

WORKING WITH INDEPENDENT CONTRACTORS

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Overland's Approach

The Overland mission emphasizes discovering how beautiful and exciting the world is through outdoor exploration. This involves working with over a hundred independent contractors (partners) as our groups sea kayak, rock climb, use private transportation services, do service work, and more. This poster deals primarily with activities-based providers.



What are some risks involved in working with partners?

- **Lack of expertise.** When working with partners it's common that your staff and clients are in an environment in which your staff must rely on the expertise of the partner's staff.
- **Lack of oversight.** Working with partners often means that your staff will not be the ones directly overseeing the activity or service being provided.
- **Introduction of an independent agent.** Independent contractors are, well, independent. They may have ways of doing things that you're not comfortable with.
- **Legal complications.** Incidents that occur while your staff and clients are working with partners can be more legally complicated than those that occur in the absence of the partner.

When your clients are out climbing with an ice climbing guide, you need to feel confident in their staff's approach to risk management. You also need to know that they're qualified to teach the necessary skills for ice climbing and that you're clear on your legal relationship.



Process Overview

1. Do you need to work with an independent contractor? Does the activity advance your mission?



2. Consider the risks involved. For example, are you able to evaluate if your partners' staff are equipped to teach the skills necessary for an activity?



3. Select a partner to work with. This should include both a conversation and a signed document (see documents next to the poster for a general example).



4. Continuously review the partners that you work with. Document this process.

Deciding which partners to work with.

There are important practical considerations to make, like the type of activity being offered, the location of the partner, and cost.

Additionally, you should collect information about how they operate. To help with this, Overland asks partners to complete a questionnaire. Some topics covered are listed below. There are copies of an example of a general questionnaire next to the poster.

- Staff training & certifications
- Equipment (safety equipment used, equipment maintenance, etc.)
- Participants/clients (orientation, instruction, supervision)
- Emergency response & serious incident history
- Transportation (if they'll be providing it)



You should also work with your legal team to decide if other documents or agreements are needed, such as a document outlining what your staff will provide and what their staff is expected to provide.

Maintaining a positive relationship with partners.

Once you've initially vetted a partner, you should continually review your relationship and make changes when needed. This review should include the following:

- **Staff & client feedback.** During and after your season, communicate with your staff about their experience with your partners. It's also helpful to collect feedback from clients.
- **Provide feedback.** Based on what your staff and clients say, have a conversation with your partner that addresses any concerns your organization has. Include positive feedback, too!
- **Get feedback.** Ask your partners for feedback on your organization.
- **Require updated questionnaires.** Ask that your partners renew their questionnaire, either by completing a new one or signing off on one they've already completed.