

Associated Colleges of the South
Report to the Robert W. Woodruff Foundation
New Initiatives in Cost Containment
December 31, 2003

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I. Introduction

The Associated Colleges of the South is pleased to present its fourth report on the activities made possible by the Robert W. Woodruff Foundation Cost Containment Grant that was received in May 2000. This report covers the twelve-month period ending December 2003. A financial summary is included in Appendix A.

It was a year of solid activity in the program areas funded by this cost-containment grant. Five new consortial purchasing contracts were signed. REALIA (Rich Electronic Archive for Language Instruction Anywhere) debuted in March 2003 and received national recognition in October 2003. After several setbacks and delays, the Cuban Art Exhibit, which is part of the Cuban Connections program, arrived in this country and will make its ACS debut at the March 2004 Latin American Studies Symposium. In addition, the Latin American Studies program completed negotiations for affiliation with the School for Field Studies (SFS), which owns research centers in Baja Mexico and Costa Rica. The chief financial officers completed a third ratio analysis project and an accounts payable benchmarking study. Two technology workshops brought together constituents who are exploring ways technology can provide collaborative opportunities and enhance the teaching and learning environment within their respective disciplines.

II. Organization and Structure of the Grant Program

As in the past, the ACS Council of Deans provided general program review of the grant funded activities throughout 2003. The academic officers received full reports at their February, May, and October meetings. Between meetings, the Council received updates via e-mail. The ACS presidents received full program reports at their annual meeting in June and interim reports throughout the year via e-mail.

The cost containment experiment that began early in 2002 for the Council of Deans and the presidents now is an accepted and established practice. Instead of sending notebooks filled with written reports to the Council of Deans and presidents before each meeting, staff reports are posted on a password protected website, about a week before each meeting. Additionally, late breaking and/or new developments are added to the electronic reports and identified as "New" items for review. When updates are posted after the initial reports have been posted online, members of the group receive an e-mail announcing that new information is available for review. Posting reports online saved an estimated \$3,000, in 2003, in such items as paper, postage, notebooks, and supplies.

In October 2003, the Council of Deans began another cost containment experiment. Instead of having all four ACS program directors attend each Council of Deans meeting to give a verbal report, one program director attends each meeting. Determining which program director

attends a given meeting is based on program needs and/or meeting location. At the meeting, the attending program director focuses on the program needs in her area(s) that are before the deans for discussion and/or action. Using this model will result in an estimated savings of \$6,870 per year. This calculation includes travel, lodging, meals, and personnel compensation. However, the financial bottom line is not the only consideration in assessing this model. The Council of Deans also will evaluate the extent to which this model continues to provide adequate guidance to all ACS programs for which they have general oversight.

Program guidance, planning, and evaluation, as well as maintenance of fiscal responsibility, continued to be provided by grant-related program committees working collaboratively with ACS staff. A core committee of faculty and staff shepherded the activities of the virtual departments. The Joint Purchasing Committee continued to receive and to review vendor proposals and to select vendors for consortial agreements. Instructional technology staff and faculty guided the planning of collaborative technology workshops for faculty and staff. And the chief financial officers continued the Ratio Cost Analysis project and undertook an additional Accounting Measures Benchmarking Study.

In 2003, the Cost Containment Grant from the Robert W. Woodruff Foundation enabled ACS to continue leveraging and maximizing resources for the benefit of its member institutions. All of the ACS constituents who were energized, or found renewal, or learned new skills, or shared conversations with colleagues, or benefited in some way from participation in grant-related opportunities express their appreciation to the Robert W. Woodruff Foundation for its continued support of the Associated Colleges of the South.

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

The following report presents the programs undertaken in 2003 that were made possible by the Foundation grant. Collaborative academic initiatives are presented first. Administrative collaborative efforts are presented next. Each report was written by an ACS staff member in consultation with members of the respective program committees.

A Academic Collaboration

1. Collaborative Initiative in Languages ("ALIANCO")

In 2003, ALIANCO (Allied Languages in a Networked Collaboration Online; also Esperanto for “alliance”) focused on the completion of the REALIA (Rich Electronic Archive for Language Instruction Anywhere) media database prototype that was begun early in 2002 and planning for its sustained development and operation. The REALIA Project resulted from a need, expressed by faculty involved in ALIANCO, for high-quality, annotated web-based materials in a sharable and searchable format. Such materials are quite different from the typical, individually posted “web galleries,” which are not searchable and generally have little or no accompanying information. Another distinguishing characteristic is that in the RELIA project both faculty and students are encouraged to contribute materials to the database. The goals of this project included:

- acceptance of contributions from both faculty and students
- a straightforward contribution mechanism that enables instructors to readily share materials

- an easy to use search mechanism and interface that encourages use of contributed material in the classroom.

This dream became a reality when the REALIA Project Prototype officially debuted online (<http://www.realiaproject.org>) on March 5, 2003, with 200 annotated images for the teaching of Spanish and Russian. These images were contributed by seven faculty members from ACS and its collaborative partners ACM (the Associated Colleges of the Midwest) and GLCA (The Great Lakes Colleges Association).

The prototype archive uses ContentDM as its delivery system, and is hosted by the ACS Technology Center (located at Southwestern University, Georgetown, TX). The descriptive metadata for collection material is based on accepted standards, such as the Library of Congress Name and Subject Authorities, the Dublin Core, and the Getty Thesaurus of Geographic Names, to allow precise searching and potential sharing of materials with other standards-based collection. The site also includes guidelines for images (resolution, scanning and correction), and a survey in which faculty are asked to provide feedback on the design and functionality of the archive. A white paper was produced describing the process of the prototype's creation, along with suggestions for implementation of the full project.

On June 12-16, 2003, twelve project participants, including the six Managing Board members, met at the ACS Technology Center in order to increase the number of images in the existing prototype, as well as to plan the growth and sustainability of the project. The Managing Board members (composed of faculty, librarians and technologists) focused on the next steps for expanding the archive and refining the collection and publication processes. In order to do this, the board members:

1. reviewed the results from the survey of the prototype design. While the results were limited, they were overwhelmingly positive. The survey results contained ideas for improving the utility of the site included the ability to browse by category, a geographic interface, improved navigation features, and list of collections by photographer. It was agreed to keep the survey open for further data collection.

2. revisited the editorial process. It was determined that a minimum of two editors (one being the managing editor) per language was needed to have adequate peer review of the editors' work. It would be valuable to tap other resources such as graduate schools, visiting guests from other countries, and faculty outside of the consortium for the associate positions. The editorial teams would be rounded out with a Librarian for each language. Production support would come from students hired to assist in the digitizing, editing, and cataloging of materials. German and French are most likely to be adopted as the next languages.

3. discussed alternative tools for use with the collection. This included the possibilities of using the latent semantic indexing (LSI) technology, being developed at National Institute for Technology and Liberal Education, and Digital Asset Management software that was developed at the ACS Technology Center last summer by ACS students (REALIA acted as a client for that software development project). These developments will enable better collection search capabilities and access functions.

4. worked on sustainability for the next phase and began exploring possible partnerships with similar media-based projects, as well the development of a plan for assessing and evaluating the project.

Also during the June 12-16, 2003, meeting, several modern language faculty and librarian participants participated in a collection building and pedagogy workshop. The agenda included an overview of the REALIA project, which was followed by a discussion of teaching with

images led by Jeff Barnett (Professor of Spanish, Washington and Lee University) and Arlene Forman (Professor of Russian, Oberlin College). One of the results of this workshop was agreement that the REALIA collection needed to accomplish three important tasks:

1. to introduce concepts to lower level students.
2. to provide resources for upper level work (“cultural proficiency” with understanding of “non-high” culture).
3. to provide pre-departure preparation for study abroad.

The workshop participants concurred that a major and important benefit of this project will be the archiving of materials of vanishing/vanished cultures, including the fading Soviet Union. An added benefit will be the development and inclusion of “Threads,” or learning modules on specific topics, which will serve as models for how to teach with images. The workshop closed with teams of faculty, students, and library catalogers adding images and descriptive information to the archives. This activity increased the number of archived records to over 600, and more will be uploaded.

In August 2003, a presentation on the REALIA Project was made at the national “Digital Imaging: Pedagogy, Technology, and Practice” conference that was held at DePauw University.

On October 28, 2003, the REALIA Project received notification that the MERLOT (Multimedia Educational Resource for Learning and Online Teaching) World Languages Editorial Board had conducted a peer review of the REALIA project and posted the results at www.merlot.org. The project received five stars, the highest possible rating. Since then, the REALIA Project and MERLOT have signed a Memorandum of Understanding, which will enable the two projects to collaborate on various aspects of web-based media and teaching, including the sharing of tools and resources, joint efforts in creating learning materials and promoting collaboration among respective constituencies, creation of guidelines for teaching with media on the web, a survey of current language lab facilities and multimedia teaching resources/best practices, the creation of collective guidelines and materials for the student study abroad media projects, and discussion of international copyright standards. REALIA and MERLOT are in similar discussions with CARLA, the Center for Advanced Research on Language Acquisition at the University of Minnesota.

A relatively new feature on the REALIA website is the ability to “test search by category.” This idea grew out of a suggestion that was submitted during the prototype design survey. In addition, ACS computer science students designed and implemented a new digital assets management system, which was created explicitly for the needs of the REALIA project. This system should be ready for use in spring 2004.

In summary, the funding received for ALIANCO and REALIA have provided beneficial collaborative opportunities for ACS modern language faculty that led to the creation of a resource that will be widely valuable at ACS institutions and beyond. Moreover, project creators have, with careful planning and attention, created a process whereby this resource will continue to be developed and sustained by faculty and staff.

2. Collaborative Effort and Program in Latin American Studies (LAS)

The Latin American Studies (LAS) advisory planning group, consisting of academics from a variety of disciplines with interests in Latin American Studies, undertook several exciting projects in 2003. The group’s discussions were facilitated through the *acs-las* (ACS Latin American Studies) email list which includes faculty, study abroad administrators, and librarians from all sixteen ACS campuses.

The annual Latin American Studies Symposium, at Birmingham-Southern College, which serves as the ideal opportunity for the planning group to reconnect in a face-to-face and focused venue, was held April 4-5, 2003 and had a 10% increase in participation over the previous year. The symposium brought together over 85 attendees from ACS institutions and from as far away as California and Puerto Rico. In addition, the symposium was pleased to have the opportunity to host student art work from Escuela de Artes Plásticas in Puerto Rico.

As in the past, this meeting provided ACS undergraduate students with the opportunity to present original research in a supportive and congenial atmosphere. A particularly successful presentation was an original film, *When I Dream Dreams*, by a Trinity University student. The keynote speaker for this symposium was renowned scholar Professor Charles Perrone, of the University of Florida, who spoke on the “Towering Giant” of Brazil—its culture, civilization and hemispheric links. See Appendix B for the 2003 symposium program.

At the 2003 symposium, the planning group members discussed and reviewed the following topics and projects:

a. HAPI (Hispanic American Periodicals Index)

In 2002, the group recommended and negotiated a consortial contract with the HAPI (Hispanic American Periodicals Index) on-line reference service about Central and South America, Mexico, the Caribbean basin, the United States-Mexico border region, and Hispanics in the United States. HAPI Online provides complete bibliographic citations to articles, book reviews, documents, original literary works, and other materials appearing in more than 400 key social science and humanities journals published throughout the world, from 1970 to the present. This arrangement provides ACS institutions with a 20% savings over non-consortial subscription rates. The group expressed satisfaction with this arrangement and recommended continuing the contract. In August 2003, the contract was extended for another year, through August 2004. Nine ACS institutions currently subscribe to this Index.

b. Encountering Contemporary Cuba: March 2003 Trip

In March of 2003, the ACS LAS program, in conjunction with Augsburg College, Minneapolis, Minnesota, provided students and faculty with the opportunity to visit Cuba. Six faculty members and four students participated in the intense and experiential *Encountering Contemporary Cuba* seminar. A wide range of topics were examined, including health care and educational systems, organized and traditional religion, the role of women in Cuban society, economic development, and environmental sustainability. Two members of the planning group and Augsburg College personnel served as faculty leaders for the program.

Unfortunately, recent changes in regulations from the U.S. Treasury Department have eliminated the type of people-to-people educational license under which Augsburg operated this trip. While academic licenses are still available, these are more frequently awarded to individual institutions and normally allow only travel by students and faculty from that institution. However, we will continue to explore other options that may allow for participation by multiple institutions. All participants in this trip agreed that it is important to continue working on a program in Cuba, and there continues to be strong interest in Cuba among ACS faculty.

c. Cuban Art Exhibit

In April of 2003, the curator of the University of Richmond Museums and a Richmond faculty member traveled to Cuba to make final selections for an ACS art exhibit featuring contemporary, Cuban visual artists, who would provide a concise insight into the current Cuban cultural climate. Following a number of complicated and cumbersome administrative steps, the works arrived in the United States and are being mounted and prepared for exhibition. The exhibition will go first to Birmingham-Southern College, where it will be on display during the 2004 Latin American Studies Symposium, and then it will return to the University of Richmond for display during the fall of 2004. It will be available thereafter to other ACS institutions.

d. Original Film on Cuban Art

Over the last two years, members of the LAS planning committee and ACS staff have worked with two Argentine filmmakers during the creation of a documentary film profiling Cuban artists. The film entitled *Cuba Plastica* was completed in the fall of 2003 and had its first showing in October at the University of Richmond.

This film is an excellent complement to the Cuban Art exhibit mentioned above and will make its ACS debut at the 2004 Latin American Studies Symposium where one of the filmmakers will be featured as a featured speaker. In addition, the filmmaker will speak to various classes prior to the Symposium. Copies of the film will be distributed to all campuses after the Symposium.

e. Affiliation Agreements for Latin American Programs

On the recommendation of the planning group, ACS explored developing consortial affiliation agreements with third party providers of study abroad programs in Latin America. Negotiations for such an agreement are in process with the School for Field Studies (SFS), which owns research centers in Baja Mexico and Costa Rica. This agreement will provide ACS students and faculty with priority access and discounted rates to these SFS centers along with other facilities in Australia, Kenya and the British West Indies.

f. Digital Archive Project (REALIA)

In addition to the above projects, several members of the LAS planning group continued to be actively involved in working on and contributing to the REALIA project, a digital archive for language teaching, which was described in items 1.c., 1.d., and 1.e. above.

3. Technology Workshops

There were two technology related workshops in 2003 that were funded by the cost containment grant from the Woodruff Foundation. For the first time since the inception of this grant, one of the workshops was held at a location other than the ACS Technology Center. Both workshops enabled faculty from small departments to learn new techniques and technology applications, to review technology advances and software that are discipline specific, and to explore ways to work together to maximize technology resources.

a. Drama/Theatre Workshop

In June 2003, Birmingham-Southern College, Birmingham, Alabama, hosted the second drama/theatre workshop. The evaluation summary of this event is found in Appendix C of this report. Eleven participants representing eight ACS institutions attended. The workshop focused on sharing resources, particularly technology resources, and furthering collaboration. Each of the presenters shared projects that have been completed successfully on their home campuses and now have the potential of growing and being shared with others. Presentations included:

- *Online History of Theatre Production*, by Matthew Hallock, Centre College
- *Online Resources and Helps for Planning Student Tours to English Regional Theatres*, by Tony Haigh, Centre College
- *Online Resources on Tools: Set Building and Safety*, by Tim Francis, Trinity University
- *A Comparison of Stage Lighting Software Programs*, by John Ore, Southwestern University
- *Potential Collaboration for Playwriting Courses*, by Alan Litsey, Birmingham-Southern College
- *Furman (University) Drama Department Image Database: Building a Wizard*, by Rhett Bryson and Will Lowry, a 2003 Furman graduate

Workshop participants identified several projects to pursue during the remainder of 2003:

- Matthew Hallock's *Online History of Theatre Production* is to be the core of a "Learning Object" that can be used by any interested drama/theatre classes. Matthew will serve as editor for supervising the editing of his materials and the addition of new materials contributed by faculty from other institutions. However, since this project is quite detailed and the materials need extensive editing to keep online files to a manageable size, it is anticipated that this project will not be online until late 2004.

- Tony Haigh's English Regional Theatre site is online and available at <http://www.colleges.org/~drama/engreg.html>. Specific information about venues, hotels, and travel arrangements will be added and updated as information is available.

- Faculty from Birmingham-Southern College, Hendrix College, and Centre Colleges are exploring ways their playwriting classes can use technology to participate in joint assignments.

- The student created materials on set construction and lighting that were presented by John Ore (Southwestern University) and Tim Francis (Trinity University) are online at the ACS Drama/ Theatre website.

The concluding activity for this workshop was attending a Birmingham Festival Theatre performance of *Shirley Valentine*, which was directed by workshop participant Michael Flowers of Birmingham-Southern College.

The 2004 Drama/Theatre Workshop will be hosted at Trinity University, July 15-18. During a major renovation four years ago, Trinity's Jane and Arthur Stieren Theatre was equipped with an array of new technology. Because of this and some additional equipment acquisitions, participants in this workshop will have access to such items as computer lighting consoles, intelligent lights, pattern rotators, color scrollers and more. Workshop plans also

include a tour of the Tobin Collection at the McNay Museum, which houses one of the best collections of theatre production models and artwork, an opportunity to work with a playwright and/or an artistic director, and time to share the exciting things that are happening in our ACS drama and theatre departments. For the first time, faculty will be encouraged to bring one or two students with them to participate in the workshop.

b. Web-enhanced Course Development and Software Review

Twelve ACS teacher educators and two teacher educators from a non-ACS member institution participated in this workshop. Institutions represented were Southwestern University, Rollins College, Birmingham-Southern College, Centenary College of Louisiana, Davidson College, Hendrix College, Centre College, Washington and Lee University, Spelman College, Furman University, Rhodes College, Millsaps College, and Agnes Scott College.

Rebecca Davis, a staff member at the ACS Technology Center, shared what/how other ACS groups are working with online courses and the process for developing such a course, with particular attention paid to the ACS models for Classics and Archaeology. The discussion included advantages and disadvantages of teaching web-enhanced (online) courses, various forms of these courses take (full and partial versions), course development cycle, and possible course features. In this case, the interest is in developing one or more basic education courses that can be taught online during the summer months. Since regional and state accrediting agencies continue to increase mandatory course requirements for teacher education programs, small education departments, like those at many of our ACS member institutions, are turning to technology to help them find ways to maintain program integrity while meeting mandated standards and requirements. Examples of web-enhanced courses that might be developed include:

- a Technology and Education Course, with an emphasis on technology that can be used by teachers to enhance the teaching/learning environment and to increase the information fluency of students
- a course on Classroom Management Theory, based on SACS accreditation requirements
- a course on Successful Teaching Strategies, including strategies for teaching increasingly diverse student populations

In addition, the workshop participants reviewed about fourteen software programs that could be used primarily in math and science courses, either in courses to train teachers or to use directly with elementary and secondary students. Titles included the following:

- Math and Music explores the mathematics and physics behind music.
- Math and the Cosmos uses the Cosmos to explore and teach mathematical concepts.
- Hands on Math includes lesson plans for conducting a professional development institute as well as classroom activities and micro-documentaries focusing on real world application of mathematics.
- Mission to Planet X develops computer skills while introducing students to the solar system.
- Ice Cream Truck simulates an ice cream delivery business for small groups of students to run and try to earn a profit. Participation calls for decisions about

stocking product, sites to sell the product, setting sale prices, and advertising. Students must deal with such variables as random number of sales at each stop and gas used to make deliveries. Business strategies and mathematical principles involved in the use of spreadsheets, and sales data analysis skills are introduced through the game.

- The Geometer's Sketchpad encourages interactive exploration and discovery of geometric concepts by helping students to visualize and analyze a geometric problem or relationships and making conjectures before attempting a proof

The workshop agenda also included the opportunity to review and refine the ACS Teacher Education website that is under development. A traditional, printed evaluation was not used at the meeting. Instead, at the end of the meeting persons were invited to share (verbally) what had been most helpful and what changes they would like to see in the 2004 workshop. Verbal evaluations indicated that this workshop was most helpful, and some suggestions were made for 2004.

Grant funding enabled colleagues, who seldom have the opportunity to meet together, to consider common issues in their field, to share information on helpful resources, to celebrate exciting programmatic developments that are happening in their departments, to discuss challenges and ask how others handle the same or similar ones, and to explore ways technology can benefit their work.

The next workshop will be held in April 2004, on the campus of Birmingham-Southern College. The agenda will include continued discussion of developing web-enhanced courses; further development of the website; the review of appropriate software in reading, special education, lesson planning, and classroom management; programmatic policies and procedures; and a pilot, student collaboration research conference.

B. Administrative Collaboration

1. Joint Purchasing

In 2003, the ACS Joint Purchasing Committee met in April and October. During the year, new consortial contracts were signed with:

- Interface Flooring, a carpet manufacturer that produces environmentally Friendly carpet tiles
- Human Scale, which offers office accessories
- Southwest Contract, which offers office and residence hall furniture
- Teknion, a provider of desking systems
- Southern Business Communications, which sells Infocus and Proxima projectors

Consortial agreements renewed in 2003 included A. Arnold World Class Relocation, Herman Miller (office furniture), Adobe (computer software), and VWR (scientific supplies). The VWR renewal is notable in that VWR initiated the offer to extend the pilot program through September 2004. The company felt (1) that they (VWR) “dropped the ball” during a reorganization period and (2) that the increase from around \$100,000 to over \$400,000 in the aggregated volume of purchases made by ACS institutions was significant enough to warrant continuing the experiment. This means that ACS institutions will continue to be able to purchase

scientific supplies at Tier I pricing, which is the best possible pricing available to any of VWR's customers.

The Joint Purchasing Committee declined several vendors, including Blue Ridge Carpet; Design Options (desking systems); New England Woodcraft, which is a small Vermont based manufacturer of wood furniture; and Performance Plus, a provider of on-site professional development training opportunities. The decisions to decline these vendors were based on non-suitable services and/or the fact that ACS member institutions would not realize substantial savings over contracts already negotiated and in use by individual campuses. In addition, one vendor, Staples, withdrew an offer when it determined that a consortial contract was "not in their best interest." Conversations and negotiations will continue into 2004 with such vendors as Enterprise (car rental) and Nolij Corp, a producer of a virtual filing system known as Nolijweb.

For the first time, the Joint Purchasing Committee agreed to conduct a Purchasing Practices Benchmarking Study. A small committee developed the survey and presented it to the entire committee for review. Based on the suggestions made during the review, the document was revised and then distributed to the sixteen ACS purchasing contacts. The Controller at Rollins College was very instrumental in this process and even used a software program that he developed to post the survey on a secure website. He also received and collated the initial results and reported the outcome to the Committee at its October 2003 meeting. Based on the level of response and comments about the actual survey, the decision was made to post another revision of the survey on a secure website and permit purchasing officers to either add to/change information already submitted (based on the revised questions) or to participate in the survey for the first time.

The impact of the Purchasing Practices Benchmarking survey already is visible. For example, through the process of answering the survey questions, one Associate Vice President for Finance realized that his purchasing personnel needed training in certain areas and that there were inefficiencies in the campus purchasing system and reporting. He already has taken action to correct the perceived deficiencies.

Another new area that the Joint Purchasing Committee ventured into in 2003 was the world of "Requests for Pricing" (RFPs), where vendors are requested to submit nonbinding proposals. The two products chosen for the initial ventures were can liners and residential hall mattresses.

Growing out of a Joint Purchasing Committee conversation about the desire to identify vendors and/or manufacturers who offer "green" can liners and to negotiate a consortial agreement for this commodity, Emory University took the lead in this project and invited us to participate with them in a "Can Liner RFP." Sending the RFP to manufacturers and asking them to set the pricing and to assign distributors turned out to be a unique approach. While our logic was sound, it seems that the can liner industry was very resistant to changing the way it goes to market. Out of the eight to ten manufacturers who received the RFP, only three responded. Of these three, one offered pricing that was better than contracts in place at any of the ACS member institutions. However, in the final analysis, the excellent pricing was not enough to overcome the problems with the required minimum quantity that had to be ordered, the variances in can liner sizes required by the institutions, and distribution issues. The decision was made to revisit this process at a later date when some of these issues could be more easily resolved.

The Mattress RFP also was placed on hold until a later date. After considering the internal and external order deadlines campuses operate under and the multiple persons on a campus involved in ordering mattresses for residential halls, it became apparent that there was

not enough time to go through the entire RFP process, choose a consortial vendor, negotiate a contract, place orders, and have mattresses delivered to campuses by the end of June 2004.

Since the majority of the ACS member institutions practice decentralized purchasing, where multiple persons/offices have responsibility for purchasing activities, preparing for an RFP asks multiple persons within an institution to work together, to respond in a timely manner with information, and to plan ahead. Adding to the complexity and difficulty are the relationships with local vendors that sometimes make it difficult to effect real change in purchasing practices. Until campus cultures and attitudes toward purchasing change, successful RFPs and truly successful cost containment efforts will be hard to come by. This does not mean that the RFP idea will be abandoned. It may just mean that areas that are more visible to the campus community, ones that have a larger budgetary impact, such as travel, motor pool outsourcing, and telephone contracts will generate more interest and participation. Persons will have to be shown what can happen when different offices and departments join together in purchasing efforts and shown the efficacy of such action. This is not something that purchasing officers can do by themselves. RFPs and other cost containment efforts need to be visibly supported and encouraged by the campus chief financial officer (CFO). In an effort to elicit more overt support from the CFOs, three purchasing officers from the ACS Joint Purchasing Committee plan to make a presentation at the March 2004 CFO meeting, outlining the difficult issues faced in joint purchasing, the need for more visible support from the CFO, the issue of preferred vendor, and an example of how using a preferred vendor can result in tremendous cost savings.

For 2004, the Joint Purchasing Committee is considering moving from two meetings a year to an annual meeting. They will continue to seek vendors interested in consortial purchase agreements and will use email and conference phone calls to conduct business between meetings. In addition, the committee will continue to search for vendors that are committed to “green” products.

As in previous years, there are five additional ACS cost containment consortial efforts that deserve to be mentioned as examples of cost containment efforts in other ACS programmatic areas:

- a. In 2003, three ACS libraries again jointly leased OCLC's First Search database project, with unlimited access, at a five percent discount.
- b. Twelve ACS member institutions continued to jointly license a social science database from the Inter-University Consortium for Political and Social Research (ICPSR) and saved over \$22,000 in 2003.
- c. Nine ACS institutions utilized the Adobe software contract in 2003 and realized an approximate savings of \$14,000.00. This contract, initiated in 2001, was renewed in 2003 for an additional two years.
- d. HAPI: Hispanic American Periodicals Index. Nine ACS member institutions participate in the agreement and each receives a 20% discount on the subscription rate, which amounts to a total, collective savings of approximately \$2,500
- f. ICCS: Intercollegiate Center for Classical Studies in Rome. Eleven ACS institutions continued to participate in the ACS consortial membership with ICCS. Under this agreement, each institution pays an annual membership fee of \$181.82. Without the consortial agreement, the annual per institution fee would be \$1,000.

2. Benchmarking Activity in the Business Area

In 2003, the chief financial officers used their email listserv to share information about policies, practices and issues. Topics included budget reserves; internal auditors; budget increases; RFPs for insurance; the “Cost of College Analysis Program,” which is run by the National Association of College and University Business Officers (NACUBO); tuition rates and increases; summer fees; health insurance costs and employee contributions for health care; student health insurance; guest lodging facilities; payroll questions; adjunct music faculty travel policies; endowment waiting periods; endowment spending rates; and bookstore operations. Many times the questions posed in these emails resulted in quick surveys that yielded comparative information for the member institutions use.

The chief financial officers completed two benchmarking activities in 2003. The second Ratio Analysis report, which updated the 1998-2001 report received in May 2002, was presented at the March 2003 annual CFO meeting. Again, all sixteen ACS member institutions participated in this project. With the 2003 update, the CFOs have an invaluable four year credit profile that:

- outlines financial strengths
- identifies areas for improvement
- presents information that can be used in planning and managing capital projects
- provides data that can be used in determining the timing of convertible assets and charitable contributions.

This project has proved so helpful that the CFOs have asked the consultant, who has been preparing the reports, to continue this project for another year. The third Ratio Analysis Report is expected to be presented at the March 2004 CFO meeting.

The second study was the Accounting Measures Benchmark. This was completed in early 2003, which enabled the CFOs to receive the final report at their March 2003 meeting. Fourteen of the sixteen ACS member institutions participated in this project. Questions addressed the policies and practices in such areas as financial systems; purchasing cards; travel cards; number of employees and compensation; accounts payable office structure and duties of accounts payable clerks; satisfaction with the effectiveness and efficiency of the accounts payable function/process; accounts payable staff training, experience, and credentials; statistics that are kept; online entries; electronic invoices; record retention policy; payment method for vendors; ghost cards; audit policies and procedures; requirements for check signatures; accounting firm fees; interim financial statements; budget office and budget committee structure, duties and reports; fiscal year end policies and practices; and endowment spending formulas.

The Accounts Payable Benchmark Study produced a wealth of potentially helpful information and data. A four-person sub-committee of the CFOs has reviewed the report results and identified areas where further study is desirable. In preparation for a report at the March 2004 meeting, the sub-committee members will construct a survey, collate the responses, and prepare a useful report with comparative data. One of the sub-committee members developed a software program for use in this and other ACS surveys, such as the Joint Purchasing Benchmark Study on Purchasing Practices.

In addition to benchmarking, there will be time for CFOs to share how their campuses are complying with the Sarbanes-Oxley Ethics legislation that was passed in 2002 after the accounting scandals at several national companies. Other agenda items for the 2004 CFO meeting include purchasing cards, a purchasing presentation by three members of the Joint

Purchasing Committee, and an opportunity for participants to share highlights and concerns on their campuses. Consideration also will be given to conducting a follow-up energy audit to update the 1996 pilot energy audit that was conducted on the campus of Rollins College.

3. Additional Cost Containment Collaborations for 2004

There are four additional, “new” cost containment collaborative program activities that are being explored:

a. A “Train-the-Trainer” workshop focused on prejudice reduction.

This exploration is a result of recommendations from participants attending the 2003 ACS Diversity Conference and a June 2003 meeting of selected chief student affairs officers (CSAOs), diversity officers, and students. With the approval of the ACS Council of Deans, the ACS Diversity Planning Team recommends that CSAOs and diversity officers nominate some 20-25 faculty, staff, and students to attend the training, which would be provided by the National Coalition Building Institute (NCBI). NCBI is internationally known and recognized and has focused on developing prejudice reduction training models specifically for the higher education community. Part of the June 2003 conversation among CSAOs, diversity officers, and students was dedicated to experiencing the NCBI model. In addition, several ACS campuses have participated in their workshops before, and one or two ACS diversity officers are NCBI trainers. This model was recommended after a review of four other training models and experiencing it first-hand at the June 2003 meeting.

Persons participating in the training will be asked to be available as resources persons on their own campuses as well as to other ACS campuses.

b. A banner advertisement announcing faculty vacancies within ACS

This is something that has been discussed before but never acted upon. This time, the Council of Deans is seriously considering a joint advertisement. One goal is to encourage applications from ethnically diverse persons for faculty positions that are open within ACS. Another goal is to strengthen the “outside” perception that ACS institutions are dedicated to building and maintaining diverse faculties and student bodies. A joint advertisement not only is cost effective, it also presents an intentional opportunity for institutions to support each other by sharing names of qualified candidates. The joint ad would include institutional names, disciplines with openings, and an internet link that would connect to web pages with more detailed job and contact information. The Chronicle of Higher Education is one of the publications under consideration.

c. A CONNEXIA pilot program

In the last couple of years, CONNEXIA, a local Atlanta company, has been gaining a national reputation for its online Admissions *Genie* program. They now have enough data to show that not only does the program increase applications, yields, student quality, diversity, and enthusiasm, but it also is an effective cost containment tool. One of the ACS member institutions has expressed interest in this program, and the possibility of them piloting this for the consortium is being explored.

d. Virtual Filing Cabinet Software

On the recommendation of two ACS member institutions, the Joint Purchasing Committee is exploring a consortial agreement with Nolij Corporation, which produces and supports software for an online virtual filing cabinet. Both institutions reviewed similar products,

but chose Noliweb and have been very happy with the product and the support. The program is very flexible, has built-in security features, can be used in any office or department in an institution, and can link on- and off-site offices. It is suitable for both document and accounting management, storage, and retrieval. Once subscribed to the system, the company provides regular updates, often several times a month, as new features are added and technology advances become available. It is very much a cost containment activity, saving money and time. The ACS offices are exploring the use of this product.

IV. Conclusion

Without the support of the Robert W. Woodruff Foundation, the ACS cost containment programs would not be as strong or as successful as they are. This grant has made it possible to create and to expand networks, to offer substantive opportunities for cost containment, to try new approaches and to share the results, to modify current practices, and to identify new policies and practices that will be beneficial to the consortium and its member institutions. The opportunities to expand horizons, to forge collaborative partnerships, and to realize what can be achieved through cost containment efforts will have ripple effects that last far beyond the life of this grant.

The existing programs that continue into 2004 and the new programs that are being explored offer ACS constituents rich and rewarding possibilities. Those who benefit from the opportunities made possible by this grant express their gratitude for the Foundation's investment in the Consortium.

