

Outsourcing for your IE Office: Why & When to Look for Outside Help

AIEA 2013 Conference, New Orleans, LA

Tuesday, February 19, 3:30-4:45 PM

How do I decide if outsourcing is the best option for reaching our goal?

What do I need help with?

- Stand-alone project or specific piece of a project
- Project, program, or initiative start-up or restart
- Initiative expansion or reduction
- Evaluation and assessment

What types of people do I need, and where can I find them?

- Do I need someone with specific technical or content knowledge?
- Do I have the resources/skills/knowledge within my staff? Do they have time?
- Can I find the resources elsewhere on my campus?
- What other entities on campus must be involved if I use outside assistance (e.g., attorney's office, accounting office, faculty, President's office, etc.)?

What are the risks involved?

- What are the risks involved if I use my own staff? if I use outside entities?
- How long will it take to train/educate my staff if I do not look for outside assistance?
- What is the monetary cost of training my staff vs. using outside assistance?

What types of outsourcing can I consider?

Other units or departments on campus – e.g. student services, institutional research, development

Student workers – to do administrative tasks, student outreach, peer counseling, etc.

Volunteers (community members, staff, students) – to do student outreach, administrative tasks, etc.

Third party providers – e.g. education abroad, international student recruitment, credential evaluation, pathways programs

Temporary employees – to provide technical skills, data entry, administrative tasks, or cover for temporary staff absences

Outside consultants – to provide expertise, specific knowledge, outside perspective, additional staffing

What planning is involved in order to use outsourcing?

Basic planning processes (set goals, create milestones, assign responsible people, estimate costs, etc.)

Budget planning

- Planning within the department/office budget context
- Project-specific budget

Exit strategy (what will we do if the outsourced entity fails for some reason?)

Prepare staff for any roles they have with the outsourced entity

Prioritize:

- Can it wait for the next budget cycle?
- Can we postpone something else and use that time and those resources?

A few important steps in outsourcing work

Determining appropriate fit with institutional and department goals

Negotiating costs

Ensuring there is a written contract, including how to end the relationship, if needed

Being clear about specific roles for each party involved

Justifying and securing funding

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Additional Resources for Planning and Outsourcing

“Meeting the Institutional Challenge: Managing Growth” (CIEE Management Institute, 2006)

<http://www.ciee.org/images/uploaded/pdf/ManagingGrowth.pdf>

“How to Think Strategically About Outsourcing” (*Harvard Management Update*, 2002)

<http://hbswk.hbs.edu/archive/3022.html>

“The ABCs of Outsourcing” and “Real-World Advice on Blended Teams” articles from *Outsourcing Toolkit* (supplement in *Associations Now*, ASAE, 2009)

<http://www.asaecenter.org/files/FileDownloads/Outsourcing%5FToolkit.pdf>

“An Outsourcing Checklist” (*Associations Now*, ASAE, 2008)

<http://www.asaecenter.org/Resources/ANowDetail.cfm?ItemNumber=35694>

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