their sites
- needed to learn some tools for managing the larger sites that many faculty now are creating.

Sixteen faculty members from twelve ACS institutions attended these sessions, as well as several ACS staff members who will support the applications that were introduced. The workshop introduced participants to the Macromedia suite of web development tools, the industry standard for web page creation and site management, which are being increasingly adopted at ACS institutions. In addition to learning how to manage larger sites using Macromedia Dreamweaver, participants learned a number of techniques for introducing interactivity into their web sites, in order to create more compelling and pedagogically viable teaching and learning materials.

As with other ACS workshops, mechanisms were put into place to enable participants to continue consulting with one another as they apply their new skills back home. Participants from this workshop communicate frequently with each other as they create more elaborate web resources for their courses.

c. Instructional Technology (IT) Staff Meeting/Workshop

"Providing Technical Support at a Small Liberal Arts Institution" was the theme of the second meeting of IT staff members, which was held July 11-15, 2001. Led by Pat Ramsey (Southwestern University), it was a follow-up to last summer's meeting, as reported in the Year 1 Report. Participants involved in both meetings have shared information regularly via the consortial "support" email list and have continued their dialogue about collaborative support strategies.

The July 2001 meeting covered a wide range of topics relevant to technical trainers, help-desk personnel, network administrators, and IT management. Topics included teaching methods for technical support teams, changes in classroom technology, network infrastructure, and an update on the status of various desktop operating systems (Windows, OS X, and Linux). Workshop participants also discussed at length the role of ACS in enhancing collaboration among technical support teams at all ACS institutions and suggested holding an additional IT workshop in November, with bandwidth and streaming media as two topics of especially timely interest. We therefore put together a program addressing these issues for the November 15-17, 2001 meeting, which was attended by 16 participants from 11 ACS institutions.

This group has found the "networking" aspects of consortial meetings particularly valuable, as such meetings provide them with opportunities to share strategies and solutions to common challenges.

Future plans include a meeting of ACS webmasters as well as a clinic addressing IT management strategies in small colleges. Members of this group also have begun to provide consulting for one another. For example, an IT manager from one institution visited another ACS campus to assist them in setting up their help desk operations. Several similar consultations are scheduled for the upcoming year.

d. Online Databases

Tom Whaley, professor of mathematics and computer science at Washington and Lee University, led the workshop entitled "Providing Web Access to Database" on July 18-22, 2001. 13 faculty and staff members from 11 institutions attended this workshop, the size of which was limited due to the need for highly technical hands-on assistance.

Since ACS faculty and staff often request assistance with making database data available via the web, this workshop introduced a fairly straightforward way to provide web access to databases. This proved extremely helpful to the participants, because they work with a variety of databases, including student projects for courses or for independent projects, faculty databases created for research purposes, and/or databases to be shared with colleagues at member institutions. Often such projects are created with a personal computer database system such as Microsoft Access or FileMaker Pro, but could be developed using a more powerful system such as Oracle. The workshop also included practical topics on database design and implementation. ACS created accounts for all participants on a central ACS server, thus providing faculty with a centralized database server on which to continue to develop projects begun at the workshop, as well as a platform for new database projects.

Database creation and usage, like digital video, are areas in which expertise does not necessarily exist in our small IT departments, even though there is a fair amount of demand for these skills from faculty and staff members when considering the needs of the 16 campuses as a group. Thus, we plan to continue to offer such workshops in the future, perhaps focusing on different solutions each time in order to accommodate varying server operating systems

supported at ACS institutions. Although our small campuses are not able to regularly offer training in such advanced topics, we have discovered that by pooling interest and expertise across the consortium, we are able to offer our faculty cutting-edge training that normally would not be available on the home campuses. We also will continue exploring the feasibility of providing a consortial platform for such projects, which might be a cost-effective way to make resources available across the consortium.

e. Music and Technology II

"Effective Use of Technology in the Music Curriculum: Part II" was held July 26-30, 2001, and was led Patricia Gray (Rhodes College), who provided leadership for the first meeting and workshop. Members of this group expressed a strong interest in collaboration as a way to share resources and provide more opportunities to their students.

The workshop included a discussion of future consortial collaborations (e.g. visiting/travelling artists programs, webcasting performances, creating shared materials archives and inter-institutional team-teaching). It also included an overview of and hands-on sessions concerning various music-teaching technologies, including:

- web design for class websites and student projects
- music notation
- animation construction
- digital video recording of performances
- technical aspects of creating streaming video and audio

As a result of this workshop, ACS music faculty (now called "The Orpheus Alliance") have begun to collaborate in a number of exciting projects. These include a composition forum that matches newly composed works (by both faculty and students) with performing groups on the campuses, and the creation of a new summer program to the Santa Fe opera for ACS faculty and students (a trip that no single campus could undertake on its own). Members of the Orpheus Alliance are also at work designing and creating self-contained teaching modules that can be used by a variety of classes, with a module about Wagner's Tristan and Isolde now in progress. Others are in the proposal phase.

This group has a clear vision about the potential benefits of consortial collaboration, and they generate a profusion of ideas about how they can collaborate to provide ACS students with the best possible educational experience. Their goal is to provide the resources of a research institution in a small liberal arts college setting. For more information on this program, see <http://www.colleges.org/~music>.

B. Administrative Collaboration

1. Joint Purchasing

The ACS Joint Purchasing group met three times in 2001. To guide their deliberations, they

developed a three-prong mission statement that defines their work in terms of

- *identifying, reviewing, and recommending* best purchasing practices,

including cost containment, value-added and environmental issues, and quality assurance.

- *exchanging* new products and pricing information in order to select specific commodities as targets of opportunity - for the extension of existing favorable contracts held by individual institutions to all members.
- *developing, negotiating, and maintaining* new joint purchasing agreements that address common needs and meet established standards.

Furthermore, the Purchasing group sees the need to develop educational programs to communicate ACS purchasing standards on each member campus, as well as the need to promote integrated procedures to raise the level of purchasing awareness and achieve the most favorable price/value balance. In addition, there is the ongoing need to raise individual campus awareness regarding existing consortial contracts, as well as the cost savings that accrue through the joint purchasing process. While this may be the more difficult and the more ambitious of its tasks, it also provides the opportunity for some exciting possibilities and new collaborative efforts with faculty, students, staff, and/or administrators.

In addition, to its mission statement, the Purchasing group set forth eleven criteria to assist them in identifying and selecting vendors with whom to establish consortial contracts. These criteria include consideration of: compatible market environments, quality of products, potential savings, the advantage of aggregate purchasing, ease of campus decisions, [minimal] obstacles to execute the contract, local delivery to all sixteen member institutions, and a positive environmental impact.

While numerous vendors were considered during the past year, at least seven vendor proposals were rejected when they were evaluated using the selection criteria. For example, a wireless communications company was turned down because their service area included only eight of the sixteen ACS institutions. Another vendor was rejected because individual institutions could negotiate better contracts with the company than what was offered in the consortial contract. Still another was declined when the terms proved to be too cumbersome from a management perspective. Yet another proposal was declined when it was determined that it would cost rather than save ACS money to enter into the contract.

With the counsel of an outside consultant, who has expertise in contract negotiation, the Joint Purchasing group has negotiated and signed six consortial contracts. Three of these were signed in 2001: Herman Miller, Inc.; Kimball International Marketing, Inc.; and the Foundation for California Community Colleges, which includes in one contract over 75 vendors specializing in hardware, software and services related to technology. The other three consortial contracts are with Office Depot, A. Arnold World Class Movers, and Boise Cascade Office Products Corporation.

The seventh consortial contract was negotiated in 2001 by the ACS Technology Center with Adobe Educational Software. Even though institutions still purchase Adobe products individually, ACS institutions are permitted to "pool points" to reach a certain level of volume buying. This allows member institutions to purchase Adobe titles at a discount of over 65%, which represents significant savings over retail price. What is remarkable is that within three months of signing the contract enough "points" were accumulated to meet the volume Adobe required for the entire 2001-2003 contract period. And in one academic term, between the inception of the contract in late August 2001 and December 31, 2001, the cost savings already amount to more than \$21,000.

In the coming year, the Purchasing group will continue to explore consortial contracts with suppliers of science laboratory equipment and materials, on-line as well as land-based shipping vendors, e-commerce, and other areas of common need.

The Purchasing group has begun what will be a very important collaborative relationship with the ACS Environmental Alliance. At their October 2001 meeting, they talked with one of the environmental alliance co-directors to explore ways the two groups might work together. Three immediate actions occurred as a result of this conversation:

- The Purchasing group voted unanimously to include an "environmental moment" at each of its future meetings. This may include inviting an outside speaker to address the group or someone from within the group taking the initiative to make a pertinent presentation.
- The Purchasing group invited the ACS Environmental Facilities Fellows to join them for a conversation on environmental issues at their February 2002 meeting. The purpose of this conversation is to explore ways they can work together and be mutually supportive of each other in their work. Currently, there are thirteen ACS Facilities Fellows, who have responsibility for campus facilities related environmental initiatives, including energy conservation and recycling.
- Kevin Lyons, who is the head of purchasing at Rutgers University, Camden Campus, and an internationally known expert on "Buying Green," has been invited to the February 2002 meeting to share his "Lessons Learned Along the Way," with both the Purchasing Group and the Environmental Physical Plant Fellows.

The Woodruff Foundation grant has enabled the Joint Purchasing committee to pursue the best possible consortial contracts for the sixteen diverse institutions that comprise the ACS. It is interesting to note that other Georgia-based consortia have noticed the work of this group and are inquiring about the possibility of inclusion in ACS consortial contracts. With one exception, our consortial vendors have been willing to expand their ACS contracts to include other Georgia-based consortia. The Joint Purchasing group anticipates that 2002 will be very productive in terms of negotiating consortial contracts.

There are two additional ACS cost containment consortial efforts that need to be mentioned:

- a. Three ACS libraries continue to find an advantage to jointly leasing OCLC's First Search database project.
- b. Twelve of the ACS member institutions realize cost savings by licensing a social science database from the Inter-university Consortium for Political and Social Research (ICPSR). By participating in a consortium license, the group has saved \$19,200.

2. Benchmarking Activity in the Business Area

During year one of the grant, the chief business officers began sharing information and benchmarking activities related to the campus budget process. One ACS institution, Hendrix College, volunteered to pilot a budget model, and a project coordinator was identified. The entire group met with the consulting company representatives and a small committee reviewed the

proposed project in detail. After analyzing the proposal, the group decided not to proceed. They concluded that the joint budget model would not be as useful as it first appeared to be. Consequently, they turned their attention to a financial ratio analysis project.

The goal of the financial ratio analysis project is to share and to analyze financial data to help ACS institutions achieve their goals and objectives by:

- quantifying the status, sources and use of resources.
- assessing the institution's ability to repay current and future debt.
- gauging institutional performance and functional effectiveness.
- identifying financial anomalies and focusing attention on matters that should be of concern to the institution.
- explaining relative liquidity, financial viability and leverage attributes.

Furthermore, the ACS Ratio Analysis Initiative will provide comparative financial data for a peer group of post-secondary institutions and help them make fiscally sound decisions.

Fifteen of the ACS chief business officers have agreed to participate in this project and will provide audited financial statements for 1998, 1999, 2000, and 2001. An outside consultant has been retained to collect and to analyze the data. The report is expected to be presented at the group's May 2002 meeting.

In addition to the formal projects undertaken by this group, the chief business officers have used an electronic listserv, created solely for their use, to share information informally during the past year. Topics included strategic planning, contingency budgets, indirect cost rates, and organization structure for various board committees related to business affairs.

Looking beyond the ratio analysis project, the chief business officers have identified potential areas for the next finance benchmarking and best practices project(s), which they would undertake in the second half of 2002 and beyond. Possible topics include the following aspects of financial reporting, accounts payable, and financial operations:

- **Financial Reporting**
 - a. Closing the books: how frequently (monthly, quarterly, annually)
If books are closed more frequently than annually how is this accomplished
 - b. Preparing interim financial statements: how often, what format, are they GAAP statements
 - c. Reporting to departments: what is provided; how are they provided
- **Accounts Payable**
 - a. Filing and retrieval of invoices
 - b. Average time to pay invoices
 - c. Process flow
 - d. Payment methods
 - e. Relationship with purchasing office
 - f. Technologies employed in the payment process
- **Budgeting**
 - a. Budget schedule
 - b. Participation in the budget process
 - c. Distribution of budget information
 - d. One year vs. multi-year budgeting

- **Financial Operations**
 - a. End-user vs. centralized input into financial systems
 - b. Approval process for transactions

It is proposed that while a chief business officer will coordinate any overall project that is undertaken in these areas, an outside consultant will be secured to receive, compile, and analyze the materials. Furthermore, the associate/assistant business officers, who deal with the daily matters of the financial picture on each campus, will be asked to provide whatever information is needed to complete the project. Such benchmarking projects have the potential to help institutions identify and implement policies and procedures that will be efficient and cost effective.

3. Collaboration among Admissions Officers

In March 2001, thirteen of the fifteen ACS admissions officers participated in an Enrollment Technology Summit sponsored by ACS, Microsoft, College Board, and Sequitur Corporation. It was held at the Microsoft Campus in Redmond, Washington. At the end of this two-day summit, the ACS admissions representatives spent an additional one-half day in an individualized discussion session with representatives from Sequitur Corporation, a leader in recruitment software.

While all of the ACS institutions use the Internet and World Wide Web to some capacity, none are harnessing the full power of this technology. Therefore, the goal of the summit was to offer ACS enrollment leaders insights into the latest technologies available, to glimpse the future of technological challenges and opportunities facing our constituents, and to explore the methods and techniques of fully utilizing the Internet and World Wide Web in the enrollment process. Representatives from Microsoft, College Board, and Sequitur presented information on the future of PC software development and the direction in which the World Wide Web is heading. As a result of this session, ACS participants have valuable information regarding Web enhancements: what they will be, projections for Web use, and what our institutions can do to prepare for further developments.

In addition, Sequitur staff presented information on the latest mobile devices and wireless connectivity capabilities. Because each ACS college/university has admissions counselors who travel to high schools and host receptions for prospective students, this kind of technology can be extremely useful. For example, it is imperative that these traveling admissions counselors have access to the latest information in order to communicate effectively with prospective students. Wireless technology and devices such as Blackberry, Red Hat, Palm Pilots, HP and others provide a mobile format for quick access to needed information. Information can be retrieved any time, anywhere. However, it was quickly acknowledged that since new technologies are developed every day, the best long-term strategy may well be to purchase the latest technology, which meets the institution's current and projected needs, and to resist over- or under-buying.

The presentations made the case that by fully integrating the power of cyberspace the potential cost savings may be considerable. Reducing data entry and increasing the ability of the schools to provide more responsive contacts with prospective students will be critical to post-secondary institutions desiring to reduce costs, increase efficiency, and continue to recruit the best possible students.

The complete summit agenda and roster of ACS participants are included in the Appendix. Two ACS attendees, Benny Walker of Furman and Carey Thompson of Centre,

served as presenters during the Summit. Doug Wofford, president of Sequitur Corporation led the ACS discussion during the special one half-day session.

As a result of this summit, four courses of action are proposed. First, ACS institutions are establishing a user group that will enable them to share technological issues and solutions with each other. This mechanism will provide the means to exchange ideas quickly with institutions of a similar size and with similar challenges. And since these colleges use similar integrated administrative computing systems and are involved in selective admissions, this forum will provide valuable information for expediting solutions to technical problems.

Second, the group will utilize the ACS Technology Center staff and workshops to provide intense technological training with colleagues from other ACS colleges and universities.

Third, a one and one-half day conference is proposed for the purpose of sharing "best technological practices." The goal is to accelerate the learning process of the participating institutions and help avoid unnecessary time and money expense in "reinventing the wheel."

Fourth, in 2002, the Admissions group plans to host a second meeting with Sequitur personnel, in Atlanta in late January/early February. The purpose is to take the technology discussions and applications to the next level. The need is to address a broad range of strategic and operational needs in a holistic manner. The goal is to create a basic technological recruiting template for adaptation to the needs and goals of individual institutions. The meeting will include a review of on-line tools, products and integrated management solutions that assist colleges as they work to attract and enroll students.

With most admissions offices now receiving more inquiries via technology than through the phone or in writing, there is a need to help our institutions refine and shift their recruitment and response efforts to technological means. Furman University and Centre College have fully integrated Sequitur "solutions" into their admissions model and strategies. They can be most helpful to the five or six ACS member institutions that are interested in integrating the Sequitur module(s) into their systems.

Activities three and four are being called "ESP" or the "Enrollment Solutions Plan." Those providing leadership for this group expect to report their findings at the May meeting of the Deans' Council.

Meanwhile, the Admissions group is reviewing other collaborative efforts that will raise the visibility of all 16 ACS member institutions. These include such possibilities as:

- engaging in joint minority and/or international recruitment.
- designing and distributing joint publications.
- developing and testing collaborative admissions/recruitment models.
- creating a clearinghouse for resources, ideas, projects.
- using a consultant, especially attuned to admissions/enrollment issues, to work with the ACS admissions officers.
- entering into a joint purchasing agreement for admission specific software.
- working with existing regional high school consortia to host "information sessions" about ACS member colleges and universities.
- sponsoring a seminar/workshop for targeted high school counselors and career planners and presenting information on all ACS institutions.
- arranging tours for high school counselors, either on-site or virtual, of all ACS institutions.

Clearly, 2002 will be an extremely active year, building on the efforts and plans from 2000-2001.

IV. Conclusion

In conclusion, the grant from the Robert W. Woodruff Foundation continues to enable the consortium to address all of the major thrusts contained in its cost containment plan. Networks continue to operate collaboratively, new issues and goals continue to emerge, and plans are underway to move into year three with new and/or expanded projects to address cost containment issues in the ACS consortium.

Without the funding provided for the Foundation, these discussions and actions would not have been possible. Nor would they have been as rich or as useful. With the encouragement from the Foundation and its financial support, the consortium has moved forward in the area of cost containment and looks ahead to presenting even more substantial results in the years ahead.

(Woodruff grant - year two) 12/31/01