



# Volunteer Coordinator Manual

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# INTRODUCTION

The history of the Catholic Church is built on people volunteering their time and talent. Volunteers are vital to the success of parish ministries.

## **What is a Volunteer Coordinator?**

A volunteer coordinator could be an employee or volunteer. They are responsible for overseeing the selection of volunteers, assignment of duties, orientation and training, and the designation of select individuals to supervise the volunteers.

This handbook has been developed to support your work as the Volunteer Coordinator. We appreciate your willingness to take on this role. Please feel free to contact the Risk Management Department or your Claims/Risk Manager if you need further assistance or have additional questions.

## **Definition of a Volunteer**

Merriam-Webster dictionary defines a volunteer as “a person who voluntarily undertakes or expresses a willingness to undertake a service.”

A volunteer is a valued part of the church. The volunteer should be at least 18 years of age. If under 18, the volunteer should be accompanied by a parent or have been given permission by the parent to perform volunteer activities while supervised by another adult.

Every volunteer should go through a screening process which will be covered within this handbook. A volunteer is not someone who is compensated for their service or under contract for their service. A volunteer is also not an employee functioning under their job description.

The guidelines in this handbook should be followed for those individuals who have frequent or reoccurring volunteer duties. It may not always apply to the one-time volunteer.



## Selection, Screening and Assignment of Duties

Ideally, a volunteer position description should be created for each potential volunteer activity. This description should outline the tasks the volunteer will be expected to perform, the skills or qualities a volunteer should possess to perform their task, and any orientation or training that the parish can provide. Sample volunteer position descriptions can be found in *Appendix A*.

Once the volunteer positions have been identified, the next step should be recruitment of volunteers. Announcements can be posted in the church or school bulletin, fliers can be sent home with school or RE students, posters can be hung throughout the building, letters can be sent to each parishioner, or phone calls can be made to each household.

All volunteers should be required to complete a Volunteer Application, *Appendix B*. This sample application form asks the volunteer to provide references. It is highly recommended to check references. Each long-term volunteer should be interviewed as part of the application process. Please do your best to utilize volunteers that are the appropriate age and have the skills necessary to perform the tasks/duties they are being asked to do. Although not recommended, if a volunteer is asked to perform a task such as plumbing, electrical or roof work, the volunteer should be licensed. **It is okay not to accept a volunteer for a certain position or at all in order to limit risk.** A sample Volunteer Interview Form can be found in *Appendix C*.

All volunteers are required to comply with Diocesan policy on Safe Environment. Any volunteer that will be working with children or vulnerable adults should be required to have a background check completed. For those individuals that will be involved in fidelity (money-handling) positions such as counting collections, working with scrip, etc., we recommend credit checks be conducted. Various risk management materials that pertain to fidelity controls can be found in *Appendix D*.

Adequate records need to be kept on the selection, screening and assignment of duties for each volunteer. We recommend maintaining these records for a period of three (3) years.

Limit the issuance of facility keys to volunteers. Keys should only be checked out to volunteer supervisors and returned to the office upon completion of the project. It is recommended to maintain a record of all keys that have been checked out. Do not permanently assign keys to volunteers.

## Orientation and Training

This needs to be reviewed and provided as appropriate for each and every volunteer. Never assume someone is qualified. Orientation for new volunteers is only part of the training process as volunteers also need continuing education as they perform their duties.

Volunteer needs to take the applicable online training module(s) available through Catholic Mutual's website [www.catholicmutual.org](http://www.catholicmutual.org).

Each volunteer should be properly trained in the proper use of any equipment or tools needed to perform the task. The equipment (parish or otherwise) should be inspected to determine that it is in safe operating condition and equipped with all applicable safety requirements. If there is any doubt, do not allow to be used. The parish should be responsible to provide any personal protective equipment for volunteers, as needed. Examples would be gloves, safety glasses, goggles, or a respirator.

Never allow a volunteer to provide any homemade equipment. Examples would include homemade scaffolds, ladders, grills, cooking equipment, dunking booths, playground or carnival ride type equipment.

No one can be allowed to volunteer without being screened and granted permission. For minors, permission form from parents/guardians is required. See Parent/Guardian Consent Form, *Appendix E*.

Certain volunteer activities and projects may require a Release Form to be signed by the volunteer, especially for activities with an increased liability exposure such as construction activities. The diocese may use their discretion to decide if a release form should be used on a broader basis. The Adult Volunteer Hold Harmless/Indemnity Agreement can be found under *Appendix F*.

## **Supervision & Support**

Volunteers need to have someone in command so they know who to ask for guidance. Before any project or activity begins, supervisory staff or designated adult supervisors must be present to oversee the work. This is especially important when any minors are participating. Support for the volunteers should also be provided by designating someone they can go to with problems that arise from their volunteer work.

Choose supervisors wisely. Ensure they have the ability, temperament and are given the direction to ensure volunteers are used in a safe and effective manner.

## **Injury/Emergency Procedures**

It is important to know what to do if a volunteer is injured as well as know what to do in case of an emergency. First aid equipment should be accessible in areas used by volunteers. A telephone or other means to contact emergency responders should be available.

Volunteers should know who to call at the parish in case of an emergency or injury. If an emergency occurs, an Accident Investigation Report Form should be completed, *Appendix N*.

Be prepared to cancel any projects that take place outside in case of inclement weather such as lightning, strong winds, etc.

## **Routine Evaluations**

With all volunteers, you should consider doing a routine review of the volunteer's performance. This could help in determining whether you feel the volunteer should be used again in the same capacity. The Post Activity Review Form could be used to conduct such an evaluation, *Appendix G*.

## **GUIDELINES FOR COMMON VOLUNTEER ACTIVITIES**

### **Construction, Assembly Activities**

Volunteers should not be allowed on roofs and scaffolds. Although discouraged, only trained adult volunteers should be allowed to use a ladder. See ladder safety information, *Appendix H*.

Only trained adults should be allowed to operate power tools, (i.e. drills, saws, etc).

Be aware of any projects involving heavy items needing to be lifted or moved.

Parish must ensure the volunteer is of the appropriate age and physically fit to perform such work.

Parish should have an adequate supply of ice melt, salt and/or sand on site.

Parish should ensure volunteer has the proper equipment to complete the required snow and ice removal.

The Winter Maintenance Log, *Appendix I*, should be kept in an accessible location and completed each time snow/ice removal or treatment is performed. It is important to ensure the name of the volunteer performing the task is recorded on the log.



### **Lawn Care Activities**

Ideally, individuals should be 18 and older to operate manual push mowers. An individual **must** be 18 or older to operate riding mowers, trimmers, and other power equipment.

Safety goggles/glasses must be worn any time the volunteer is using a trimmer, leaf blower, etc.

### **Volunteer Parish Nurse Activities**

Does the volunteer have a nursing license and is it current?

The diocese may have a policy regarding these activities or please refer to the Guidelines for Parish Nurse/Health Ministry Programs, *Appendix O*.

### **Home Health Care Activities**

Volunteers should not perform any medical tests, medical evaluations/diagnosis or dispense medicine.



## Money and/or Scrip Handling - Counting of Collections

If volunteer provides this service on a regular basis, consideration should be given to performing a credit check as part of the screening process prior to assigning the volunteer to this task.

Financial control guidelines have been established and should be followed when volunteers work with money, *Appendix D*.

## Driving and Transportation Activities

The Volunteer Driver should be a minimum of 21 years of age and not have any impairment which could prohibit safely driving the vehicle. If the volunteer will be responsible for transporting other individuals, the recommended minimum age is 25.

Volunteer drivers must complete the Volunteer Drivers Form, *Appendix J*. For frequent drivers, a Motor Vehicle Record check (MVR) is recommended.

Volunteers using their own vehicle must maintain minimum liability coverage on their vehicle of 100,000/300,000. The volunteer should be informed in advance that their insurance would be primary if an accident occurred.

Any volunteer that has indicated on the Volunteer Drivers Form having three or more moving violations or accidents within the last three years should be required to take a Defensive Driving Course before being allowed to drive.

Volunteer drivers should also complete the Driver Acknowledgement Form, *Appendix K*.

Towing or attaching trailers or flatbeds to a vehicle is not allowed. The only exception is if the volunteer owns and has driven with an attached trailer due to his business or through personal ownership.

Field trips and youth group trips - Contracting with a bus company is recommended. Absolutely no 11-15 passenger vans are allowed to be used. For private passenger vehicles or when available on other vehicles, everyone must wear a seatbelt. Car seats and booster seats should be used to meet your state law requirements. Maximum driving duration is 8 hours with regular breaks being taken. Always be aware of the risk of fatigue.

Volunteers driving on behalf of the parish need to be safe and courteous drivers. **At no time** should any electronic device such as cell phones, Bluetooth, Blackberry, etc. be allowed while operating a motor vehicle. These devices should only be used when the driver has pulled off the road and is safely parked.

Volunteer should only be allowed to drive for tasks specifically targeted toward their volunteer activity.

## **Food Service – Food Preparation Activities**

Volunteers designated to prepare or serve food should follow proper food handling guidelines, *Appendix M*.

## **Housekeeping/Cleaning Activities**

Volunteers should not use scaffolds or ladders for cleaning projects.

Only trained individuals can operate industrial/propane operated cleaning equipment.

## **Festival Activities**

Do not allow volunteers to bring in any homemade grills or barbeque equipment.

Only trained employees should light pilot lights for kitchen stoves and ovens.

Always keep temporary external cooking equipment a safe distance from buildings.

Volunteers should be instructed to monitor floors and walkways for spills or other debris.

The diocese may have a policy regarding parish festivals or please refer to the Parish Festival Guidelines, *Appendix P*.

## Volunteer Position Description

(Sample Format – Parish Name)

<b>Name of Group/Ministry</b>	Extraordinary Eucharistic Minister to the Sick
<b>Accountability</b>	<i>Parish team and coordinator</i>
<b>Purpose of Ministry</b>	<i>Bring the Eucharist and the prayerful support of the parish to the infirm and shut-ins</i>
<b>Participant Group</b>	<i>Infirm and shut-ins</i>
<b>Activities and Responsibilities</b>	<i>Meet with the infirm and the shut-ins in their homes (or nursing homes). Follow the schedule provided and find a replacement when unable to fulfill duties. Inform coordinator of visits. Maintain confidentiality.</i>
<b>Skills and Qualifications Required</b>	<i>Baptized, practicing Catholic Patient and dependable. Good listening skills.</i>
<b>Time Commitment/ Duration</b>	<i>Two hours per week as per schedule. Two year term, renewable.</i>
<b>Orientation/ Training</b>	<i>Provided by parish team and/or coordinator. Experienced volunteers bring new volunteer along during visits. Annual training workshop.</i>
<b>Support/ Supervision/ Evaluation</b>	<i>Parish team and coordinator. Random calls to participants. Review annually.</i>
<b>Risk Assessment</b>	<i>High Risk</i>
<b>Screening Procedures</b>	<i>Provide a Position Description Form. Fill out necessary forms. Interview Reference checks Police record checks Orientation and training Supervisory checks and evaluations</i>

Date Approved: \_\_\_\_\_ Date Reviewed: \_\_\_\_\_

Ministry Leader: \_\_\_\_\_

Parish Screening Committee Member: \_\_\_\_\_

Pastor: \_\_\_\_\_

## Volunteer Position Description

(Sample Format – Parish Name)

<b>Name of Group/Ministry</b>	Collection Counters
<b>Accountability</b>	<i>Pastor</i>
<b>Purpose of Ministry</b>	<i>To count money from Mass collections and to record envelopes</i>
<b>Participant Group</b>	<i>Parish</i>
<b>Activities and Responsibilities</b>	<i>Two or more individuals per team. Count money from weekly collections. Record envelope contributions on appropriate ledgers. Make up deposit slips and prepare cash for deposit.</i>
<b>Skills and Qualifications Required</b>	<i>Accounting skills. Able to work as part of a team. Honesty and confidentiality.</i>
<b>Time Commitment/ Duration</b>	<i>Two hours per week, as per schedule. Two year term, renewable.</i>
<b>Orientation/ Training</b>	<i>Provided by the Pastor.</i>
<b>Support/ Supervision/ Evaluation</b>	<i>Pastor. Review annually.</i>
<b>Risk Assessment</b>	<i>High Risk</i>
<b>Screening Procedures</b>	<i>Provide a Position Description Form. Fill out necessary forms. Interview Reference checks Police record checks Credit check. Orientation and training Supervisory checks and evaluations</i>

Date Approved: \_\_\_\_\_ Date Reviewed: \_\_\_\_\_

Ministry Leader: \_\_\_\_\_

Parish Screening Committee Member: \_\_\_\_\_

Pastor: \_\_\_\_\_

## Volunteer Position Description

(Sample Format – Parish Name)

Name of Group/Ministry	Catechist
<b>Accountability</b>	<i>Parish team and coordinator</i>
<b>Purpose of Ministry</b>	<i>Provide children and youth with catechetical instruction.</i>
<b>Participant Group</b>	<i>Children and youth; ages 6-14</i>
<b>Activities and Responsibilities</b>	<i>Grade by grade presentation of Catholic teaching in a classroom setting. Sacramental preparation. Plan and implement parish program. Follow schedule and inform coordinator if unable to attend.</i>
<b>Skills and Qualifications Required</b>	<i>Baptized, practicing Catholic Work well with children. Good communication, interpersonal and organizational skills. Imaginative and creative.</i>
<b>Time/ Commitment/ Duration</b>	<i>Two hours per week.  Two year term, renewable.</i>
<b>Orientation/ Training</b>	<i>Provided by parish team and/or coordinator. Periodic ongoing training provided by coordinator.</i>
<b>Support/ Supervision/ Evaluation</b>	<i>Parish team and coordinator. Periodic visits by parish team and/or coordinator. Review annually.</i>
<b>Risk Assessment</b>	<i>High Risk</i>
<b>Screening Procedures</b>	<i>Provide a Position Description Form. Fill out necessary forms. Interview Reference checks Police record checks Orientation and training Supervisory checks and evaluations</i>

Date Approved: \_\_\_\_\_ Date Reviewed: \_\_\_\_\_

Ministry Leader: \_\_\_\_\_

Parish Screening Committee Member: \_\_\_\_\_

Pastor: \_\_\_\_\_

## Volunteer Position Description

(Sample Format – Parish Name)

Name of Group/Ministry	Ushers
<b>Accountability</b>	<i>Parish team</i>
<b>Purpose of Ministry</b>	<i>To help keep the parish organized during Mass.</i>
<b>Participant Group</b>	<i>Parish congregation during Mass.</i>
<b>Activities and Responsibilities</b>	<i>Seat people when church is becoming full. Guide people to Communion. Collect donations. Organize the offertory procession. Distribute the bulletin.</i>
<b>Skills and Qualifications Required</b>	<i>Patience Good interpersonal skills. Follow dress code.</i>
<b>Time Commitment/ Duration</b>	<i>One mass per week as per schedule.</i>
<b>Orientation/ Training</b>	<i>Provided by the parish team. At the start of duties and once per year.</i>
<b>Support/ Supervision/ Evaluation</b>	<i>Parish team.</i>
<b>Risk Assessment</b>	<i>Low Risk</i>
<b>Screening Procedures</b>	<i>Provide a Position Description Form. Fill out necessary forms. Orientation and training</i>

Date Approved: \_\_\_\_\_ Date Reviewed: \_\_\_\_\_

Ministry Leader: \_\_\_\_\_

Parish Screening Committee Member: \_\_\_\_\_

Pastor: \_\_\_\_\_



**References**

Please provide two personal/professional references. If you have resided in this area for less than two years, please provide at least one reference from your previous area of residence.

Name _____			Name _____		
City _____	State _____	Phone _____	City _____	State _____	Phone _____
Relationship _____		Years Known _____	Relationship _____		Years Known _____

**IMPORTANT – Please read and sign below**

The information provided on this form is true and complete. If accepted as a volunteer, any misstatement or omission of fact on this form may result in suspension of my services. I grant permission to check my background and references and release the diocese and all diocesan locations from any and all liability that may result.

I further understand that all persons who will have contact with children or vulnerable adults are required to comply with Diocesan Safe Environment policies and procedures and are required to undergo a state and federal criminal background check.

Print Name: \_\_\_\_\_  
Signature: \_\_\_\_\_  
Date: \_\_\_\_\_

# **VOLUNTEER INTERVIEW**

1. Have you performed this type of work before?
2. What is your experience?
3. Have you operated the machinery or equipment before?
4. Any physical restrictions or health concerns for the position?
5. \* Is the volunteer 21 years of age or older? If not, what is their age?
6. Give volunteer a copy of the Volunteers and the Catholic Church brochure.

\*Minors should never be allowed to operate inherently dangerous power equipment such as power saws, drills or similar equipment. Individuals should be 18 years of age to operate any power riding equipment. See attached list of age appropriate tasks.

**TYPES OF WORK ALLOWED BY AGE GROUP**

<u>AGES</u>	<u>ACCEPTABLE WORK</u>	<u>NON-ACCEPTABLE WORK</u>	<u>ACCEPTABLE TOOLS TO USE</u>	<u>PROTECTION EQUIPMENT REQUIRED</u>
10-14	Simple cleaning operations such as dusting, mopping, and sweeping. Light yard work such as raking, picking up branches/leaves. Serving food at designated food distribution sites.	No use of ladders or scaffolding. No handling of toxic materials. No use of power saws or other power-driven woodworking machines. No structural demolition. No operation of chain saws. No operation of motor vehicles or power-driven hoisting apparatus. No excavation operations. No roofing operations or work on or related to roofs.	Ordinary cleaning and yard work tools such as brooms, shovels, rakes, wheelbarrows, mops, rags and buckets.	Long shirt and pants, shoes or work boots, work gloves (as appropriate to nature of work). Also, any Personal Protection Equipment (PPE) required per safety regulations for proper use of specific tools or materials.
15-17	As above, plus simple construction jobs such as putting up drywall, laying floors, tiles, carpets.	No use of ladders or scaffolding. No handling of toxic materials. No use of power saws or other power-driven woodworking machines. No structural demolition. No operation of chain saws. No operation of motor vehicles or power-driven hoisting apparatus. No excavation operations. No roofing operations or work on or related to roofs.	As above, plus hammers, pry bars, crowbars, floor scrapers.	As above
18-20	As above, including more advanced demolition and construction projects.	No use of scaffolding. No handling of toxic materials. No use of power saws or other power-driven woodworking machines unless properly trained. No structural demolition. No roofing operations or work on or related to roofs.	As above, plus drills and simple power tools.	As above
21 and older (Adult)	All work jobs typically expected of a mission worker and appropriate to skillset of volunteer.	No roofing operations or work on or related to roofs.	Any tools as appropriate to nature of jobs.	As above

# REVIEW OF PARISH ACCOUNTS AND FINANCIAL CONTROL GUIDELINES

The financial control guidelines outlined below are recommended to all parishes. These guidelines are not intended as an all-inclusive money-handling guide, but have been developed as a guideline, which will prevent the majority of embezzlements from occurring.

## Internal control

- All accounts using the parish and/or school's federal ID number must be approved and controlled by the parish council. All account statements must go to the parish and be accessible to the parish finance council.
- The individual who prepares checks should not be authorized to sign checks.
- The person who signs checks should not be allowed to balance monthly bank statements. Monthly bank reconciliations should be submitted with the monthly statements for review by the Finance Council, or review by a knowledgeable individual other than an authorized signer.
- Budgets should be developed and approved. Disbursements not specified in the approved budget should not be allowed without the direct approval of management or the Finance Council.
- Each month, a report comparing actual to budget should be made available for the Finance Council. Significant variances should be investigated, explained, and resolved.
- Clearly define the type of expenses that can be paid with specific funds. Define expenses that are inappropriate. Define the employee's job function as it relates to the account and disbursement function.
- Each check issued by a parish should be signed by at least two individuals. Again, the person preparing the check should not be an authorized signer.
- Signature stamps should not be used to sign checks.
- Checks should not be signed in advance or be signed without documentation.
- Sequentially numbered checks should be used.
- The individual responsible for preparing checks should be required to take an annual vacation.

- Key responsibilities should be separated. One individual should not handle billing, collections, and bank deposits. One of these tasks should be completed by a second individual.
- Comprehensive pre-employment screening should be conducted, including a criminal background check, the verification of educational data, verification of employment history, and checking of references.

## Physical control

- Each parish should own a safe. Collections and all cash should be stored in the safe. The safe must be kept locked at all times (even during parish business hours).
- Deposits should be made on a regular basis. Accumulations of cash and checks totaling \$ 1,000 or more should not remain in the parish safe for a time period longer than 48 hours.
- If possible, parishes should make arrangements for evening and Sunday deposits. Also, many banks will provide facilities for money counting.
- **CHURCH MONEY MUST NEVER BE TAKEN HOME BY ANYONE.**

## Cash Receipts/Money Counting

- Ideally, each parish should have five teams of money counters (consisting of three members per team). If five teams cannot be formed, there must be at least two. There should be at least three members per team. Members of teams must also be shuffled on a periodic basis. Also, husbands and wives should not be allowed on the same team.
- All checks received should be immediately endorsed to the appropriate account. A self-inking endorsement stamp is recommended for this purpose.
- A tape of the cash and checks to be deposited, along with the deposit, should be prepared by one of the individuals. A tape of the receipts of envelopes, along with a summary of totals by account classification should be prepared by the second individual. The totals should then be compared to verify that the amounts are the same. All members of the money counting team should sign the collection summary tape to verify the amount of the collections.
- The recap of the receipts or envelopes along with the tape should then be given to the bookkeeper for entry into the books of record. The deposit slip and second tape should accompany the cash and checks and be deposited intact the day of collection by the team of money counters.
- A comparison of the total of the receipts to the deposit slip must be done by the bookkeeper.

- Cash withdrawal from the deposits must not be allowed.
- A yearly “giving” statement should be distributed to all parishioners.

## **Annual financial review**

- It is strongly recommended that each parish conduct a review of parish accounts on an annual basis. Accordingly, each parish should form a review committee composed of at least two individuals. Signers and preparers of checks should not, under any circumstances, participate nor have the opportunity to be a member of the parish financial review team. Also, trustees or business managers should not be on the review team. It is highly recommended that the parish’s finance committee (unless members are the individuals noted above) be allowed to handle the review.
- The attached Catholic Mutual Parish Financial Review Verification form can be used by the financial review team. Any questions on how to complete the “self” review should be directed to the Risk Management Department at **(800) 228-6108**.

# Parish Financial Review Verification Form

Parish name: \_\_\_\_\_

Parish address: \_\_\_\_\_

Date(s) of review: \_\_\_\_\_

Arch/Diocese: \_\_\_\_\_

1. All parish checking accounts must be inspected by the financial review team for accuracy and irregularities. Examples of parish accounts are home and school accounts, bingo accounts, cemetery accounts, athletic booster accounts.
2. The review team must inspect canceled checks from each account for several months to ensure that checks are written for legitimate purposes and to businesses with which the parish does business. Please ensure that checks have been cashed and that each cashed check was endorsed by the proper party. Also, verify that checks were not altered prior to cashing.
3. The review team should verify that payroll tax returns are being filed on a timely basis. Additionally, it should be verified that payroll taxes are being paid on time.
4. If irregularities are found in parish accounts, on canceled parish checks, on the payment of payroll taxes or tax returns, or if the parish is not complying with the financial control guidelines, contact your Arch/Diocesan financial manager.

## Members of Parish Review Team:

_____	_____	_____
<b>Print name</b>	<b>Signature</b>	<b>Date</b>
_____	_____	_____
<b>Print name</b>	<b>Signature</b>	<b>Date</b>
_____	_____	_____
<b>Print name</b>	<b>Signature</b>	<b>Date</b>
_____	_____	_____
<b>Print name</b>	<b>Signature</b>	<b>Date</b>

# SCRIP HANDLING GUIDELINES

Many parishes utilize Scrip as a fundraiser. Parishioners purchase Scrip from the parish, which they then use at local stores such as JC Penney, Kohl's, or K-Mart. Scrip is also commonly used to pay utility bills. There are literally hundreds of businesses nationwide that participate in the Scrip program. When parishioners purchase items with Scrip, the parish receives a small percentage as the fundraiser contribution.

People order Scrip from the parish, which in turn orders Scrip from a company such as the National Scrip Center. The Scrip then arrives at the parish to be picked up by or distributed to parishioners.

Scrip can be an excellent fundraiser if it is properly handled and safeguarded. Since Scrip is an alternative form of currency, it should be treated as cash. Accordingly, parishes should practice safe procedures in the handling of Scrip. The following procedures should be followed:

1. Volunteers should not take Scrip home for delivery. Parishioners participating in the program should pick up Scrip at the parish in a centralized location. Scrip can be sent home from school with a person's son or daughter if the person signs a waiver providing the parish permission to do this (a sample waiver is attached).
2. Scrip should be stored in a safe, which is locked at all times. The safe should be kept in a non-obvious, secure area on the parish premises.
3. A large inventory of Scrip should not be maintained. Scrip can be received from the National Scrip Center (or other Scrip clearinghouses) in one day by airmail. Parishes should only order the amount of Scrip which has been requested by program participants.
4. Adequate bookkeeping that tracks the purchase and distribution of Scrip is required. At least two people should have dual responsibility for the maintenance of Scrip records. When a parish receives an order of Scrip, serial numbers should be recorded. In the event that Scrip would be lost or stolen, the recording of the serial numbers would allow the parish to quickly identify which Scrip was missing. Local stores could then be alerted to watch for the stolen Scrip.
5. Scrip records should be audited or reviewed by the parish finance committee on a regular basis. Additionally, the Scrip records should not be stored with the Scrip, but in a separate area.

Scrip can be an excellent way for a parish to raise funds. To be successful, parishes must understand that Scrip is a cash equivalent and should be treated with the same care.

## PERMISSION FOR CHILD/WARD DELIVERY OF SCRIP AND WAIVER OF CLAIM

I, \_\_\_\_\_ give permission to  
Parent/Guardian  
\_\_\_\_\_ to deliver Scrip,  
Parish/School  
which I have ordered from parish/school, to my child/ward, \_\_\_\_\_.  
Child/Ward

I understand that my child/ward will be responsible for the safe transport of the Scrip from school to my home and certify that I have discussed the responsibilities associated with the transport of the Scrip with my child/ward. I further understand that I have the option of personally picking up my Scrip orders from the parish/school rather than having my child/ward transport it.

I agree that once the parish/school delivers the Scrip to my child/ward that the parish/school is not responsible for any Scrip which is lost, stolen or misplaced. I hereby waive any right of recovery that I may have against the parish/school for Scrip which is lost, stolen or misplaced after it is given to my child/ward.

This agreement is effective for the \_\_\_\_\_ school year.

\_\_\_\_\_  
Parent/Guardian Signature

\_\_\_\_\_  
Date

## PARENT/GUARDIAN CONSENT FORM

Participant's Name: \_\_\_\_\_

Birth Date: \_\_\_\_\_

Parent/Guardian's Name: \_\_\_\_\_

Home Address: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

I, \_\_\_\_\_, grant permission for my child, \_\_\_\_\_,

Parent/Guardian Name

Child's Name

to participate in this parish event that may require transportation to a location away from the parish site. This activity will take place under the guidance and direction of parish employees and/or volunteers from the parish. A brief description of the activity follows:

Type of Activity: \_\_\_\_\_

Destination/Location: \_\_\_\_\_

Individual in Charge: \_\_\_\_\_

As parent and/or legal guardian, I remain legally responsible for any personal actions taken by the above named minor ("participant").

I hereby authorize \_\_\_\_\_ to take my child for medical treatment in the event of an emergency in which neither parent can be reached. I authorize any licensed physician or medical center to treat my child.

Signature \_\_\_\_\_ Date: \_\_\_\_\_

**ADULT VOLUNTEER  
HOLD HARMLESS/INDEMNITY AGREEMENT**

**PARISH:** \_\_\_\_\_  
(PARISH is understood to include the Arch/Diocese of \_\_\_\_\_)

**ADULT VOLUNTEER:** \_\_\_\_\_

**DATE(S) OF VOLUNTEER ACTIVITY:** \_\_\_\_\_

**TYPE OF VOLUNTEER ACTIVITY:** \_\_\_\_\_

The above named ADULT VOLUNTEER agrees to defend, protect, indemnify and hold harmless the above named PARISH against and from all claims arising from the negligence or fault of the above named ADULT VOLUNTEER which arise out of the above named VOLUNTEER ACTIVITY at the above named PARISH.

Additionally, the above named ADULT VOLUNTEER agrees to protect, defend, hold harmless and fully indemnify the above named PARISH for any claim or cause of action whatsoever arising out of the above mentioned VOLUNTEER ACTIVITY which takes place during the above identified DATE(S) OF VOLUNTEER ACTIVITY that is brought against the PARISH by the above named ADULT VOLUNTEER or their family members whether such claim arises from the alleged negligence of the PARISH, its employees or agents or ADULT VOLUNTEER's negligence. If any portion of this agreement is held invalid, it is agreed that the balance thereof, shall continue in full legal force and effect.

**SIGNED BY:** \_\_\_\_\_

**NAME (Please Print):** \_\_\_\_\_

**DATE:** \_\_\_\_\_

## POST ACTIVITY REVIEW FORM

With all volunteers, you should consider how you would answer the following questions to determine whether or not they should be used again in the same volunteer capacity or whether they'd be suited better for an alternate form of volunteer duties. This should be part of your routine review of every volunteer or volunteer activity.

1. Did the volunteer follow instructions?
  
2. Were the volunteer's skills suited to the ministry for which he/she signed up?
  
3. Did the volunteer drive a motor vehicle as part of their ministry?
  - a. If yes, did they have adequate liability insurance coverage of \$100,000/\$300,000 on their vehicle?
  
  - b. Did they successfully pass the Motor Vehicle Record Check (MVR)?
  
  - c. Did they restrict their driving to ministry activities only?
  
4. Were there any volunteers that were not appropriate for the activity? If so, should keep a written record of this in parish files.

## **Use Scaffolding Equipment & Ladders Safely**

Use of scaffolding equipment and ladders can create serious injury and liability exposures for the Catholic Church. These exposures increase significantly when equipment is in poor condition or used improperly. Catholic Mutual handles numerous claims involving employees and volunteers falling off step-stools, ladders, and scaffolds. While conducting nation-wide safety inspections, Catholic Mutual Group's Loss Control Representatives have often visited locations that have wobbly, broken, and unstable ladders.

### **Safe ladder use**

The most common causes of falls from ladders include: overreaching, which can make the ladder tip; not maintaining a center of balance when getting onto or off the ladder from a roof or platform; having the ladder slide out from under the user; and using ladders which are unstable, wobbly, and not safe. Recommendations to prevent these accidents from occurring include the following:

- Avoid over-reaching to prevent the ladder from tipping. The “belt buckle rule” is a sound guideline to follow in this situation. The “belt buckle” rule states that you should never allow your belt buckle to move past the frame of the ladder when reaching to the sides. Rather than taking a short cut by over-reaching, get off the ladder and move it closer to the area you are working on.
- Whenever you're climbing on or off a ladder, keep your weight in the center of the ladder. Never climb past the top two steps. Each ladder should be labeled with safety warnings that indicate when you should stop climbing. Always read each safety label before climbing.
- The ladder should be positioned on a stable surface and preferably braced or held by a co-worker. It may also be appropriate to secure the ladder with rope or strong elastic cord.
- Is the ladder in good condition? Unstable, wobbly ladders affect balance and contribute to many falls. Therefore, please discard all ladders which are in poor condition. Simply repairing the ladder is not recommended, as the materials and workmanship may not meet manufacturer's requirements.

### **Safe scaffold use**

While only a small percentage of locations we visit own or rent scaffolds, often the individuals using this equipment have not been properly trained and do not use appropriate safety features required by the manufacturer. Recommendations to prevent falls from scaffolds include:

- Transfer the risk by hiring a qualified company to perform complex repair or renovation projects, especially those that require the use of scaffolding equipment. Always remember to obtain a Certificate of Insurance naming the (Arch)Diocese and the location as additional insureds.

- Control the risk! If hiring a qualified contractor is not possible, and parish employees or volunteers use scaffolding equipment, please ensure they have been trained and that all applicable safety guidelines are followed. Appropriate safety railings, fall protection, and outriggers should be utilized. An outrigger is a brace support which extends out from the base posts of the scaffold to greatly improve the stability and reduce the potential of having the scaffold tip over.

Following these recommendations will improve worker safety and prevent accidents. Please contact the Risk Management Department at Catholic Mutual if you need additional information.





## **Slips, Trips and Falls**

### ***Ice and Snow Removal Procedures***

Numerous injuries occur on (Arch) diocesan properties during the winter months as a result of slips and falls on icy or snowy surfaces. While some injuries may be minor in nature, there are also those that result in serious injuries to the head, arms, legs or back. Many of these injuries may have been prevented if an ice and snow removal program were in place.

Implementation of a program is important to ensure ice is properly treated and snow is removed from your premises prior to visitors/employees arriving for mass or any other function at your facilities.

In an effort to minimize injury on your property, the following maintenance recommendations should be followed:

1. Instruct your employees or schedule volunteers to arrive at the facility early enough to remove the ice and snow prior to other individuals coming onto the property.
2. Maintain adequate supplies of ice melt and sand and have it available to make the walkways safe for foot traffic. A bucket of salt/sand with a scoop should be kept by the main doors of buildings that are used during times you are not available. You cannot always be there when weather worsens, so the supplies should be available where others can utilize them.
3. Proper snow removal equipment is a necessity in removing ice and snow and should be readily available. If volunteers are utilized, proper training on mechanical equipment (i.e. snow blowers) is imperative.
4. Pay special attention to areas where water drains off the roof and crosses walking paths to the buildings. These areas may require frequent monitoring as they can become “black ice” with a sudden drop in temperature or in the evening hours. Also, take extra care with walkways on the north side of your buildings or those that are consistently in the shade.
5. Keep a maintenance log that will document shoveling, salting and sanding activities. This log could be kept on a clipboard near your shovels and ice treatment supplies for easy recordkeeping. We recommend these records be retained for at least three (3) years. This documentation can also provide a strong defense when responding to allegations of negligence in the event someone is injured on your property. A sample Winter Maintenance Log is attached.
6. Ensure you have an adequate number of floor mats located inside the entrance doors to your buildings for removal of excess moisture from shoes of individuals entering from the outside.



# VOLUNTEER DRIVER FORM

Name of Driver: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Drivers License #: \_\_\_\_\_ State Issued: \_\_\_\_\_

Year, Make & Model of Vehicle: \_\_\_\_\_

Insurance Company's Name: \_\_\_\_\_

Liability Limits: \_\_\_\_\_

(Minimum Limits of \$100,000/\$300,000 Required)

Agent's Name: \_\_\_\_\_

In order to provide for the safety of those we serve, we must ask each volunteer driver to list all accidents or moving violations they have had in the last three years:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Please be aware that as a volunteer driver, your insurance is primary.**

Thank you for helping us with our transportation needs.

### Certification

*I certify that the information given on this form is true and correct to the best of my knowledge. I understand that as a volunteer driver, I must be 21 years of age or older, possess a valid driver's license, have the proper and current license and vehicle registration, and have the required insurance coverage in effect on any vehicle used to transport students. I agree that I will refrain from using a cell phone or any other electronic device while operating my vehicle.*

\_\_\_\_\_  
Volunteer Driver Signature

\_\_\_\_\_  
Date

## Driver Acknowledgement Form

I am aware I am not to operate any electronic devices while driving. \_\_\_\_\_

I will only use a cell phone when safely parked or during an emergency. \_\_\_\_\_

All passengers at all times will be required to wear a seat belt. \_\_\_\_\_

I have phone numbers of individuals to call in the event of an emergency or contact when needed. \_\_\_\_\_

Signed: \_\_\_\_\_

Date: \_\_\_\_\_



## LAWN MOWING GUIDELINES

- Persons under the age of 18 should not be allowed to operate tractors, trimmers, riding lawn mowers or other power equipment.
- No persons, other than the operator, should ride on tractors or lawn mowers.
- While not recommended, with proper training, individuals over the age of 16 could be allowed to operate a manual push mower.
- Persons under the age of 16 should not be allowed to fuel any gasoline-powered equipment.
- All fuel should be stored in properly labeled and approved containers. Type II safety cans are recommended. Quantity of fuel should be limited to 5 gallons or less.
- Safety glasses and hearing protection should be worn at all times.
- Manufacturer's maintenance and safety guidelines for all equipment should be followed. Frequent inspection of equipment is essential.
- Persons under the age of 16 should be given tasks appropriate to their age and skill level. Tasks such as raking or bagging would be acceptable. Heavy lifting should not be allowed.
- Many states require work permits for employees that are minors. Check with your state requirements to ensure compliance.



## ***Proper food handling and storage – reducing the risk of contamination***

Due to the illnesses and incidents which have occurred across the United States, there has been more media coverage and information concerning food poisoning. Recently, this has included newspaper articles and television news programs. All have reviewed illnesses which can and have occurred. What is your risk of exposure, and what safeguards should you practice to reduce the potential of a foodborne illness?

### **Handle food safely**

Meat and poultry processors have begun providing additional labeling on packages to better educate and protect consumers. Government agencies including the USDA have been underway in establishing stricter testing and inspection requirements for food processors, as well as programs to assess food safety along the entire food distribution chain. It is important to understand that an improved inspection system can't replace good sanitation and safe food handling by those food handlers responsible for the final storing, preparing, and serving of food. This would include restaurants, schools, parishes, and consumer households. As many schools and parishes routinely prepare and serve food, the following information is being provided to review safe storing, preparation, and serving of food.

- Refrigerators should be kept at 40 degrees or cooler. Freezers should be kept at 0 degrees. Raw meat and poultry should be refrigerated as soon as possible after purchasing or receiving. At the grocery store or deli, keep raw meats and poultry separated from other perishables. Never thaw frozen meat and poultry on the kitchen counter. Thaw them in the refrigerator. If in a hurry, thaw in a bag under cold running water. If a microwave is used for thawing, the food should be immediately cooked. Always refrigerate when marinating food.
- Canned goods should be stored in a cool, dry area and should be free of cracks, dents, and bulging.
- Cooked or prepared food requiring refrigeration should never be left unrefrigerated for more than two hours. In a warm environment, food should sit out no longer than one hour. Refrigerate or freeze cooked/prepared foods in shallow containers rather than deep containers.
- Refrigeration and freezing does not kill bacteria on food which sat out too long and has started to spoil. **When in doubt, throw it out.**

Two of the more common types of food poisoning are caused from salmonella and E.coli bacteria. At least 40,000 salmonella infections are reported annually. Experts estimate 500,000 to 4 million infections actually occur.

Any raw food of animal origin (i.e. meat, poultry, eggs, raw milk, fish, and shellfish) may carry salmonella. Food can be contaminated with E.coli when a food handler or cook does not follow good sanitary procedures. Critical to this is washing hands after using a bathroom.

## Don't let bacteria spread or grow

The key to preventing an exposure is to not allow any contamination while preparing food and to effectively destroy bacteria during the cooking process. The following steps will greatly reduce the likelihood of a food related illness.

- Inspect the food to see if there are any signs of contamination or spoilage. Fish, poultry, fruits, and vegetables should be thoroughly washed/rinsed.
- Always wash your hands with soap prior to handling and preparing food. You should also rewash your hands **prior** to preparing another type of food or when using a new knife/utensil.
- Raw meats, fish, and poultry should be cut on an acrylic cutting board, not wood. Use a wood cutting board for fruits and vegetables only.
- Never serve food on a plate or platter which raw meat, fish, or poultry was cut or prepared on.
- Never let raw meat, fish, and poultry or their juices come in contact with other foods.
- If the work area was cleaned with a dishcloth, always immediately switch to a clean one or use disposable paper towels.
- After cleaning utensils and work areas, an additional measure is to sanitize. This can be done using 2 to 3 teaspoons of household bleach in one quart of water, then thoroughly rinsing with cold water.
- Always cook food thoroughly. Only thorough cooking destroys bacteria. Thermometers are recommended to determine if the internal temperature of the food you are cooking has reached a safe temperature. Internal temperatures should reach 160 degrees. If the food includes poultry, the temperature should reach 185 degrees.
- If serving food for an extended period, hot foods should be kept above 140 degrees and cold foods below 40 degrees.

## More information

Additional information is available on the Internet from the USDA Food Safety and Inspection Service Home Page at <http://www.usda.gov/fsis>, or by calling the USDA Meat and Poultry Hotline at 1-800-535-4555. Another source is your local government Health Department.



# ACCIDENT INVESTIGATION REPORT

## I. Identification of the Accident:

Name of Injured: \_\_\_\_\_ Date of Accident: \_\_\_\_\_

Time of Accident: \_\_\_\_\_ Location of Accident: \_\_\_\_\_

## II. Nature of Injury:

Exact part of body affected and type of injury:

\_\_\_\_\_  
\_\_\_\_\_

Description of HOW and WHY accident occurred:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name(s) of witnesses:

\_\_\_\_\_  
\_\_\_\_\_

## III. Accident Prevention Information:

Equipment, tool, or thing causing injury: \_\_\_\_\_

Was accident caused by failure to use or observe safety practices, policies, or regulations?

\_\_\_\_\_

## IV. Corrective Action:

What corrective action can be done to prevent a recurrence of this accident/injury?

\_\_\_\_\_  
\_\_\_\_\_

Comments/Recommendations

\_\_\_\_\_  
\_\_\_\_\_

Person(s) responsible for corrective action:

\_\_\_\_\_  
\_\_\_\_\_

Safety Director/Manager Review:

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Signed

\_\_\_\_\_  
Date

# CATHOLIC MUTUAL GUIDELINES FOR PARISH NURSE/HEALTH MINISTRY PROGRAMS

## Necessary Qualifications

The parish nurse should be a professional registered nurse who has completed additional studies in the areas of parish nursing and spiritual formation.

### Qualifications/licensing requirements:

- Graduate of an accredited school or college of nursing.
- Currently licensed as a professional registered nurse (RN).
- At least three years of nursing experience in a clinical setting.
- Possession of a valid driver's license.

## What insurance and liability issues need to be addressed?

Listed below are the insurance requirements and guidelines for parish health ministry.

### *Who is covered?*

Insurance coverage is dependent upon which option a parish chooses to provide health ministry. If the parish contracts with an agency or hospital/care center, the parish nurse must provide proof that he or she is covered by that organization's professional liability insurance. Additionally, the outside agency or hospital must name the parish and the Arch/Diocese as an additional insured under the hospital's/nurse's professional liability coverage. Also, it is recommended that the outside agency or hospital sign the Health Care Institution Hold Harmless/Indemnity Agreement.

If a parish chooses to directly employ a parish nurse or to utilize the volunteer services of a parish nurse, then the parish and the parish nurse are automatically covered by The Diocesan Insurance Program. This coverage only applies while the nurse is working or volunteering for the parish (not while the parish nurse is working for other organizations).

Please note that there is no insurance coverage through Catholic Mutual for a physician participating in a parish's health ministry program.

## **Pre-screening for parish nurse employees and volunteers**

The parish could be held liable for failure to verify credentials and perform background checks. Considering the nature of parish nursing and the potential high risks involved with a parish health ministry program, verification of credentials and background checks must be performed on parish nurses who are employed or who volunteer.

The *credential* check must:

- Verify that the parish nurse has a valid license as a registered professional nurse in the state in which the nurse practices.

The *background* check must include the following:

- Both employment references and personal references.
- A criminal background check.
- Driver record check.

It is very important that the parish verify the nursing license along with performing the background checks. Failure to do so will greatly increase the parish's liability associated with the parish health ministry program. If the parish contracts with an agency or hospital/care center for nursing services, verify that the agency or hospital/care center has performed credential and background checks.

### **Risk and liability concerns**

There are many liability concerns associated with a parish health ministry program. The most common allegation against a parish nurse would be that he or she overstepped the boundaries of their professional expertise. Adhering to the following guidelines will assist in reducing the liability for a parish's health ministry program.

- All parish nurses should be licensed as registered nurses, be a graduate of an accredited nursing program and a graduate of a parish nurse preparation program.
- Parish nurses must keep records on all parishioner-clients. The records are confidential between the client and parish nurse and should be kept in a locked cabinet. Even though a parish nurse may be reporting to the pastor/parish director or business administrator, the records are confidential unless otherwise released with the client's written permission.
- A parish nurse cannot provide a medical diagnosis. Appropriate procedures should be followed for referral to physicians and other healthcare providers as needed.
- All abuse involving minors must be reported to the appropriate governmental agency.
- All abuse involving adults must be reported to the appropriate governmental agency.
- A parish nurse cannot dispense medication. This includes non-prescription or over-the-counter medication.
- All acts delegated within the scope of professional nursing to an LPN or less skilled assistant must be in compliance with the State Requirements.
- All non-RN employees/volunteers should have professional experience in the ministry in which they are participating.

### **Liability involving transportation**

Most parish nurses will use their own automobile to carry out certain nursing activities. The Diocesan Insurance Program provides an excess liability policy over and above a nurse's personal automobile liability policy. However, it is important for parish nurses to maintain liability coverage levels of \$100,000 per person, \$300,000 per accident in order to provide adequate protection.

**HEALTH CARE INSTITUTION**  
**HOLD HARMLESS/INDEMNITY AGREEMENT**

HEALTH CARE INSTITUTION: \_\_\_\_\_

PARISH(S): \_\_\_\_\_

DATES OF SERVICES: \_\_\_\_\_

The above named HEALTH CARE INSTITUTION agrees to defend, protect, indemnify and hold harmless the above named PARISH(S) and the Arch/Diocese against and from all claims arising from the negligence or fault of the above named HEALTH CARE INSTITUTION or any of its clients, patients, employees, agents, family members, officers, volunteers, helpers, partners, organizational members and associates, and parish nurse in connection with the performance of parish nurse duties for the above named PARISHES.

The above named HEALTH CARE INSTITUTION agrees to provide a certificate of insurance to the PARISH(S) which provides evidence of workers compensation insurance, general liability coverage of not less than two million dollars (\$2,000,000) per occurrence and nurses professional liability coverage of not less than two million dollars (\$2,000,000). HEALTH CARE INSTITUTION also agrees to have the PARISH(S) and Arch/Diocese named as an “Additional Insured” on its general liability and nurses professional liability policies for activities carried out in performance of the Parish Nurse Program and for claims made by its patients, clients, employees, agents, guests, invitees, customers, partners, family members, organizational members and associates, and the parish nurse. It is agreed that HEALTH CARE INSTITUTION also agrees to ensure that its general liability and professional liability insurance policies will be primary in the event of a covered claim or cause of action against PARISH(S).

If and only if HEALTH CARE INSTITUTION fails to comply with the above (second) paragraph, the HEALTH CARE INSTITUTION agrees to protect, defend, hold harmless and fully indemnify the above named PARISH(S) and Arch/Diocese for any claim or cause of action whatsoever which arises from the performance of parish nursing duties or that is brought against the PARISH(S) and/or the Arch/Diocese by the above named HEALTH CARE INSTITUTION, or its patients, clients, employees, agents, guests, invitees, customers, partners, family members, organizational members and associates, and the parish nurse, whether such claim arises from the alleged negligence of the PARISHES, their employees or agents or HEALTH CARE INSTITUTION and/or parish nurse’s negligence.

SIGNED BY: \_\_\_\_\_  
(Must be an officer of HEALTH CARE INSTITUTION)

NAME & TITLE: \_\_\_\_\_

DATE: \_\_\_\_\_

# PARISH FESTIVAL GUIDELINES

The following safety and insurance guidelines are designed to assist festival committees in the planning and management of parish festivals. These guidelines focus on safety recommendations to reduce or prevent the most common claims associated with parish festivals. Catholic Mutual has much additional information available on specific parish festival safety issues. Please feel free to contact our Risk Management Department at (800) 228-6108 to request additional information or receive a clarification on items in this handout.

## FESTIVAL SUPERVISION

Good planning and supervision are the foundation for holding a successful parish festival. Parishes should have a festival chairperson that is responsible for communicating all policies and procedures to parish festival workers. In addition to a festival chairperson, each operational area of a parish festival should have a supervisor. As with the festival chairperson, the supervisor's responsibility will be to alert parish festival workers of policies and procedures. It is strongly recommended that parishes develop written guidelines for the operation of their festivals which are handed out to all volunteer supervisors and workers. It is our experience that many problems occur at festivals when policies and procedures are not formalized and communicated to the proper individuals. On the contrary, we have found that parishes that utilize and implement a well-organized plan have a successful and safe parish festival.

## CERTIFICATES OF INSURANCE AND VENDOR AGREEMENT

The Parish Festival Vendor Hold Harmless/Indemnity Agreement should be signed by vendors who provide services at parish festivals. The Parish Festival Vendor Agreement must be signed by the following types of parish festival vendors:

1. Ride and game vendors
2. Tent companies
3. Security companies
4. Suppliers of large quantities of food
5. Vendors who provide medical services

The Parish Festival Vendor Agreement requires the festival vendor to provide the parish with a certificate of insurance documenting general liability coverage in the amount of two million (\$2,000,000) dollars per occurrence. The certificate of insurance must name your parish and the (Arch)Diocese as an additional insured. It is not adequate to obtain a certificate of insurance from a parish festival vendor which names the parish as a "certificate holder."

## DO NOT SIGN CONTRACTS WITHOUT APPROVAL

It is very important to read a contract before signing it. It is equally important to understand what the contract says. For this reason, Catholic Mutual and your (Arch)Diocese has a contract review policy. Contracts in which a parish festival chairperson signs which contain hold harmless, indemnity, or similar insurance wording must be reviewed by Catholic Mutual.

In the past, there have been many contracts which parishes have signed relating to parish festivals, which have contained very unfavorable wording. Most of the unfavorable contracts contained hold harmless and indemnity wording that required the parish to pay for any type of claim which happened during the parish festival. Since the insurance program does not cover any type of claim that ever happens, parishes that signed these types of contracts were actually risking parish assets.

Another type of unfavorable contract commonly signed by parishes is a contract requiring the parish to be responsible for any damage that occurs to equipment which is rented. In these instances, the parish has agreed to pay for damage to the equipment regardless of how it happens, even if the damage was due to natural causes such as wind or lightning. The insurance program does not provide automatic insurance coverage for another organization's property. Considering this, the parish would be responsible for the damaged equipment.

A parish festival chairperson should never sign a contract, which contains wording as described above. It is only acceptable to accept responsibility for claims or property damage which the parish would be legally responsible for in the absence of the contract. Remember that no matter how small a contract may be, if it contains unfavorable hold harmless, indemnity or reimbursement language, the parish is risking severe financial burden if a liability claim or property damage occurs. To ensure that Catholic Mutual has adequate time to review a contract, please allow at least ten (10) business days for review. When signing of a contract before it has been approved is a necessity, write on the contract, "This contract is contingent upon the approval of our insurance company representative." This will allow you to void the contract if necessary.

## **SAFETY ON FESTIVAL GROUNDS**

Most claims associated with parish festivals result from trips, slips and falls on parish grounds. Many of these accidents can easily be prevented with proper planning and periodic inspections of the grounds during the festival. Below we have identified some common physical safety hazards at festivals, along with suggestions to alleviate the safety hazard and greatly reduce the parish's liability in the event of an accident.

- **Electrical cords and hoses** - Electrical cords and hoses in walkways present a common trip hazard at parish festivals. Vinyl cord and hose protectors should be used to combat these trip hazards and reduce the parish's liability. Other ways of dealing with these trip hazards are taping or tacking down the loose cords and hoses or placing orange cones at either end of a cord or hose extending across a walkway to identify its presence by making it more obvious.
- **Lighting** - As the majority of parish festivals extend into the evening hours, adequate lighting is essential to reduce the parish's liability in the event of an evening fall. The festival grounds should be well lit as well as parking areas provided by the parish. Temporary lighting may need to be installed to ensure adequate lighting.
- **Tent stakes and ropes** - Tent stakes and ropes should be marked with orange flags to identify their presence. In the event that an individual trips over a tent stake or rope, the presence of an orange flag will greatly reduce the parish's liability.

- Debris on grounds - Many accidents occur when people slip on food or litter while on festival grounds. Although it is difficult to completely eliminate this problem, plenty of trash receptacles should be provided. These receptacles should be periodically emptied to ensure that festival patrons have an area to discard litter. In addition to providing trash receptacles, the grounds should be periodically inspected and cleaned where needed to make sure undesirable amounts of litter are not accumulating on the grounds.

## **SECURITY**

Parish festivals need a security plan. Formal security is necessary, as parish festivals deal with large amounts of money and high volumes of people. It is highly recommended that parishes utilize security rental agencies. When hiring private security, be sure to check references and verify that you have hired a reputable security company. Once a security company is hired, allow the company to manage and supervise their own employees. Remember that the security company is a professional organization with experience in providing security at events such as your parish festival.

When confrontations between festival patrons occur, allow security personnel to handle these types of situations. Parish festival volunteers are not trained to deal with these types of situations and in many cases make the situation worse. The parish can be held liable in cases where a festival worker attempting to break up a fight inadvertently causes an injury.

Security during non-festival hours is as important as security during festival hours. During time periods when the festival is not operating, vandalism and theft can occur on festival grounds. For this reason, it is highly recommended that security guards be used during non-festival operating evening hours. In addition to private security, lighting is very important. Lighting should be maintained as a security measure even when the festival is not operating. The presence of night security guards and lights will greatly deter potential vandals and thieves.

## **PARKING**

Parking is a concern for parish festivals. Similar to the actual festival grounds, injuries can occur in parking areas. Additionally, vehicles can be damaged or stolen.

Adequate lighting is perhaps the most important component for a safe parking lot. Often times, temporary lighting is needed to provide adequate lighting in a field or paved area that is not normally used during evening hours, but will be used for parking during a festival. Another concern is whether or not the parking area is level. Although vehicles are not usually damaged from an uneven surface, an even surface is necessary to ensure that people do not trip and fall while walking to and from their vehicles.

Although we can attempt to provide a well-lit parking lot, we cannot guarantee that a vehicle will not be vandalized or stolen. For this reason, we recommend posting signs at the entrance to lots indicating, "*The parish festival will not be responsible for damaged or stolen vehicles.*"

Parking space must be made available for emergency vehicles. Additionally, there must be access routes to and from the festival and through parking lots for emergency vehicles to travel. When planning your festival, keep in mind that the fire department, police, or an ambulance service may need access to your festival if an emergency occurs.

## **MEDICAL SERVICES**

As injuries do occur at parish festivals, it is very important that medical services be utilized to reduce the effects of the injury. This is very important from both a medical and legal standpoint. The type of medical service needed at a parish festival will vary by the size and type of activities at the festival. For small, family-oriented festivals, it would be adequate to simply have first aid supplies available in the event of injury. For festivals ranging from 500 to 1500 people, the festival should have a first aid station on festival grounds. For festivals that exceed 1500 people, parishes should seriously consider contracting with an outside vendor to provide on-site medical services.

First Aid stations should be visible and easily detected by an injured person and be equipped to deal with minor injuries such as cuts, abrasions, and sprains. When a major injury occurs, an ambulance should be called immediately. Whenever medical treatment is provided, it should be documented with a written record. If an individual that is injured denies medical treatment, a signed refusal of medical treatment should be obtained from that individual. Written documentation of patients should include a name, nature of injury, type of treatment, and the time.

Local police and hospitals should be alerted prior to a parish festival so these entities are aware of the possibility for the need of emergency medical services. Hospitals and emergency centers should be given relevant information such as the dates and hours of the festival, number of people anticipated at the festival, as well as the types of activities at the festival that could cause injuries. A contact person should be made available to emergency centers and hospitals and lists of 24-hour telephone emergency numbers should be made available to festival personnel.

## **ALCOHOL**

Beer and wine coolers are sold at virtually all parish festivals. Parishes should be aware that they are potentially liable for property damage or injury claims resulting from individuals which become intoxicated at a parish festival. Specifically, parishes should be concerned with minors and making sure that people who are obviously intoxicated are not sold alcoholic beverages. Below are some recommendations that can reduce the parish's liability in the event of an alcohol related accident.

- Licensed bartenders should be present in the beer tent at all times.
- All bartenders should be at least 21 years of age and should not be allowed to consume alcohol while they are working behind the bar.

- A pre-existing plan should exist to handle individuals who have had too much to drink. The plan should include the necessary security needed to assist the bartender who is refusing service to an intoxicated individual. Also, an alternate method of transportation should be provided to individuals who feel they are too intoxicated to drive their vehicles. Identification should be checked to ensure that individuals under the age of 21 are not served alcohol. A good rule of thumb is to check the identification of any individual that appears to be under the age of 30.
- Alcohol should not be given away as a prize.

One of the following two set ups is highly recommended for the sale of beer:

1. “The Beer Garden” atmosphere - A fence should be placed around the perimeter of the tent providing a beer garden atmosphere. Security should be placed at both entrances and exits to the beer garden. At the entrance to the beer garden, security will be responsible for checking identification to ensure that individuals are of legal age to consume alcohol. At the exit points, security will be responsible for not allowing alcohol outside the beer garden area. If alcohol is allowed outside the beer garden area, security should limit the amount of beer or wine coolers that one individual can remove from the area.
2. “Bracelet Booth” - In lieu of a beer garden, a bracelet booth can be set up where identification is checked to ensure people are of legal age to consume alcohol. An individual that has shown proper identification will be furnished with a colored bracelet designating they are of legal age to consume alcohol at the parish festival. Security and festival workers would have the responsibility of patrolling and monitoring the grounds to ensure that individuals consuming alcohol are wearing the necessary bracelet.

## **MONEY**

If your parish festival is successful, large amounts of cash will accumulate throughout the day and evening. The parish should have a predetermined plan to deal with cash as it flows through the festival. A good plan should accomplish the following:

- Cash should be collected from festival stands at regular intervals.
- Groups of three or more individuals should be responsible for the transfer of cash from festival stands to a centralized location.
- Cash that accumulates at the festival’s centralized location should be stored in a locked safe that is guarded by security.
- Cash should always be counted by at least two people.
- Bank deposits should be made at regular intervals during the festival. Cash should not be allowed to accumulate in the safe until completion of the festival.

- When collecting cash from festival stands or taking deposits to the bank, both times and routes of the collections or deposits should be varied to eliminate a pattern from developing.
- Catholic Mutual recommends the use of a “ticket system” at parish festivals. A ticket system allows festival participants to purchase tickets at ticket booths that can be exchanged for rides, food, beverages, or other items for sale at the parish festival. The purpose of the ticket system is to reduce the amount of cash flowing through the parish festival at various booths. Instead of having each individual booth handle cash, monies will be handled at centrally located ticket booths. The use of a ticket system will reduce the risk of loss associated with theft or the mysterious disappearance of festival revenues. In addition to reducing the possibility of theft, the ticket system provides an excellent internal control to monitor cash flows at parish festivals.

## **SAFETY COORDINATOR**

In addition to the festival chairperson, parish festivals should create a position called “safety coordinator.” The safety coordinator will be responsible for making sure that all safety recommendations are met. The designated safety coordinator will also be responsible for making periodic inspections of the festival grounds during the festival. Obviously, any physical safety hazards that are detected by the safety coordinator should be dealt with to remove the hazard. It is highly recommended that the safety coordinator utilize a logbook indicating the time the inspections took place during the festival and the condition of the festival grounds during the inspection.

(Arch)Dioceses that have utilized an on-site safety coordinator volunteer at parish festivals have been very successful in reducing the number of claims associated with parish festivals. An onsite safety coordinator will also greatly reduce the parish’s liability in the event of a loss, as it will illustrate the parish exercised due diligence in attempting to eliminate safety hazards.

## **CLAIM PROCEDURES**

When a claim takes place, an Incident Report should be filled out and forwarded to Catholic Mutual on the next workday. The written incident report should include an in-depth description of how the accident happened. The report should also include the name, address, phone number, and date of birth of any injured person along with the names and phone numbers of potential witnesses.

Often when an accident occurs, it is difficult to reconstruct how it happened or what the premises looked like at the time of the accident. For this reason, the festival safety coordinator should photograph accident scenes to preserve the appearance of the accident site. It is recommended that the safety coordinator videotape the parish festival grounds once the festival set-up is complete. This will assist in any recreations of the festival premises that must be done for litigation. If an individual that is injured on festival grounds feels they need immediate contact with the festival’s insurance carrier, contact Catholic Mutual prior to sending the written incident report. Often a potential claimant will contact an attorney because he/she has not been contacted in a timely fashion by the insurance company. For your convenience, we have attached an example of an Incident Report that can be used at parish festivals. Incident reports should be made available to all operational supervisors and security staff.

**PARISH FESTIVAL VENDOR  
HOLD HARMLESS/INDEMNITY AGREEMENT**

PARISH: \_\_\_\_\_

PARISH is understood to include the Arch/Diocese of \_\_\_\_\_

VENDOR: \_\_\_\_\_

TYPE OF VENDOR: \_\_\_\_\_

DATES OF USE: \_\_\_\_\_

The above named VENDOR agrees to defend, protect, indemnify, and hold harmless the above named PARISH against and from all claims arising from the negligence or fault of the above named VENDOR or any of its agents, family members, officers, volunteers, helpers, partners, organizational members, or associates in connection with the operations of the above named VENDOR at the above named PARISH.

VENDOR agrees to provide a certificate of insurance to the PARISH, which provides evidence of general liability coverage of not less than two million dollars (\$2,000,000) per occurrence. VENDOR also agrees to have the PARISH named as an "Additional Insured" on its general liability policy for the DATES OF PARISH FESTIVAL in relationship to the VENDOR'S activities. It is agreed that VENDOR also agrees to ensure that its liability insurance policy will be primary in the event of a covered claim or cause of action against PARISH.

If and only if VENDOR fails to comply with the above (second) paragraph, then VENDOR agrees to protect, defend, hold harmless, and fully indemnify the above named PARISH for any claim or cause of action whatsoever which takes place during the above identified DATE(S) OF USE that is brought against the PARISH by the above named VENDOR or its employees, agents, guests, invitees, customers, partners, family members, organizational members, and associates, even if such claim arises from the alleged negligence of the PARISH, its employees or agents or the negligence of any other individual or organization not a party to this agreement. If any paragraph or sentence of this agreement is held invalid, it is agreed that the balance thereof, shall continue in full legal force and effect.

SIGNED BY: \_\_\_\_\_

(Must be an official agent of VENDOR)

NAME AND TITLE: \_\_\_\_\_

DATE: \_\_\_\_\_