Compendium of Interinstitutional Partnerships

50+ Examples of Higher Ed Institutions Partnering With Peers to Share Costs and Grow Revenue

Business Affairs Forum

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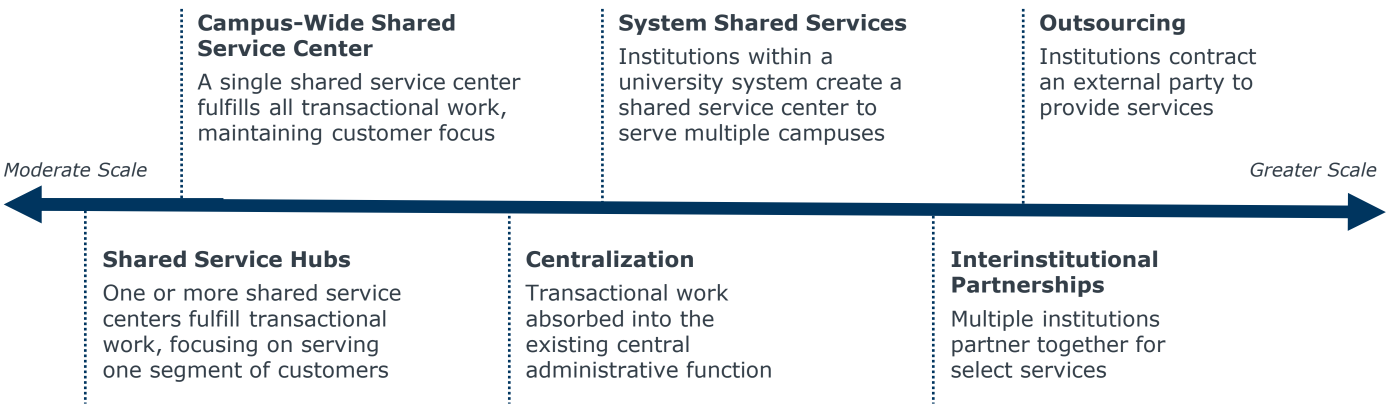
Executive Summary

Financial Pressures Driving Urgency to Scale Operating Costs

The higher education business model has been under fire for the past decade, as escalating costs and volatile state support have driven unsustainable tuition and fee growth. As revenue pressures intensify, higher ed leaders are focusing on cost management as a path to a more viable operating model. In particular, many leaders are looking for new opportunities to scale costs, since most of higher ed’s operating costs are fixed.

Spectrum of Organizational Options for Achieving Scale



Across the past decade, many institutions have achieved greater efficiency by deploying the strategies on the left end of the spectrum: shared service hubs, campus-wide shared service centers, and greater centralization. However, given recent budget pressures, leaders are increasingly interested in **interinstitutional partnerships** as a means to achieving even greater savings or benefits. This is a particularly promising solution for small institutions with limited opportunities to consolidate their own staff or services.

The Promise of Partnership

Through interinstitutional partnerships, two or more institutions can provide compulsory goods or services—like health benefits or office equipment—at a lower price point. Partnerships also enable institutions to provide more diverse or higher-quality services that they could not afford on their own, enhancing their value proposition or administrative effectiveness. For example, a group of institutions can partner to offer academic programs or student activities at a cost-effective price point, increasing their individual appeal among prospective students.

Barriers to Widespread Adoption

Despite their benefits, interinstitutional partnerships are still rare in higher education. Successfully forming partnerships can require complex negotiations, material upfront costs, and cultural disruption—and some cabinets are not convinced that the effort will be worth the reward. Others recognize that partnership is their institution’s most viable financial path forward but aren’t sure what the best partnership options are.

Source: EAB interviews and analysis.

Executive Summary (cont.)

How to Use This Resource to Secure Buy-in and Expand Partnerships

This resource is designed to help cabinets and boards overcome these barriers to partnership. Section 1 identifies eight industry trends in interinstitutional collaboration, based on EAB's analysis of diverse partnership models. Leaders can review these trends to gain a macro-level understanding of how institutions across the industry use partnerships to share costs and enhance their value propositions.

Section 2 of this resource contains a compendium of fifty types of interinstitutional partnerships in existence in higher ed today. Leaders should consider this a comprehensive menu of partnership options and use the examples to inspire ideas for addressing current cost barriers.

The fifty examples in the compendium are organized in nine functional categories, including academics, administrative services, auxiliaries, and information technology. Within each category, each example contains a description of the partnership and its savings agents (e.g., shared facilities, shared staff, group purchasing power). Each example also includes an implementation complexity score (i.e., low, medium, or high) to help leaders anticipate the upfront costs and negotiations required to replicate it.

Excerpt of Partnerships Compendium

Partnership Type	Capsule Description and Sample Institutional Partnership	Savings Agent	Implementation Complexity
#18: Admissions staff	The University System of New Hampshire shares an Online Enrollment Center. Six recruiters with the Center reach out to prospective students identified by the individual campuses. The Center and shared staff enable them to increase enrollments and revenue for their individual campuses while scaling the costs and boosting the admissions staff's impact.	• Staff salaries and benefits • Office space • Incidental expenses	Medium

Description of partnership and higher education case study

Driver(s) behind cost savings (i.e., shared costs or joint contract negotiations)

Assessment on low, medium, high scale:

- Low: can be implemented with few disruptions to stakeholders
- Medium: requires coordination between multiple stakeholders; may require new technology, legal agreement, and changes in staff roles due to eliminated positions or tasks
- High: requires complex legal and operational negotiations and board approval; staff or faculty roles change due to eliminated positions or tasks

The best-fit partnership opportunities for an institution will depend on its mission, geographic location, and enrollment and financial goals. Leaders should consider their campus' readiness for partnership and gravity of financial challenges when evaluating opportunities. Some leaders will prefer to start with low-complexity, low-savings partnerships to generate buy-in and trust for more transformative partnerships in the future, while others may conclude that their financial challenges necessitate bigger and bolder partnerships.

Source: EAB interviews and analysis.

Executive Summary (cont.)

Section 3 of this resource includes five case studies of robust interinstitutional partnerships that can serve as proof-of-concept for bigger, transformational changes. These partnerships create significant cost savings opportunities for the partner institutions while enhancing their value proposition to students, faculty, and staff. Each case study outlines the core areas of collaboration, the unique factors contributing to the partnership's success, and demonstrated savings and impact.

Institutions Profiled in Section 3 Case Studies

	Partnership Name	Defining Characteristic	Page Number
1	The Claremont College Services	Dedicated 501(c)(3) organization provides shared services and technology across seven campuses	pg. 29
2	St. Olaf College and Carleton College	Partnership accelerated by an external grant from the Mellon Foundation	pg. 31
3	Green Mountain Higher Education Consortium	Shared cloud-based ERP will expand administrative collaboration	pg. 33
4	Colleges of the Fenway	Shared student services and activities enhances student brand and enrollments	pg. 35
5	Bridgeport University Park	Joint real estate acquisition intends to expand student opportunities and advance local economic development	pg. 36

Source: EAB interviews and analysis.

Industry-Wide Trends in Interinstitutional Collaboration

SECTION

I

Trends in Interinstitutional Collaboration

Based on EAB Review of 50+ Higher Education Partnerships

1. **Partnerships tend to start small and may expand after demonstrating proof of concept.**
   Many institutions initially choose to partner in one discrete area (e.g., health benefits, library collections). This allows them to build trust and gain familiarity with each other's processes and resources before committing to partner in more transformative or disruptive ways. Their preliminary smaller-scale collaborations generate proof of concept that help build confidence and grow interest in deeper cooperation.

2. **Partnerships have historically focused on back-office cost savings, but increasingly institutions are considering joint-ventures with the goal of revenue generation.**
   Given current financial pressures, many institutions express interest in partnering on back-office service delivery, since these partnerships tend to produce direct cost savings without compromising institutional autonomy or affecting brand identity. That said, cost savings alone will not guarantee institutional financial sustainability, so increasingly institutions are seeking partnerships with the goal of generating revenue through new or expanded academic offerings or improved student services. These partnerships may be more disruptive to form, since they can affect an institution's student-facing brand and academic enterprise. But they allow institutions to more cost-effectively compete with larger or better-resourced institutions on the student experience.

3. **While partnerships exist across all university administrative functions, they're most common in procurement.**
   Through joint-contracting and purchasing, institutions use their combined market clout to attain lower rates for goods and services—without dramatically affecting an institution's own processes or resource needs. Because of their benefits and relatively low start-up costs, these partnerships are common across the industry, varying from a small cohort of local private institutions to multistate organizations composed of 50 or more universities. However, interinstitutional collaborations span many other functional areas, including academic affairs, student services, athletics, and facilities management. Partnerships in functional areas outside of procurement tend to require additional infrastructure and integrated processes but can potentially yield greater cost savings and revenue-generating opportunities.

4. **Regional public and private institutions are most likely to pursue highly integrated and potentially risker partnerships.**
   Growing administrative costs coupled with accelerating enrollment challenges have spurred more institutions to explore partnerships to share costs and improve quality. Facing the greatest fiscal headwinds, the regional public and private segments have been the most willing to explore riskier and more complicated collaborations to-date, including sharing academic programs, facilities, and student-facing services. In the years ahead, financial pressures will continue to drive institutions in these segments to expand their collaborations with other institutions and potentially take on more multifaceted engagements.

Source: EAB interviews and analysis.

Trends in Interinstitutional Collaboration (cont.)

5. **Partnerships benefit from geographic proximity, but institutions do not need to be in the same geographic area to forge successful arrangements.**
   Many existing partnerships have been formed between institutions in close physical proximity, since physical nearness enables greater sharing of services and resources between institutions (e.g., students can access shared facilities; shared staff can move across campuses). Proximity also helps establish relationships between institutional leaders, who can easily visit each other's campuses or who may already sit on local task forces or governing bodies together. That said, physical proximity is not a prerequisite to successful partnership. Some back-office services (e.g., benefits administration, accounts payable) and functions delivered primarily through virtual means do not have geographic confines. In fact, the compendium in Section 2 of this publication profiles several examples of collaborations that span states or regions. With greater emphasis on remote work and virtual collaboration due to the COVID-19 pandemic, we expect that physical distance will not impede future partnerships and more institutions will explore longer-distanced partnerships in the coming years.

6. **Most partnerships require upfront investments to seed, so partner institutions do not typically realize immediate cost savings.**
   Except for some joint-procurement and contracting partnerships, most partnerships require material upfront costs to seed, including dedicated staff time to manage initial negotiations, execution, and change management. As a result, these partnerships do not yield immediate cost savings, and upfront costs may pose a barrier to entry for some institutions. That said, more time- and resource-intensive partnerships, like those profiled in Section 3 of this compendium, tend to see their value grow over time, as their upfront investments ultimately yield savings that can seed new collaborations.

7. **Shared resources and group purchasing power are partnerships' primary cost saving sources.**
   Institutional partnerships achieve cost savings primarily through two agents: shared resources and group purchasing power. Sharing personnel, technology, or physical resources allows institutions to scale necessary investments across partnership members. Group purchasing enables institutions to leverage their combined customer bases to achieve lower rates.

8. **More integrated shared services and cross-functional partnerships commonly create 501(c)(3) organizations to manage joint-assets and employ shared staff.**
   The most expansive consortia organizations in higher education, such as the profiled Claremont Colleges Services (pg. 29) and the Green Mountain Higher Education Consortium (pg. 33), employ dedicated staff to facilitate the partnership and provide shared services. A dedicated 501(c)(3) entity formalizes their partnerships, enabling more sophisticated and integrated collaboration on shared services and joint-ventures. This organizational structure provides clear role definitions between individual partners and the consortium while promoting service quality and accountability.

Source: EAB interviews and analysis.

EAB

Compendium of Interinstitutional Partnerships

SECTION II

- Academic Partnerships
- Benefits Consortia
- Procurement Consortia
- Shared Administrative Staff
- Shared Auxiliaries
- Shared Events
- Shared IT Services
- Shared Libraries
- Shared Student Groups

Academic Partnerships

Academic partnerships enable an institution to maintain a quality academic portfolio with fewer teaching staff and physical resources. In some cases, external partnerships can also generate revenue by attracting prospective students to in-demand programs that an institution may not be able to afford to offer on its own. For additional guidance for academic partnership implementation, see EAB's Planning Academic Programs Across Campuses.

Partnership Type	Savings Source	Partner Institutions	Partnership Details	Implementation Complexity
#1: Academic credit agreement: in-person instruction	• Faculty salaries and benefits • Classroom space	• Middlebury Institute of International Studies at Monterey (Monterey, CA) • California State University, Monterey Bay (Seaside, CA)	Middlebury Institute students can take up to four credits per semester at CSU Monterey Bay. The institution offers courses in environmental science and marine conservation that are not available on the Middlebury Institute campus. CSU Monterey Bay students can also enroll in classes at the Middlebury Institute through their exchange program and receive credit towards graduation.	Low
#2: Academic credit agreement: online instruction	• Faculty salaries and benefits • Shared technology • Classroom space	• California State University System • 23 institutions (full membership here)	Through the CSU Fully Online program and platform, full-time in-state students can take one free online course per semester at any system campus and receive credit at their home institution. Out-of-state students pay partial tuition. All classes are asynchronous, so that they are more accessible to students with schedules that conflict with traditional class schedules.	Medium
		• Online Consortium of Independent Colleges and Universities (OCICU) • 66 institutions (full membership here)	OCICU is a virtual academic consortium. All member institutions share online courses and programs and students can receive academic credit at their home institution. Members are regionally-accredited, independent, nonprofit, and liberal arts-focused, and the consortium is managed by a consulting group housed with the private nonprofit Regis University. OCICU professes that in the face of competition with resource-rich, for-profit online options, OCICU members can "enter or expand the world of online education for their students while keeping technology and course costs low."	Medium

Source: Middlebury Institute of International Studies at Monterey; CSU Fully Online; Online Consortium of Independent Colleges and Universities (OCICU); EAB interviews and analysis.

Academic Partnerships (cont.)

Partnership Type	Savings Agent	Partner Institutions	Partnership Details	Implementation Complexity
#2 (cont.): Academic credit agreement: online instruction	• Faculty salaries and benefits • Shared technology • Classroom space	• NEXus • 17 institutions (full membership here)	NEXus is a consortium of 17 colleges and universities that offer online doctoral programs in nursing. Students enrolled at the institutions can cross-register for courses at member institutions via a single online platform and receive credit at their home institution. Institutions benefit by bolstering their course offerings without the expense of offering additional institution courses. NEXus offers over 300 courses annually and institutions split tuition revenue from cross-registered students.	Medium
#3: Academic credit agreement: study abroad	• Faculty salaries and benefits • Program management staff salaries and benefits • Program management costs	• Duke University (Durham, NC) • 50+ institutions (selection of partners here)	In addition to its institution-managed study abroad programs, Duke University maintains a list of "Duke-Approved" partner programs. These partner programs are sponsored by other U.S. institutions, international institutions, or third-party providers. Duke students pay the tuition and fees of the administering university or provider, but also pay a study abroad fee to Duke to maintain their enrollment there. The fee is $4,580 per semester for the 2020-2021 academic year. Upon completion of the program, students can transfer their earned credits back to Duke.	Medium
#4: Joint department	• Faculty salaries and benefits • Classroom space	• North Carolina Agricultural & Technical State University (Greensboro, NC) • University of North Carolina at Greensboro (Greensboro, NC)	NCATU and UNC Greensboro have a joint Master of Social Work and joint PhD in Social Work. Faculty from both institutions split the course load. Students pay all fees to their home institution, but the joint program budget is shared equally. Students have access to advising, libraries, and all services on both campuses, and their degree is granted jointly by both universities.	High
#5: Multi-campus administered degree: guaranteed transfer program	• Faculty salaries and benefits • Administrative staff and salaries • Program management costs • Classroom space	• St. Norbert College (De Pere, WI) • Bellin College (Bellevue, WI)	Undergraduate students attend St. Norbert College and live on the campus for their first two years. They take liberal arts classes and have a pre-nursing advisor. They then transition into the nursing program at Bellin College, in which they earn Bachelor of Science in nursing. Graduates are alumni of both institutions.	High

Source: NEXus; Duke University; NCATU and UNCG Joint Programs in Social Work; St. Norbert College and Bellin College Partnership: Nursing Program; EAB interviews and analysis.

Academic Partnerships (cont.)

Partnership Type	Savings Agent	Partner Institutions	Partnership Details	Implementation Complexity
#6: Multi-campus administered degree: shared classes	• Faculty salaries and benefits • Classroom space	• UC Consortium for Language Learning and Teaching • 10 institutions (full membership here)	University of California institutions collaborate to offer undergraduate, graduate, and UCLA Extension students less-commonly taught languages, such as Burmese and Swedish. Professors at various UC campuses teach the classes via distance learning and videoconferencing. Enrolled students can apply their earned credit toward specific language or general degree requirements at their home institution.	Medium
#7: Multi-campus administered degree: shared major	• Faculty salaries and benefits • Classroom space	*Bi-College or "Bi-Co"* • Bryn Mawr College (Bryn Mawr, PA) • Haverford College (Haverford, PA)	Haverford College and Bryn Mawr College faculty collaborate to offer certain majors, such as German & German Studies and East Asian Languages & Cultures, as well as programs like Comparative Literature, Education, and Health Studies. Professors from both institutions share the course load in the majors and programs.	High
#8: Multi-campus administered degree: shared minor	• Faculty salaries and benefits • Classroom space	• Colleges of the Fenway (COF) • 5 institutions (full membership here)	The five colleges in the Fenway neighborhood of Boston collectively comprise 16.2% of the total Boston population of undergraduates. The colleges offer joint minors in sustainability, performing arts, and migration studies. Coursework can be completed at member institutions for home institution credit. For example, students in the Migration Studies minor take an introductory course that rotates instructors and institution; three electives, of at least one is encouraged to be taken away from a student's home institution; and a service-learning course of their choice, also offered at multiple institutions.	Medium

Source: The UC Consortium for Language Learning and Teaching; Bi-Colleges; Colleges of the Fenway; EAB interviews and analysis.

Benefits Consortia

Institutions that participate in benefits consortia are often small and independent. By partnering, institutions can create greater purchasing power that allows them to secure higher-quality benefits at better rates than they would have achieved individually.

Partnership Type	Savings Agent	Partner Institutions	Partnership Details	Implementation Complexity
#9: Healthcare benefits	• Purchasing power • Healthcare benefits	• Council of Independent Colleges in Virginia (CICV) • 28 institutions (full membership here)	CICV represents 28 private colleges in Virginia. Part of the collaboration includes a Benefits Consortium of 16 colleges. The Consortium covers member employees with medical, dental, vision, and/or prescription drug plans. By collaborating, each member institution can provide employees with high quality health insurance that each institution wouldn't be able to afford on its own. The consortium also allows members to better control healthcare costs; rates for the consortium increase 5-6% per year, while the market average is between 12-14%.	Medium
#10: Relocation services	• Purchasing power • Life and wellness benefits	• Higher Education Consortium of Central Massachusetts (HECCMA) • 11 institutions (full membership here)	HECCMA is a 501(c)(3) consortium that enables cross-registration, cost effective partnerships, and collaboration among 11 member institutions. One service for faculty and staff is real estate assistance (e.g. closing cost credits, cash rebates, a moving service).	Low
#11: Retirement plan	• Purchasing power • Retirement benefits	• Council of Independent Colleges in Virginia (CICV) • 28 institutions (full membership here)	CICV represents 28 private colleges in Virginia. Part of the collaboration includes a Multiple-Employer Plan (MEP) retirement plan. The joint venture for the 403(b) plan provides members with access to top vendors (e.g., Fidelity) that some members may not have been able to afford individually. It also enables lower 403(b) record-keeping fees.	Medium
#12: Voluntary benefits	• Purchasing power • Voluntary benefits	• The Wisconsin Association of Independent Colleges and Universities (WAICU) • 24 institutions (full membership here)	Founded in 1961, WAICU is a 501(c)(3) whose members consist of Wisconsin's 24 private, nonprofit colleges and universities. Through the WAICU Collaboration Project, member institutions share the costs of some benefits programs, including a Kidnap and Ransom Insurance Program, Life & Disability Insurance Program, and Property & Casualty Insurance Program.	Medium

Source: Council of Independent Colleges in Virginia, Inc. (CICV); Higher Education Consortium of Central Massachusetts (HECCMA); The Wisconsin Association of Independent Colleges and Universities (WAICU); EAB interviews and analysis.

Procurement Consortia

Procurement consortia are the most common type of interinstitutional partnership. Implementation complexity is generally low, and institutions can save millions of dollars that can be directed to more mission-critical purposes. If an institutional does not currently engage in interinstitutional partnerships, leaders should start here.

For more information, see EAB's Maximizing the Benefits of System Shared Services and Procurement Insight Center.

Partnership Type	Savings Agent	Partner Institutions	Partnership Details	Implementation Complexity
#13: Procurement: discounted goods	• Purchasing power • Discounted goods	• Green Mountain Higher Education Consortium • 3 institutions (full membership here)	Consortium schools band together and leverage greater purchasing power to achieve lower rates on purchases such as their Amazon Business Account, a secure paper shredding contract, W.B. Mason office supplies, and rental car contracts.	Low
#14: Procurement: discounted services	• Purchasing power • Discounted goods	• Big Ten Academic Alliance Purchasing Consortium • 14 institutions (full membership here)	The Purchasing Consortium is a collaboration between the Big Ten Academic Alliance institutions. Among other partnerships, they've partnered with General Information Services (GIS) to provide background checks and related employment eligibility services on one contract. The agreement for these services alone is projected to save each participating institution $700,000 each year.	Low
#15: Procurement: insurance	• Purchasing power • Insurance contributions	• Council of Independent Colleges in Virginia (CICV) • 28 institutions (full membership here)	CICV members collectively purchased property and casualty group insurance. The insurance broker offers significant savings and enhanced service that some CICV members may not have been able to afford individually. The coverage includes property insurance and insurance for boilers and machinery, commercial automobiles, inland marine, workers' compensation, general liability, educators' legal liability, excess liability, and professional liability.	Medium

Source: Green Mountain Higher Education Consortium (GMHEC); Big Ten Academic Alliance Purchasing Consortium; Council of Independent Colleges in Virginia, Inc. (CICV); EAB interviews and analysis.

Procurement Consortia (cont.)

Partnership Type	Savings Agent	Partner Institutions	Partnership Details	Implementation Complexity
#16: Procurement: shared preferred suppliers	• Purchasing power • Procured goods and services	• Lehigh Valley Association of Independent Colleges (LVAIC) • 6 institutions (full membership here)	LVAIC institutions formed a Joint Purchasing Program to purchase goods and services as a group at lower rates. Institutions make these purchases through membership in Group Purchasing Organizations or through LVAIC Preferred Suppliers or Contracted Vendors.	Low
#17: Procurement: shared technology	• Purchasing power • Shared technology • Procured goods and services • Shared rebates	• The Wisconsin Association of Independent Colleges and Universities (WAICU) • 24 institutions (full membership here)	Founded in 1961, WAICU is a 501(c)(3) whose members consist of Wisconsin's 24 private, nonprofit colleges and universities. Through the WAICU Collaboration Project, members benefit from collaborative equipment and office supply purchasing. The consortium also has a shared purchasing card program with a single technology platform and a rebate program based on the combined purchases of the group.	Medium

Source: Lehigh Valley Association of Independent Colleges (LVAIC); The Wisconsin Association of Independent Colleges and Universities (WAICU); EAB interviews and analysis.

Shared Administrative Staff

Sharing administrative staff requires complex negotiation in the initial stages of a partnership. Institutions need to reconcile disparate processes, vendor contracts, benefits packages, and unions. However, institutions benefit from lower labor costs and staff members who can glean and share best practices among institutions. To date, geographically proximate institutions have piloted this strategy, but as remote staff become more common in higher education, institutions that are not within driving distance may find this opportunity available to them.

Partnership Type	Savings Agent	Partner Institutions	Partnership Details	Implementation Complexity
#18: Admissions staff	• Staff salaries and benefits • Office space • Incidental expenses	• University System of New Hampshire • 4 institutions (full membership here)	The University System of New Hampshire shares an Online Enrollment Center. Six recruiters with the Center reach out to prospective students identified by the individual campuses. The Center and shared staff enable them to increase enrollments and revenue for their individual campuses while scaling down the costs and boosting the admissions staff's impact.	Medium
#19: Campus safety staff	• Staff salaries and benefits • Office space	*Bi-College or "Bi-Co"* • Bryn Mawr College (Bryn Mawr, PA) • Haverford College (Haverford, PA)	Bryn Mawr College and Haverford College comprise the "Bi-Co" partnership. Haverford administers campus safety for both institutions; the director's title is Director of Bi-Co Campus Safety. Campus safety staff are employed by each college. Haverford receives financial support from Bryn Mawr for this partnership	Medium
#20: Counseling staff	• Staff salaries and benefits • Office space • Malpractice insurance	• The Claremont Colleges • 7 institutions (full membership here)	The seven Claremont Colleges share mental health services. Their Monsour Counseling and Psychological Services center centrally employs 20 psychologists, psychiatrists, and assistants. The office is located in an off-campus space near the college campuses. The office is managed by The Claremont Colleges Services (TCCS), the consortium's 501(c)(3) governing organization.	Medium
#21: Dining staff	• Staff salaries and benefits • Office space	*Bi-College or "Bi-Co"* • Bryn Mawr College (Bryn Mawr, PA) • Haverford College (Haverford, PA)	Bryn Mawr College and Haverford College comprise the "Bi-Co" partnership. Bryn Mawr oversees dining for the two campuses; the director's title is Executive Director of Dining Services, Bryn Mawr and Haverford. Dining staff are employed in-house by each college. Bryn Mawr receives financial support from Haverford for this partnership.	Medium

Source: University System of New Hampshire; The Claremont Colleges; Bi-Colleges; EAB interviews and analysis.

Shared Administrative Staff (cont.)

Partnership Type	Savings Agent	Partner Institutions	Partnership Details	Implementation Complexity
#22: Environmental Health and Safety (EHS) staff	• Staff salaries and benefits • Office space	• Carleton College (Northfield, MN) • St. Olaf College (Northfield, MN)	Carleton College and St. Olaf College are located two miles apart in Minnesota. They share an Environmental Health and Safety (EHS) office, staffed by a Director of Environmental Health and Safety Compliance and an Environmental Health and Safety Specialist/Training Coordinator. They provide health and safety training, manage EHS policies, and process injury/illness reports for both institutions.	Medium
#23: Facilities staff	• Staff salaries, benefits, and overtime • Office space • Facilities equipment and supplies	• The Claremont Colleges • 7 institutions (full membership here)	The Claremont Colleges consortium is supported by The Claremont Colleges Services (TCCS), which provides shared services and coordinates interinstitutional partnerships. TCCS employs a central Facilities team to perform routine and preventive maintenance at member colleges. Requests for work are directed through each institution's Facilities office and supported by the TCCS maintenance team. The central TCCS team consists of 11 maintenance shops.	High
#24: Finance staff	• Staff salaries and benefits • Shared technology • Office space	• The Claremont Colleges • 7 institutions (full membership here)	The Claremont Colleges consortium is supported by The Claremont Colleges Services (TCCS), which provides shared services and coordinates interinstitutional partnerships. TCCS provides central benefits and payroll administration for the consortium. 11 staff members provide these services for 3,200 faculty and staff.	Medium
#25: Healthcare staff	• Staff salaries and benefits • Health center space • Medical equipment • Malpractice insurance	• The Claremont Colleges • 7 institutions (full membership here)	The Claremont Colleges consortium is supported by The Claremont Colleges Services (TCCS), which provides shared services and coordinates interinstitutional partnerships. TCCS manages a central Student Health Services office. The office provides services like general medical visits, immunizations, STD testing, lab services, and flu shot clinics. Student Health Services employs 15 medical staff members and assistants who serve 8,500 students between all seven colleges. The office is located in an off-campus space near the college campuses.	Medium

Source: Carleton and St. Olaf Colleges; The Claremont Colleges; EAB interviews and analysis.

Shared Administrative Staff (cont.)

Partnership Type	Savings Agent	Partner Institutions	Partnership Details	Implementation Complexity
#26: IT staff	• Purchasing power • Staff salaries and benefits • Office space	• Nova Scotia Higher Ed IT Shared Services Program • 11 institutions (full membership here)	Nova Scotia's 11 higher education institutions share central IT staff. The staff include IT procurement experts, business analysts, and project managers. Central staff manage purchasing and new system implementation across the member institutions. In addition, each institution has its own IT staff to support daily operations.	Medium
		• Massachusetts College of Art and Design (Boston, MA) • Wentworth Institute of Technology (Boston, MA)	Two of the five colleges in the Colleges of the Fenway consortium (Massachusetts College of Art and Design and Wentworth Institute of Technology) share an Information Security Officer. The institutions benefit not only financially from the shared position, but also from shared best practices and a broader awareness of security threats.	Medium
#27: Library staff	• Staff salaries and benefits • Office space	• The Claremont Colleges • 7 institutions (full membership here)	The seven Claremont Colleges share a single library building, the Honnold/Mudd Library. The library employs 26 librarians, 31 support staff, and 72 student assistants who support 8500 students and over 3200 faculty and staff. The library is managed by The Claremont Colleges Services (TCCS).	High
#28: Research administrative staff	• Staff salaries and benefits • Shared technology • Office space	• Research Foundation for The State University of New York (SUNY RF) • 30 institutions (full membership here)	The RF is a nonprofit 501(c)(3) that serves as a research foundation for the entire SUNY system. The campuses share select research administrative services. Institutions share funding, technology and administrative offices, including HR, Payroll, Procurement and General Counsel through over 100 central staff. In addition to the central staff, an operations manager works locally on each of the 30 campuses in the system.	High

Source: Nova Scotia Higher Ed IT Shared Services Program; Colleges of the Fenway; The Claremont Colleges; SUNY RF; EAB interviews and analysis.

Shared Administrative Staff (cont.)

Partnership Type	Savings Source	Partner Institutions	Partnership Details	Implementation Complexity
#29: Student Services staff	• Staff salaries and benefits • Office space	• The Claremont Colleges • 7 institutions (full membership here)	The Claremont Colleges consortium is supported by The Claremont Colleges Services (TCCS), which provides shared services and coordinates interinstitutional partnerships. As one of over 30 services, TCCS supports students with a shared Disability Resource Center. The center employs one director and one testing coordinator. The office is located in an off-campus space near the college campuses.	Medium
#30: Sustainability staff	• Staff salaries and benefits • Office space	• Lehigh Valley Association of Independent Colleges (LVAIC) • 6 institutions (full membership here)	The LVAIC institutions share a Director of Sustainability Initiatives. The LVAIC director supports sustainability initiatives across the consortium. At three of the six campus in the association, the director is the only dedicated sustainability staff member. At the other three campuses, the director supports the ongoing work of dedicated local staff.	Medium

Source: The Claremont Colleges; Lehigh Valley Association of Independent Colleges (LVAIC); EAB interviews and analysis.

Shared Auxiliaries

Institutions have the potential to increase their auxiliary revenue with partnerships that decrease auxiliary operating costs. Institutions can also pool their resources to provide additional auxiliary services, such as transportation, that they may not be able to provide alone.

Partnership Type	Savings Source	Partner Institutions	Partnership Details	Implementation Complexity
#31: Bookstore	• Facility costs • Staff salaries and benefits	• The Claremont Colleges • 7 institutions (full membership here)	The Claremont Colleges consortium is supported by The Claremont Colleges Services (TCCS), which provides shared services and coordinates interinstitutional partnerships. The seven Claremont Colleges share a single bookstore in an off-campus space near the college campuses.	Medium
#32: Conference center	• Facility costs • Staff salaries and benefits	• The Claremont Colleges • 7 institutions (full membership here)	The Claremont Colleges consortium is supported by The Claremont Colleges Services (TCCS), which provides shared services and coordinates interinstitutional partnerships. TCCS provides an Executive Conference Center for members to use for meetings, conferences, and special events.	Low
#33: Fleet services	• Vehicle purchasing cost • Vehicle maintenance cost • Staff salaries and benefits • Vehicle maintenance space and equipment	• University System of Maryland • 12 institutions (full membership here)	Several of the University System of Maryland schools share a vehicle fleet. The University Fleet Administrator and the vehicles are located at the system's largest campus, the University of Maryland College Park. The University Fleet Administrator develops, coordinates, and disseminates fleet policies and procedures, and reports on fleet management at the system and state-level. Each participating institution has its own Institutional Fleet Coordinator who manages and coordinates all institutional fleet activities.	Medium
#34: Printing services	• Staff salaries and benefits • Equipment • Shared technology	• The Claremont Colleges • 7 institutions (full membership here)	The seven Claremont Colleges share a single library building, the Honnold/Mudd Library. Within the library, member schools share a center for printing services. The center is managed by The Claremont Colleges Services (TCCS), the consortium's support organization.	Low

Source: The Claremont Colleges; University System of Maryland University Fleet Administrator; EAB interviews and analysis.

Shared Auxiliaries (cont.)

Partnership Type	Savings Source	Partner Institutions	Partnership Details	Implementation Complexity
#35: Transportation	• Staff salaries and benefits • Vehicle leasing costs	• Baltimore Collegetown • 13 institutions (full membership here)	Baltimore Collegetown is a consortium of 13 Baltimore-area high education institutions. Five of the institutions share a transportation service called the Collegetown Shuttle, which transports students, faculty and staff between the campuses and to locations throughout the Baltimore region through leased buses. Rides are free to anyone who has a member college ID. The service averages over 100,000 shuttle rides per year.	Medium

Source: Baltimore Collegetown; EAB interviews and analysis.

Shared Events

Sharing events, especially for colleges that are geographically proximate, presents few implementation hurdles. Partner institutions not only share event costs, but also can recruit more attendees due to broader marketing.

Partnership Type	Savings Source	Partner Institutions	Partnership Details	Implementation Complexity
#36: Admissions events	• Attendee hotel costs • Attendee meals • Attendee transportation • Incidental costs	• Lehigh Valley Association of Independent Colleges (LVAIC) • 6 institutions (full membership here)	Four of the LVAIC colleges split the cost of an annual three-day tour for approximately 100 guidance counselors and educational consultants. Attendees spend a half day on each campus.	Low
#37: Career fairs	• Physical event space costs • Event equipment • Marketing	• Atlanta University Center Consortium • 4 institutions (full membership here)	The four Atlanta-area HBCUs hold joint career fairs. In 2019, the career fair hosted over 400 employers to meet with consortium students. The institutions save the cost of hosting their own event as well as benefit from a more robust career fair with additional employment opportunities.	Low
#38: Extracurricular events	• Physical event space costs • Event equipment • Marketing	• Colleges of the Fenway (COF) • 5 institutions (full membership here)	The five colleges in the Fenway neighborhood of Boston collectively comprise 16.2% of the total Boston population of undergraduates. COF institutions share their major annual events, including the COF Block Party, Campus Movie Fest, and Spring Carnival. COF opportunities are advertised and shared via a COF app.	Low

Source: Atlanta University Center Consortium (AUCC); Lehigh Valley Association of Independent Colleges (LVAIC); Colleges of the Fenway; EAB interviews and analysis.

Shared IT Services

Institutions can achieve significant savings by partnering with other institutions to share IT services or software contracts. Leaders should note that while IT partnerships offer great savings potential, they often require complex legal and financial negotiations, executive sign-off, and sometimes support from many stakeholders to achieve successful implementation.

Partnership Type	Savings Source	Partner Institutions	Partnership Details	Implementation Complexity
#39: Cybersecurity services	• Staff salaries and benefits • Shared technology	• OmniSOC • 5 institutions (full membership here)	OmniSOC is a cybersecurity operations center shared among five institutions. OmniSOC's staff of 15 provide cybersecurity services for their members by taking in their data, analyzing for potential threats, and then notifying campuses when incidents require further action.	High
#40: Data Center	• Facilities costs • Equipment	• Ivy Tech Community College of Indiana (Indianapolis, IN) • Indiana University-Purdue University Indianapolis (Indianapolis, IN)	Ivy Tech and IUPUI share a data center on the Indiana University-Purdue University Indianapolis (IUPUI) campus. The shared space and equipment saves money and encourages interinstitutional collaboration.	Medium
#41: Internet/ networks	• Network infrastructure • Technology	• Big Ten Academic Alliance • 14 institutions (full membership here)	Big Ten Academic Alliance institutions share a fiber optic network called OmniPoP. OmniPoP merges members' regional optical networks to a collaboratively owned fiber cable in Chicago. The reduced-cost network provides schools with a high-speed, ultra-high bandwidth connection. It also eliminates network downtime with redundant back-up connectivity options.	Medium
		• Colleges of the Fenway (COF) • 5 institutions (full membership here)	The five colleges in the Fenway neighborhood of Boston collectively comprise 16.2% of the total Boston population of undergraduates. The colleges share Eduroam Wi-Fi technology. Students, faculty, and staff can use their school's Wi-Fi authentication on every COF campus.	Low
		• Ocean State Higher Education Economic Development and Administrative Network (OSHEAN) • 155 institutions (full membership here)	OSHEAN consists of 155 universities, libraries, hospitals, and government agencies in Rhode Island and Massachusetts. The institutions partner together to receive discounted information technology services, including internet and on-campus networking.	Low

Source: OmniSOC; Ivy Tech and IUPUI; OmniPoP; Colleges of the Fenway; Ocean State Higher Education Economic Development and Administrative Network (OSHEAN); EAB interviews and analysis.

Shared IT Services (cont.)

Partnership Type	Savings Source	Partner Institutions	Partnership Details	Implementation Complexity
#42: IT support	• Technology maintenance • Staff salaries and benefits • Purchasing power: Technology • Office space	• Texas Connection Consortium • 40 institutions (full membership here)	The Texas Connection Consortium (TCC) consists of 40 state universities, colleges, and community colleges who partner with Ellucian to receive discounts on their software contracts and customer support. TCC shares the resources of a Technical Support Center, staffed by 10 Ellucian employees. The Support Center reduces the IT effort to meet state regulations, supports migration of Texas-specific data to local ERP systems, and provides general technical support. Members have also negotiated a discount on Banner software, license fees, maintenance, and other services. TCC estimates that members have saved over $17 million from the Center since it was founded in 1995.	High
#43: Payroll system	• Staff salaries and benefits • Shared technology	• University of California System • 10 institutions (full membership here)	The University of California System shares an online payroll system and HR service center called UCPath. The center and new payroll technology streamline 100 payroll, finance, and workforce administration processes. The plan is that UCPath will employ approximately 400 staff members once the system is implemented at all UC campuses in 2020. This is a reduction from the 6,000 staff members across the UC system who previously had payroll and benefits as part of their job. Eliminating this local HR responsibility will enable local staff to perform more strategic and less transactional work.	High
#44: Software contract	• Purchasing power • Discounted technology	• The Wisconsin Association of Independent Colleges and Universities (WAICU) • 24 institutions (full membership here)	Founded in 1961, WAICU is a 501(c)(3) and its members consist of Wisconsin's 24 private, nonprofit colleges and universities. WAICU members share several software contracts, including Adobe Purchase Program, Mathematica software, a Microsoft Suite contract, Statistical Package for the Social Sciences (SPSS) software, and an Admissions Customer Relationship Management (CRM) software program. Members can purchase the CRM, Ellucian Recruiter, with a highly discounted, perpetual license.	Low

Source: Texas Connection Consortium (TCC); UCPath; The Wisconsin Association of Independent Colleges and Universities (WAICU); EAB interviews and analysis.

Shared IT Services (cont.)

Partnership Type	Savings Source	Partner Institutions	Partnership Details	Implementation Complexity
#44 (cont.): Software contract	• Purchasing power • Discounted technology	• Green Mountain Higher Education Consortium • 3 institutions (full membership here)	The three private colleges of the Green Mountain Higher Education Consortium are currently implementing "Project Ensemble," a process to select, purchase, and deploy new shared ERP system. The colleges purchased Blackbaud for their Advancement offices, Oracle Fusion Cloud for Finance HR, and are considering Oracle software also for student services. Through their partnership, the three institutions share infrastructure and best practices and ultimately achieve a greater ROI than each could have achieved on its own.	Medium
#45: Student ID Card Systems	• Shared technology	• Carleton College (Northfield, MN) • St. Olaf College (Northfield, MN)	Carleton College and St. Olaf College are located two miles apart in Minnesota. They share a student ID card system that gives students access to certain buildings and dining spaces at both campuses. Students from both colleges can also use any credit on their Student ID card at the same local restaurants. This initiative was assisted by a $1.4 million grant from the Mellon Foundation to advance collaboration in library services, IT, management operations, and academic programs at Carleton and St. Olaf.	Medium
		• Colleges of the Fenway (COF) • 5 institutions (full membership here)	The five colleges in the Fenway neighborhood of Boston collectively comprise 16.2% of the total Boston population of undergraduates. All students, faculty, and staff at member institutions use the Fenway Card as their ID. The ID also holds "Fenway Cash," which can be used to make purchases at all member institutions as well as local businesses. The card and debit program are powered by CampusCa$h technology.	Medium

Source: Green Mountain Higher Education Consortium (GMHEC); Carleton and St. Olaf Colleges; Colleges of the Fenway; EAB interviews and analysis.

Shared Libraries

Most often, interinstitutional library partnerships involve shared access to library holdings. Institutions save the cost of obtaining additional resources and can reduce licensing costs by entering into collective licensing agreements. Geographically proximate institutions can also share the physical library building, thus lowering individual operating costs.

Partnership Type	Savings Source	Partner Institutions	Partnership Details	Implementation Complexity
#46: Library collections	• Licensing costs • Shared collections	• Big Ten Academic Alliance • 14 institutions (full membership here)	The Big Ten libraries collaborate to minimize the costs of acquisition and content licensing and extend individual purchasing power. Between 2013 and 2018, consortium members saved $37 million in licensing costs because they entered into collective licensing agreements instead of individual licensing. Additionally, over 90 million books are available to Big Ten libraries through their collaborative UBorrow online catalog.	Low
		• Five Colleges Consortium • 5 institutions (full membership here)	Students from the five institutions have access to each college's library collections. Additionally, consortium members partnered to create a single, joint library catalog web platform to simplify the process and purchase a single technology.	Medium
#47: Library facilities	• Building design and construction • Building maintenance	• Atlanta University Center Consortium • 4 institutions (full membership here)	The four Atlanta-area HBCUs share the 200,000-square foot Robert W. Woodruff library. One study found that institutional members realize a combined average annual savings of $3.28 million in operational expenditures by sharing the library. Additionally, the library has greater borrowing opportunities due to the financial strength of the four member institutions. This credit partially funded a recent $16.2 million building renovation.	High

Source: Big Ten Academic Alliance Library Initiatives; Five Colleges Consortium; Atlanta University Center Consortium (AUCC); EAB interviews and analysis.

Shared Student Groups

By sharing student groups, institutions can pool funding for student activities while still providing students with equivalent opportunities. Shared student groups are easiest to implement on geographically proximate campuses.

Partnership Type	Savings Source	Partner Institutions	Partnership Details	Implementation Complexity
#48: Athletics	• Staff salaries and benefits • Athletics facilities • Equipment • Marketing	• Claremont-McKenna College (Claremont, CA) • Harvey Mudd College (Claremont, CA) • Scripps College (Claremont, CA)	Three of the Claremont Colleges--Claremont McKenna, Harvey Mudd, and Scripps Colleges--share an athletic program. The program sponsors 10 men's and 11 women's Division III sports, comprising student-athletes from all three institutions.	High
#49: Clubs and organizations	• Student programming funds	• Colleges of the Fenway (COF) • 5 institutions (full membership here)	The five colleges in the Fenway neighborhood of Boston collectively comprise 16.2% of the total Boston population of undergraduates. The COF institutions have hundreds of clubs between them, and most organizations are open to cross-institutional membership.	Low
#50: Performing Arts	• Faculty and staff salaries and benefits • Facilities design and construction • Facilities maintenance • Equipment • Technology	*Bi-College or "Bi-Co"* • Bryn Mawr College (Bryn Mawr, PA) • Haverford College (Haverford, PA)	Bryn Mawr College and Haverford College have combined performing arts groups, such as the Bi-Co Orchestra, Bi-Co Chamber Singers, and the Bi-College Theater Program. Haverford professors lead the music ensembles and fine arts departments, while Bryn Mawr faculty lead the theater and dance programs.	Low
		• Colleges of the Fenway (COF) • 5 institutions (full membership here)	The five colleges in the Fenway neighborhood of Boston collectively comprise 16.2% of the total Boston population of undergraduates. The COF institutions share performing arts groups such as an orchestra, chorus, dance ensemble, theater group, and jazz band. The COF also share a joint minor in performing arts that integrates performing experience with academic studies.	Low

Source: The Claremont Colleges; Colleges of the Fenway; Bi-Colleges; EAB interviews and analysis.

Interinstitutional Partnership Case Studies

SECTION III

- The Claremont College Services
- St. Olaf and Carleton College
- Green Mountain Higher Education Consortium
- Colleges of the Fenway
- Bridgeport University Park

The Claremont Colleges Services (TCCS)

Overview

Year Established: 1925

Location: Claremont, CA

Partner Institutions: Seven private selective non-profit institutions

- Pomona College
- Claremont Graduate University
- Scripps College
- Claremont McKenna College
- Harvey Mudd College
- Pitzer College
- Keck Graduate Institute of Applied Life Sciences

Combined Institutional Enrollment and Employees: 8,500 students; 3720 faculty and staff

Consortia Model: Shared services provided by a dedicated Section 501(c)(3) Organization Type I supporting organization under IRC Section 509(a)(3)

Shared FTEs (FY17): 443

Shared Assets (FY17): $145M

Shared Functional Expenses (FY17): $47M

Five Largest Shared Contracts (FY17):

- Workday (ERP)
- PwC (accounting)
- Loeb & Loeb (legal services)
- Bon Appetite (dining services)
- Kronos (consulting)

Background

The Claremont College Services (TCCS) is widely recognized to be the oldest and most mature interinstitutional consortium in the United States. Originally, TCCS modeled the Oxford University's organizational structure with independent academic colleges united around a shared library and administrative apparatus. The number of institution in the consortium has grown since the inception, from two in 1925 to seven by 1997. Throughout its existence, TCCS has grown in sophistication and function based on the demand of its partner institutions.

Areas of Functional Collaboration

Function	Examples
Financial and Administrative Services	• Benefits and payroll administration • Financial services, records management, and risk management • Facilities and campus services • Conference spaces, dining, & catering
Student Services	• Cultural and spiritual life • Student physical and mental healthcare • Student bookstore • Library
Campus Safety	• Emergency preparedness • Environmental health and safety
Information Technology	• Workday financial systems • Workday human resources information system • Workday student information system

Source: The Claremont Colleges Services; TCCS Tax Filings FY18; EAB interviews and analysis.

The Claremont Colleges Services (cont.)

Factors Contributing to Consortium's Success

Dedicated Shared Services Entity

As an independent 501(c)(3) organization, TCCS employs its own staff and provides services to partners through contracted vendor agreements. This organizational structure provides clear role definitions between individual partners and the consortium while promoting service quality and accountability.

Service Adaptability

TCCS launches new services and expands the legacy services it provides as partner needs evolve and shift. This agility has allowed TCCS to remain an efficient service provider while maximizing the value it provides to its partners. For example, TCCS contracted a shared Title IX investigator and plans to centralize adjudication procedures in response to shifting federal Title IX regulations.

Accountability and Performance Incentives

TCCS partner institutions can opt-out or withdraw from a shared service if they are not satisfied with the quality they receive for the price. This incentives TCCS to maintain satisfactory service levels.

Stability Mechanisms

While partners can opt-out or withdraw from a shared service, they're contractually obliged to a two-year waiting period between notice and discontinuation. This raises the exit barrier for partner institutions and provides short-term operational and financial sustainability for TCCS.

Close Geographic Proximity and Shared Real Estate

Six of the seven partner institutions are located on the same real estate while the seventh is located less than a mile away. This proximity enables closer integration of physical plant management and in-person services, such as student health services.

Shared Institutional Culture and Mission

The institutions that make up TCCS hold a foundation of interinstitutional collaboration that dates to their chartered mission. This had embedded a collaborative culture that emphasizes cooperation and pooling resources among the staff, faculty, and leaders.

Distinct Benefits

Highly Integrated Services

Dedicated 501(c)(3) service provider and common real estate enable robust resource sharing, especially on student services and physical plant operations.

Collective Scale and Network Clout

By pooling resources, TCCS partner institutions can offer more specialized services, programs, and staff (e.g., a full-time Title IX coordinator) than many institutions of comparable size.

Replicability Challenges

Foundational Culture of Collaboration

Partner institutions have collaborated for over 100 years. Five of the institutions were founded after the initial partnership was formed and joined the partnership from their inception. As a result, collaboration is entrenched in their institutional culture and histories.

Geographic Proximity

Proximity between the partners allows for greater collaboration on student-facing services and operations that institutions who are farther apart may struggle to integrate.

St. Olaf College and Carleton College

Overview

Year Established: 2003

Location: Northfield, MN

Partner Institutions: Two private non-profit liberal art colleges

- St. Olaf College
- Carleton College

Combined Institutional Enrollment and Employees: 5,000 students; 600 faculty; 740 staff

Consortia Model: Direct institutional collaboration through joint ventures and service agreements

Background

The St. Olaf College and Carleton College collaboration started small through multiple interpersonal connections between the two institutions, such as a friendship between the heads of the two colleges' bookstores. These organic connections prompted discussions about sharing a bookstore. After a successful initial partnership, the institutions progressed to sharing a library catalog system. The library partnership gradually deepened from the shared catalog system through pooled research publication databases, library staff, and back-office library support work. Success in shared library services fostered trust and increased the appetite at both institutions for further collaborations, designed to boost service quality and/or contain costs.

To catalyze and financially seed additional partnerships, St. Olaf and Carleton jointly applied and won a $1.4M Higher Learning grant from the Mellon Foundation in 2013 to promote liberal arts education. The grant seeded the Broadening the Bridge Project, a joint venture between Carleton and St. Olaf to grow interinstitutional partnerships in library services, academic programs, IT, and business affairs. Using the Mellon Foundation grant, the schools jointly installed an office of environmental health and safety as well as a chief information security officer to oversee cybersecurity. On the systems side, they began sharing an internet access point from which they both access Wi-Fi and a student ID card system. On the academic side, the two schools offer joint academic offerings and classes (e.g., a course on *Political Psychology of Presidential Foreign Policy Decision Making)*.

Areas of Functional Collaboration

Function	Examples
Academic Programs	• Joint-academic programs • Shared classes and cross registration
Student Services	• Student bookstore • Library
Campus Safety	• Environmental health and safety
Information Technology	• Cybersecurity • Systems integration

Source: Broadening the Bridge; Carleton and St. Olaf Colleges to Merge Library Catalog; Collaborative course brings together St. Olaf and Carleton students; Mellon Foundation awards St. Olaf and Carleton $1.4 million grant; EAB interviews and analysis.

St. Olaf and Carleton College (cont.)

Factors Contributing to Consortium's Success

Gradualism and Experimentation

Collaboration between St. Olaf and Carleton started small and targeted base-level administrative services, such as a cross-library borrowing system. As these ventures proved their value and yielded implementation insights, both institutions felt empowered to explore additional partnership pathways with increasing sophistication (e.g., joint-academic programs, a shared environmental health & safety office).

External Seed Funding

The Mellon Foundation application process and grant created an agreed-upon collaborative framework that served as the roadmap for establishing expanded shared services. The grant lowered the upfront investment costs and provided a financial catalyst that accelerated the partnership rollout. It also helped foster institutional buy-in around expanding interinstitutional partnerships and allowed for individual staff and faculty to propose additional collaboration opportunities.

Parity Between Partners

St. Olaf and Carleton are similar in annual operating expenditures, student body size, and liberal arts orientation. This high degree of institutional overlap enabled leaders to quickly identify shared challenges (e.g., ability to maintain a robust library service at scale) and build collaborative solutions that directly targeted them. It also allowed both institutions to enter the partnership on equal terms, assuming comparable degrees of risk.

Distinct Benefits

Joint Academic Programs and Courses

The institutions' shared liberal arts orientation has facilitated course sharing. This allows both institutions to satisfy student academic demands and interests while sharing the costs of delivery.

Specialized Talent

Through the Mellon Foundation grant and cost-sharing, St. Olaf and Carleton were able to jointly hire a shared chief cybersecurity officer, allowing them access to critical specialized talent at more cost-effective rates.

Replicability Challenges

External Seed Funding

Mellon Foundation funds lowered the upfront investment costs borne by each institution. This enabled greater risk-taking and partnership experimentation that may not have been financially possible without the grant.

Institutional Alignment

St. Olaf and Carleton are located in the same town, offer similar academic programs, and share a liberal arts education mission. This overlap created organic connectivity between the institutions that anchored partnership.

Green Mountain Higher Education Consortium (GMHEC)

Overview

Year Established: 2013

Location: Shelburne, VT

Partner Institutions: Three full-member private non-profit institutions and one limited member

- Champlain College
- Middlebury College
- Saint Michael's College
- Norwich University (select services)

Combined Institutional Enrollment and Employees: 4,500 students, 600 faculty, 1,300 staff

Consortia Model: Shared services provided by a dedicated Section 501(c)(3) Organization Type I supporting organization under IRC Section 509(a)(3)

Shared FTEs (FY20): 18

Shared Assets (FY17): $1.6M

Shared Functional Expenses (FY17): $2.8M

Four Largest Shared Contracts (FY17):

- Oracle Cloud (ERP)
- Blackbaud RE NXT (CRM)
- Hitatchi Consulting (consulting)
- CampusWorks (project management)

Background

The three institutional presidents started conversations on partnering to reduce their administrative costs to minimize tuition price increases. One of the presidents came from a larger institution and observed that the administrative functions of smaller institutions were often redundant and disproportionate to the institution's size. They identified shared services between the institutions as the best way to lower costs and improve services, tasking their CFOs to explore other consortia models and create a pathway for partnership. In 2013, the three institutions created GMHEC to establish shared services in HR, finance, and IT. GMHEC first targeted combined purchasing cards and procurement as an area where consolidation would lower overhead through increased purchasing power. Next, GMHEC sought to tackle shared cloud-technology projects. Extensive cost-analysis proved that buying and implementing this technology on an individual basis would be significantly more expensive than if done through the consortium.

To this end, GMHEC launched the Project Ensemble initiative to use their collective expertise and purchasing clout to identify, purchase, and implement new enterprise technology (e.g., Blackbaud RE NXT and Oracle Cloud), going live with finance and advancement in 2019. The shared enterprise technology systems facilitated additional opportunities for consolidation in procurement, benefits administration, payroll, and accounts payable. This also included creating a shared business analyst team to support the new technology. Collaborations expanded in other areas such as hiring a shared wellbeing initiatives coordinator to serve the full members and Norwich university. In 2020, GMHEC rolled out a shared benefits program for member institution employees.

Areas of Functional Collaboration

Function	Examples
Financial and Administrative Services	• Benefits administration • Procurement • Staff wellness
Information Technology	• Oracle Cloud • Blackbaud RE NXT

Source: Green Mountain Higher Education Consortium (GMHEC); EAB interviews and analysis.

Green Mountain Higher Education Consortium (cont.)

Factors Contributing to Consortium's Success

Shared Enterprise Technology and Systems

GMHEC prioritized procuring and implementing a shared cloud-based ERP. They selected Oracle Cloud and created a shared platform that met each institution's operational needs while preserving data privacy between institutions. The new ERP provided improved functionality over preexisting systems at a cost-effective rate. Through joint-contracting, the savings on the software and implementation are estimated to be $13.7M as of 2020 with a full payback on the initial investment likely between 5.9 to 11.4 years. By creating a common ERP platform, GMHEC built the infrastructure for further shared services, such as payroll and benefits administration.

Central Consortium Leadership

Two years into the partnership, the three institutions agreed to hire an executive director to spearhead the formation of shared services and run the central consortium organization. The executive director helped identify areas for partnerships and implement the rollout of consortia-level services, such as a shared ERP system.

Duplicative Role Elimination

As GMHEC developed and rolled out shared services in procurement and payroll, redundant staff at the individual institutional level were given advanced notice that their positions would be eliminated. Shared services reduced payroll staff by 2.5 FTEs and accounts payable by 2.8 FTEs.

Benefit Administration Consolidation

Through unified negotiations with providers, GMHEC created a standard benefits plan for member institutions, and they intend to centralize benefits administration over the next year. This has resulted in a combined savings of $11M. Additionally, the member institutions (plus nearby Norwich University) pooled resources to fund wellness programming and as an added benefit of the shared contract the third-party medical provider (CIGNA) paid for a shared well-being coordinator, a role that each institution would have been unable to financially support on its own. The well-being coordinator's initiatives sought to boost staff health to help lower the self-insurance costs of healthcare.

Distinct Benefits

Preserved Student-Facing Brand

GMHEC provides only centralized back office services. Each institution maintains its unique student brand and cultural identity while benefiting from lower administrative costs.

Partner Scalability

The consortium's organizational design provides a pathway for new members to join in a limited capacity, such as Norwich University, or potentially as full members should there be sufficient interest.

Replicability Challenges

Shared Technology Complexity

Rolling out a shared ERP involves a high-degree of resources and collaboration that can be too prohibitive for other interinstitutional partnerships, especially for newly formed and less centralized consortia due to the need for strong project management and consortia leadership.

Upfront Investment Costs

The founding institutions accepted the upfront investment costs associated with building out the shared service entity and deferred short-term cost savings for longer-term sustainability.

Colleges of the Fenway (COF)

Overview

Year Established: 1996

Location: Boston, MA

Partner Institutions: Four private non-profit institutions and one public institution

- Emmanuel College
- Massachusetts College of Art and Design (MassArt)
- Massachusetts College of Pharmacy and Health Sciences (MCPHS University)
- Simmons University
- Wentworth Institute of Technology

Combined Institutional Enrollment and Employees: 13,207 undergrad and 3,103 graduate students (FY19), 700 faculty, 1,600 staff

Consortia Model: Shared services provided by a dedicated Section 501(c)(3) Organization Type I supporting organization under IRC Section 509(a)(3)

Shared FTEs (FY17): 12

Shared Assets (FY17): $2.1M

Shared Functional Expenses (FY17): $3.4M

Background

In 1996, Emmanuel College's president, Sister Janet Eisner, convened a group of colleges located in Boston's Fenway neighborhood to identify partnership opportunities. The collaboration originated with a dual purpose of expanding student opportunities and lowering administrative costs. On the student opportunity front, these small, specialized, and less-resourced institutions lacked sufficient scale to offer a comparable student experience to larger institutions in their region (e.g., Northeastern, Boston University) at a marketable price point. To this end, the consortium focused its collaboration on building a compelling student experience through course cross-registration, joint-academic programs, and centralized student amenities, services, and activities (e.g., a shared fitness center, intramural sports, and clubs & student organizations). These partnerships yielded noteworthy enrollment increases over time for the consortium members while lowering the costs of delivering the expanded student experience.

In recent years, the group expanded its collaboration to back-end administrative functions. They've partnered on procurement, joint-contracting, environmental health and safety, and information technology. One of the most consequential partnerships involved procuring and building a shared fiber optic network. The development of the shared network led the consortium to create a 501(c)(3) organization to own the jointly-held asset.

Areas of Functional Collaboration

Function	Examples
Academic Programs	• Study abroad • Joint programs and minors • Cross-institution course registration
Financial and Administrative Services	• Procurement and joint contracting
Student Services	• Dining services and facilities • International student services • Fitness facilities • Libraries • Student performing arts, clubs, and intramural sports • Common ID card and prepaid cash accounts
Campus Safety	• Emergency preparedness • Environmental health and safety
Information Technology	• Cybersecurity • System integration

Source: Colleges of the Fenway; EAB interviews and analysis.

Colleges of the Fenway (cont.)

Factors Contributing to Consortium's Success

Diverse Partner Institutions

Each institution has a distinct academic focus, institutional mission, and brand. Uniquely, COF includes four private institutions and one public college (MassArt). In addition, Emmanuel is a religious-affiliated institution while the other members are secular. Rather than hindering the interinstitutional collaboration, member diversity strengthens the consortium as it expands student academic and extracurricular opportunities while elevating its collective brand's competitiveness against larger regional peers.

Focus on Student Experience

The COF partnership originated with a focus on expanding student opportunities. It emphasized opportunities to increase enrollment through improved student services and program diversification, including study abroad opportunities, performing arts, intramural sports, and dining. In doing so, it created additional partnership pathways through the establishment of COF shared minors and faculty collaboration on courses and research.

Effective Balance Between Consortium and Institutional Identity

Students, staff, and faculty benefit from the resources of a larger institution while maintaining the specialized community associated with smaller schools. This balance between consortium scale and institutional culture creates a distinctive student experience for COF members that allows each institution to stand out from other regional competitors.

Strong Student-Facing Brand

The central consortium staff engage directly with students enrolled at the partner institutions, and the consortium is marketed as a value-add to the student experience. Students participate in consortium-sponsored organizations and activities that build a sense of shared community. When surveyed, 50% of first-year students across partner institutions cited their institution's participation in the consortium as a primary factor in their decision to enroll at their institution.

À La Carte Shared Services

Partner institutions can elect or decline to participate in certain administrative shared services. This gives COF the ability to tailor its services to partner institutions' unique needs and support collaborations between two or more partner institutions without requiring the participation of all five.

Distinct Benefits

Enhanced Student Experience

COF directly contributes to the enrollment growth of its member institutions by providing a stronger value proposition to students through improved student amenities and additional academic offerings.

Diversified Academic Offerings

Joint academic programs and classes allows the specialized institutions (e.g., MassArt) within the consortium to broaden their academic portfolio without having to unilaterally launch their own programs.

Replicability Challenges

Uneven Risk Profiles

COF members occupy different market positions and are unevenly impacted by changing consumer preferences that can impact individual member enrollment and sustainability. Not all boards and cabinets may be willing to assume risks of partnering with institutions with more volatile financial or market positions.

Continuity of Leadership

COF has benefited from sustained leadership at the president and CFO-level among its partner institutions, as well as at the central consortium level. This has helped foster trust between institutions and maintain momentum.

Bridgeport University Park Consortium

Overview

Start Date: Announced on June 30th, 2020

Location: Bridgeport, CT

Partner Institutions: Three private non-profit institutions and one for-profit institution

- Goodwin University
- Sacred Heart University
- University of Bridgeport
- Paier College of Art

Enrollment and Employees: 17,000 students, 600 faculty, 1,200 staff

Consortia Model: Joint-venture real estate acquisition and program consolidation with shared administrative services

Background

The University of Bridgeport has experienced sustained enrollment and financial challenges since the Great Recession. Its leaders explored a variety of solutions to close its operating deficit, including internal program consolidation and aggressive cost containment. But despite cuts, the increasingly competitive and constrained enrollment environment in New England continued to jeopardize Bridgeport's long-term financial sustainability. In response, Bridgeport considered merging with Marlboro College to shore up enrollment and lower costs. After announcing a merger deal in July 2019, negotiations broke down, leaving Bridgeport's financial stresses unaddressed. At this point, Bridgeport initiated conversations with potential acquiring institutions with the hope of completing a merger before it became insolvent.

Goodwin University's leadership recognized that acquiring Bridgeport could grow their enrollments by diversifying their academic programs and expanding student services. However, Goodwin lacked the financial means to acquire Bridgeport unilaterally. Instead, Goodwin elected to pursue a multilateral merger with other local institutions and collaborations with state and local officials. Working with Sacred Heart University and Paier College of Art, they entered conversations with the University of Bridgeport to explore a deal. On June 30, 2020, Goodwin, Scared Heart, and Paier announced that they would acquire most of Bridgeport's assets and programs, while Bridgeport would transition from a standalone institution into a sub-entity of the consortium. Bridgeport's outstanding debt would be paid off by the three acquiring institutions. Its endowment's restrictions and donor intent would still be upheld. The three acquiring institutions intend to co-locate on Bridgeport's campus to launch shared academic, student, and administrative programs and services.

Areas of Functional Collaboration

Function	Examples
Academic Programs	• Joint programs • Cross-institution course registration
Financial and Administrative Services	• Shared physical plant and academic facilities
Student Services	• Dining services and facilities • Joint-residential communities • Fitness facilities • Libraries
Campus Safety	• Emergency preparedness and campus security

Source: Bridgeport University Park Consortium; EAB interviews and analysis.

Bridgeport University Park Consortium (cont.)

Factors Contributing to Consortium's Success

Merger and Acquisition Activity Through an Interinstitutional Partnership

Merger conversations often break down due to high transaction costs, limited investment capital, and intolerably high-risk concentration. The Bridgeport University Park Consortium attempts to overcome these barriers through interinstitutional collective action and delocalized risk and cost undertaking. Rather than a single entity owning the acquisition, the consortium spreads that burden across three institutions who unilaterally would have been unable to support the deal.

Workforce and Economic Development Focus

The consortium emphasizes that their expanded collective talent pool and program diversification will advance local workforce skills and support economic development in the City of Bridgeport. Creating a co-located university park that houses the consortium will densify student-generated economic activity—a welcome proposition for the local business community.

Strategic Co-Location

Prior to the deal, the individual campuses did not share geographic proximity, which impeded collaboration. By acquiring Bridgeport's real estate, the consortium gained access to shared facilities and can co-locate courses, student services, and administrative functions—capitalizing on close physical proximity to facilitate deeper collaboration.

State and Local Partnerships

Both the Governor of Connecticut and the Mayor of Bridgeport supported the acquisition plan because of its focus on regional economic and workforce development. They facilitated conversations between the institutions and helped work through the zoning and logistics of creating the university park.

Dissimilar Institutional Cultures and Academic Missions

The Bridgeport University Park Consortium brings together a group of diverse institutions, ranging from a Catholic university to a for-profit art school. The consortium has emphasized that this diversity is a value-add, as it will provide students will a diverse array of academic and student life offerings to pursue. Moreover, students will benefit from exposure to a more diverse student community.

Distinct Benefits

Joint Acquisition of Assets

The consortium acquired a struggling university and its core assets that would have been too large for any of the individual institutions to conduct unilaterally.

Co-Located Facilities

In acquiring Bridgeport, the consortium secured co-located facilities that will serve as the infrastructure for deeper collaboration and service integration.

Replicability Challenges

Significant Cultural Change

The Bridgeport University Park Consortium is a complex and highly transformative partnership that may be too disruptive to the core institutional identity and operations of other universities.

Unproven Concept

As the consortium only exists in principle, the key integration logistics and details have yet to be determined.

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