



PROGRESS REPORT
LVAIC PLANNING

February 17, 2011

**Submitted to LVAIC Board of Directors by the
LVAIC Planning Committee:**

Betty Powell, Cedar Crest College
Bob Snyder, DeSales University
Jim Krivoski, Lafayette College
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Gordy Weil, Moravian College
John Ramsay, Muhlenberg College
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Progress Report to LVAIC Board
LVAIC Planning Process
February, 2011

Executive Summary

This is a report of progress made in LVAIC planning from September 2, 2010 – February 2, 2011. It describes progress to date and recommended next steps on:

- LVAIC Mission and Vision review;
- Board Approved Priority Goal Areas
 - Shared Language Programs
 - Cross Registration
 - Library – ebook purchases; access for faculty, students, staff
 - Back Office Efficiencies
 - Block Booking
- Campus Initiated Proposals for New Collaborations; and
- Observations by the consultants regarding LVAIC governance, structure, management

The timeline for this year is ambitious yet the process remains on schedule for meeting key deadlines. The actual implementation of immediate/short-term goals [*i.e.*, Fall Semester, 2011] may not be completed in all situations but will be initiated. The Planning Committee is recommending that planning on the 3-5 more promising campus generated proposals be started as the current projects move to the actual implementation phase. This on-going cycle of identification – implementation must include monitoring and evaluation.

The Planning Committee recommends that the LVAIC Coordinating Council [approved by the Board, March 19, 2010] assume the functions of the Planning Committee to continue the planning work and as a resource to the LVAIC Executive Director and LVAIC staff.

Progress Report to LVAIC Board
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Overview

The LVAIC Board approved a planning process on March 19, 2010. Dr. Lorna Peterson, Executive Director, Five Colleges, Inc. [ret.] and Mr. Phil DiChiara, both nationally recognized for their expertise in best practices for consortia, were selected as consultants. The process began on September 2, 2010 with the consultants meeting with the Board and the LVAIC Planning Committee. The consultants utilized the results of the survey on LVAIC Mission, Budget, Goal Setting, Communication, etc., that had previously been completed by: Board members, VPs for Academic Affairs, Finance, Student Affairs, Development, and LVAIC staff. At the conclusion of the Board meeting, the Board [a] recommended the Planning Committee undertake a review the current LVAIC vision and mission, and [b] identified implementation of shared language courses *via* video conferencing as a priority and communicated this priority in a memorandum to the Chief Academic Officers.

On October 12, 2010, the planning consultants conducted one half day planning workshop with the LVAIC Vice Presidents or members of leadership teams to identify new and continuing priorities for collaboration. Dr. Thomforde, Board Chair, opened the meeting with a reminder of the Board's sense of urgency for the process and selection of attainable outcomes. Subsequent to the identification of possible goal areas, the Planning Committee reviewed the lists and identified priority goal areas for Board review and approval [October 2010]. Details of this phase are found in Consultants' Report #2 [October 22, 2010].

The five goal areas are:

- * Shared Language Programs
- * Cross Registration
 - Library – ebook purchases; access for faculty, students, staff
 - Back Office Efficiencies
 - Block Booking

**Board Initiated*

➤ **Review of LVAIC Vision and Mission**

Status excerpted from the Consultant Report [10/22 /10]

The charge to the Planning Committee from the consultants' visit in September was:

- 1) To consider the current LVAIC mission statement and suggest changes to the mission and vision.
- 2) Once accepted and approved by the Presidents, list this information on the LVAIC website and the institutional websites' link to LVAIC.

The Planning Committee met before the plenary session to exchange and update information and respond to any questions that might have arisen over the past month. Discussion was undertaken about the mission and vision statements, later affirmed in the plenary session with agreement to submit them to the Board for approval:

LVAIC Mission Statement (proposed): *LVAIC promotes and facilitates inter-institutional cooperation between and among the independent colleges and universities of the Lehigh Valley in order to enrich and increase opportunities for students, faculty and staff.*

Vision Statement (former mission statement): *LVAIC makes strong colleges stronger through collaboration.*

Recommendations:

#1 is completed. #2 remains to be implemented. The Board gave approval for the above statements in a conference call in early November, 2010. Prior to dissemination [as described above] and after grammatical editing, the Planning Committee recommends:

- Formal approval by vote at a Board meeting so the changes become part of the minutes; and
- Direction to appropriate campus offices to disseminate and include on websites

➤ **Progress on Identified Goals**

Subsequent to Board approval, the Planning Committee reviewed the goal areas and using a decision matrix, identified supporting and primary goals for consideration by working groups. The initial task of these groups was to conduct a situation analysis of the barriers, problems, definitions, etc. for each goal area. With one exception, the initial work was the function of the existing constituent groups. Only the Cross Registration Situation Analysis working group was a cross-institutional/cross-functional group. Regardless of composition, each group was to identify: perceived barriers, possible timelines, and probably offices/groups to implement solutions. To facilitate review by the Planning Committee and Board, each working group completed a summary template. The summaries of each of these groups are at the conclusion of the progress report.

Chart 1: Charges to Situation Analysis Working Groups

Area	Charge	Membership
Cross Registration	Conduct an analysis of the current practices/barriers to LVAIC cross-registration for undergraduate students	2 Registrars; 1 IT director; 1 Academic Adm/Advisor; Dr. Weil, Planning Committee; Dr. Lynch, LVAIC;
Shared Languages	Implement shared language courses in Fall, 2011 using video-conferencing	CAOs includes Planning Committee members - Dr. Weil, Dr. Ramsay, Dr. Powell; Dr. Lynch, LVAIC & It Directors/Inst. It staff;
Library Operations	Investigate collaborative ebook purchase <i>Implement seamless access to holdings – focus on cross registration issues</i>	6 Library Deans/Directors; 1 IT Director; Dr. Ramsay, Planning Committee; Dr. Lynch, LVAIC <i>Not yet initiated</i>
Back Office Efficiencies	Determine shared understanding of terminology to develop options	6 CFOs Includes Planning Committee members – Bob Snyder; Peggy Plympton
Block Booking	Create a system of shared booking of programs, events, acts for savings	6 SSAOs; Jim Krivoski, Planning Committee; Dr. Lynch, LVAIC

Each group identified potential short term outcomes [i.e., can be fully or partially implemented for Fall, 2011]; outcomes for AY 2012; and long term outcomes [AY 2015]. Since the implementation groups will be charged with designing solutions/strategies to attain outcomes identified by the working groups, changes to the proposed implementation dates should be anticipated – especially for complex, systemic issues [i.e., identity authentication].

Recommendation: Continue implementation planning with focus on Fall, 2011 implementation goals.

➤ **Campus Generated Suggestions Collaborations**

The second planning phase was soliciting suggestions from members of each of the LVAIC institutional communities. Each Planning Committee member was asked to send a letter to department and administrative heads on her/his campus for general distribution. In addition, the LVAIC Ex. Director sent a similar letter to cross institutional groups which have received LVAIC funding for considerable time. The groups are: Africana Studies, Women's Studies, and Coalition of Racial and Ethnic Directors and each group received funding for over twenty years. Letters were also sent to coordinators and faculty of the Social Justice, Social Research Conference and Medieval History Symposium. These conferences, partially funded by LVAIC, are growing in numbers of participants and gaining regional and national recognition. The LVAIC Women's Studies group also sponsors an annual conference and Africana Studies is planning to host its first conference in Spring, 2011.

The campus generated suggestions for collaboration can be categorized as follows:

- was initially proposed as inter-institutional collaborative [i.e., Berman Jewish Studies],
- would benefit students at least at 2 institutions [e.g., art ed., nutrition]; and
- represent new forms of collaboration [e.g., sustainability, international].

The suggestions from the currently funded LVAIC projects [i.e., Africana Studies, Women's Studies; Diversity Directors] are a continuation of current activities. Planning Committee discussions of the campus generated suggestions are found on Chart 2. This chart also includes suggestions from the representatives of currently-funded LVAIC programs/projects.

Recommendations:

The Planning Committee discussed next steps for the above suggestions in the context of:

- progress on the current initiatives;
- practical problems of taking-on and monitoring too many projects; and
- current LVAIC resources and structure.

The Planning Committee recommends that 3-5 of these initiatives be identified for the next cycle of planning – that is, begin new initiatives to be started as current projects are moving toward implementation. The areas selected should be ones that are systemic, build on the work of the current groups [e.g., enhance cross registration], and are future oriented.

The committee recommends that each submitter receive a response from/on behalf of the Board thanking them for their suggestion and informing the individual/group that their suggestion will be considered in the next cycle of LVAIC planning initiatives or will be referred to the appropriate constituent group for further review. The committee recommends that the LVAIC funded programs/projects be reviewed in light of their original purposes and how each is continuing to meet current needs.

Chart 2: Campus-generated* Suggestions and Planning Committee Recommendations

Area	Suggestion Summary	Status / Recommendation
<i>Academic</i>		
Art	Certification across campuses [not currently allowed in cross-registration]	Refer to CAOs
Music Ed.	Certification across campuses [not currently allowed in cross-registration]	Refer to CAOs
Sports Management	Moravian/DeSales – can DeSales hold 3 seats per year	Refer to appropriate campus administrators
Nutrition	Moravian/Cedar Crest – can Cedar Crest hold 2 seats per year	Refer to appropriate campus administrators
Foreign Language Studies Institute	Collaborative with joint board - see Appendix for details	Refer to CAOs
Jewish Studies Center	No specifics provided	Refer to CAOS
At – Risk Students	Collaboration on best practices	No recommendation at this time
Middle Eastern Studies	Opportunity for new collaboration model in emerging area	Refer to CAOs –shared language courses
LVAIC Africana Studies	Keep support for faculty sharing - various views	Refer to CAOs
LVAIC Women’s Studies	Keep support for faculty sharing – no specifics provided	Refer to CAOs
LVAIC conferences/ symposia: Medieval Studies Social Research	No substantive changes; but recommendations for improving overall student experiences	Refer to CAOs
<i>Academic, Student, Administrative</i>		
Coalition of Racial & Ethnic Directors	Mentoring of administrative staff; focus on Black and Latina/o students; address injustices; continue speakers	Perhaps be part of a broader, multi-campus initiative; expand scope
Diversity	No specifics provided but is an issue for all	Second phase of Prioritized Goal areas

Sustainability	Opportunity for new collaboration in emerging area [certificate, minor]	Second phase of Prioritized Goal areas
Cross Cultural Connections	Collaborative formal partnerships in visual & performing arts	Refer to CAOs/SSAOs
Center for Civic Engagement	Opportunity for new collaboration	Refer to CAOs/ SSAOs
International Opportunities	Shared events; shared academic resources; expanded study abroad; shared Fulbright scholars	Second phase of Prioritized Goal areas

*includes currently funded LVAIC programs

➤ **LVAIC past, present and future**

In their initial report to the LVAIC Board, the consultants stated “Collaboration should not be an overlay of more work but a means of accomplishing the real work of the schools in a different way...”

They observed that it will take “time, tending, and trust” to reinvigorate LVAIC and to fulfill the promises of its founding presidents. They further stated “Change will not occur immediately and goals will not be accomplished at once, or even within the first or second year of planning; with concentrated focus and continuing commitment, however, a number of specific projects can be undertaken and implemented successfully, demonstrating the viability of collaboration to all constituents.”

Results of the survey conducted in August as part of the planning process indicated an overall lack of understanding of LVAIC’s mission, and ambiguity regarding its planning and budget processes and the roles/functions of LVAIC staff. The chart below summarizes the findings from the consultants and forms the basis for planning.

Chart 3: Summary of Concerns Identified by Consultants

AREAS OF CONCERN	EXAMPLES PROVIDED
Governance	Board meetings [number, length] Length of Term of Board chair
Mission, Vision, Goals	Shared responsibility Historically goals not met
Collaborative Process	LVAIC meeting participation & groups; LVAIC Ex. Director & Staff are primarily viewed as clerical support staff to groups
Communication, Participation, Motivation	Communication on campuses; “marketing” LVAIC; Web presence & interactivity; Meeting participation
Best Practices/ Management/Operational Methods	LVAIC office staffing is inadequate; Budget process is “after-thought”; not focused on priorities or innovations; LVAIC staff responsible for solutions without “supports”; No professional development for LVAIC staff; LVAIC office equipment is limited/outmoded; Associate members pay inconsequential dues

The above concerns must be addressed in a constructive, collaborative process. If LVAIC is to become integral to – and part of, not apart from –the missions and futures of the member institutions, planning must include a re-thinking and re-energizing of LVAIC. At its January 24, 2011 meeting, the Planning Committee began discussion of the above issues, with particular reference to current and future planning. Subsequent to this meeting, a copy of the Recommendation for Coordinating Council, approved by the LVAIC Board on March 19, 2010, was sent to Planning Committee members. The Coordinating Council membership and functions mirror the membership and functions of the current LVAIC Planning Committee.

Recommendations:

Effective July 1, 2011, the current Planning Committee be reconstituted as the LVAIC Coordinating Council with members appointed by LVAIC Board at the May 9, 2011 meeting. The Coordinating Council continue the work of the Planning Committee for FY 2011-2012 to:

- oversee initial implementation of the goal areas;
- initiate planning for the second group of priority goal areas;

Summaries of Working Committees



Cross Registration Situation Analysis Group
Summary & Recommendations to LVAIC Planning Committee
January, 2011

Members: Frank Benginia, Registrar, Lafayette College; Debbie Tamte-Horan, Registrar, Muhlenberg College, Harry Miller, Director of IT, Muhlenberg College; James Skalnik, Assistant Dean for Academic Advising, Moravian College, Gordy Weil, Vice President for Academic Affairs & Planning Committee, Moravian College, Bonnie Lynch, LVAIC & Planning Committee.

Charge: Conduct an analysis of the current practices/barriers to LVAIC cross-registration for undergraduate students

Short Term Goals: Identify obstacles in current cross-registration to facilitate Fall, 2011 registration in shared language courses

Identify obstacles in current cross-registration;

Summary of Challenge: Cross registration has been underutilized as an academic resource for LVAIC students. The barriers include academic and policy considerations, technological limitations, and informational issues.

Charts below identify the barriers to cross registration by categories, timeline, and implementation groups. Certain barriers may be categorized in more than one area. Supporting documents [e.g., summaries of meetings; worksheets, etc.] are included as attachments.

The goal for implementation of specific barriers is as follows:

Short -Term - begin or have implemented a solution or “temporary work around” by fall, 2011

Mid-Term - implementation by AY 2012 – 2013

Long-Term - implementation by AY 2015

Policy Barriers	Group to Address Barrier	Timeline
No individualized courses allowed	CAOs/CFOs?	Short-Term - Mid-Term
First year students can't participate	CAOs	Short-Term - Mid-Term
Students can't CR if similar course at home	CAOs	Short-Term - Mid-Term
Limit to number of total and per semester courses a student can take	CAOs	Mid-Term
Academic standing?	CAOs	Mid-Term
Academic calendar	CAOs/Registrars	Long-Term
Scheduling of classes	Registrars	Long-Term
No on-line courses permitted	CAOs/CFOs?	Short-Term - Mid-Term
Priority for registration	CAOs/Registrars	Short-Term - Mid-Term

Logistical Barriers	Group to Address Barrier	Timeline
Parking on campus	Parking Authorities	Mid-Term
Transportation [bus, zip cars, etc.]		Long-Term
Reciprocity of meal/food services	SAOs	Long-Term
Library access	Librarians	Mid-Term
Students must repeat procedures for access at each campus, each semester for each course	CAOs – IT directors; Registrars	Mid-Term – Long-Term
Access to IT on other campuses	IT Directors	Long-Term

Registration Process Barriers	Group to Address Barrier	Timeline
Information not easily available on LVAIC or campus websites; students, faculty & advisors don't know what's offered	IT Directors/Registrars; Web development office	Mid-Term
Websites are not interactive	IT Directors/Registrars; Web development office	Mid-Term
CR opportunities can't be "marketed" using websites	IT Directors/Registrars	Mid-Term
Forms not available on-line to download [triplicate form]	IT Directors/Registrars	Short-Term
No union catalog on LVAIC site	IT Directors/LVAIC Director	Mid-Term - Long-Term
Registration dates vary across campuses	CAOs/Registrars	Long-Term

Other	Group to Address Barrier	Timeline
Coding between LVAIC & campuses	Registrars/LVAIC Director	Mid-Term
Reporting is limited in audience	Registrars/LVAIC Director	Mid-Term

Reporting is limited to fiscal information not by students, courses	Registrars/LVAIC Director	Mid-Term
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Three courses are proposed to be offered using video-conferencing in Fall, 2011 and Spring 2012. Listed below are issues/tasks that should be addressed by the identified groups as immediate considerations for implementation or temporary work arounds.

SHARED LANGUAGE COURSES	Group to Address Barrier	Timeline
Cross registration policies are in conflict with proposed offerings [first year students; on line courses;]	CAOs	Short-Term
Location of information for students, faculty and advisors	IT Directors	Short-Term
"Marketing" of information	IT Directors	Short-Term
Compatibility of instructional systems across campuses	IT Directors	Short-Term



Summary of Shared Language Courses using Video-Conferencing AY 2011-12

Courses to be offered via video-conferencing:

Italian I	Fall, 2011	DeSales University
Arabic I	Fall, 2011	Muhlenberg College
Italian II	Spring, 2012	DeSales University
Arabic II	Spring, 2012	Muhlenberg College

Language courses offered in traditional classroom format are also available through cross-registration.

Remaining Issues to be resolved:

- Compatibility and availability of video-conferencing at receiving sites;
- Potential conflicts with existing Cross Registration policies [e.g., on-line courses; similar courses; no first year students];
- Current cross registration procedures are cumbersome;
- Information for students and faculty and advisors and “marketing” options are limited on websites;
- Different registration dates on campuses;

Long term issues for consideration:

The current planning model is focused on offering courses next year using video-conferencing – an approach not favored by faculty.

Planning for shared language courses should be incorporated into the long term planning on cross registration.

A process for ensuring back office processes become institutionalized / formalized is needed for long term implementation.



**Library Situation Analysis Group
Summary & Recommendations to LVAIC Planning Committee
January, 2011**

Charge: Investigate collaborative ebook purchase

Members: Mary Beth Freeh, Cedar Crest College; Debbie Malone, DeSales University; Terese Heidenwolf, Lafayette College; Christie Roysden; Lehigh University; David Schappert, Moravian College; Joyce Hommel, Muhlenberg College; Bonnie Lynch, LVAIC; John Ramsay, Muhlenberg College

Issue[s]: Ebook purchasing was identified because it is an emerging area in which there might be opportunities for collaborative purchase at reduced price. Ebook purchases might help address contractual issues with interlibrary loan [i.e., we are currently unable to loan individually held electronic titles to other institutions due to vendor contract demands].

External Barriers

Some vendors:

- will not provide discounts to consortia [JSTOR, ELSEVIER]
- sell only to large consortia such as Lyasis
- will not provide variable pricing [no discounts regardless of size – i.e., \$ X 6]
- sell to consortia but require each institution to purchase [i.e., all six LVAIC libraries would have to agree to purchase the same product]

Current Lyasis discount may be better than any price LVAIC or other small consortium could get directly from vendor

Ebook market is unstable [e.g., merging and consolidation]; new university press projects have been announced but products have not yet been unveiled.

Internal Barriers

There are:

- differing philosophies regarding ebook collection development [e.g., perpetual vs. leased access]
- differing campus cultures regarding ebooks; responding to nascent need

There are:

- variations in library budgets that will impact ebook purchase [e.g., cost for ebooks can be significantly higher – especially if purchasing whole collections with unlimited access; price almost always includes hosting fee in addition to cost of ebooks;]
- variations in disciplinary focus on each campus and this drives collection needs
- difficulties in measuring usage [guides future purchasing decisions]

Staff time considerations for implementation; annual vendor renewal data; coordination of title collections across institutions

Single sign-on may be an issue

Implementation Planning – Spring Semester, 2010

Planned visit from EBSCO representative [NetLibrary] on February 8, 2011. EBSCO expressed interest in a LVAIC purchase agreement with LVAIC

ProQuest [ebrary] may open to similar deal

Because it is an emerging and dynamic field, an ebook pilot might be prudent first step [if there is a purchase agreement]. Pre-pilot implementation would include:

Exploration of how other consortia fund library initiatives

Addition of seed money in '11-'12 FY LVAIC budget

Recommended Implementation Group for Ebook Purchase and Pilot

LVAIC Library Deans/Directors Group

Specific library staff from each campus

Patty Reich, Director of LVAIC Business Services



LVAIC BLOCK BOOKING PROJECT
Planning Summary
January 2011

- Group:** SENIOR STUDENT AFFAIRS OFFICERS (SSAOs)
- Members:** Karen Green, Muhlenberg College; Bev Kochard, Moravian College; Jim Krivoski, Lafayette College; Denise O’Neil, Cedar Crest College; John Smeaton, Lehigh University; Linda Zerbe, DeSales University;
- Group Charge:** Create a system which will enable LVAIC institutions to take advantage of possible savings through the block booking of programs, acts, and other events.
- Short-term goals** Gather information about what programs are booked each year on each campus and who oversees these
- Mid-term goals** Pass information to the LVAIC Directors of Student Activities to operationalize
- Longer-term goals** Implement system
- Summary of Issue[s]/Challenges:** TBD
- Charts or Description of specific issues/barriers:** TBD
- Resources:** [summaries of work; meeting minutes] Detailed charts prepared
- Useful Links:**



LVAIC Planning Group Summary

Group: Chief Financial Officers

Members:

Dennis Domchek	VP Finance and Administration	Moravian College
Kent Dyer	Chief Business Officer & Treasurer	Muhlenberg College
Audra Kahr	Chief Financial Officer & Treasurer	Cedar Crest College
Margaret Plympton	VP Finance and Administration	Lehigh University
Robert Snyder	VP Finance and Administration	DeSales University
Mitchell Wein	VP Finance and Administration	Lafayette College

Group Charge:

The Chief Financial Officers (CFOs) were given the charge to review various “back office operations” of each of their institutions in an effort to find opportunities for collaboration. These opportunities for collaboration may have varied benefits from direct cost savings through purchasing leverage or efficiencies of operation to enhanced services for operation with similar cost outlays. The CFOs met several times to discuss possible areas of collaboration and compiled the following list of potential opportunities:

<u>Opportunity</u>	<u>Potential Benefits (“C”)</u>
Environmental, Health & Safety	Center of expertise
Bookstore (C/I)	Cost savings
Printing	Cost savings
Mail Services	Cost savings
Food Service	Cost savings
Transportation/Parking	Cost savings & efficiency
Event Planning	Efficiency
Payroll	Efficiency & lower admin. Costs
Facilities Planning & Operations	Efficiency & lower admin. Costs

HR: Employee Training
Residential Services

Opportunity

Health Care and Benefits Mg't
External Audit
Risk Management (Insurance)
Furniture Mg't/Inventory
Custodial and Grounds

Efficiency & lower admin. Costs
Efficiency & lower admin. Costs

Potential Benefits ("C")

Lower cost (pooled risk) and leverage
Purchasing leverage
Purchasing leverage
Purchasing leverage & common standards
Purchasing leverage, lower costs

Potential Benefits ("I")

ID Cards
IT Administrative Services
Budget Mg't
Bursar
Payables
Controller/Accounting
Research Accounting
Endowment Mg't
Treasury
Purchasing

Efficiency
Efficiency
Lower admin. Costs
Lower fees -shared consultant
Optimize cash management
Purchasing leverage, less staff

C = can be "carved" out and employ separate IT platforms which can be linked to school IT Systems as required.

I = Function requires full integration with IT and other administrative system.

Short term and intermediate term goals:

Generally, areas that do not depend on significant information systems integration, identified under section "C" above, should have a shorter evaluation and implementation cycle than areas that require information systems integration, identified under section "I" above. However, it is understood that certain opportunities may not be appropriate or a good fit for every institution, and collaboration will likely not occur with all six institutions for every area, such as occurred with the LVAIC Healthcare Consortium (DeSales, Moravian, Muhlenberg) and the Sustainability Coordinator (DeSales, Lehigh, Moravian). Short term and intermediate term goals would consider those collaborative opportunities where implementation could be achieved in one to three years.

Longer term goals:

Because of the development time required for implementing collaborative opportunities, longer term goals will consist of potential opportunities identified in both the “C” and “I” lists above. For example, implementing the LVAIC Healthcare Consortium took approximately two years to implement. This opportunity clearly falls under category “C” above. Generally, opportunities that require system changes will have a longer horizon to plan and fund; however, certain institutions already have common administrative software platforms as follows: Lafayette College and Lehigh University use SCT Banner; and, Moravian College and Cedar Crest College use Jenzabar. However, Muhlenberg College uses Financial Edge and DeSales University uses Datatel. As a result, Lafayette College and Lehigh University, or Moravian College and Cedar Crest College, respectively, may realize a shorter window for implementation of collaborative opportunities that require common systems. For institutions that do not have common systems, a longer-term horizon will likely exist in order to plan and fund such an implementation, if after evaluation such a migration would be determined to be financially beneficial.

Summary of Issue[s]/Challenges:

Additional time is needed for the CFOs to evaluate the potential opportunities identified above for “best fit” at each of their respective institutions. Based on such analysis, a shorter list will be developed that will identify which teams of institutions will work to initiate collaboration for the given area. The shorter list will be based on highest priority for efficiencies and cost savings that can be gained. As part of this more intensive process, opportunities will be more clearly stratified between short, intermediate and long-term goals. It is anticipated that this analysis will be completed by June 30, 2011.

The only certain issue that can be identified is the amount of time to work on integrating opportunities, which is the reason why additional careful planning is required to focus the CFOs efforts. Resource availability may also be a limiting factor; however, it is too early in the process of evaluation of opportunities to reasonably quantify. For example, certain opportunities may require an upfront investment that will create efficiencies and generate a financial and service benefit that may be realized over a longer period of time.

Charts or Description of specific issues/barriers:

None identified at this time. Additional analysis required of potential opportunities.

Immediate Action – LVAIC Resource:

In order to streamline the process of evaluating and prioritizing the potential opportunities identified above, the CFOs will require support from the Executive Director and Business Manager of LVAIC (“LVAIC Personnel”). The CFOs would expect that LVAIC Personnel would be able to obtain input from other consortiums to determine the extent of collaboration in the areas identified for potential consortial opportunity, determine the type and order of magnitude of benefits, quantify the effort required, and identify “best practice” processes that would assist in implementing collaborative opportunities. The resources and consortial knowledge of LVAIC Personnel, with guidance from CFOs, will be significant in helping to move potential consortial opportunities forward in an efficient and effective manner.