

The Risk Management Report Card

A safe and caring ministry has important safeguards in place today

Your Risk Manager should review this form annually with the agent 120 days before your annual policy renewals
This is optional, but your agent can not offer you your best possible premium with less without your help

Named Insured _____

Policy No. _____

Location address _____

Occupancy _____ # of Risk Locations _____ Building number or sections _____

Please place an 'x' in each 'Y' or 'N' box as it applies and explain all deficient items or make necessary comments. Complete this survey for each main building note the building or section above

Our agency has personally inspected and/or reviewed inspection reports for the entire premises and interior of the building to review these risk factors.

Comments: _____

Number of members: _____ Average weekly worship attendance: _____ Number of paid staff full-time _____ Number of paid staff part-time _____

NA Y N

Personal Property Inventory completed and current? Date Last reviewed _____

Scheduled Property Inventory completed and current? Date Last reviewed _____

Crises plans in place with practice done, exit routes properly marked and properly displayed in people rooms for fire, storm, and such crises? _____

Are staff and volunteers, students for school if one, trained on how to properly respond in an emergency situation? _____

Are staff and volunteers, leaders, ushers, members of church, trained on how to properly respond in an emergency situation? _____

No torn carpeting or worn/defective flooring that could create trips and falls? Date Last reviewed _____

Exit lights, and emergency lighting serviced in last 12 months? Date Last reviewed _____

Exits ways checked for a clear path on a regular bases? Date Last reviewed _____

Smoke detectors checked & serviced in last 12 months? Date _____

Co detectors checked & serviced in last 12 months? Date _____

Central Station or other Alarm certificate on file in our office? _____

Fire Extinguishers serviced in last 12 months? Date serviced _____

Heating & Air Conditioning units checked & serviced in last 12 months? Date of last inspection _____

All furnace and mechanical rooms are free of flammables checked monthly? Date of last inspection _____

No exposed wires? Date of last electrical inspection by an electrician? _____

No outlets overloaded by improper use of extension cords? Date of last inspection _____

No plumbing deficiencies? Date of last inspection? _____

No visible interior water damage on ceilings or walls? Date of last inspection? _____

All down spouting and eaves in good working order? Date of last inspection _____

No signs of roof needing replaced/repared? Age of roof? _____ Date of last repairs or inspection? _____

No visible structural hazards such as cracks in walls, foundation or bowed/bulging walls? Date of last inspection _____

No tuck-pointing (mortar joints between bricks) necessary? Date of last inspection _____

All windows and frames are in good repair? Date of last inspection? _____

No paint is needed on outside of building? Date of last inspection? _____

No visible graffiti issues? Date of last inspection? _____

Are there written procedures in place to keep track of completed work and reported issues that need repairers and such? _____

Good housekeeping is evident? _____

Has a risk management position been established with supporting team members as is appropriate for organizational size and scope of ministry? _____

Parking areas and driveways are in good repair with no potholes or other trip and fall hazards?
Comments or Recommendations: _____

Steps and sidewalks are in good repair with no cracking, uneven surfaces, chipping or other hazards that could create trips and falls?
Comments or Recommendations: _____

All indoor and outdoor steps and stairways have sturdy handrails in place?
Comments or Recommendations: _____

Playground equipment is in good repair and has proper fall-absorbing materials ground surface covering?
Comments or Recommendations: _____

Property Valuation Report completed?
Comments or Recommendations: _____

Does property exterior lighting provide adequate risk management aspects and properly maintained?
Comments or Recommendations: _____

What has been the organization's greatest safety and security challenge and what actions were taken to meet that challenge? _____

What has been the organization's achievement success in reducing risk for itself ? _____

What other things has the organization done to reduce its risk factors? _____

N A Y N

- Does the organization have clearly written procedures for any and all building and property use by outside entities that meets risk management guidelines, kept on file? _____
- Is the outside entity use form on file with agent for review? _____
- Does the organization have clearly written procedures for collecting, counting, depositing and reporting finances by different and more than one person ? _____
- Does the organization have written procedures for the signing of checks and dealing with organizational credit cards ? _____
- Does the organization have an impartial audit done of the organizational books periodically by a professional CPA? _____
- Does the organization have an impartial audit done of the organizational books each year? _____
- Are ushers other offering handlers, for the church trained on how to keep collections safe? _____
- Does the organization have written and followed workers' compensation program that each employee and read, understands and has signed off on as such, and the singed form kept on file ? _____
- Does the organization have written job descriptions ? _____
- Does the organization have a procedure for training each employee about safe work practices and how to operate equipment they are expected to work with ? _____
- Does the organization review the working conditions and work space for each employee as to its space and appropateness for the work of the employee ? _____
- Employment & Volunteer Handbooks & applications reviewed for risk management points and filed with agent for review?** _____
- Have employee and volunteer background and reference checks been conducted? _____
- Have employee, volunteer, and officers been explained the line of authority, decision making, and their responsibilities for the organization? _____
- Are there written procedures for the selection, hiring, and dismissal covering all volunteers and employees? _____
- Are there written procedures that have been adopted to cover the organization should a sexual misconduct issue surface? _____
- An annual employee, volunteer, and officer orientation meeting where organizational procedures, handbooks, forms and policies are reviewed sign off for each, kept on file? _____
- A written procedure for completing an annual review performance with each employee and volunteer, which is signed by the employee or volunteer and kept on file? _____
- A written adult/child ratio that covers all organizational aspects that each volunteer and employee has read, understands, and has sign off as such and kept? _____
- Transportation risk management completed, forms filed with agent for review:** _____
- Is there regular maintenance as factory recommended for each owned vehicle? _____
- Does the driver do an inspection each time the vehicle is driven, sign, date and keep on file? _____
- Is their a clearly communicated, written transportation policy that is reviewed with each driver annually, is the a kept sign off of such annually? _____
- Are their pre-selection procedures and screening of all drivers of owned and non-owned vehicles, annually that is kept on file? _____
- Is their a training program for all drivers of owned vehicles? _____
- Has the issues surrounding 15-passenger vans been properly dealt with? _____
- Is their a written adult/child ratio in place for all drivers and transportation operations of both owned and volunteer vehicles? _____
- If risk is a church have you submitted your staff number form to the agent for review ? _____
- If risk is a school have you submitted your student number form to the agent for review ? _____
- If risk is a school have you submitted your staff number form to the agent for review ? _____
- If risk is a headquarters office have you submitted your staff number form to the agent for review ? _____
- If risk is a camp or retreat center have you submitted your camper day report form to the agent for review ? _____
- Reviewed Claims history, Comments or Recommendations: _____

Y N

- Claim free for the last year ?
- Claim free for the last 2 years ?
- Claim free for the last 3 years ?
- Claim ratio last 3 years , less then 5% ?
- Claim ratio last 3 years, less then 10% ?
- Claim ratio last 3 years, less then 15% ?
- Claim ratio last 3 years, over 15% ?

THANKS FOR TAKING THE TIME TO WORK WITH US ON THIS REPORT CARD. THIS WILL PROVIDE US THE MOST UP TO DATE DATA THAT CAN BEST ASSIST US IN PRESENTING YOUR ORGANIZATION TO THE INSURANCE COMPANY. THIS UP TO DATE DATA WILL ALSO ASSIST US BOTH AS WE WORK TOGETHER WITH THESE ELEMENTS THAT CAN BE CRITICAL IN OUR MINISTRY TODAY.

Notes:

Signature of Person Reviewing form with agent

Please Print Your Name

Position

Date Completed