



COMMITMENT * EXPERTISE * STABILITY

PRE-INSPECTION RISK ASSESSMENT 2016-2017



CATHOLIC DIOCESE OF PEORIA, IL

FORM MUST BE SAVED BEFORE COMPLETING

Your time is valuable, so therefore, this pre-inspection form is to assist with the on-site inspection of your Parish/School location. Please review and completed the following and return to CMG via email: mblock@catholicmutual.org or aschallmoser@cdop.org or via fax: 309-671-1580 prior to the scheduled inspection. Thank you for your continued cooperation and commitment to CMG & CDOP Risk Management Program.

Name of Location <i>(Parish / Institution)</i>			Location Website
Name of School <i>(if applicable)</i>			School Website <i>(if applicable)</i>
Location Mailing Address			Date Self Inspection Completed
City	Zip Code	Phone	Name / Title of Individual Completing Inspection
Location Email			Email OR Phone for Individual Completing Inspection
School Email <i>(if applicable)</i>			Ledger Page
			CATHOLIC DIOCESE OF PEORIA, IL

YES NO NA VEHICLES:

1	Does the location own any vehicles? If yes, number of vehicles	
2	Does the location own any buses? If yes, number of buses	
3	Does the location own any 11-15 passenger vans? If yes, # of vans	
4	Is a complete inspection done on all owned vehicles?	
5	Does the Diocese insure any of the parish owned vehicles? <i>If YES, please list vehicles</i>	

YES NO NA VOLUNTEER DRIVERS:

- 1 Have all volunteers that drive personal vehicles for the location completed "Volunteer Driver" forms?
- 2 Have **ALL** volunteers that drive personal vehicles for the location taken the 3 defensive driving modules that can be found at www.CMGconnect.org? Examples could include: making bank deposits, field trip drivers, youth group drivers, picking up supplies, Eucharistic ministers, making hospital visits, etc.

- 3 Are all volunteer driver forms kept on file at the location?
- 4 Is a current list of qualified employee and/or volunteer drivers maintained?

YES NO NA **SEXUAL MISCONDUCT:**

- 1 Are you in compliance with the Diocesan Safe Environment Program? *Included but not limited to, fingerprinting, CANTS background check, Safe Environment Training*

YES NO NA **PERSONNEL:**

- 1 Are you aware the Chancellor **must** be contacted prior to any involuntary termination?
- 2 Have all paid employees with a valid driver's license taken the 3 defensive driving modules as required? The modules can be found at www.CMGconnect.org
- 3 Have all employees that work directly work with minors completed Safe Environment Training (including fingerprinting, CANTS background check, Safe Environment training)
- 4 Has an employee been designated as the Volunteer Coordinator?
- 5 If YES, has that employee been made aware of the Volunteer Coordinator duties? (www.catholicmutual.org / Risk Management)

YES NO NA **WORKERS COMPENSATION:**

- 1 CMG has formed a strategic alliance with Church Mutual Insurance Company (CMIC) under which CMIC will underwrite the workers' compensation insurance for all Catholic arch/diocese, religious orders and other Catholic institutions that CMG services. Are you aware of the new reporting procedure?
- 2 Are employees instructed that they **MUST IMMEDIATELY** report all work related injuries to their employer (Priest (or designated personnel) or Principal; late reporting could cause benefits to be delayed or denied?
- 3 Are you aware that if an employee injury is life threatening emergency call 911; after the employee has been taken care of, the employer **MUST** file an IL Form 45: Employer's First Report of Injury via email mblock@catholicmutual.org or via fax 309-671-1580?
- 4 Are you aware that if an employee injury is **NOT** life threatening and the employee has **NOT** received any outside medical care, the employer with the employee present, **MUST** contact: **CHURCH MUTUAL NURSE HOTLINE @ 844-322-4662?** The Nurse hotline should be called anytime an injury likely requires "more than a Band Aid but less than an ambulance ride." No IL Form 45 must be filed when an injury is reported through the Nurse hotline.
- 5 Are you aware that if an employee sought medical care before reporting the incident to their employer, the employer **MUST** file an IL Form 45: Employer's First Report of Injury via email mblock@catholicmutual.org or via fax 309-671-1580?

YES NO NA **LOCATION SPONSORED EVENTS:**

- 1 Does the location have an Event Coordinator for each event?

- 2 If alcohol is being sold at an event do you know to request a certificate of insurance from CMG? *(CMG form – Certificate Request)*
- 3 If alcohol is being sold at an event do you know you must obtain a temporary liquor license from the city and state prior to the event?
- 4 Are certificates of insurance obtained from all caterers/vendors providing food / rides / entertainment at an event?
- 5 Do certificates of insurance from caterers/vendors name the location and Diocese of Peoria as an additional insured?
- 6 Do you follow the recommendations outlined in CMG's Parish Festival
- 7 Are there any location sponsored events held **ONSITE** each year? *Please list events*

- 8 Are any location sponsored events held **OFFSITE** each year? *Please list events*

YES NO NA SPECIAL EVENT PROGRAM:

- 1 When the facility is being rented is the Special Event Application used *(i.e.: receptions, anniversaries, reunions, birthday parties, etc.)*
- 2 The cost for Special Event Coverage is \$100 (\$125 for an overnight event). *This form is located at www.catholicmutual.org . The form must be submitted at least 15 days prior to the event and it can be submitted email to: mblock@catholicmutual.org or aschallmoser@cdop.org or by fax. Please attach a copy of the submitted form to the payment made out to Dunne Property, N.F.P. and submit to Catholic Mutual Group 419 NE Madison Ave, Peoria, IL 61603.*
- 3 Is the current special event application being used?
- 4 If alcohol is being **served** (cannot be sold with this program) is a copy of the Diocesan Liquor Liability Guidelines provided to the renter.

- 5 Is a Facility Usage / Indemnity Agreement signed by the renter for each rental?
- 6 Is an Unaffiliated Organization Agreement signed by the renter when appropriate?
- 7 Are **CERTIFICATES OF INSURANCE** obtained from all outside agencies? Such as:
 - Boy Scouts
 - Girl Scouts
 - Trail Life USA
 - 12 Step Programs (*no certificate needed for AI Anon*)
 - Voter Registration / Polling Place (*insurance verification is acceptable for self-insured*)
 - Knights of Columbus
 - American Heritage Girls

YES NO NA CONTRACT REVIEW:

- 1 Does anyone other than assigned clergy reside on the premises?
- 2 Does the location have any rental properties?
- 3 If Yes, do you have lease agreements?
- 4 Would you like a sample residential lease agreement?
- 5 Do all renters obtain renter insurance?
- 6 Do you have any lease agreements for office equipment?
- 7 Has a certificate of insurance been provided to the leasing company?
- 8 Are you aware when you lease for new/additional office equipment you must request a new certificate of insurance to send to the leasing company?
- 9 Are **ALL** contracts forwarded to CDOP Legal Department for review prior to being signed (regardless of the amount of the contract)?
- 10 Has there been any new construction/repairs/renovation within the last 24 months?
- 11 If Yes, were certificates of insurance (*minimum \$2 million GL per occurrence*) obtained?

YES NO NA FACILITIES:

- 1 Do you keep a record of preventative maintenance?
- 2 Do you follow the summer maintenance guidelines?
- 3 Do you have established ice and snow removal procedures?
- 4 Are logs kept for ice and snow removal procedures?
- 5 Is there a periodic termite inspection?
- 6 Is there a formal procedure established for lending / assigning keys?
- 7 Is there an alarm on facility? If YES, who on staff has the codes?

- 8 Have you completed a written inventory on all location contents?

- 9 Are all clergy personal items labeled?
- 10 Do you have a history in the buildings including past renovations and repairs?
- 11 Is that information maintained in the location office?

YES NO NA RISK QUESTIONS:

- 1 Does the location participate in the Parish nurse program?
- 2 Is the Parish nurse paperwork on file with Catholic Charities?
- 3 Is there a heart defibrillator (AED) on site?

Where is the AED located:

- 4 Are there first aid kits on site?

Where are the first aid kits located:

- 5 Are staff or volunteers trained in basic first aid or CPR?

YES NO NA CATHOLIC MUTUAL GROUP – ONLINE TRAINING VIDEOS:

- 1 Are you aware that the defensive driving courses? www.CMGconnect.org
"Be Smart – Drive Safe"
"Church Transportation"
"Passenger Vans"
- 2 Are you aware of "The Business of the Church" training videos available?
Best Practices in Human Resource Management
Best Practices in Facilities Usage Management and Operations
Best Practices for Financial Management for Cash Handling
Best Practices for Cyber Security
- 3 Are you aware of other training modules available that include:
Fire Safety
Preventing Slips, Trips & Falls
Preventative Maintenance
Youth Ministry Everything Matters and Everyone has a Role
Safe and Successful Parish Festivals
- 4 Are you aware of "CMG Connect Parents"? www.CMGparents.org
 CMG has developed a new website and video specifically for parents and others who work with our youth to help address social media issues to include pornography and cyber bullying.

YES NO NA FINANCIAL SECURITY:

- 1 Is money counted immediately following Mass?
- 2 Are tamper proof bags used?
- 3 Do you rotate money counters?

4 Please advise where collections are counted and how they are transported to the bank:

5 Is a safe used to store money until it is taken to the bank?

6 Is money locked into a file cabinet with limited access before being taken to the bank?

7 What persons have access to the safe or file cabinet?

8 What types of security measures do you have to protect the safe and the safe area?

9 Does the location have security cameras?

10 Is the room where the safe kept locked?

11 Is the safe key or code secured?

12 Who has access to this area during and after mass?

13 When was the last time the security procedures were reviewed?

14 Who has control of the computer passwords?

15 Are safe combinations and computer passwords changed regularly?

16 Is there a Scrip program?

17 If YES, are Scrip Guidelines being followed to prevent theft or loss of scrip?

Form Completed By:	Title:	Phone (<i>with area code</i>):	Email: