

Vetting External Associates Checklist

If you hire drivers, pilots, captains, or other contracted assistants, it is essential that these employees be qualified to perform the tasks for which they were hired.

**CREDENTIALS**

[ ]  If applicable, identify if the potential associate has an active license or certification to perform the tasks required.

• Pilots, drivers, captains, and personnel hired for security must have active licenses applicable to the field location.

• Other associates should have an accredited professional certification (e.g., Mountain guides- AMGA or IFMGA Certification)

[ ]  Identify if the associate has appropriate training. Communicate what additional training will be required.

• Translators, interpreters, and other associates may require specialized training (e.g., crevasse rescue training, wilderness first responder training).

[ ]  Consider confirming that they will be capable of performing strenuous physical activities, if required to do so, in an environment that may be far from medical assistance.

[ ]  Ask for professional references.

[ ]  Follow up with their references, certification/licensing/training agencies, to verify credentials.

**EXPECTATIONS**

[ ]  Discuss the process of making travel arrangements and how costs will be covered.

[ ]  Outline the scope of work you expect the associate to perform. Include the location, duration of activity, and scheduling.

[ ]  Indicate what gear will be provided and what they will need to bring themselves.

[ ]  If necessary, indicate the nature of the accommodations and working conditions.

[ ]  Provide the associate with an assessment of hazards likely to be encountered.

[ ]  Discuss expectations of behavior and conduct.

**EQUIPMENT**

[ ]  Identify if equipment is in good working condition.

[ ]  If applicable, ask for copies of legal equipment registration.

[ ]  Inquire about any potential issues with equipment.

[ ]  Discuss cost coverage in the case of equipment breakdown.

**EMERGENCY PLANNING**

[ ]  Leave a list of hired external associates, and contact information, with your University Emergency Contact.

[ ]  Discuss emergency and contingency plans with the associate. Identify their role during an emergency.

[ ]  Ask about previous experiences in emergency situations.

[ ]  If applicable, discuss necessary safety equipment requirements and use.

Information and assistance regarding:

• Travel and transportation should be directed to the Department of Business Services.

• Consulting and Pcard related service questions should be directed to Procurement & Strategic Sourcing.

• Sponsored agreement specific terms and conditions should be directed to the Office of Research Administration.