Risk Management Best Practices with Supporting Documents

DIOCESE OF MADISON
Catholic Mutual “CARES”
Risk Management Information

Sign into [www.catholicmutual.org](http://www.catholicmutual.org)

Click on “Member Login”

The user name is: **178mad** and the password is **service**
(All lower case letters)

Click on “Login”

Once you are logged in, you are able to choose an area of interest.

The Risk Management Info tab will bring you to this screen where our ‘CARES’ policies, procedures, and other informational guides are located. You can search by letter, or by clicking on a specific category.
PROPERTY

Emergency Preparedness

Weather/Natural Disaster
- After The Storm
- Are You Ready For and Earthquake
- Index of Government Earthquake Publications
- Lightning Risk Assessment Guide
- Power Interruption Pre-Planning Awareness
- Reduction of Lightning Exposure
- Safety and Survival in an Earthquake

Other
- Active Shooter Emergency Response
- Automatic External Defibrillator (AED) Safety Presentation
- Emergency Evacuation Safety Survey
- Emergency Preparedness Overview
- Emergency Procedures Manuals
- Lockdown Procedures
- OSHA Bloodborne Pathogen Standards Safety Presentation
- School Violence Prevention and Preparedness
- Security Policy (Sample)

Fire

Fires and Fires Prevention
- Candle Safety
- Electrical Fire Safety-Keep an Eye on Those Extension Cords
- Electrical Preventative Maintenance (EPM)
- Fireworks Display Safety
- Fire Prevention Checklist
- Fire Prevention Safety Presentation
- Fire Protection Safety Survey
- Overheated Clothes Dryers Can Cause Fires
- Portable Fire Extinguishers
- Smoke Alarms
- Space Heaters-What You Should Know
- Wildland Urban Interface Safety

Maintenance
- Propane Gas Pit Checklist

Maintenance Cemeteries
- Accident Investigation Report
- Cemetery Inspection Report
- Golf Cart and Low Speed Vehicle Safety
- Grinder Safety Guidelines
- Hazardous Materials, Chemicals and Flammable Liquids
- Ladder Safety
- Lawn Mowing Guidelines
- Machinery and Equipment
- Portable Power Tools Checklist
- Scaffolding
- Use of Aerial Platforms (Lifts)
- Using Backhoes/Front End Loaders Safety
- Wake Services Can Create Additional Liability Exposures for the Church
Equipment
Compressed Gas Cylinders-Safety Guidelines
Golf Cart and Low Speed Vehicle Safety
Grinder Safety Guidelines
Hazardous Materials, Chemicals and Flammable Liquids
Ladder Safety
Lawn Mowing Guidelines
Machinery and Equipment
Portable Power Tools Checklist
Scaffolding
Sump Pump Guide: 101
Unmanned Aircraft
Use of Aerial Platforms (Lifts)
Using Backhoes/Front End Loaders Safety

Preventative Maintenance
Bleacher Construction Raise Life Safety Concerns
Chair and Table Maintenance
Do You Have a Mold Problem?
Ice and Snow Removal Procedures
Preventative Maintenance Checklist
Prevent Frozen Sprinkler Systems
Procedures to Follow When Water Damage or a Water Loss Has Occurred
Protect Your Property from Freeze Damage
Recommendations for Preventing and Reducing Mold Growth
Self Inspection Report
Steps to Reduce Roof Leaks
Summer Maintenance Checklist
Ten Things You Should Know About Mold
Underground Storage Tank Inspection Checklist
Vacant and/ or Unoccupied Buildings

Other
Choir Loft Safety Survey
Facility Program Evaluation Overview
Facility Program Evaluation
Office Safety Survey
Parish Risk Management Manual

Residential
Carbon Monoxide-A Deadly Gas
Dog Ownership Safety
Escape From Fire No Matter Where You Are
Fire Prevention Checklist
Fire Prevention Guidelines For the Home
Home Electrical Safety Audit-Room by Room Checklist
Home Safety Survey
Residential Security
Residential Security Survey
Tips for Winterizing your Home

Security

Internet/Cyber
Cyber Security Practices
Cyber Security Tips Data
Protection Policy
Network Security Policy
Protecting Your Network

Facility
Automobile Security
Business Security
Conceal Carry Policy for School Facility Members
Establishing a Key Control Policy Will Enhance Security
Lockdown Procedures
Neighborhood Watch
Perpetual Adoration
Protecting Yourself from Carjacking
Residential Security
Residential Security Survey
School Vandalism
School Violence Prevention and Preparedness
Security Policy (Sample)
Security Profile-Suspicious Activity Described
Security Recommendations

Operations
Automobiles
11-15 (including driver) Passenger Van Policy
Automobile Security
Distracted Driving
Fleet Safety Program
Important Steps to Defensive Driving
Protecting from Carjacking
Student Drop Off and Pick Up
Vehicle Safety Policy (Sample)
Volunteer Driver Form

Contracts
Non-Sponsored Building Use
Adult Hold Harmless/Indemnity Agreement
Addendum to Service Contract
Addendum to Lease
Facility Usage/ Indemnity Agreement
Facility Usage/ Indemnity Agreement with Non-Owned Auto
Contract Review/ Facility Usage Policy (Sample)
How can an Outside Organization Cause You Liability Safety Presentation
Unaffiliated Organization Agreement
Sponsored Building Use
Adult Hold Harmless/ Indemnity Agreement
CMG’s Coverage & Indemnification Guideless
How Can Outside Organization Cause You Liability Safety Presentation
Parish Festival Vendor Hold Harmless/Indemnity Agreement

Construction
Addendum to Construction Contract
Addendum to Construction Contract (When Contractor Provides Builders Risk Coverage)
Addendum to Lease
AIA Documents (Needed Deletions)
Addendum to Service Contract
Contract Review/ Facility Usage Policy (Sample)
How Do I Know If My Parish Has Been Named as an Additional Insured?

Financial Administration
Safeguarding Monetary Assets
Fidelity Control Overview
Fidelity Control Safety Presentation
Financial Control Policy (Sample)
Review of Parish Accounts and Financial Control Guidelines
Scrip Handling Guidelines

Healthcare
School Programs
Automatic External Defibrillator (AED) Safety Presentation
Flu Pandemic Preparedness
Healthcare Related Workplace Violence
*OSHA Bloodborne Pathogen Standards Safety Presentation*
New School Healthcare Education Manual
**Healthcare Liability Resources**
Asthma Booklet
*Bed Bug PowerPoint Presentation*
Best Practice Guidelines for Medication Administration
Biohazard Brochure
Bloodborne Pathogens
*Breaking the Chain of Infection PowerPoint Presentation*
*Childhood Obesity PowerPoint Presentation*
Childhood Obesity Poster
Concussion/Head Injury
Concussion Poster
Diabetes Management Plan
Diabetic Brochure
Drug Use Resource Chart and Booklet
Ebola Virus
First Aid Quick-Guide
Food Allergies Booklet
Food Allergies Poster
Flu Prevention Measures
Flu Prevention Flyer
*Hand Hygiene PowerPoint Presentation*
Healthcare Liability Resource Guide
ICD Fact Sheet
ICD Poster
ICD Safety Guidelines
Infection Control Resource Guide
Lice Booklet
*Medication Administration Training PowerPoint Presentation*
Medication Administration Training Quick-Guide
Mosquito Safety
*OSHA Bloodborne Pathogen Standards Safety Presentation*
Sample Policy for Medication Administration
Seizure Booklet
School Peanut Allergy Safety Guidelines
Suicide Brochure
Wheelchair Transportation Safety
**Parish Nurse Program**
*Automatic External Defibrillator (AED) Safety Presentation*
Guidelines for Parish Nurse/ Health Ministry Programs
Healthcare Related Workplace Violence
*OSHA Bloodborne Pathogen Standards Safety Presentation*
**Long Term Healthcare**
Beauty Salon Recommendations
Bed Bugs Presentation
*Breaking the Chain if Infection Presentation*
Hand Hygiene Presentation
*Healthcare Security Threat Management Presentation*
Infection Control
Infection Control Resource Guide
Nursing Guide in Long Term Care
Resident Behavior Resource Guide
*Understanding Bloodborne Pathogens Presentation*
Wheelchair Transportation Safety
**Employee Safety**
- *Automatic External Defibrillator (AED) Safety Presentation*
- Back Injury Loss Control for Healthcare Facilities
- Bloodborne Pathogens
- Concussion/Head Injury
- Fire Prevention Safety Presentation
- Healthcare Related Workplace Violence
- Mosquito Safety
- *OSHA Bloodborne Pathogen Standards Safety Presentation*
- Reducing Employee Injuries
- *Reducing Employee Injuries Safety Presentation*

**Parish Events**

**Activities**
- Bonfire Safety Guidelines
- CM Safety Guidelines for Parish Hall Rental/Usage
- Festival/High Risk Events Best Practice Checklist
- Fireworks Display Safety
- Fish Fry Best Practices Fundraiser
- Food Pantries—Safe Food Storage
- 5K Walk/Run Events Guidelines for Parish Festivals
- Haunted House Should Not Hold Real Dangers
- Hayrack Rides
- How to Safeguard your Bingo Events
- Liquor Liability
- Propane Gas Pit Checklist
- Resale if Items through Thrift Store and Rummage Sales
- Thrift Store Guidelines
- Use of Inflatables/Bounce Houses

**Agreements**
- Addendum to Lease
- Addendum to Construction Contract
- Addendum to Service Contract
- Adult Hold Harmless/Indemnity Agreement CMG’s
- Coverage & Indemnification Guidelines
- Parish Festival Vendor Hold Harmless/Indemnity Agreement
- Unaffiliated Organization Agreement

**Personnel**

**Online Training**

**Online Training Course**
- Bloodborne Pathogens
- Defeating a Violent Intruder
- Fire Safety
- Preventing Slips, Trips and Falls
- Preventative Maintenance
- Church Transportation—is It Necessary and Ministry-Based?
- Youth Ministry—Everything Matters and Everyone has a Role
- Safe and Successful Parish Festivals
- Be Smart Drive Safe
- Best Practices in Human Resource Management
- Best Practices for Financial Management and Cash Handling

**Safety Presentation**
- Automatic External Defibrillator (AED) Presentation
- Fidelity Control
Volunteer Activities

Volunteer Program
- Brochure
- Volunteers and the Catholic Church Poster
- Food Pantries— Safe Food Storage
- Volunteer Coordinator Manual
- Volunteer Coordinator Quick Guide
- Volunteer and the Catholic Church

Vehicle Usage
- 11 - 15 (including driver) Passenger Van Policy (sample)
- Automobile Security
- Distracted Security
- Fleet Safety Program
- Online Driving Course Link
- Protecting Yourself from Carjacking
- Vehicle Safety Policy (sample)
- Volunteer Driver Form

Other
- Adult Hold Harmless/ Indemnity Agreement
- Vulnerable Adults and My Ministry

Workplace Safety Employees

- Accident Investigation Report
- Distracted Driving
- Employee Injury Analysis
- Grinder Safety Guidelines
- Hazardous Materials, Chemicals and Flammable Liquids
- Hazing Prevention
- Ice Dams
- Ladder Safety
- Lawn Mowing Guidelines
- Leading Cause of On-the-Job Injuries
- Machinery and Equipment
- Maintaining a Healthy Back
- Mosquito Safety
- OSHA Bloodborne Pathogen Standards Safety Presentation
- Portable Power Tools Checklist
- Preventative Maintenance Checklist
- Property Prospective
- Reducing Employee Injuries Checklist
- Reducing Employee Injuries Safety Presentation
- Safety and Health Committees Overview
- Safety and Health Policy Statement
- Safety Program Organization
- Scaffolding
- Unsafe Actions and Unsafe Conditions
- Use of Aerial Platforms (Lifts)
- Using Backhoes/ Front End Safety Loaders
- Workplace Safety Survey
Injuries
Accident Investigation Report
*Automatic External Defibrillator (AED) Safety Presentation*
Bloodborne Pathogen
Employee Injury Analysis
*Fire Prevention Safety Presentation*
Incident Investigation
*OSHA Bloodborne Pathogen Standards Safety Presentation*
Reducing Employee Injuries
*Reducing Employee Injuries Safety Presentation*
Slips, Trips and Falls-Ice and Snow Removal Procedures
*Slips, Trips and Falls: Just What Are We Looking For? Safety Presentation*
Slips, Trips and Falls Safety Survey
Slips, Trips and Falls-Some Basic Information

Youth

Schools
*Administration, Building Safety, Maintenance & Risk Management*
Active Shooter Emergency Response
After the Storm
*Automatic External Defibrillator (AED) Safety Presentation*
Cheerleading Guidelines
Combustible Materials in Classrooms and Auditoriums
Conceal Carry Policy for School Faculty Members
Emergency Procedures Manual
Field Trip Risk Management Information
Fire Exit Drill Report
Fire Prevention Safety Presentation
Food Service Safety Survey
Guidelines and Procedures for Industrial Education
Hazardous Materials, Chemicals and Flammable Liquids
Lockdown Procedures
*OSHA Bloodborne Pathogen Standards Safety Presentation*
Procedures to Better Organize School Chemical Storage Areas
Reducing Employee Injuries
Safety Dress Regulations
Safety Rules for Kitchens
Safety Survey-Auditoriums, Stadiums and Gymnasiums
Safety Survey-Buildings and Grounds
Safety Survey-Classrooms, Office and Special Rooms
Safety Survey-Food Service and Cafeteria Operations
Safety Survey-General Guidelines for Schools
Safety Survey-Science Laboratory
School Risk Management Manual
*School Risk Management Safety Presentation*
School Safety Overview
School Safety Survey
School Safety-TV Carts
School Vandalism
School Violence Prevention and Preparedness
Several Reasons Why Chemicals Should Not Be Stored in Alphabetical Order
Storage and Handling of Lab Chemicals
Student Drop Off & Pick Up
Unmanned Aircraft
Vacant/ or Unoccupied Buildings
Safety Surveys
Office Safety Survey
Safety Survey – Auditoriums, Stadiums and Gymnasiums
Safety Survey – Building and Grounds
Safety Survey – Classrooms, Office and Special Rooms
Safety Survey – Food Service and Cafeteria Operations
Safety Survey – Science Laboratory
School Safety Overview
School Safety Survey
School Safety – TV Carts

Security
Active Shooter Emergency Response
Conceal Carry Policy for School Faculty Members
Hazing Prevention
Lockdown Procedures
School Vandalism
School Violence Prevention and Preparedness
Security Policy (sample)

Athletics
Athletic and Sporting Events – Parental/Guardian Consent Form and Liability Waiver
Athletic and Sporting Events – Risk Reduction Measures
Bike Helmets Help Reduce Injuries
Cheerleading Guidelines
Climbing Walls
Concussion Head Injury
Football Helmet Safety
Guidelines for Movable Soccer Goal Safety
Hazing Prevention
In-Line Skating/ Roller Blading
Safeguarding the Health of the Athlete
Swimming Pools Rules and Procedures
Swimming Pool Safety Survey

Other Activities
Bus Safety
Cheerleading Guidelines
Food Pantries – Safe Food Storage
Fundraiser 5k Walk/Run Events
Haunted Houses Should Not Hold Real Dangers
Resale of Items through Thrift Stores and Rummage Sales
Use of Inflatable/ Bounce House

Equipment
Compressed Gas Cylinders – Safety Guidelines
Golf Cart and Low Speed Vehicle Safety
Grinder Safety Guidelines
Ladder Safety
Machinery and Equipment
Portable Power Tools Checklist
Scaffolding
Sump Pump Guide: 101
Unmanned Aircraft
Use of Aerial Platforms (Lifts)
**Playground Safety**
General Guidelines for the Playground
Playground Age Appropriate Equipment, Signage and Fencing
Playground Inspection Checklist
Playground Guidelines for the Elementary School
Playground Leader’s Checklist
Playground Maintenance Checklist
Playground Surfacing

**Childcare/Preschool**
Childcare Centers-Risk Reduction Measures
Preschool Child Care Agreement
School and Preschool Prescription Drug and Medication Authorization
School/Peanut Allergy Safety Guidelines

**Agreements**
Parent/Guardian Consent Form/Liability Waiver

**Checklist**
Bus Inspection Checklist
Festival/High Risk Events Best Practices Checklist

**Maintenance**
After The Storm
Bleacher Construction Raises Life Safety Concerns
Chair and Table Maintenance
Do You Have a Mold Problem?
Gold Cart and Low Speed Vehicle Safety
Hazardous Materials, Chemicals and Flammable Liquids
Lawn Mowing Guidelines
Preventative Maintenance Checklist
Procedures to Follow When Water Damage or a Water Loss Has Occurred
Recommendations for Preventing and Reducing Mold Growth
School Safety Survey
Steps to Reduce Roof Leaks
Summer Maintenance Checklist
Ten Things You Should Know About Mold
Underground Storage Tank Inspection Checklist
Vacant and/or Unoccupied Buildings

**School Safety by the Kids**
School Safety Contest

**Healthcare**
Automated External Defibrillators
Bloodborne Pathogens
Bloodborne Pathogen Training
Concussion CARES
Flu Pandemic Preparedness
New School Healthcare Education Manual
Safeguarding the Health of the Athlete
School and Pre-School Prescription Drug and Medication Authorization
School Peanut Allergy Safety Guidelines

**Other**
Food Service Safety Survey
Food Pantries—Safe Food Storage
Safety Rules for Kitchens
Safety Survey-Food Service and Cafeteria Operations
Youth Ministry/ Religious Education

Youth Ministry Program
Youth Ministry Manual
Youth Ministry Online Training Brochure
Youth Ministry Poster
Youth Ministry Quick Guide

Activities
Bonfire Safety Guidelines
Camping Guidelines
Chaperone Guidelines/Behavior Standards
Climbing Walls
Field Trip Risk Management Information Fireworks
Display Safety
Haunted Houses Should Not Hold Real Dangers
Hayrack Rides
In-Line Skating/ Roller Blading Mission
Work Trips-Service Projects
Use of Inflatables-Bound Houses
Youth Trips Involving Overnight Stay

Automobile/Transportation
11 (including driver)-15 Passenger Van Policy (Sample)
Automobile Security
Distracted Driving Fleet
Safety Program
Protecting Yourself from Carjacking
Volunteer Driver From
Vehicle Safety Policy (Sample)

Other Safety Concerns
Automatic External Defibrillator (AED) Safety Presentation Fire
Food Pantries—Safe Food Storage
Drills-A Must for Religious Education Classes
Hazing Prevention
Liability Issues in Your Youth Ministry Program Safety Presentation
OSHA Bloodborne Pathogen Standards Safety Presentation
Vulnerable Adults and My Ministry

Rev 2/17
Risk Management Best Practices
Risk Management Best Practices

- Risk Management Best Practices
- Transportation Best Practices/Defensive Driving and 11-15 (including driver) Passenger Vans
- Festival/High Risk Events Best Practices
- Facility Security Best Practices
- Youth Ministry Best Practices
- Parish Nurse/Health Ministry Best Practices
- Volunteer Administration Best Practices
- Online Training
Diocese of Madison
Risk Management Best Practices

The Diocese of Madison introduces its Risk Management Best Practices. The Best Practices
address facility and operational issues that bring unique risk to the Church. The Best Practices
address the following areas:

• Transportation and 11-15 (including driver) Passenger Vans
• Parish Festivals
• Security
• Youth Ministry
• Volunteer Administration
• Parish Health Ministry
• Online Training

The Best Practices that follow are an abbreviated version of the full Best Practices documents. For additional information and to view the full documents, please visit Catholic Mutual’s website.

Below is information to visit and enter the Catholic Mutual website.

➢ Sign into Catholic Mutual’s website www.catholicmutual.org
➢ Click on “Member Login”
➢ The user name is: 0178mad and the password is service (all lower case letters).
➢ Click on “Login”

To view the Risk Management Best Practices documents:

➢ Select “My Diocese”
➢ Select document you would like to view
Transportation Best Practices/Defensive Driving and 11 – 15 (including driver) Passenger Vans
Q – Can employee or volunteer drivers be used in our school or church programs?

A – When appropriate, employees and volunteers can be asked to drive on Church business. Often, employee and volunteer drivers are important in allowing the Church to fulfill its ministries.

Q – What resources are available to help in determining when employee or volunteer drivers should be used?

A – Catholic Mutual has developed an online training, *Church Transportation: Is It Necessary And Ministry-Based?* that should be viewed by all Church and school personnel involved in the arrangement of transportation. This training can be accessed under the *Driving Administrator* Curriculum on www.CMGconnect.org.

Q – What can we do to make sure our employee and volunteer drivers are properly trained?

A – Employee and volunteer drivers should take Catholic Mutual’s defensive driving course, *Be Smart – Drive Safe*. This 18 minute training program educates drivers to avoid the seven most common causes of accidents. In addition, each driver completes a short questionnaire to verify they have a valid driver’s license and an acceptable driving record. Attached is information to get you started in implementing the *Be Smart – Drive Safe* program at your location.
Q - Is it acceptable to use an 11 – 15 (including driver) passenger van to transport passengers?

A – No. As early as 2001, the National Highway Traffic Safety Administration issued warnings on the serious rollover potential of these types of vans. This led to the federal prohibition of the sale or leasing of these vans to schools by authorized dealerships.

**So what should be used?**

- A school bus or a Multifunction School Activity Bus (MFSAB).
- A mini-van or a SUV that has a total capacity of no more than 8 people.
- Vehicles that have a rated capacity of 16 or more passengers, such as shuttle buses, must comply with the same safety standards as a multifunction school activity bus.
- Simply removing the seats to reduce the occupant capacity of the vans is not allowed.
- Any current vans owned by the locations can be converted for use as a maintenance or cargo van by permanent removal of the seats.

To verify that locations are not utilizing 11 – 15 (including driver) passenger vans, Catholic Mutual Group has a short “read only” training regarding the vans which can be taken annually at CMGConnect under the Driving Administrator Curriculum.
One growing area of liability exposure within the Catholic Church is related to driving and transportation activities. With this in mind, Catholic Mutual Group has developed curriculums for our driving programs:

**Be Smart—Drive Safe**

and

**Church Transportation—Is it Necessary and Ministry-Based?**
**BE SMART - DRIVE SAFE**

**WHAT IS BE SMART—DRIVE SAFE?**

*Be Smart—Drive Safe* is a condensed 18 minute online defensive driving course. This informative course will provide the trainee useful information to become a better defensive driver. *Be Smart—Drive Safe* is available at no cost and can be easily accessed and viewed when it is most convenient for the trainee!

**HOW DOES BE SMART—DRIVE SAFE BENEFIT MY PARISH OR SCHOOL?**

By asking any employee or volunteer who drives on behalf of the church or school to take the course, safer transportation will be provided and the church or school will reduce its liability exposure to an auto loss!

**HOW DOES BE SMART—DRIVE SAFE BENEFIT THE TRAINEE?**

The trainee becomes a better defensive driver AND can possibly be eligible for a reduction in their personal insurance rates!

**WHO SHOULD TAKE BE SMART—DRIVE SAFE?**

Anyone that drives on behalf of your church or school should take the course.

**HOW CAN A DRIVER ACCESS BE SMART—DRIVE SAFE?**

Enclosed is a handout that provides instructions for the end user to access CMGConnect. This handout can be distributed to anyone that drives on behalf of your church or school.

**HOW DO WE ADMINISTER THE BE SMART—DRIVE SAFE PROGRAM AT OUR CHURCH OR SCHOOL?**

Ideally, the church or school should designate a transportation coordinator(s). The transportation coordinator identifies drivers and provides those drivers the Defensive Driving handout. The transportation coordinator, parish administrator, or CRM can verify through the platform that the course has been taken successfully.

**HOW CAN WE PROPERLY SCREEN THOSE WHO DRIVE FOR OUR CHURCH OR SCHOOL AND DETERMINE IF THEY ARE ELIGIBLE TO DRIVE?**

Upon completion of *Be Smart—Drive Safe*, trainees will be asked a series of driving related questions, such as, “have you been convicted of driving under the influence (DUI) in the past 3 years?” The transportation coordinator, parish administrator, or CRM can check the trainee’s status on the platform and results of the screening questions. In cases where answers indicate a potential problem driver, the trainee should not be allowed to drive on church or school business. As an added bonus, the screening tool can replace the need for the driver to complete the Driver Information Sheet/Volunteer Driver Form—as this information will always be available on the online platform.
CHURCH TRANSPORTATION – IS IT NECESSARY AND MINISTRY-BASED?

WE HAVE EMPLOYEES AND VOLUNTEERS DRIVE ALL THE TIME TO ASSIST THE CHURCH AND SCHOOL IN OUR EVERYDAY ACTIVITIES. WHAT'S THE BIG DEAL?

In today's litigious society, the Catholic Church has seen an increase of large loss automobile claims and in particular, non-owned auto liability claims. It is vital that churches and schools develop a “best practices” approach when utilizing employees or volunteers to drive on behalf of the church or school. Not only will this approach provide a better assurance that our drivers and passengers will be safer, but also reduce the liability exposure associated with church and school transportation.

WHY DO WE HAVE TO GO TO SUCH EXTREMES TO SCREEN DRIVERS THAT MAY ONLY OCCASSIONALLY DRIVE ON BEHALF OF OUR CHURCH OR SCHOOL?

The Church is legally liable and ethically responsible for accidents that happen as a result of individuals driving on behalf of the Church. With this in mind, Catholic Mutual has developed an online training titled Church Transportation—Is it Necessary and Ministry-Based? This training addresses the needs and ramifications of the Church being involved in transportation. This training is required to be viewed by at least one person in an administrative position at your location once every two years. It would also be beneficial to be viewed by any pastors, business managers, principals, or any other designated individual(s) at your location responsible for coordinating driving such as the transportation coordinator.
This training module can also be found on the CMGConnect platform under the Driving Administrator Curriculum. Employees and volunteers can self-register for this course, which is available at no cost. Training takes less than 20 minutes to complete and can be easily accessed and viewed when it is most convenient for the trainee!
Catholic Mutual Group Presents

Defensive Driving

- *Be Smart—Drive Safe* is our online defensive driving course.
- This 18-minute video should be taken by all volunteers and employees that drive on behalf of the parish or school.

For additional information please contact your Claims Risk Manager
Getting Started:

1. Access the training site from your Diocese webpage or at: www.CMGconnect.org.

2. Create a user account by completing the required fields. This allows your Diocese to confirm your training history.

3. If you have done training in the past and had an account, you can use that same username and password to Sign-In.

4. Your main learning dashboard will show you all of the requirements and optional training curriculums that have been customized for your Diocese.
Diocese of Madison

Use of 11-15 Passenger (including driver) Vans is Prohibited!

11 - 15 passenger (including driver) vans should either be replaced with a school bus or a Multifunction School Activity Bus (MFSAB). A MFSAB is a vehicle which complies with the Federal Motor Vehicle Safety Standards (FMVSS) applicable to school buses for crash survivability and mirrors.

If a MFSAB is used, the vehicle must meet the following four FMVSS:

- **FMVSS 111** – *Fulfills the safety requirement for the rear-view and cross-view visibility.*
- **FMVSS 220** – *Establishes requirements for the school bus body structure in rollover accidents.*
- **FMVSS 221** – *Regulates the strength of body panel joints in school buses.*
- **FMVSS 222** – *Establishes occupant protection requirements for school bus passenger seating and barriers.*

Removal of seats from a vehicle designed to transport 11 (including driver) - 15 passenger vans to make the vehicle a 10 or less passenger vehicle is not allowed. Additionally, shuttle buses that do not meet the above listed Federal Motor Vehicle Safety Standards (FMVSS) for a MFSAB are not allowed.

Mini-vans may be used to transport children or adults. A mini-van is defined as a passenger vehicle designed to transport no more than 8 total occupants.

While the use of 11-15 (including driver) passenger vans is prohibited to transport people, the vehicles can be used for cargo hauling only if all but the two front seats are removed.

If you have questions whether or not your vehicle would be in compliance, please contact the Risk Management Department at 1-800-228-6108.
Festival/ High Risk Events Best Practices
**Diocese of Madison**  
**Festival/High Risk Events Best Practices**

_Q – Why is it important to have risk management procedures and practices in place for our parish festivals and other large events?_

_A – Festivals and other large-scale events that go above and beyond the daily ministries of the Catholic Church create unique liability exposures. The Church is legally liable and ethically responsible for accidents that happen as a result of any involvement and sponsorship in these types of events. It is vital that churches and schools develop a “best practices” approach for any parish-sponsored event. Not only will this approach provide better assurance for the safety of everyone involved, it will also reduce the liability exposure associated with these types of large events._

_Q – What resources are available to successfully manage our parish festival or other large events?_

_A – Catholic Mutual offers Safe & Successful Parish Festivals online training which you can access by logging into the CMGConnect and accessing the Parish Festival Curriculum._

By being aware of the “best practices” safety checklist and understanding the detailed information available in the Guidelines for Parish Festivals, you will be better prepared to ensure a safer event and reduce or eliminate common claims associated with these types of events. The Guidelines for Parish Festivals can be found on Catholic Mutual’s website at [www.catholicmutual.org](http://www.catholicmutual.org), and selecting Risk Management Info.
Festival/High Risk Events - Risk Management Best Practices

Checklist

♦ Supervision

☐ There is a designated Festival Chairperson (overseen by staff person at parish/school)
☐ There is a designated Supervisor for each operational area of festival (overseen by festival chairperson)
☐ There is designated Safety Coordinator to ensure all safety recommendations are met (overseen by Chairperson)

♦ Vendors

☐ Vendor contracts/agreements have been reviewed by Arch/Diocese or CMG prior to signing
☐ Vendor Hold Harmless/Indemnity Agreement has been obtained by each vendor (i.e. ride, game, food, security vendors)
☐ Certificates of Insurance have been obtained from vendor with parish/diocese named as additional insured

♦ Transportation

☐ Driving duties have been limited to a select number of properly screened individuals
☐ Drivers have taken “Be Smart - Drive Safe” online defensive driving course
☐ Chairperson and Supervisors have taken Church Transportation - Is It Necessary and Ministry-Based?

♦ Volunteers

☐ Are 18 years of age or older OR supervised by adult with parent permission
☐ Have been selected and matched to tasks according to training and/or skills
☐ Have a clear understanding of duties and risks associated with the assigned task
☐ Have been provided with personal protective equipment, if needed

♦ Premises Safety

☐ Electrical cords and hoses have been rerouted, taped down or covered
☐ Adequate lighting has been provided
☐ Tent stakes and ropes have been secured
☐ Alternate plans are in place for inclement weather
☐ Emergency response procedures/evacuation plans have been developed
☐ Adequate number of trained security guards have been hired

♦ Parking

☐ Valet parking will not be allowed
☐ There is adequate lighting in parking lots
☐ Adequate space for pedestrian traffic has been provided through parking lots
☐ Adequate space will be made available for emergency vehicles

♦ Medical Services

☐ There is a First Aid station and supplies available
☐ An Automated External Defibrillator (AED) will be readily accessible
☐ Local police and hospitals have been notified about upcoming event
☐ Hand washing stations are provided

♦ Food

☐ Appropriate food temperatures will be maintained
☐ Employees and volunteers have been informed of food-borne illness best practices

♦ Alcohol

☐ Meet all State and local liquor licensing requirements
☐ Identification checkpoints are in place
☐ Colored bracelets will be provided for legal age individuals wishing to consume alcohol
☐ Trained bartenders will be used
☐ Alternate transportation will be provided for intoxicated patrons

♦ Money/Cash Handling

☐ Background and credit checks will be completed on individuals working with money
☐ Tamper-proof of bags will be utilized
☐ Cash will be regularly collected from stands, alternating times and routes
☐ Three or more individuals will be involved in collecting cash
☐ Money will be counted by two or more people
☐ Cash will be kept in a locked safe and guarded by security
☐ Consideration has been given to using a ticket system

♦ Activities/Equipment

☐ Festival activities will not include any of the following: hot air/tethered balloons; helicopter rides; ATV rides/speed contest; climbing contests; gambling or liquor (when not approved by state statutes); bungee jumping; dunking booths involving individuals 21 years of age and under; or archery/firearms
☐ Homemade equipment (i.e. gas grills, dunking booths, and miniature motorized vehicles) and other similar devices will not be utilized
☐ All activities for the festival have been approved by the arch/diocese and/or Catholic Mutual Group

♦ Claim Procedure

☐ Accident Report forms on hand
☐ Staff is aware of claim reporting procedures
Facility Security Best Practices
Diocese of Madison
Facility Security Best Practices

Q – Why is it important to have a security policy in place?
A – Having unsecured schools, churches, parish halls, and offices provides free and unrestricted access to your buildings and their contents and could expose your facilities to theft, vandalism and expose those visiting or working there to possible injury.

Q – Is it expensive to provide for a safe and secure environment in our schools, churches and offices?
A – No. By developing a simple written policy for each of your buildings, you can make them safe and secure.

Catholic Mutual Group offers a variety of maintenance and security information under the Risk Management/Property Section of the website, www.catholicmutual.org, enter the user Login: 0178mad Password: service, and selecting Risk Management Info.

By following the items in the below checklist, you can easily, and with little expense, provide sound security measures for the protection of property and people.

CHECKLIST

- **Schools**
  - The written security policy is in place and the staff and parents have been educated on the policy.
  - Visitor reporting procedures are in place.
  - All secondary doors are secured against entry and all visitors are directed to a single, monitored, entrance. (Monitoring of the school entrance must be by visual means, electronic or video monitor, or with remote buzzer to unlock the door.)
  - All offices, storage rooms, janitor closets, and unoccupied rooms are kept locked.

- **Church**
  - Operational hours for when the church is unlocked are set. At the end of the day, all church doors are locked against entry until the next day.
  - All doors inside the church are locked to restrict access to authorized staff only.

- **Office**
  - All parish records are kept in a secure location.
  - Parish Office hours of operation are posted and followed.

- **General Measures**
  - All landscaping is trimmed to eliminate hiding places for potential intruders.
  - The key control policy is in place and strictly followed.
  - All interior and exterior doors are checked daily for security.
  - Emergency procedures are in place and all staff and volunteers are provided an orientation on the policy.
Youth Ministry Best Practices
Q - Why is risk management an important component of youth ministry?

A - Often, the danger and liability exposures from youth ministry activities are not fully understood until an accident occurs. Best Practices will help ensure the safety of all participants.

Q - Is it difficult to implement necessary risk management procedures?

A - No. Catholic Mutual has completed an online training module and extensive supportive information to assist youth ministers, leaders and chaperones. This can be accessed by logging onto CMGConnect.
Activity Event

Dates and/or Training of Event

Locations

Please ensure all questions have been reviewed and a response indicated.

• _____ Is the activity safe and approved?
  Comments: ________________________________________________________________

• _____ What type of transportation is being utilized?
  Comments: ________________________________________________________________

  *Note: 11–15 (including driver) passenger vehicles cannot be used unless they meet school bus standards.

• _____ If drivers are employees or volunteers, have required driver forms been completed?
  Comments: ________________________________________________________________

  *Note: Motor vehicle record checks are always recommended.

• _____ Have all staff and volunteer drivers completed the online Be Smart Drive Safe defensive driving module?
  Comments: ________________________________________________________________

• _____ Have all leaders and chaperones completed appropriate safe environment training and undergone successful background checks?
  Comments: ________________________________________________________________

• _____ Are the adult leaders and chaperones-to-youth ratio adequate for the activity?
  Comments: ________________________________________________________________
The key to a successful Youth Ministry program is finding an effective – yet safe – way to connect with kids today. Youth Ministers are charged with the profound responsibility of engaging young people within the Catholic Church, while keeping those who participate safe from harm. Not only are Youth Ministers responsible for safety, but the young person themselves and their parents must also play a role. The following guidelines have been developed to assist you in your role as a Youth Minister. Please feel free to contact Catholic Mutual if you have any further questions.

Thank you for all your efforts in keeping youth safety at the forefront of your ministry.
Balancing ministry and fun - The key to a successful Youth Ministry program is finding an effective, yet safe way to reach kids today while still making it fun.

Activity Selection
- Think about safety….think about risk…..
- Good idea vs. bad idea
- Assess the risk - Is it necessary for a successful ministry?

Examples of what might be too risky:
- High Ropes Course
- White Water Rafting
- Rock Climbing/Rappelling
- Paintball
- Water Skiing
- Off-Road (Jet Skis, Snowmobiles, Dirt Bikes, ATV's)

When planning any activity, be sure to contact the Diocese or your local Catholic Mutual Office prior to scheduling.

Transportation Selection
- Review Diocesan Transportation Policy
- View Church Transportation - Is it Necessary & Ministry Based? online training.
- Preferred Methods
  - Meet at location
  - Wheels for hire
  - Approved volunteer drivers
  - Drivers should take Be Smart-Drive Safe online course

NEVER
- Allow anyone under the age of 21 to drive
- Permit unapproved drivers
- Use 11 - 15 (including driver) passenger vans

Chaperone/Volunteer
A chaperone/volunteer must:
- Complete Safe Environment requirements
- Review “CARES” Chaperone Guidelines
- Be 21 years of age or older
- View Youth Ministry: Everything Matters and Everyone Has a Role online training
- Attend required meetings
- Know the activity
- Understand his/her responsibilities

Details, Details, Details
- Obtain contact information for parents
- Obtain Youth Ministry Registration Packet from each youth member
- Ensure Diocese reviews any contract/agreement associated with activity
- Make an advance visit to off-site activity location to help foresee any potential risks
- Create a plan of action for potential emergencies
- Obtain Parent Permission Slips and Adult Chaperone Liability Waivers
- Obtain Volunteer Driver Form
Parents must:
- Know activity
- Know transportation mode
- Know destination
- Know timeframe
- Have read/signed all forms

Parents should:
- Attend planning meetings
- View Youth Ministry: Everything Matters and Everyone Has a Role online training
- Be involved

GET THE WORD OUT
- Communication (text, blogs, email, social networking, etc.) must be:
  → Appropriate
  → Monitored
- Communication from Youth Ministers should:
  → Be open & transparent
  → Be sent to all youth (i.e. text, blog, email, etc.)
  → Include copy to parents
  → NOT be done privately with an individual youth
- If a social network site is established for Youth Ministry, it must be monitored on a regular basis. Any inappropriate material should be deleted immediately.

WWJD?
- Code of Conduct - covenant between all participants and the Church to agree to behave appropriately and safely
- View Youth Ministry: Everything Matters and Everyone Has a Role online training

Also Available:
- Youth Ministry Resource Manual
- Youth Ministry Quick Guide
- Youth Ministry Poster

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Omaha, NE 68154

Phone: (800)-228-6108
Fax: (402)-551-2943
Email: rm@catholicmutual.org
Parish Nurse/Health Ministry Best Practices
Q – Who can be a Parish Nurse and what do they do?
A - A Parish nurse’s role focuses on personal health counseling, health education, referrals, wellness promotions, advocacy and the integration of faith and healing. A parish nurse can be a paid employee or volunteer of the parish. A parish nurse can also be contracted through a local healthcare institution.

Q – Does starting a parish nurse/health ministry program bring additional risk to our parish’s liability insurance program?
A – Your exposure to loss increases anytime a new program is started within the parish. However, if parish nurse programs adhere to the best practice guidelines and do not perform any “hands on” type nursing activities, your increased exposure is minimal.

Q – What procedures must be in place before starting a parish nurse/health ministry program at my parish?
A - By being aware of and following the “best practices” for parish nurse/health ministry programs shown below and understanding the detailed information available in the Catholic Mutual Guidelines for Parish Nurse/Health Ministry Programs, you will be better prepared to provide a well-run, effective program at your parish. To access the information, log onto the Catholic Mutual website at www.catholicmutual.org, Login: 0178mad Password: service and select Risk Management Info.

- Qualifications
  ___ Graduate of an accredited school or college of nursing
  ___ Currently licensed as a professional registered nurse (RN)
  ___ 3 years or more of nursing experience in a clinical setting
  ___ Possession of a valid driver’s license
  ___ Credential and background check conducted

- Parish Nurse Program Partnered with Healthcare Institution (if applicable)
  ___ Healthcare Institution Hold Harmless Indemnity Agreement completed
  ___ Certificate of Insurance obtained from Healthcare Institution naming the parish and Arch/diocese as additional insured

- Transportation
  ___ Verified minimum auto liability limits of $100,000 per person/$300,000 per accident
  ___ Completed a motor vehicle record check (MVR)
  ___ Has taken Be Smart – Drive Safe online defensive driving course
  ___ Has taken Church Transportation – Is It Necessary and Ministry-Based?
• Professional Boundaries
  ___ Parish nurse is aware he/she cannot provide medical diagnosis, only referrals to physician or other healthcare provider as needed.
  ___ Parish nurse is aware he/she cannot dispense medications
  ___ Parish nurse is aware to report abuse involving a minor or vulnerable adult to the appropriate governmental agency
  ___ Parish nurse is aware to keep confidential records in locked cabinet in accordance with HIPAA
Volunteer Administration Best Practices
Q – Can volunteers be used as part of Church ministries?

A – Volunteers are an important aspect of Catholic Church ministries. When appropriate, volunteers should be used in assisting with the Church’s mission.

Q – What can be done to ensure that volunteers are safe and volunteer activities do not create unnecessary risk for the Church?

A – Catholic Mutual Group offers a variety of volunteer information which can be accessed by logging into the Catholic Mutual website, www.catholicmutual.org, Login: 0178mad Password: service, and selecting Risk Management Info.

Volunteer administration best practices are available to assist in the management of volunteers. Available resources include a brochure designed for volunteers, the Volunteer Quick Guide and a complete Volunteer Risk Management Manual. To get you started in successfully managing your volunteer program, consult the checklist below.

**CHECKLIST**

- **Selection**
  - Background check (as needed for Safe Environment compliance) has been completed
  - Safe Environment training has been done
- **Volunteer Assignment**
  - Appropriate age for volunteer position has been verified
  - Volunteers meet qualifications of the position
  - Volunteers have thorough understanding of what tasks are to be completed
  - Parental permission has been obtained for volunteers under 18
- **Volunteer Orientation**
  - Volunteers clearly understand duties
  - Supervision is in place
  - Volunteers have been trained on the proper use of equipment needed for the position
  - Volunteers have been given personal protective equipment (PPE) required to perform the task
  - Volunteers know what to do in case of injury
  - Volunteers have been given the *Volunteers and the Catholic Church* brochure
- **Volunteer Drivers**
  - Have completed *Be Smart – Drive Safe* training
  - Are a minimum 21 years of age or older
  - Possess a valid driver’s license and current license and vehicle registration
  - Have appropriate insurance requirements for vehicle in place ($100,000/$300,000)
  - Have undergone a Motor Vehicle Record Check (MVR)
  - Have been made aware that **NO** cell phones or other hand-held electronic devices can be used while driving
Online Training
Diocese of Madison
Online Training

Q - What is online training?
A - Online training consists of several training videos. Each training video is under 20 minutes and are all free.

Q - Why is it important to take the training?
A - Our extensive experience in working with the Church has allowed us to provide specific training for your employees and volunteers. This training will further educate and reinforce loss prevention and risk management procedures. This in turn, helps our locations become safer and reduce the potential for injuries and claims.

Q - How do we access the training?
A - All training can be viewed on CMGConnect.

To assist with having appropriate staff and volunteers complete training related to their duties and responsibilities, an easy-to-use checklist is provided.

CHECKLIST

- **Transportation Training**
  - Have all staff and volunteers who drive on your behalf successfully completed the *Defensive Driving* Curriculum?
  - Have youth ministers, transportation coordinators or anyone else who has transportation supervisory duties viewed the *Driving Administrator* Curriculum?

- **Maintenance and Facility Training**
  - Have all employee and volunteer maintenance staff and facility directors completed the Building Safety Curriculum: *Preventative Maintenance; Preventing Slips, Trips and Falls; and Fire Safety*?

- **Youth Ministry Training**
  - Have all youth ministers, youth leaders and chaperones viewed the *Youth Ministry* Curriculum?
• **Festival Training**
  ____ Have employees and volunteers involved in the administration and planning of parish festivals or high risk events viewed the *Parish Festival* Curriculum?

• **The Business of the Church**
  ____ Has at least one individual at your location in charge of administrative responsibilities viewed the following modules?
    ____ *Best Practices in Human Resource Management*
    ____ *Best Practices for Facilities Usage Management and Operations*
    ____ *Best Practices for Financial Management and Cash Handling*

  These can be found under the *Parish Administrator* Curriculum.

• **School Training**
  ____ Has appropriate staff viewed the following modules?
    ____ *Defeating a Violent Intruder*
    ____ *Bloodborne Pathogens*

  These can be found under the *School Safety* Curriculum.
Online Training Instructions
End-User Instructions

Self-Register

1. Please access all training at www.CMGconnect.org, or from a customized link on your Diocesan webpage. *These screen prints are samples only—these will help during your account set-up and accessing the training.*

2. Create an account by completing all of the information in the next several screens. **If you have done training in the past, you already have an account. Please login with your previous username and password.** If you cannot remember your username and password, please click the FAQ or the Support tab for additional information.

All end-users from the previous system **HAVE** an account—please use your previous username and password.
3. You will be asked to provide your address.

4. You will be asked to provide your primary parish.

5. Next you will select how you participate within your parish or school. Please select the job descriptions that are applicable to how you work or volunteer at your location. This allows the platform to automatically assign training that your diocese requires you take. If you are unsure please contact your Diocese.
6. Once you have completed the registration process, you will see the training curriculums. Click to start.

Note: The screen prints below are samples and may not reflect the custom training your Diocese has selected.

7. You must complete all sections within your training curriculum for full credit.

For technical assistance, please click the Support tab.