



THE BIG BOOK OF CHECKLISTS

Risk Management Checklists
for Ministries

IMPORTANT INFORMATION

The information in this publication is intended to help ministry leaders better understand issues of risk management and assist them in developing a risk management program for their churches and related ministries.

No portion of this publication should be used without prior legal review, revision, and approval by an attorney licensed to practice law in your state. Brotherhood Mutual Insurance Company assumes no liability for reliance upon the information provided in this publication nor for the use and distribution of the sample forms provided.

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INTRODUCTION

Checklists for Ministries

HOW SHOULD I USE THIS BOOK?

The checklists in this book are designed to help you take the first steps toward improved risk management by assessing risk in key areas of your ministry. You can complete the checklists individually or all at once—whichever works best for you.

- If you answer “yes” to questions on a checklist, that means your ministry is already following some generally accepted best practices.
- If you answer “needs attention” to any of the questions, you can use the checklist to note issues that need more attention and create a follow-up plan for improvement.

Each checklist contains room to make notes for specific needs that are discovered while completing the checklist. These notes will become the building blocks of your plan.

You may want to create a binder of the completed checklists. Consider storing relevant notes, estimates, receipts, and other related paperwork in the binder.

Evaluating risk throughout your ministry is not a one-time procedure. Rather, it will become an ongoing process that you continually evaluate and improve upon.

Risks vary by a ministry’s size, attendance, programs, and other factors, and this book doesn’t include a checklist for every risk imaginable. However, completing these checklists can give you an overall feel for your ministry’s risk management mindset.

WHAT SHOULD I DO FIRST?

Find the right person to oversee this responsibility. A team of people may be needed to do the work of evaluating your ministry’s risks, and someone with a heart for risk management should lead the team. Then, decide which area of ministry to tackle first. Once you have improved safety in one area, you can build on that success to make changes elsewhere.

1 | RISK MANAGEMENT

The following checklists will help you review how your ministry approaches risk management and the types of risks that may be present in each area of your ministry, including loss of property or equipment, illness, lawsuits against your ministry, and more.

Complete this section to learn what to critical risk management steps your ministry can take today.

- Developing a Risk Management Mindset
- Creating a Risk Management Plan

 Organization Name

Developing a Risk Management Mindset Checklist

	Yes	Needs Attention
1. Do you have a designated risk manager who is familiar with your ministry's policies and procedures?	<input type="checkbox"/>	<input type="checkbox"/>
2. Does your risk manager have adequate time for this responsibility and the authority to implement risk control measures?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you have a risk management committee made up of members who have professional experience in areas like administration, finance, childcare, or construction?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do the members of your risk management committee possess good communication skills and the ability to creatively solve problems?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you evaluate which areas of your ministry could cause the highest number of losses (accidents, damages, injuries)?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you determine which areas of your ministry could cause the most expensive losses?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you determine which areas of your ministry could benefit the most from safety improvements?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you make a list of which areas of your operations are most important to your ministry?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you make a comprehensive list of potential hazards within each area of your ministry? (These include damage or loss of equipment, damage or loss of property, theft or loss of finances, illness, lawsuits against the ministry, sexual abuse or molestation, injury or death.)	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you estimate the frequency of each potential hazard, from highly unlikely to highly likely?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you determine the severity (or cost) of each potential loss, from low to high?	<input type="checkbox"/>	<input type="checkbox"/>
12. Do you consider the relationship between risk frequency and risk severity? (For example, drowning has a low frequency but high severity. Slip-and-fall accidents generally have a high frequency but low severity.)	<input type="checkbox"/>	<input type="checkbox"/>

(Continued next page)

	Yes	Needs Attention
13. Do you identify ways to avoid high-frequency, high-severity risks?	<input type="checkbox"/>	<input type="checkbox"/>
14. Do you identify ways to prevent high-frequency, low-severity risks?	<input type="checkbox"/>	<input type="checkbox"/>
15. Do you identify ways to reduce low-frequency, high-severity risks?	<input type="checkbox"/>	<input type="checkbox"/>
16. Do you identify ways to modify your plan to better control risks?	<input type="checkbox"/>	<input type="checkbox"/>
17. Do you record the reasons behind your risk assessments in writing?	<input type="checkbox"/>	<input type="checkbox"/>
18. Do you regularly re-evaluate hazards to be sure that you are appropriately addressing them as your ministry changes through the years?	<input type="checkbox"/>	<input type="checkbox"/>

Notes: _____

Completed by: _____ Date: _____

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 Organization Name

Creating a Risk Management Plan Checklist

	Yes	Needs Attention
1. Do you have the right insurance policies and limits to cover the amount of risk you've identified?	<input type="checkbox"/>	<input type="checkbox"/>
2. Have you discussed increasing your insurance deductible in order to reduce insurance costs? (This would mean absorbing additional costs if a claim occurs in order to reduce your insurance premium.)	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you use agreements that can help transfer some costs associated with risk to others (e.g., participants in youth outings sign liability release forms and contractors provide certificates of insurance)?	<input type="checkbox"/>	<input type="checkbox"/>
4. Can your current budget accommodate needed changes like additional insurance coverage, building or vehicle maintenance, or additional alarm, security, or screening tools?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you communicate your risk management plan to staff, volunteers, and participants in your ministry?	<input type="checkbox"/>	<input type="checkbox"/>
6. Have you made necessary changes to your building and/or vehicles?	<input type="checkbox"/>	<input type="checkbox"/>
7. Have you purchased and installed additional alarm, security, or screening tools?	<input type="checkbox"/>	<input type="checkbox"/>
8. Have you made necessary improvements to your ministry's operating procedures?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you train staff and volunteers when you have changes?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you define ways to establish accountability for your new operating procedures?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you assess how well the plan works?	<input type="checkbox"/>	<input type="checkbox"/>
12. Do you evaluate whether staff and volunteers are appropriately performing their roles?	<input type="checkbox"/>	<input type="checkbox"/>
13. Do you obtain feedback from staff, volunteers, and others about your new risk management plan?	<input type="checkbox"/>	<input type="checkbox"/>
14. Do you have plans in place to evaluate your risk management procedures on a regular basis and make adjustments as needed?	<input type="checkbox"/>	<input type="checkbox"/>

 Notes: _____

Completed by: _____ Date: _____

2 | BUILDING/PROPERTY RISK MANAGEMENT

The following checklists will help you look for fire hazards, hire a contractor, increase security, and protect your building from weather-related problems.

Complete this section to learn what to watch for, what to avoid, and what you can do to protect your ministry's property investment.

- Building Security
- Property Inventory
- Fire Safety
- Arson Prevention
- Lending Your Church Facilities
- Hiring a Contractor
- Cold Weather Maintenance
- Preventing Slip-and-Fall Accidents
- Swimming Pool Safety
- Water Damage Prevention
- Water Safety
- Wildfire Preparation Checklist
- Ministry Construction Planning

 Organization Name

Building Security Checklist

	Yes	Needs Attention
1. Do you keep a record of everyone who has a key or security code to the building, and use a system for tracking keys or changing security codes as volunteers/employees leave your organization?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you have adequate outdoor lighting near doors, in parking lots, and at rear entrances?	<input type="checkbox"/>	<input type="checkbox"/>
3. Is your outdoor lighting on a timer, a light-sensitive switch, or a motion switch?	<input type="checkbox"/>	<input type="checkbox"/>
4. Does your building have adequate indoor lighting that is on a timer so that it comes on even when the facility is not in use?	<input type="checkbox"/>	<input type="checkbox"/>
5. Is your outdoor landscaping trimmed and maintained just below window level so it doesn't provide hiding places for vandals or burglars?	<input type="checkbox"/>	<input type="checkbox"/>
6. Is the neighborhood surrounding your property clean and well-maintained?	<input type="checkbox"/>	<input type="checkbox"/>
7. Does your ministry enlist the help of the community surrounding your property and/or participate in a neighborhood watch program to help keep the area safe from crime?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you lock the doors of interior offices, classrooms, and supply rooms when they are not in use and restrict access to unused parts of the building?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you ask a church representative to open the church building for guests, monitor the events, and secure the building when they leave rather than give the guests full access to your building?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you lock petty cash, small valuables, keys, and important documents in a safe? Do you secure larger valuables, such as laptop computers, DVD players, and musical equipment?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you maintain an inventory of your building's property?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Property Inventory Checklist

You may also consider a video/digital record of property items. Store a copy of the digital file offsite.

CATEGORY	VALUE	MAKE	MODEL	NUMBER
Furniture				
Sanctuary chairs (excluding attached pews)	\$			
Unattached whiteboards	\$			
Unattached carpeting and rugs	\$			
Unattached chairs, desks, and tables	\$			
Unattached cupboards and cabinets	\$			
Owned Musical Instruments				
Free standing organ/keyboards	\$			
Pianos	\$			
Bells/free standing chimes	\$			
Guitars	\$			
Drums/percussion	\$			
Electronics				
Calculators	\$			
Overhead projectors and screens	\$			
Radios and televisions	\$			
Radio broadcasting equipment	\$			
Sound and video recording equipment	\$			
Stereo equipment	\$			
Tapes, records, and compact discs	\$			
Office Equipment				
Computers (entire system including hardware, software, and peripherals)	\$			
Major phone system	\$			
Printers and photocopy machines	\$			
Telephones and fax machines	\$			
Maps and globes	\$			
Files and filing cabinets	\$			
Outdoor Equipment				
Lawn and snow equipment	\$			
Sports equipment	\$			
Kitchen	\$			
Carts and trays	\$			
Coffee makers, mixers, and toasters	\$			
Dishes and silverware	\$			

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Pots and pans	\$			
Pressure cookers	\$			
CATEGORY	VALUE	MAKE	MODEL	NUMBER
Furniture				
Altar furnishings	\$			
Artwork	\$			
Bible	\$			
Books	\$			
Choir music	\$			
Choir robes and vestments	\$			
Christmas decorations	\$			
Communion service items	\$			
Draperies	\$			
Gas/electric fireplaces/space heaters	\$			
Hymnals	\$			
Indoor plants	\$			
Lamps	\$			
Items of Precious Metals (gold, silver, etc.)				
Communion set of gold or silver	\$			
Statuary/icons	\$			
Other Tools and Equipment				
Unattached gymnasium and playground equipment	\$			
Paint supplies and ladders	\$			
Mops and brooms	\$			
Cleaning compounds and waxes	\$			
Other Valuables				
Furniture total	\$			
Owned musical instruments total	\$			
Electronics total	\$			
Office equipment total	\$			
Outdoor equipment total	\$			
Kitchen's total	\$			
Furnishings total	\$			
Items of precious metals total	\$			
Other tools and equipment total	\$			
Other valuables total	\$			
Total value of property	\$			

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Fire Safety Checklist

	Yes	Needs Attention
1. Is your heating, ventilation, and air-conditioning system professionally cleaned and inspected annually?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you hire a professional to analyze the electrical system for adequacy, replace equipment like frayed, worn, or dried-out extension cords, and check the fuse box to make sure all fuses are the proper size for each circuit?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you ensure that combustibles, like paint supplies and other flammable liquids, are not stored in the same room as the furnace or boiler?	<input type="checkbox"/>	<input type="checkbox"/>
4. Are all exits clearly marked and free of obstacles so that someone could easily access them in the event of an emergency?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you have smoke alarms installed throughout your building?	<input type="checkbox"/>	<input type="checkbox"/>
6. Does your building have fire extinguishers in easily accessible locations on every floor?	<input type="checkbox"/>	<input type="checkbox"/>
7. Are fire extinguishers checked by a professional on a regular basis to make sure they're in working order?	<input type="checkbox"/>	<input type="checkbox"/>
8. Does your building have sprinkler systems installed to automatically extinguish fires as soon as they're detected?	<input type="checkbox"/>	<input type="checkbox"/>
9. Has your ministry worked with a professional to install a lightning and surge protection system?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do your staff members and volunteers know that they should turn off electrical items when they are not in use?	<input type="checkbox"/>	<input type="checkbox"/>
11. Does your ministry have a well-designed, comprehensive, and practiced evacuation plan for fires and other emergencies?	<input type="checkbox"/>	<input type="checkbox"/>

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Arson Prevention Checklist

Churches are particularly vulnerable to arson because they're often unoccupied for long periods of time. Arson damage can be reduced or prevented with effective fire prevention and evacuation plans.

	Yes	Needs Attention
1. Are all outside entrances to your building well-lit?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you keep trees and shrubs around your building trimmed and well-maintained?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you secure all windows, basement entries, and external stairways on your building?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you store flammable liquids in approved containers, either away from church property or under lock and key in a secure area within the church?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you store exterior trash containers away from the building to prevent a trash fire from spreading?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you regularly test your building's alarm system and train ministry staff in its operation?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you maintain a good record of who knows your alarm system's security code?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you change your alarm system's security code on a regular basis?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Lending Your Church Facilities Checklist

The key issue with loaning or renting church buildings to outside organizations is that your church can be held liable for accidents or injuries, even if your ministry is not the event sponsor. A secondary issue is security. Ministry items could be damaged or stolen while the building is open for other groups' events. If you haven't taken steps to secure valuables, your ministry may bear the cost of replacing missing items.

	Yes	Needs Attention
1. Is the borrower's reputation well established and generally accepted by your community?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you have a signed Facility Use agreement with the outside group?	<input type="checkbox"/>	<input type="checkbox"/>
3. Does the agreement contain a "hold harmless," indemnity, and defense clause for any liability claims resulting from the borrower's activities on your premises?	<input type="checkbox"/>	<input type="checkbox"/>
4. If you have a Facility Use agreement, did your attorney review it to make sure it complies with your state laws?	<input type="checkbox"/>	<input type="checkbox"/>
5. Does the agreement require that the borrower have a Certificate of Insurance (COI) public liability insurance policy with at least a \$1 million limit of liability coverage and a \$5,000 limit of medical payments coverage?	<input type="checkbox"/>	<input type="checkbox"/>
6. Does the agreement require that your organization be named as an "additional insured" on the borrower's policy for liability damages resulting from its activities on your premises?	<input type="checkbox"/>	<input type="checkbox"/>
7. Does the agreement require the borrowers to furnish you with a certificate of insurance that proves coverage and shows your organization as an additional insured?	<input type="checkbox"/>	<input type="checkbox"/>
8. Will the group's activities cause undue wear and tear on your facilities?	<input type="checkbox"/>	<input type="checkbox"/>
9. Are the group's activities of a high-risk nature in which people might be easily injured?	<input type="checkbox"/>	<input type="checkbox"/>
10. Will the group be confined to one specific area of your building, or will multiple rooms be required?	<input type="checkbox"/>	<input type="checkbox"/>
11. If the group using your facility works with children or youth, will there be adequate adult supervision?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name _____

Hiring a Contractor Checklist

	Yes	Needs Attention
1. Do you have a planning team to help determine the church's current and future facility needs?	<input type="checkbox"/>	<input type="checkbox"/>
2. Have you determined what needs to be done and how the construction project should look when it's finished?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you know how much your ministry can afford to spend and how you'll pay for the project?	<input type="checkbox"/>	<input type="checkbox"/>
4. When choosing your builder candidates, do you bid the job out to at least three companies and check each company's references (past and current customers)?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you check with the local building contractors' association and the Better Business Bureau to see if they recommend your candidate?	<input type="checkbox"/>	<input type="checkbox"/>
6. Does your candidate have at least five years' experience?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you ask to see samples of your candidate's work?	<input type="checkbox"/>	<input type="checkbox"/>
8. Are you familiar with the licensing requirements for your area?	<input type="checkbox"/>	<input type="checkbox"/>
9. Is your candidate fully licensed?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you know whether you or your contractor is responsible for insuring the building project?	<input type="checkbox"/>	<input type="checkbox"/>
11. Does the contractor have a certificate of insurance that includes workers' compensation, general liability, and auto, each with limits of at least \$1 million?	<input type="checkbox"/>	<input type="checkbox"/>
12. Does the contractor have builder's risk coverage on the property?	<input type="checkbox"/>	<input type="checkbox"/>
13. Do you have a construction contract provision that requires the contractor to "hold harmless," indemnify, and defend you in the event of injury or damage to the property of others that is caused by the contractor?	<input type="checkbox"/>	<input type="checkbox"/>
14. Do you ask an attorney to review all contracts used by your ministry?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Cold Weather Maintenance Checklist

	Yes	Needs Attention
1. Do you have a qualified professional inspect your entire roof regularly to make sure that the roof surface, flashings, caulking, and sealants are watertight?	<input type="checkbox"/>	<input type="checkbox"/>
2. Are your gutters, downspouts, and drains clear of debris that could trap water, ice, or snow on the roof?	<input type="checkbox"/>	<input type="checkbox"/>
3. Are your outdoor steps and hand railings in good shape to help prevent slips and falls from occurring on slippery walkways?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you seal the draft areas around doors and windows and replace worn weatherstripping?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do your ceilings and walls have extra insulation where needed?	<input type="checkbox"/>	<input type="checkbox"/>
6. Are your outside spigots shut off, and are shut-off valves to all exterior faucets closed?	<input type="checkbox"/>	<input type="checkbox"/>
7. Are your water hoses detached, coiled, and stored off the floor to prevent mildew growth?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you insulate pipes that are exposed to extreme cold to prevent them from freezing?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you have a snow-removal plan to keep all parking lots, walkways, and entrances free of ice and snow?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you have a designated person check on the building on a daily basis during cold snaps?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you use remote monitoring of building temperature and water pipes to protect against flooding from frozen pipes?	<input type="checkbox"/>	<input type="checkbox"/>
12. Do you maintain a good stock of winter supplies for vehicles, like antifreeze, sidewalk salt, gloves, and snow removal equipment?	<input type="checkbox"/>	<input type="checkbox"/>
13. Do you maintain an up-to-date list of emergency phone numbers for needs like snow removal, service and repair contractors, utility companies, the local weather station, etc.?	<input type="checkbox"/>	<input type="checkbox"/>

BUILDING / PROPERTY

Notes: _____

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 Organization Name

Preventing Slip-and-Fall Accidents Checklist

Wet floors and slippery sidewalks are among the leading reasons people slip and fall. Such falls are especially hazardous to seniors, who might be more likely to suffer an injury. Snow, rain, and ice compound the problem during winter. While slips may seem unavoidable, there are preventive measures you can take to help keep people safe.

	Yes	Needs Attention
1. Are your sidewalks and parking lots in good repair? Are they free of uneven surfaces, holes, and cracks that people could easily trip over?	<input type="checkbox"/>	<input type="checkbox"/>
2. Are handrails and steps also in good condition? Are handrails securely fastened? Do you routinely check for and repair worn or damaged steps?	<input type="checkbox"/>	<input type="checkbox"/>
3. Are your steps (indoor and outdoor) clearly marked so pedestrians can easily differentiate their levels?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you use mats or rugs with non skid backings at each of your entrances? Do you ensure that they lie flat so nobody trips over them?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you use only non slip coatings and waxes on your floors to improve traction?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you clearly mark slipping/tripping hazards such as wet floors, using cones or signs, to discourage people or walking on them?	<input type="checkbox"/>	<input type="checkbox"/>
7. Is someone designated to mop/dry floors when they become wet?	<input type="checkbox"/>	<input type="checkbox"/>
8. Is your carpet in good repair? Do you routinely replace worn or frayed carpeting to prevent people from tripping over loose pieces?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you have an organized snow removal plan to help keep parking lots, walkways, and entrances free of snow and ice?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you educate ushers/greeters to know to whom to report slip/trip hazards?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Swimming Pool Safety Checklist

	Yes	Needs Attention
1. Are safety rules posted and enforced?	<input type="checkbox"/>	<input type="checkbox"/>
2. Are emergency telephone numbers posted?	<input type="checkbox"/>	<input type="checkbox"/>
3. Is rescue equipment readily accessible?	<input type="checkbox"/>	<input type="checkbox"/>
4. Is a trained attendant on duty at all times when pool is open?	<input type="checkbox"/>	<input type="checkbox"/>
5. Is the children's area roped off?	<input type="checkbox"/>	<input type="checkbox"/>
6. Is pool surrounded by a security fence and securely locked when not in use?	<input type="checkbox"/>	<input type="checkbox"/>
7. Is diving strictly prohibited?	<input type="checkbox"/>	<input type="checkbox"/>
8. Is pool area inspected regularly for sharp edges?	<input type="checkbox"/>	<input type="checkbox"/>
9. Are pool ladders, steps, and treads in good repair?	<input type="checkbox"/>	<input type="checkbox"/>
10. Are walkways and deck in good repair and coated in a non-slip material?	<input type="checkbox"/>	<input type="checkbox"/>
11. Is pool depth marked conspicuously?	<input type="checkbox"/>	<input type="checkbox"/>
12. Is water tested in accordance with applicable regulations?	<input type="checkbox"/>	<input type="checkbox"/>
13. Is water clear and the bottom clearly visible?	<input type="checkbox"/>	<input type="checkbox"/>
14. Are screens secure over all water intakes?	<input type="checkbox"/>	<input type="checkbox"/>
15. If hot-water pipes are present, are they located where people cannot contact them?	<input type="checkbox"/>	<input type="checkbox"/>
16. If night swimming is permitted, is illumination adequate?	<input type="checkbox"/>	<input type="checkbox"/>
17. Are underwater lights GFCI equipped and periodically tested by an electrician?	<input type="checkbox"/>	<input type="checkbox"/>
18. Are pool drains in compliance with the VGB Act?	<input type="checkbox"/>	<input type="checkbox"/>

BUILDING / PROPERTY

 Notes: _____

Completed by: _____ Date: _____

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Ministry Construction Planning Checklist

CREATE PRELIMINARY PLANS

- Nominate a vision team.
- Have the team choose a chairman, secretary, and possibly someone to coordinate communication with church leadership and the congregation.
- Have the team research current ministry needs.
- Have the team consider future ministry needs and include expansion in your plans.
- Document all team meetings—especially decisions.
- Ensure that the team communicates their vision to church leadership and the congregation before proceeding.

CHOOSE QUALIFIED PROFESSIONALS

- Consider hiring a design firm—preferably one with experience building churches.
- Choose a reputable contractor.
Research the candidates:
 - Make sure they're licensed.
 - Make sure they have at least five years of comparable experience.
 - Seek examples of work your candidates have done.
 - Check references from several current or past clients.

Gather information from:

- Your local building department.
- The Building Contractors' Association.
- The Better Business Bureau.

Ask specific questions, such as:

- Was the project completed on schedule?
- Was it completed within budget?
- Were there problems along the way?
- Were you pleased with the overall results?

Check for insurance:

- Obtain a certificate of insurance from your top three candidates as proof that they carry professional liability insurance.
- Require the general contractor and all subcontractors to furnish a certificate of insurance verifying that all workers are covered by workers' compensation insurance.

Bid it out:

- Ask the best three candidates to submit bids on your project.
- Give all three the same specifications for your project, so the bids will be easier to compare. Remember that the lowest bid isn't always the best bid. That contractor might use lower-quality materials or do less extensive work.

- Consider bonding the project if it's large or time-sensitive. A bond ensures that a contractor is financially prepared to assume responsibility if he's unable to complete the job. Never proceed with a contractor if he's unable or unwilling to back up his work financially.

CREATE A MASTER PLAN

- Prioritize your list of ministry needs.

Prepare to work with an architect or design professional:

- Nominate a liaison between your team and the architect.
- Establish a chain of command between your team and the architect.
- Establish a communication plan between your team and the architect.
- Document communication and decisions.

Work with an architect or design professional:

- Determine whether you will build in phases.
- Design an infrastructure that allows for expansion, if building in phases.
- Determine the size of the initial project.
- Determine the quality of materials.
- Determine the cost.

EVALUATE FINANCES

- Decide how much your church can afford.
- Establish how you'll pay for the project (loan, bond, capital stewardship campaign).
- Revise design plans, if necessary, to reflect your financial ability.

REQUIRE A WRITTEN CONTRACT

- Specify the time frame.
- Specify the price range your church expects to pay.
- Include a copy of the drawings or architectural plans.
- Include a complete list of building specifications.
- Make sure the construction contract contains an indemnification provision requiring the contractor to compensate you for any injury, loss, or damage he or she causes.
- Have an attorney review all contracts before you sign them.

OBTAIN BUILDER'S RISK INSURANCE

- Before a project begins, work with your agent to purchase builder's risk insurance.
- Clarify in writing who's responsible for insuring the building while it's being constructed.
- After the project is completed or occupancy begins, cancel the builder's risk coverage and add the building onto your ministry's property and liability policy.

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 Organization Name

Wildfire Preparation Checklist

	Yes	Needs Attention
1. Did you close all windows?	<input type="checkbox"/>	<input type="checkbox"/>
2. Are all single-paned windows covered with shutters or 1/2 inch-thick plywood?	<input type="checkbox"/>	<input type="checkbox"/>
3. Did you move overstuffed furniture away from windows?	<input type="checkbox"/>	<input type="checkbox"/>
4. Did you remove curtains made from lace, nylon, or light material?	<input type="checkbox"/>	<input type="checkbox"/>
5. Did you close all fire-resistant window coverings, heavy drapes, and Venetian blinds?	<input type="checkbox"/>	<input type="checkbox"/>
6. Did you fill sinks and the baptismal with water? Firemen can use this water to put out spot fires.	<input type="checkbox"/>	<input type="checkbox"/>
7. Did you leave a light on in each room to aid firefighters?	<input type="checkbox"/>	<input type="checkbox"/>
8. Did you shut off gas and propane lines?	<input type="checkbox"/>	<input type="checkbox"/>
9. Did you cover attic and basement vents with 1/2 inch-thick plywood or several layers of aluminum foil?	<input type="checkbox"/>	<input type="checkbox"/>
10. Did you put tennis balls into downspouts and fill your church's gutters with water?	<input type="checkbox"/>	<input type="checkbox"/>
11. Did you position a ladder against the church's roof on the side facing away from the approaching fire?	<input type="checkbox"/>	<input type="checkbox"/>
12. Is all combustible outdoor furniture inside the church or garage?	<input type="checkbox"/>	<input type="checkbox"/>
13. Did you remove wooden flower boxes from beneath windows?	<input type="checkbox"/>	<input type="checkbox"/>
14. Did you park church vehicles in a garage or move them to a safer location?	<input type="checkbox"/>	<input type="checkbox"/>
15. Are all vehicle windows closed if you're unable to move vehicles to a safer location?	<input type="checkbox"/>	<input type="checkbox"/>
16. Did you close any garage doors?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Water Damage Prevention Checklist

Water damage can ruin carpeting, destroy computer equipment, and delay worship services. To save money and avoid many of the hassles associated with water damage, perform regular inspections and have professionals do routine plumbing maintenance.

	Yes	Needs Attention
Surface Water		
1. Are all windows and doors securely closed each night?	<input type="checkbox"/>	<input type="checkbox"/>
2. Are all exterior drains clean and free of debris, particularly those at the bottom of outside stairwells?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do all doors seal properly at the base?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do window wells have secure covers (no cracks or holes)?	<input type="checkbox"/>	<input type="checkbox"/>
5. Are any wall or floor cracks sealed?	<input type="checkbox"/>	<input type="checkbox"/>
6. Does the sump pump have a backup power supply?	<input type="checkbox"/>	<input type="checkbox"/>
7. Does the ground slope away from the building in all areas?	<input type="checkbox"/>	<input type="checkbox"/>
Plumbing		
8. Do you inspect pipes regularly, looking around connections and joints for signs of corrosion, rust, or leaks?	<input type="checkbox"/>	<input type="checkbox"/>
9. Does a professional regularly inspect and maintain fire suppression systems?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do pipes in attics, basements, and other places have enough insulation to keep them from freezing?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do all areas of each building stay above 50 degrees in winter?	<input type="checkbox"/>	<input type="checkbox"/>
12. During extreme cold spells, does someone check church buildings daily for frozen or burst pipes?	<input type="checkbox"/>	<input type="checkbox"/>
13. Are buildings equipped with alarms that alert you to water overflows?	<input type="checkbox"/>	<input type="checkbox"/>
14. Do you check toilets regularly to ensure they flush properly, water supply valves close smoothly and water supply lines attach securely?	<input type="checkbox"/>	<input type="checkbox"/>
15. Does a plumber inspect your water heater and flush sediment from the tank every one or two years?	<input type="checkbox"/>	<input type="checkbox"/>

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3 | CHILDREN/YOUTH RISK MANAGEMENT

Help protect children and teens by carefully screening volunteers, adequately supervising events, and regularly inspecting your play equipment.

Use these checklists to help you develop and perform safety inspections, supervise youth activities, and keep young people safe.

- Nursery Safety
- Playground Safety
- Water Safety Checklist
- Youth Activities
- Youth Texting/Communication
- Safeguarding Against Sexual Abuse
- Youth Supervision and Discipline
- Background Screening
- Child Safety Program, Policies, and Procedures

 Organization Name

Nursery Safety Checklist

Are your congregation's youngest members safe in your nursery? Child safety is likely a top concern for your ministry. That's why it's imperative to check your nursery on a regular basis to make sure it remains a safe place for the infants and toddlers entrusted to your care.

	Yes	Needs Attention
1. Are crib slats no more than 2-3/8 inches apart to prevent head entrapment? Make sure there are no loose or missing slats.	<input type="checkbox"/>	<input type="checkbox"/>
2. Are crib mattresses firm and tight-fitting with space for no more than two fingers between the mattress and the crib side?	<input type="checkbox"/>	<input type="checkbox"/>
3. Are all nuts, screws, and bolts tightened on your crib(s), and are all mattress supports secure?	<input type="checkbox"/>	<input type="checkbox"/>
4. Is the mesh on your playpen(s) made of a fine weave and free of tears, holes, and loose threads?	<input type="checkbox"/>	<input type="checkbox"/>
5. Is all nursery furniture (cribs, playpens, changing tables, etc.) free of cracked or peeling paint and splinters?	<input type="checkbox"/>	<input type="checkbox"/>
6. Are all cribs newer than 10 years old, with sturdy hardware and fixed sides that cannot be lowered?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do all high chairs have high, stable bases that won't collapse easily, as well as functional restraining straps?	<input type="checkbox"/>	<input type="checkbox"/>
8. Is the nursery free of any toys with small parts, fuzzy stuffed animals or dolls, balloons, and foam toys?	<input type="checkbox"/>	<input type="checkbox"/>
9. Have you surveyed the room from your hands and knees? Is the floor free of objects a small child could swallow, such as coins, paper clips, or buttons?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do doorways provide visibility for adults but also adequate coverage to prevent children from wandering off? Do they have childproof locks or latches on them?	<input type="checkbox"/>	<input type="checkbox"/>
11. Are all bulletin boards and walls free of tacks and pins that children could reach?	<input type="checkbox"/>	<input type="checkbox"/>
12. Are all electrical outlets covered, and are all window treatment cords properly secured?	<input type="checkbox"/>	<input type="checkbox"/>
13. Do gliding rockers have side panels to prevent injury?	<input type="checkbox"/>	<input type="checkbox"/>

(Continued next page)

	Yes	Needs Attention
14. Are all walls free of peeling wallpaper and/or chipped paint? Are all ceiling tiles firmly in place?	<input type="checkbox"/>	<input type="checkbox"/>
15. Are all stairwells gated or otherwise blocked from children's access?	<input type="checkbox"/>	<input type="checkbox"/>
16. Are all shelves and heavy furniture anchored so children cannot pull them down? Are all sharp corners or edges padded?	<input type="checkbox"/>	<input type="checkbox"/>
17. Are all cleaning and diaper-changing products stored out of children's reach or in latched cabinets?	<input type="checkbox"/>	<input type="checkbox"/>
18. Does the room contain a well-stocked first-aid kit that is stored out of the reach of children?	<input type="checkbox"/>	<input type="checkbox"/>
19. Are smoke and carbon monoxide detectors installed?	<input type="checkbox"/>	<input type="checkbox"/>
20. Are emergency phone numbers posted in a prominent place? If there is no phone in the room, is there a sign posted that provides the location of the nearest phone?	<input type="checkbox"/>	<input type="checkbox"/>
21. Are disaster response instructions posted as well as a map to the nearest exit?	<input type="checkbox"/>	<input type="checkbox"/>
22. Does your ministry have an established check-in/check-out system to keep children safe?	<input type="checkbox"/>	<input type="checkbox"/>
23. Does your ministry maintain records of food allergies and take the necessary precautions involved with these allergies?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Playground Safety Checklist

	Yes	Needs Attention
1. Was your playground equipment designed and installed by professionals?	<input type="checkbox"/>	<input type="checkbox"/>
2. Does your playground equipment sit on at least 9 to 12 inches of shock-absorbing surface material, and is it firmly anchored to the ground?	<input type="checkbox"/>	<input type="checkbox"/>
3. Are elevated play areas on your playground protected with continuous guardrails. (20 inches above the ground for preschoolers, 30 inches above the ground for school-aged children)?	<input type="checkbox"/>	<input type="checkbox"/>
4. Is the space between handrails and ladder rungs no larger than 3.5 x 9 inches to prevent head entrapment?	<input type="checkbox"/>	<input type="checkbox"/>
5. Are your playground swings spaced at least two feet apart and 30 inches from the side poles to help prevent crashes?	<input type="checkbox"/>	<input type="checkbox"/>
6. Is your playground separated from roadways with a fence, wall, or other secure barrier?	<input type="checkbox"/>	<input type="checkbox"/>
7. Is your playground cleaned regularly and inspected for broken glass or sharp, metal objects?	<input type="checkbox"/>	<input type="checkbox"/>
8. Is your playground equipment regularly inspected for worn or missing parts, loose bolts, sharp edges or points, damaged "S" hooks, and exposed components that could trip, pinch, or crush someone?	<input type="checkbox"/>	<input type="checkbox"/>
9. Are moving parts on your playground equipment properly lubricated?	<input type="checkbox"/>	<input type="checkbox"/>
10. Is splintered or cracked wood repaired as soon as possible?	<input type="checkbox"/>	<input type="checkbox"/>
11. Are children under the age of 5 accompanied by at least two adults at all times when using your playground? Are proper adult-to-child ratios for supervision followed?	<input type="checkbox"/>	<input type="checkbox"/>
12. Do children know how to use the equipment correctly and understand the rules and expectations for playground safety?	<input type="checkbox"/>	<input type="checkbox"/>

CHILDREN / YOUTH

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 Organization Name

Water Safety Checklist

	Yes	Needs Attention
1. Do you pair up swimmers regardless of their skill level and use the buddy system during all outings that involve water play?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you employ certified lifeguards at all of your swimming areas and limit swim times to when a lifeguard is on duty?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you post rules and safety regulations in highly visible places near all of your swimming areas?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you use wristbands or some other form of identification for all of your young children and inexperienced swimmers, so they can be easily seen while in the water?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you limit inexperienced swimmers' water play to shallow areas, in order to help ensure their safety?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you provide young children and inexperienced swimmers with U.S. Coast Guard-approved life jackets (personal flotation devices)?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you schedule regular swim breaks (for example, 10 minutes at the top of every hour) and strictly enforce them?	<input type="checkbox"/>	<input type="checkbox"/>
8. When swimming involves natural bodies of water, do you clearly mark off the deep areas and drop-offs?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you have a designated person assigned to watch the weather for pop-up storms that could pose lightning dangers?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do your group leaders know how to prevent, recognize, and respond to emergencies?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do your group leaders know CPR?	<input type="checkbox"/>	<input type="checkbox"/>
12. Do your group leaders have ready access to a cell phone or radio, in the event of an emergency?	<input type="checkbox"/>	<input type="checkbox"/>

CHILDREN / YOUTH

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 Organization Name

Youth Activities Checklist

	Yes	Needs Attention
1. Do you enlist the services of an experienced vendor who specializes in sponsoring and supervising activities (like river rafting) when needed?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do your youth leaders require that parents or guardians sign an activity participation agreement prior to allowing young people to participate in certain high-risk activities, releasing your ministry from liability?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you recruit an adequate number of experienced event supervisors for youth activities, keeping in mind that more supervisors may be needed for higher-risk activities?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you ensure sleeping quarters are separated by gender and age during overnight events?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you document whether youth activity participants are covered by family medical or health insurance?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you invest in a charter bus service when it is necessary to transport large numbers of youth long distances and to and from activities?	<input type="checkbox"/>	<input type="checkbox"/>
7. When it is necessary to use ministry-owned or borrowed vehicles to transport youth, do you take extra measures to ensure that the vehicles are in excellent mechanical condition and that they are operated by experienced, responsible drivers?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you have experienced, certified lifeguards on duty at any youth event involving swimming?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do your youth leaders fill out an injury report form each time someone gets hurt while participating in a youth activity, no matter how minor the injury may seem?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do your youth leaders know (and regularly practice) emergency response procedures so that they are able to respond quickly to an actual emergency?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do your youth leaders have up-to-date first-aid training and ready access to first-aid supplies?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Youth Texting/Communication Checklist

	Yes	Needs Attention
1. Do you follow a published set of guidelines and policies that govern texting and messaging practices for your ministry's employees and volunteers who work with youth?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you have a standard practice (i.e. mandatory class or educational material) for communicating your guidelines and policies to the staff?	<input type="checkbox"/>	<input type="checkbox"/>
3. Does your youth ministry staff obtain the express permission of the youth's parents to communicate electronically with their children?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do your youth ministry staff members use mass text and emails to large groups and avoid individual communication whenever possible?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do multiple youth ministry staff members have access to the accounts or devices used to communicate with youth in order to provide accountability?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you educate your youth ministry staff that texting and instant messaging should not be used as a substitute for conversing with teens in person?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you train your staff on how to address and report a situation in which they receive an inappropriate message from a youth group member?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you follow your state's mandatory reporting laws regarding possessing, sending, or knowledge of improper pictures and sexually explicit messages?	<input type="checkbox"/>	<input type="checkbox"/>
9. Have you educated your youth leaders that sexting is not tolerated?	<input type="checkbox"/>	<input type="checkbox"/>

CHILDREN / YOUTH

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 Organization Name

Safeguarding Against Sexual Abuse Checklist

Safeguarding the physical, emotional, and spiritual well-being of young people and other vulnerable individuals may be one of the most important responsibilities of any ministry organization. Use this checklist as a baseline for your ministry. For more information, download “Child Protection in a Ministry Environment” resource from Brotherhoodmutual.com.

	Yes	Needs Attention
1. Do you ask volunteers to wait until they are associated with your ministry for at least six months before allowing them involvement with children of any age?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you invest in a background screening program for all employees, regardless of position, and volunteers who work with children, youth, or vulnerable adults?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do your ministry screening procedures include investigation into prior church membership and volunteer work, reference checks, and criminal records checks?	<input type="checkbox"/>	<input type="checkbox"/>
4. If you do not require the presence of two adults, do you require that the “Rule of 3” be followed—requiring that a youth ministry worker is never alone with an individual minor?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you ensure an adequate number of adult chaperones for all off-premise events, especially those that involve overnight stays?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you discourage the use of teenagers as childcare workers unless they are screened and are working alongside two adults?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you use a “claim check” procedure so that children are released only to a parent, guardian, or other authorized person?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do your children’s and youth ministry leaders have familiarity with state and federal laws regarding reporting child abuse and neglect, and have they been trained in how to comply with these laws?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do your staff members and volunteers know how to identify inappropriate behavior and the procedures for reporting such conduct?	<input type="checkbox"/>	<input type="checkbox"/>

CHILDREN / YOUTH

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 Organization Name

Youth Supervision and Discipline Checklist

	Yes	Needs Attention
1. Do you conduct comprehensive background checks for all your employees, regardless of position, and volunteers who work with youth?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you require all event volunteers to attend your church for at least six months before allowing them to serve in a leadership role?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you look for workers who demonstrate maturity and good judgment?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you avoid putting teenagers in leadership/supervisory roles?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you appoint workers who have the ability to maintain control of the group?	<input type="checkbox"/>	<input type="checkbox"/>
6. If you do not require the presence of two adults, do you require that the 'Rule of 3" be followed—requiring that a youth ministry worker is never alone with an individual minor?	<input type="checkbox"/>	<input type="checkbox"/>
7. For each of your youth programs and activities, do you have a ratio of at least one adult chaperone for every eight young people?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you appoint more than two adult workers for events that involve a greater degree of risk or involve younger children?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you meet with your workers before the event to evaluate risks, establish discipline procedures, and plan for emergency situations?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you try to enlist workers who have special training like CPR, AED first aid, or special skills that pertain to the activity?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you ask parents/guardians to fill out activity participation agreements and note any known medical conditions or allergies before allowing children to participate in any activity?	<input type="checkbox"/>	<input type="checkbox"/>
12. Do your youth activity leaders and chaperones give participants clear guidelines to follow so that young people have a good understanding of what's expected of them at all times?	<input type="checkbox"/>	<input type="checkbox"/>
13. Have your chaperones been instructed to avoid the use of accusation, criticism, blame, shame, sarcasm, and other forms of negative discipline?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Background Screening Checklist

Guiding Principle: All employees, regardless of position, and most volunteers should be screened.

	Yes	Needs Attention
1. Do you have a written policy that addresses screening of employees and volunteers?	<input type="checkbox"/>	<input type="checkbox"/>
2. Have you consulted an attorney in the development of a background check policy and screening procedures?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you ask volunteers to wait until they are associated with your ministry for at least six months before allowing them involvement with children of any age?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you conduct thorough background checks for all your employees, regardless of position?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you conduct thorough background checks on volunteers, especially those who work with children, youth, or vulnerable adults, those on your security/medical teams, and those who handle money or other confidential records?	<input type="checkbox"/>	<input type="checkbox"/>
6. Does your screening include a written application and personal interview?	<input type="checkbox"/>	<input type="checkbox"/>
7. Does your screening process include a criminal background check?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you request at least two references from all applicants?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you contact at least two references provided by applicants?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you require applicants to sign a liability release that grants consent for references to share information about the applicants?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you update criminal background checks for employees and volunteers at least every three to five years?	<input type="checkbox"/>	<input type="checkbox"/>
12. Do you obtain written authorization from applicants before conducting a criminal background check?	<input type="checkbox"/>	<input type="checkbox"/>
13. Have you developed and implemented a plan to regularly communicate your screening policy to ministry attendees?	<input type="checkbox"/>	<input type="checkbox"/>
14. Do you regularly review your program and make changes when needed?	<input type="checkbox"/>	<input type="checkbox"/>

CHILDREN / YOUTH

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 Organization Name

Creating Your Program, Policies, and Procedures Checklist

	Yes	Needs Attention
1. Do you currently have a written child abuse prevention policy for your children's and youth ministry programs?	<input type="checkbox"/>	<input type="checkbox"/>
2. Have you consulted an attorney in the development of a child abuse prevention policy?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you strictly enforce your current policy or program?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do your policies include safeguards for minimizing the risk of abuse?	<input type="checkbox"/>	<input type="checkbox"/>
a. On and off ministry premises, do you have at least two, unrelated adults supervise a group of children at all times, whether they are in a room, a vehicle, or other enclosed space—even if only one or two children need care?	<input type="checkbox"/>	<input type="checkbox"/>
b. Do you ensure an adequate number of adult chaperones for all off-premise events, especially those that involve overnight stays?	<input type="checkbox"/>	<input type="checkbox"/>
c. Do you discourage the use of teenagers as child care workers unless they are screened and are working alongside two adults?	<input type="checkbox"/>	<input type="checkbox"/>
d. Do you use a "claim check" procedure so that children are released only to a parent, guardian, or other authorized person?	<input type="checkbox"/>	<input type="checkbox"/>
e. Do you forbid one-to-one electronic communication between adults and youth?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you have adequate insurance coverage to protect yourself financially if a claim of child abuse occurs?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you provide regular training for children's and youth ministry workers?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you have a clearly defined reporting procedure in case an incident of abuse occurs?	<input type="checkbox"/>	<input type="checkbox"/>
a. Do your children's and youth ministry leaders know the state and federal requirement for reporting child abuse and neglect?	<input type="checkbox"/>	<input type="checkbox"/>
b. Do your staff members and volunteers know how to identify inappropriate behavior and the procedures for reporting such conduct?	<input type="checkbox"/>	<input type="checkbox"/>
8. Are you prepared to respond to potential media inquiries?	<input type="checkbox"/>	<input type="checkbox"/>
9. Have you developed and implemented a plan to regularly communicate your child protection policies to ministry attendees?	<input type="checkbox"/>	<input type="checkbox"/>

(Continued next page)

	Yes	Needs Attention
10. Do you regularly review your program and make changes when needed?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you instruct your chaperones to avoid the use of accusation, criticism, blame, shame, sarcasm, and other forms of negative discipline?	<input type="checkbox"/>	<input type="checkbox"/>
12. Do you instruct your chaperones to avoid any use of physical punishment?	<input type="checkbox"/>	<input type="checkbox"/>
13. Are your children's and youth leaders and volunteers given access to training that can help them develop their behavior management skills?	<input type="checkbox"/>	<input type="checkbox"/>

Notes: _____

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4 | DISASTERS/EMERGENCY MANAGEMENT

We can't always prevent accidents and disasters, but we can be prepared to respond to them.

Every ministry should have an emergency response plan that helps it react quickly to natural disasters, fires, violence, accidents, and other situations. Key volunteers need to know their roles in executing the plan, which should be reviewed annually.

Completing this section will help you learn more about disaster planning, first aid, and providing shelter in the wake of a storm.

- Developing a Disaster Plan
- Disaster Relief Teams
- Providing Temporary Shelter
- Violence in the Church
- Emergency Medical Care
- First Aid Kit Contents
- Setting up an AED Program
- AED Maintenance
- Demonstration Response
- Disaster Recovery

 Organization Name

Developing a Disaster Plan Checklist

	Yes	Needs Attention
1. Do you have a team in place that can take charge during any emergency situation? Do members of the team fill the roles of communication, evacuation, first aid, and emergency supplies?	<input type="checkbox"/>	<input type="checkbox"/>
2. Does your disaster planning team maintain an inventory of equipment available for fire protection, communications, first aid, and emergency power?	<input type="checkbox"/>	<input type="checkbox"/>
3. Has your disaster planning team identified area hazards and the resources available to help? (Consider whether your ministry is in a flood plain, earthquake zone, tornado-prone area, or near an area where hazardous chemicals are produced, stored, or transported.)	<input type="checkbox"/>	<input type="checkbox"/>
4. Has your disaster planning team consulted area experts like police, fire, or emergency personnel about special considerations for your plan?	<input type="checkbox"/>	<input type="checkbox"/>
5. Does your disaster plan identify a safe place to gather in the event of an exterior threat, like a tornado?	<input type="checkbox"/>	<input type="checkbox"/>
6. Does your disaster plan include an evacuation plan for an interior threat like a fire or bomb threat? Does it include a well-defined escape route? Are the locations of all doors, windows, and stairways clearly mapped out?	<input type="checkbox"/>	<input type="checkbox"/>
7. Does the evacuation plan designate outdoor gathering areas that are at least 150 feet away from the building?	<input type="checkbox"/>	<input type="checkbox"/>
8. Does your disaster plan specify which employees and/or volunteers are in charge of leading groups from different areas of the building?	<input type="checkbox"/>	<input type="checkbox"/>
9. Are all evacuation routes and procedures outlined in the disaster plan posted in highly visible areas throughout your building?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you practice evacuation drills on a regular basis with staff, volunteers, and attendees?	<input type="checkbox"/>	<input type="checkbox"/>

(Continued next page)

	Yes	Needs Attention
11. Do you maintain and distribute copies of the disaster plan to all people who would respond to an emergency? The plan should include each person's responsibilities and 24-hour phone numbers.	<input type="checkbox"/>	<input type="checkbox"/>
12. Do you maintain and distribute a list of the following phone numbers to all people who would respond in an emergency?	<input type="checkbox"/>	<input type="checkbox"/>
• Police and fire departments	<input type="checkbox"/>	<input type="checkbox"/>
• Ambulance service and hospitals	<input type="checkbox"/>	<input type="checkbox"/>
• Federal Emergency Management Agency	<input type="checkbox"/>	<input type="checkbox"/>
• Prevention Hotline or nearby center	<input type="checkbox"/>	<input type="checkbox"/>
• Your ministry's insurance agent	<input type="checkbox"/>	<input type="checkbox"/>
• Telephone, gas, and electric companies	<input type="checkbox"/>	<input type="checkbox"/>
• Building maintenance and security	<input type="checkbox"/>	<input type="checkbox"/>
• Newspaper, radio, and television stations	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Disaster Relief Teams Checklist

On the heels of a disaster like a hurricane, tornado, or wildfire, many people feel an overwhelming need to help those who have lost homes and loved ones. If your ministry organizes a disaster relief team, a few simple steps can help your volunteers be as effective as possible when they reach their destination.

	Yes	Needs Attention
1. Do you partner with a relief organization or church in the affected area? This can save time and make the best use of your volunteers.	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you have a team leader to supervise the work once you reach your destination?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you have your vehicle(s) fully inspected before your team's departure?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you know where your team will sleep, eat, and shower upon arrival at its destination?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you know if you will have access to adequate supplies when you reach your destination, or are you prepared to take your own?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do all team members have health insurance coverage and travel insurance?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you consider purchasing supplemental accident and sickness insurance coverage for your team's trip?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you confirm that ministry employees who are going on the trip have workers' compensation coverage?	<input type="checkbox"/>	<input type="checkbox"/>
9. Are all team members in good physical health, and did each of them sign a medical release form?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do all team members have up-to-date tetanus shots?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you know how to find the nearest emergency room where you will be working in case someone gets sick or hurt?	<input type="checkbox"/>	<input type="checkbox"/>
12. Will all team members be required to sign an activity participation agreement?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Providing Temporary Shelter Checklist

	Yes	Needs Attention
1. Do you know how many people your facility can handle while remaining within the constraints of fire codes and other local ordinances?	<input type="checkbox"/>	<input type="checkbox"/>
2. Can you limit the areas of your building to which shelter guests will have access?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you have a disaster response team in place that can minister to and monitor the activities of the people in your facility on a 24/7 basis?	<input type="checkbox"/>	<input type="checkbox"/>
4. Will you maintain a record of the name of everyone you house within your facility as well as the names of relatives to contact in the event of an emergency?	<input type="checkbox"/>	<input type="checkbox"/>
5. Does everyone in the shelter have access to, or are they informed of, your building's evacuation plan?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you have specific procedures in place to address any unlawful activities that may occur in your building?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you know what you will do with any valuables or weapons that disaster victims may have in their possession when they enter your shelter and the risks associated with securing them on your property?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you know how, or if, you will prepare food on-site for the guests at your facility? You may want to consult with your local health department before making this decision.	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you know how you will address and maintain sanitary conditions for guests at your facility, including shower facilities for both genders and trash removal?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you know how you will address the safety needs of the children who might stay at your facility?	<input type="checkbox"/>	<input type="checkbox"/>
11. Will you require people staying at your facility to sign a shelter use agreement?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Violence in the Church Checklist

	Yes	Needs Attention
1. Do you have a disaster response plan that includes policies and procedures addressing violent attacks?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you have a safety and security team that can help your ministry prepare for and respond to a violent event?	<input type="checkbox"/>	<input type="checkbox"/>
3. Does your safety and security team talk about worst-case scenarios and look at what areas of your ministry are most vulnerable to a violent attack?	<input type="checkbox"/>	<input type="checkbox"/>
4. Does your safety and security team talk with professionals like law enforcement, first responders, and emergency managers about how to prepare for and respond to a violent attack?	<input type="checkbox"/>	<input type="checkbox"/>
5. Does your safety and security team regularly participate in drills to review and practice what you intend to do during and after an emergency?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you regularly communicate with your congregation about what to do in the event of a violent attack? Are there maps and routes included in the disaster response plan and appropriately posted in each area and classroom?	<input type="checkbox"/>	<input type="checkbox"/>
7. Does your ministry invest in security equipment that enables staff and volunteers to limit access to specific areas of the building, such as the children's wing?	<input type="checkbox"/>	<input type="checkbox"/>
8. Does your ministry have security cameras, panic buttons, silent alarms, a crisis app, or other types of security equipment to help ensure the safety of your attendees, volunteers, and staff?	<input type="checkbox"/>	<input type="checkbox"/>
9. Does your ministry limit the points of entry by locking doors and by having safety and security team members monitor unlocked doors.	<input type="checkbox"/>	<input type="checkbox"/>
10. Have you discussed purchasing security operations insurance to cover possible damages caused by your safety and security team?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you have a policy which addresses the issue of whether safety and security team members will be armed, and if so, how the members will be selected and trained? Consult local counsel before arming team members to ensure compliance with state law.	<input type="checkbox"/>	<input type="checkbox"/>
12. Do you have a policy regarding weapons on ministry premises?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Emergency Medical Care Checklist

Accidents or medical emergencies during church and ministry-related activities are fairly common. Ministries that have well-established guidelines for responding to these incidents can help ensure quick, consistent aid for the injured and can reduce the risk of future legal problems. While these tips are meant to help you establish some guidelines for your ministry, they are not intended to take the place of expert medical care. Always call 911 (or your local emergency number) for emergency medical assistance.

	Yes	Needs Attention
1. Does your ministry have an established emergency plan?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you have a designated team of trained people, preferably medical professionals, who are responsible for providing first aid and calling for medical assistance in the event of an emergency?	<input type="checkbox"/>	<input type="checkbox"/>
3. Does your emergency response team know to look for an emergency medical identification card on the injured or ill person to alert you to any known medical problems or allergies?	<input type="checkbox"/>	<input type="checkbox"/>
4. Are employees and volunteers trained to complete a Notice of Injury form immediately after administering first aid?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you store completed accident reports in a secure location and limit access to the reports to those individuals in the ministry that have a need to know the information contained in the report?	<input type="checkbox"/>	<input type="checkbox"/>
6. Have you assessed ministry facilities to determine how many first aid kits you need and where on the premises they should be placed?	<input type="checkbox"/>	<input type="checkbox"/>
7. Is someone assigned to check first aid kits regularly to replace flashlight batteries, update manuals and phone numbers, make sure the kits contain the necessary materials, and that items past their expiration dates have been replaced with new supplies?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you keep the first aid kit safely out of the reach of children but easily accessible for adults?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you have gloves available to protect emergency response team members from blood and other potentially harmful bodily fluids?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you encourage your staff and volunteers to take basic first aid and CPR classes?	<input type="checkbox"/>	<input type="checkbox"/>

(Continued next page)

	Yes	Needs Attention
11. Do new employees and volunteers undergo first aid training if necessary for their duties?	<input type="checkbox"/>	<input type="checkbox"/>
12. Is there a plan in place for handling medical emergencies that are beyond the scope of general first aid?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

First Aid Kit Contents Checklist

Do the first aid kits at your ministry include the following items?	Yes	Needs Attention
1. Sterile gloves (non-latex, at least two pairs)	<input type="checkbox"/>	<input type="checkbox"/>
2. Disposable face masks	<input type="checkbox"/>	<input type="checkbox"/>
3. Sterile compresses, gauze, and dressings	<input type="checkbox"/>	<input type="checkbox"/>
4. Cleansing agents (soap, antiseptic wipes and/or hydrogen peroxide, alcohol wipes and/or ethyl alcohol)	<input type="checkbox"/>	<input type="checkbox"/>
5. Antibiotic ointment, burn ointment, and hydrocortisone ointment	<input type="checkbox"/>	<input type="checkbox"/>
6. Adhesive bandages in several sizes	<input type="checkbox"/>	<input type="checkbox"/>
7. Adhesive cloth tape	<input type="checkbox"/>	<input type="checkbox"/>
8. Elastic cloth bandages	<input type="checkbox"/>	<input type="checkbox"/>
9. Medical tape on a roll	<input type="checkbox"/>	<input type="checkbox"/>
10. Instant cold compresses	<input type="checkbox"/>	<input type="checkbox"/>
11. A breathing barrier with one-way valve for administering CPR	<input type="checkbox"/>	<input type="checkbox"/>
12. Eye wash solution	<input type="checkbox"/>	<input type="checkbox"/>
13. A thermometer (oral, non-mercury/non-glass)	<input type="checkbox"/>	<input type="checkbox"/>
14. Scissors	<input type="checkbox"/>	<input type="checkbox"/>
15. Tweezers	<input type="checkbox"/>	<input type="checkbox"/>
16. Petroleum jelly or other lubricant	<input type="checkbox"/>	<input type="checkbox"/>
17. Aspirin and non-aspirin pain relievers	<input type="checkbox"/>	<input type="checkbox"/>
18. Anti-diarrhea medication	<input type="checkbox"/>	<input type="checkbox"/>
19. Antacid	<input type="checkbox"/>	<input type="checkbox"/>
20. Blanket	<input type="checkbox"/>	<input type="checkbox"/>
21. Flashlight and extra batteries	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Setting Up an AED Program Checklist

Is your ministry prepared to handle cardiac emergencies? You may consider purchasing an Automated External Defibrillator (AED), a device about the size of a laptop computer that analyzes the heart's rhythm for any abnormalities. If necessary, it directs the rescuer to deliver an electrical shock to the victim. This shock, called defibrillation, may help the heart to reestablish an effective rhythm of its own. As you establish an AED program, consider the following questions:

	Yes	Needs Attention
1. Based on your facility's size, do you know how many AED units you would need and where they should be located?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you know who within your organization will be responsible for AED use?	<input type="checkbox"/>	<input type="checkbox"/>
3. Has AED training become part of your response team's onboarding process?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you know whether you have enough people on your response team to cover most situations/locations within your church?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you know how much money will be needed to lease or purchase the equipment, train employees or volunteers, and provide program maintenance?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you know current AED-use laws in your state? While there are AED Good Samaritan provisions in most states that provide certain legal protections to laypersons, it's good to know the legal climate in your state regarding this equipment.	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you consult with your local American Red Cross chapter for input regarding your AED such as leasing or purchasing and training for staff and volunteers?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

AED Maintenance Checklist

Automated external defibrillators have saved the lives of many people who suffered heart attacks at church. Most of the time, however, they sit idle. It's important to appoint someone in your ministry to inspect your AEDs regularly, so they'll work when you need them. Use this checklist as a general guideline. Be sure to check with your AED manufacturer for more specific maintenance instructions.

	Yes	Needs Attention
1. Do we regularly check the AED status light to see if it's functioning?	<input type="checkbox"/>	<input type="checkbox"/>
2. Is the AED clean and in working order?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do we have two sets of adult electrodes and one set of child's electrodes?	<input type="checkbox"/>	<input type="checkbox"/>
4. Are all electrodes unexpired and in original, sealed packages?	<input type="checkbox"/>	<input type="checkbox"/>
5. Does the primary battery work?	<input type="checkbox"/>	<input type="checkbox"/>
6. Is there a backup battery?	<input type="checkbox"/>	<input type="checkbox"/>
7. Does the backup battery work?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do we keep the AED plugged into an outlet when not in use?	<input type="checkbox"/>	<input type="checkbox"/>
9. Does the unit have a functioning data card (if applicable)?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do we have enough secondary supplies (alcohol prep pads, razor, gloves, scissors, wash cloth, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Demonstration Response Checklist

BEFORE THE EVENT

<input type="checkbox"/> Have we notified law enforcement of a possible demonstration?	<p>Officers will need pertinent information, such as the name of the protesting group, the date, time, and place of a planned demonstration, and other details. Create a report to share with law enforcement and ministry leaders.</p>
<input type="checkbox"/> Are all of our top leaders aware of the situation?	<p>Organization leaders need to be briefed on relevant information and understand the action plan.</p>
<input type="checkbox"/> Have we designated a qualified person to handle all communications with law enforcement and the media?	<p>Having a designated contact person reduces confusion and allows your ministry to communicate a consistent message - before, during, and after an event.</p>
<input type="checkbox"/> Have security team members, parking lot attendants, ushers, greeters, and other workers been told how to handle the demonstration?	<p>Each worker should understand his or her role in responding to the event, along with any responsibilities or restrictions. Tell workers how to interact with law enforcement, demonstrators, and the media.</p>
<input type="checkbox"/> Do staff and volunteers know to refer all requests for comment to a designated spokesperson?	<p>Prepare a referral statement that all workers can use when sending media inquiries to the spokesperson.</p>
<input type="checkbox"/> Has the general membership been told what to expect and how to handle demonstrators and the media?	<p>Provide clear and concise information about what to expect and how the church is responding. Encourage the congregation to avoid interaction with protesters or making any comments to news media.</p>
<input type="checkbox"/> Do we have a message board, phone tree, or another method of informing members of current information?	<p>Designate someone to communicate with members about the incident. This person or team would handle incoming queries and outgoing messages.</p>
<input type="checkbox"/> Has the general membership been told what to expect and how to handle demonstrators and the media?	<p>Provide clear and concise information about what to expect and how the church is responding. Encourage the congregation to avoid interaction with protesters or making any comments to news media.</p>

(Continued next page)

DURING THE EVENT

<input type="checkbox"/> Have we told law enforcement officers on site who their church contact person is?	Keep lines of communication clear. Tell law enforcement promptly about any changes or developments that occur.
<input type="checkbox"/> Have we given law enforcement a schedule of church activities and an overview of traffic flow?	This information can help officers determine the best way to limit member or guest contact with demonstrators.
<input type="checkbox"/> Does each worker have a designated contact person for reporting or receiving information?	Each contact person should be able to communicate immediately with the church's overall coordinator.
<input type="checkbox"/> Are workers following the established procedure for contact with law enforcement, demonstrators, or the media?	Some may need to be reminded how they're to interact with officers, demonstrators, or the media.
<input type="checkbox"/> Are we taking steps to reassure all workers, members, and guests that the incident is being addressed properly?	Focus members and guests on the spiritual event taking place inside the sanctuary rather than on the demonstration outside.

AFTER THE EVENT

<input type="checkbox"/> Have we documented everything that happened?	It's a good idea to finalize your initial report by documenting what happened. Keep a copy on file.
<input type="checkbox"/> Have we asked our attorney whether to issue a press release after the event?	If a press release will be issued, it's best to work with a public relations specialist in drafting the statement and then have it reviewed by your attorney.
<input type="checkbox"/> Have we conveyed our message without making disparaging comments about the demonstration or its organizers?	Avoid live, in-person interviews related to the incident, as much as possible.
<input type="checkbox"/> Have we reassured members that the incident has been resolved successfully?	Thank members for cooperating with law enforcement and complying with the response plan.

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 Organization Name _____

Disaster Recovery Planning Ministry Continuation Checklist

	Yes	Needs Attention
1. Have we discussed the implications to our church if a disaster were to strike our building or insurance that would pay for renting another facility until the rebuilding process is complete?	<input type="checkbox"/>	<input type="checkbox"/>
2. Are we prepared if a fire, tornado, flood, or other natural disaster makes our building unusable?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do we have a crisis response team to manage unexpected events?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do we have a temporary location to resume worship if we can't use our building?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do we have plans that would allow us to continue other important ministries, such as youth group, Wednesday night services, athletics, and other activities?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do we have a recent property inventory detailing all items in our buildings?	<input type="checkbox"/>	<input type="checkbox"/>
7. Have we stored a copy of it off-site?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do we have a plan for computer security or data backup, in the event that computers or network equipment are damaged?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do we have a post-disaster communication plan?	<input type="checkbox"/>	<input type="checkbox"/>
10. Have we considered buying flood insurance if that disaster commonly threatens our area?	<input type="checkbox"/>	<input type="checkbox"/>
11. Have we contacted our insurance agent to review our coverage and ministry continuation plans?	<input type="checkbox"/>	<input type="checkbox"/>
12. Do we have an attorney to whom we can turn in a time of need?	<input type="checkbox"/>	<input type="checkbox"/>
13. Do we have a network of churches willing to help us if our church gets damaged?	<input type="checkbox"/>	<input type="checkbox"/>

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5 | MANAGING EMPLOYEES, VOLUNTEERS, AND MEMBERS

Are you familiar with the latest employment laws and legal principles in your state?

When it comes to managing your ministry's employees, volunteers, and members, there's so much to think about.

Even if you're not an expert, this guide can help you learn more about managing employees, volunteers, and members, avoiding liability issues, conducting regular employee and volunteer training, and more.

- Employment Practices
- Employee Training
- Employee Discipline
- Volunteer Labor
- Safe Mission Travel
- Short-Term Mission Trip Release

 Organization Name

Employment Practices Checklist

	Yes	Needs Attention
1. Is your handbook reviewed by local counsel to confirm compliance with local, state, and federal law?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you use and consistently follow the terms of an employee handbook?	<input type="checkbox"/>	<input type="checkbox"/>
3. Is the handbook distributed and explained to employees when they are hired, and reviewed as changes are made?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you conduct thorough background checks for each of your employees?	<input type="checkbox"/>	<input type="checkbox"/>
5. In addition to background checks, do you ask for personal references for all your employees and volunteers, and follow up on those provided?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you store personnel information in a secure area that is separate from medical records?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you keep up-to-date attendance records on all personnel?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you accurately document employee performance throughout the year and maintain this documentation with the employee's records?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you keep detailed records of annual reviews and any disciplinary actions taken for each employee?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you keep good records of all changes in employee status? (e.g., promotions, leaves of absence, pay rates, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you consult local counsel before terminating employees?	<input type="checkbox"/>	<input type="checkbox"/>
12. Do you have policies in place to guide what information you can share with employees about terminations?	<input type="checkbox"/>	<input type="checkbox"/>
13. Do you keep well-organized employment records for each employee, including applications for employment, reference checks, disciplinary actions, attendance records, changes in employee status, and I-9 immigration forms?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Employee Training Checklist

	Yes	Needs Attention
1. Do you conduct new employee orientation to advise on general procedures of your ministry and to review handbook policies?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you provide regular training on employees' rights and responsibilities, including Worker's Compensation, Equal Employment Opportunity, and Sexual Harassment?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you provide periodic training regarding sexual harassment and misconduct prevention and response, including reporting procedures? (This is required in some states.)	<input type="checkbox"/>	<input type="checkbox"/>
4. During your training, do you review your organization's policies on such issues as smoking, drug/alcohol use or possession, weapons, facilities use, etc.?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you provide employees and volunteers with specific behavior guidelines?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you regularly discuss and rehearse proper response to emergency situations like fire, lightning, natural disasters, and violent attacks with your employees and volunteers?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do your employees understand their role in administering first aid, obtaining professional medical care, notifying parents, and documenting injuries that occur while they are on the job?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do your employees know what procedures to follow to prevent children from being abused emotionally, physically, or sexually?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do your employees know what reporting requirements they must follow if they suspect a child is being abused?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you require new employees to sign a personal conduct agreement outlining behavior considered unacceptable by your church?	<input type="checkbox"/>	<input type="checkbox"/>

 Notes: _____

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 Organization Name

Employee Discipline Checklist

A formal discipline process can help guide employees to meet expectations while protecting the ministry against employment-related lawsuits.

	Yes	Needs Attention
1. Does your employee discipline policy encourage communication and retraining when appropriate and maintain the ministry's right to terminate at any time?	<input type="checkbox"/>	<input type="checkbox"/>
2. When problematic behavior calls for retraining rather than termination, do you hold a formal meeting to review previous warnings, deliver a written warning, clarify expectations, and obtain a signed employee acknowledgment that the meeting occurred?	<input type="checkbox"/>	<input type="checkbox"/>
3. If the problematic behavior continues after verbal and written warnings, do you create a corrective action plan for the employee, outlining the previous corrective actions, explaining specific behavior or performance issues, setting out reasonable improvement goals, reviewing potential consequences, and obtaining a signed employee acknowledgment that the employee received the plan?	<input type="checkbox"/>	<input type="checkbox"/>
4. If using a "last chance agreement," does it detail the conditions for continued employment, inform that further violations will result in immediate termination, clearly state that the agreement does not alter the "at will" nature of employment, and require signed acknowledgment by the employee?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you retain records of all disciplinary actions taken against an employee?	<input type="checkbox"/>	<input type="checkbox"/>
6. If termination is necessary, do you consult legal counsel licensed in your state before terminating the employee?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you have a plan for communicating with other employees and the community following an employee termination?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Volunteer Labor Checklist

	Yes	Needs Attention
1. Do you hire professionals for large or complex construction or demolition jobs?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you instruct volunteers on safe work procedures and the safe use of all equipment?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you designate project leaders who understand the importance of safety and who will be alert to unsafe behavior that could result in injury?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you designate project leaders who understand/have expertise in the particular area of remodeling/construction you are undertaking?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you enlist only those volunteers who are skilled and physically capable of undertaking the work assignment required of them?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you prohibit minors from undertaking tasks OSHA does not permit them to perform as employees?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you ask potential volunteers about the medical coverage they carry prior to allowing them to work on the project at hand?	<input type="checkbox"/>	<input type="checkbox"/>
8. Did you discuss potential workers' compensation exposure with your insurance agent?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you consult with your attorney before embarking on a volunteer labor project to make sure all potential liability exposures have been addressed?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you ask your volunteer laborers to sign an Activity Participation Agreement to indemnify, defend, and hold the ministry harmless against liability claims resulting from the activities they will be working on?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you have emergency response procedures, including notification of authorities and parents?	<input type="checkbox"/>	<input type="checkbox"/>
12. Do you have written, job-specific safety training guides?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Safe Mission Travel Checklist

Planning a safe mission trip involves forethought. If an emergency arises while you're traveling, you may be able to avoid problems with a little preplanning including purchasing mission travel insurance (talk to a Brotherhood Mutual agent about your mission travel plans.) Here are some tips to help you preserve your security and peace of mind while traveling outside the United States. For more information regarding mission travel insurance, see faithventures.com.

	Yes	Needs Attention
1. Do you ask each member of your group to sign a Risk Acknowledgement and Release Form?	<input type="checkbox"/>	<input type="checkbox"/>
2. Does each member of your group provide a list of emergency contacts?	<input type="checkbox"/>	<input type="checkbox"/>
3. Does each member of your group purchase travel insurance?	<input type="checkbox"/>	<input type="checkbox"/>
4. Are all members of your group physically capable of the demands of mission travel?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do each of your travelers leave photocopies of all of their important documents (passports, credit cards, driver's licenses, vaccination records, airline tickets, and traveler's checks) with someone they trust in case they get lost or stolen?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do your travelers get all the required vaccinations required for the country to which they are traveling?	<input type="checkbox"/>	<input type="checkbox"/>
7. Does each member of your group travel with a small first-aid kit?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do your travelers use an address other than a home address on their luggage tags?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you instruct members of your group to travel with drinking water and healthy snacks like protein bars, trail mix, or other handy foods, in case transportation is delayed?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you instruct members of your group to carry valuables in concealed pockets or in a sturdy bag with the strap across their chest to avoid theft?	<input type="checkbox"/>	<input type="checkbox"/>

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Sample Short-Term Mission Trip Risk Acknowledgement and Release Form

TRIP INFORMATION (To be completed by the trip sponsor)

Sponsoring organization (Trip Sponsor): _____

Location of mission trip: _____ Dates: _____

Nature of mission trip: _____

Name of trip sponsor's coordinator: _____ Phone: _____

E-mail: _____

PARTICIPANT INFORMATION (To be completed by participant or an authorized guardian)

Name of participant: _____

Address: _____ Phone: _____

Name of emergency contact: _____

Daytime telephone: _____ Evening Phone: _____

List any current allergies, illnesses, physical conditions, or medications: _____

Is sponsor authorized to approve medical treatment? Yes No

Is participant covered by personal/family medical insurance? Yes No

If yes, name of insurer: _____

Policy or group number: _____

PARTICIPANT AGREEMENT (To be completed by participant or by parents or guardians if Participant is a minor)

I acknowledge that participation in the above trip involves risk to the Participant (and to Participant's parents or guardians, if Participant is a minor), and may result in various types of injury including, but not limited to the following: sickness, bodily injury, death, emotional injury, personal injury, property damage and financial damage.

(Continued next page)

In consideration for the opportunity to participate in the above trip, the Participant (or parent/guardian if Participant is a minor) acknowledges and accepts the risks of injury associated with participation in the trip. The Participant (or parent/guardian) accepts personal financial responsibility for any injury sustained during the trip. Further, the Participant (or parent/guardian) promises to indemnify, defend, and hold harmless the Trip Sponsor and its agents, employees, volunteers, or any other representatives (collectively included hereinafter in the term "Trip Sponsor") for any injury related directly or indirectly out of the above trip, whether such injury arises out of the negligence of the Trip Sponsor or otherwise.

If a dispute over this agreement or any claim for damages arises, the Participant (or parent/guardian) agrees to resolve the matter through a mutually acceptable alternative dispute resolution process. If the Participant (or parent/guardian) and the Trip Sponsor cannot agree upon such a process, the dispute will be submitted to a three-member arbitration panel of the American Arbitration Association for final resolution.

Signature: _____ Date: _____

Signature: _____ Date: _____

Notes: _____

Completed by: _____ Date: _____

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6 | HEALTH/WELLNESS MANAGEMENT

Your ministry relies on busy employees and volunteers who spend the majority of their time serving others. When sickness hits those on your front lines, your ministry can be impacted.

Protect the health and wellness of those you minister to through proper planning, training, and equipment.

The checklists in this section can help you learn more about keeping your ministry healthy.

- Pastoral Counseling Guidelines
- Keeping Healthy
- Food Prep Safety

 Organization Name

Pastoral Counseling Guidelines Checklist

Pastoral counseling is an important part of ministry. Reaching out to people who need advice and assistance, whether it's financial, relational, or spiritual is central to the church's mission. Ministries need to be very familiar with the legal risks associated with pastoral counseling. There are ways to protect your organization and staff against allegations of misconduct.

	Yes	Needs Attention
1. Does your ministry offer pastoral (spiritual) counseling? If so, do you put your counseling procedures in writing?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you have counseling procedures developed by an attorney that include guidelines relating to child or elder abuse reporting and confidentiality of information and that assure compliance with state mental health licensing laws or exemption from such laws?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you have an attorney prepare "informed consent" forms or counseling agreements that describe important guidelines for pastoral counseling, such as confidentiality of counselee information and exemptions to confidentiality?	<input type="checkbox"/>	<input type="checkbox"/>
4. Does your ministry have a referral network of professionals who provide counseling that falls outside the scope of spiritual counseling?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you discourage sessions in which opposite-sex counseling is permitted?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you have a second adult present when counseling members of the opposite sex or minors to protect your organization from allegations of sexual misconduct?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you screen everyone who will provide any type of counseling within your ministry?	<input type="checkbox"/>	<input type="checkbox"/>
8. If you have professional counselors, do you make sure their licenses are current and they have their own personal malpractice coverage?"	<input type="checkbox"/>	<input type="checkbox"/>
9. If you collect any fees for counseling services, have you consulted with your insurance agent about obtaining appropriate coverage for this exposure?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you offer counseling sessions only on church premises when someone else is present in the building?	<input type="checkbox"/>	<input type="checkbox"/>

(Continued next page)

	Yes	Needs Attention
11. Do you educate counselors about not using any speech or mannerisms that could be misinterpreted as sexual or romantic?	<input type="checkbox"/>	<input type="checkbox"/>
12. Do counselors either have a window that looks into their office or leave the door open during counseling sessions?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Keeping Healthy Checklist

	Yes	Needs Attention
1. Do you encourage employees and volunteers to stay home when they are sick, have a fever, or have flu-like symptoms?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you encourage your employees and volunteers to wash hands frequently and thoroughly?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do your employees and volunteers have ready access to alcohol-based hand sanitizer that contains at least 60% alcohol in areas where soap and water are not available?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you educate your employees and volunteers to avoid touching their eyes, nose, and mouth to decrease spreading germs from their hands?	<input type="checkbox"/>	<input type="checkbox"/>
5. Does your ministry have set guidelines for how to address children who become ill while in your care?	<input type="checkbox"/>	<input type="checkbox"/>
6. Does your ministry have set guidelines for how to clean and disinfect surfaces in nurseries, restrooms, and even office settings to prevent the spread of illness?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you encourage your employees to practice good health habits, like getting plenty of rest, being physically active, drinking plenty of fluids, and eating nutritious foods?	<input type="checkbox"/>	<input type="checkbox"/>
8. Does your organization have a disaster plan that could be implemented in the event of a public health emergency, like an outbreak or pandemic for Coronavirus, flu or infectious disease?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you have written, job-specific safety training guides that encourage healthy practices in the workplace?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Food Prep Safety Checklist

From pancake breakfasts to school lunches to dinners for the homeless, ministries have ample opportunities to serve meals. Whatever the occasion, safe food preparation and serving techniques can help keep everyone healthy.

	Yes	Needs Attention
1. Do you train workers and volunteers to wash their hands thoroughly before and after handling food?	<input type="checkbox"/>	<input type="checkbox"/>
2. Are countertops, cutting boards, dishes, utensils, and other surfaces regularly cleaned and sanitized?	<input type="checkbox"/>	<input type="checkbox"/>
3. Is raw meat prepared in an area that is separate from areas used to prepare raw vegetables or other types of food?	<input type="checkbox"/>	<input type="checkbox"/>
4. Is food served on plates and with utensils that have been properly cleaned and sanitized?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you check to make sure that meats have been cooked to their safe minimum internal temperatures?	<input type="checkbox"/>	<input type="checkbox"/>
6. Is excess food kept hot in the oven at 200-250° F or refrigerated until serving time?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you reheat hot foods to at least 165° F before serving?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you arrange and serve food on small serving dishes and replace depleted platters with fresh, full ones as needed?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you keep track of how long foods sit on serving tables?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you replace all food that has been on a serving table for two hours or longer?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you use chafing dishes, slow cookers, and warming trays to keep hot foods hot while held on a serving table?	<input type="checkbox"/>	<input type="checkbox"/>
12. Are hot foods held at 140° F or warmer?	<input type="checkbox"/>	<input type="checkbox"/>
13. Are cold foods held at 40° F or colder?	<input type="checkbox"/>	<input type="checkbox"/>

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7 | LEGAL/FINANCE MANAGEMENT

Use the checklists in this section to evaluate the financial controls you have in place, how your ministry handles documents and records, areas for improvement and more.

- Financial Controls
- Offerings and Disbursements
- Payroll
- Payroll Tax
- Documents and Records
- Membership Discipline Policy
- Subpoena

 Organization Name

Financial Controls

The idea of an employee or volunteer committing fraud against your church is unthinkable. Even so, it is something that ministries should prepare for. Ministries with written polices and well-communicated guidelines can help employees and volunteers remain accountable, especially when it comes to church finances.

	Yes	Needs Attention
1. Do you have a comprehensive written policy that outlines how all aspects of your ministry's finances are to be handled?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you conduct comprehensive background checks on all employees and volunteers who deal with money?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you have written position descriptions for all employees and volunteers who have access to financial documents and perform financial functions?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you document all financial transactions clearly and immediately?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you keep financial records (and duplicate copies) in a safe place?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you have a well-defined program for documenting suspicious financial incidents?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you make it easy and safe for employees or volunteers to report suspicious financial activity? Have you educated them how to do this?	<input type="checkbox"/>	<input type="checkbox"/>
8. Does your program for handling church finances involve multiple people who each have a specific role so that one person is not responsible for every aspect of your ministry's finances?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you conduct annual audits by someone other than your church's financial secretary or treasurer?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Offerings and Disbursements Checklist

	Yes	Needs Attention
1. Do you require dual signatures for withdrawals and for endorsing and cashing church checks?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you ask congregants to put offerings, including cash, in envelopes preprinted with their names and addresses?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you use a secure area for counting church offerings?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you conduct thorough background checks on volunteers who handle money?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you always have at least two people present when counting money?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you enlist money counters who are unrelated and who don't work at the same place during the week?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you avoid selecting money counters who are experiencing personal financial crises?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you rotate money counting teams on a regular basis?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you immediately stamp checks "FOR DEPOSIT ONLY" when endorsing them?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you use a safe for petty cash, small valuables, keys, and important documents?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you deposit cash daily into your bank account to avoid having cash on the premises?	<input type="checkbox"/>	<input type="checkbox"/>
12. Do you have someone other than the counters regularly reconcile the bank account and list of money received?	<input type="checkbox"/>	<input type="checkbox"/>
13. Do you send periodic statements to donors detailing the dates and amounts of gifts received?	<input type="checkbox"/>	<input type="checkbox"/>
14. Do you prepare cash disbursements only when someone has approved and documented payment?	<input type="checkbox"/>	<input type="checkbox"/>
15. Do you mark supporting documents "paid" to prevent resubmission?	<input type="checkbox"/>	<input type="checkbox"/>

(Continued next page)

	Yes	Needs Attention
16. Do you lock up all bank checks?	<input type="checkbox"/>	<input type="checkbox"/>
17. Do you disable or lock up credit card terminals when not in use?	<input type="checkbox"/>	<input type="checkbox"/>
18. Do you have someone other than the individual preparing disbursements reconcile check registers to the bank statements regularly?	<input type="checkbox"/>	<input type="checkbox"/>
19. Do you avoid making loans or the equivalent to staff or board members?	<input type="checkbox"/>	<input type="checkbox"/>
20. Do you strictly prohibit the use of church credit cards for personal purchases?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Payroll Checklist

LEGAL / FINANCE

	Yes	Needs Attention
1. Have you verified whether or not your minister(s) have dual tax status, needing to file as employees for federal income taxes and as self-employed for Social Security tax purposes?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you manage voluntary withholdings from your staff's Social Security taxes and, as such, complete the necessary quarterly and annual payroll tax filings?	<input type="checkbox"/>	<input type="checkbox"/>
3. If any ministers on your staff are receiving a housing allowance, have you entered the exact amount of the allowance into their employment contract or in the church's board meeting minutes? (It's necessary to do so to comply with tax codes.)	<input type="checkbox"/>	<input type="checkbox"/>
4. If any ministers on your staff are receiving a housing allowance, do you make certain to designate this before the start of each year?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you include "special occasion gifts" in employees' taxable income when applicable?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you follow a written policy for reimbursing workers/volunteers for business-related expenses?	<input type="checkbox"/>	<input type="checkbox"/>
7. Is the staff of your ministry educated on how to follow the ministry's reimbursement arrangement?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you have a timekeeping plan in place for your staff—including determining the point of contact for timecard approval and establishing a time card due date for each pay period?	<input type="checkbox"/>	<input type="checkbox"/>
9. Are you aware of how the Fair Labor Standard Act (FLSA) applies to your ministry and its employees individually?	<input type="checkbox"/>	<input type="checkbox"/>
10. Does your ministry retain payroll records for at least seven years after the individual leaves the ministry's employment?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Documents and Records Checklist

Charters, bylaws, member lists, and more—the list of legal documents and records that church leaders must work with is seemingly endless. It is always a good idea to seek legal counsel on any matters concerning legal documents, but church leaders must also have a working knowledge of the importance of these documents.

	Yes	Needs Attention
1. If your church is incorporated, do you consistently file an annual report with the Secretary of State's office?	<input type="checkbox"/>	<input type="checkbox"/>
2. Are you familiar with your church's organizational document (e.g., articles of incorporation, charter, or constitution)?	<input type="checkbox"/>	<input type="checkbox"/>
3. Are you aware of any restrictions and limitations outlined in your church's organizational documents?	<input type="checkbox"/>	<input type="checkbox"/>
4. Does your church's organizational document include any provisions that are required/recommended by the IRS?	<input type="checkbox"/>	<input type="checkbox"/>
5. Does your church's organizational document state that duration is perpetual, rather than a specified number of years?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do your leaders have a working knowledge of the church bylaws?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you have your church bylaws reviewed by an attorney regularly or when any changes are made to the document?	<input type="checkbox"/>	<input type="checkbox"/>
8. Are all your church leaders familiar with the organization's financial and accounting records?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do board members review church finances at each board meeting, and are they encouraged to ask questions?	<input type="checkbox"/>	<input type="checkbox"/>
10. Does your church maintain a current list of active, voting members?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do your church records include a complete set of minutes from all meetings, annual business meetings, and special meetings?	<input type="checkbox"/>	<input type="checkbox"/>
12. Does your church maintain up-to-date records on all insurance policies and keep records of past policies as well?	<input type="checkbox"/>	<input type="checkbox"/>
13. Are church leaders familiar with tax records and requirements, including payroll tax forms, housing allowance designations, and contribution records?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Membership Discipline Policy

	Yes	Needs Attention
1. Does your church have a written policy in its bylaws or other guidelines that specifically addresses member discipline?	<input type="checkbox"/>	<input type="checkbox"/>
2. Did your church consult with a local attorney in developing your written policy and does your church periodically consult with an attorney on developing law in this area?	<input type="checkbox"/>	<input type="checkbox"/>
3. If you have a written membership discipline policy, does it specify whether or not the church will continue discipline after an attempted withdrawal of membership? (Most states do not permit discipline after a person withdraws from membership.)	<input type="checkbox"/>	<input type="checkbox"/>
4. If you have a written discipline policy, does it restrict communication of private information only to those who have a right and need to know?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you obtain written consent to membership disciplinary policies through membership classes and interviews? Ideally, this would include a written statement that each person would sign, affirming that he or she understands and agrees with the policies.	<input type="checkbox"/>	<input type="checkbox"/>
6. Does your church teach regularly on church discipline so members remain aware of the biblical basis, purpose, and steps of discipline?	<input type="checkbox"/>	<input type="checkbox"/>
7. Is your church consistent when dealing with matters of church discipline?	<input type="checkbox"/>	<input type="checkbox"/>
8. Does your church carefully follow its disciplinary guidelines each time it is necessary to do so?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do your church leaders communicate only with people who have a right to know on matters of church discipline?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do your church leaders carefully refer to allegations as being "unproven" when discussing disciplinary matters?	<input type="checkbox"/>	<input type="checkbox"/>
11. Are all decisions related to church discipline based on clearly explained biblical grounds?	<input type="checkbox"/>	<input type="checkbox"/>
12. Does your church consult with a local attorney prior to providing documentation of your disciplinary policies to an inquiring attorney?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name _____

Payroll Tax Checklist for Ministries

Tax time can be complicated for ministries. If the Internal Revenue Service audits your church's tax returns and finds issues, you could be required to pay back taxes with interest and possible penalties. Answer the following questions to determine how well you're avoiding common payroll tax pitfalls.

	Yes	Needs Attention
1. Before the start of each new year, does your church officially designate the pastor's housing allowance, in writing, in the church board's meeting minutes or the pastor's employment contract?	<input type="checkbox"/>	<input type="checkbox"/>
2. If your church agrees to make voluntary withholdings from the pastor's paycheck, has the pastor filled out IRS Form W-4 before withholdings begin?	<input type="checkbox"/>	<input type="checkbox"/>
3. Are the pastor's withholdings enough to cover federal income taxes AND Social Security taxes?	<input type="checkbox"/>	<input type="checkbox"/>
4. If the church makes voluntary payroll withholdings from the pastor's paychecks, does the church complete the necessary payroll tax filings throughout the year AND in completing annual payroll tax filings?	<input type="checkbox"/>	<input type="checkbox"/>
5. Does the church treasurer review bank statements to confirm that all tax withholdings to the U.S. Treasury have been withdrawn from the church checking account?	<input type="checkbox"/>	<input type="checkbox"/>
6. Does the church properly prepare W-2's for clergy and church staff?	<input type="checkbox"/>	<input type="checkbox"/>
7. Does the pastor meet with a tax professional prior to filing to ensure tax returns are accurate?	<input type="checkbox"/>	<input type="checkbox"/>
8. If employees aren't satisfied that their payroll withholdings are accurate, have they updated their W-4 forms?	<input type="checkbox"/>	<input type="checkbox"/>
9. If your church reimburses employee business expenses, does the church treasurer encourage employees to turn in receipts within 60 days of the expense?	<input type="checkbox"/>	<input type="checkbox"/>
10. Have you made sure the church's tax preparer has experience preparing tax filings for ministries?	<input type="checkbox"/>	<input type="checkbox"/>
11. Does your church provide the church tax preparer with adequate financial documents that are organized and easy to use?	<input type="checkbox"/>	<input type="checkbox"/>

Notes: _____

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 Organization Name

Subpoena Checklist

A subpoena is a court order to provide evidence in connection with a pending lawsuit. The subpoena might require an individual to testify in person, or to produce documents or other information that will be used as evidence at trial.

	Yes	Needs Attention
1. We've reviewed the subpoena and have made note of the time limit we have in which to respond.	<input type="checkbox"/>	<input type="checkbox"/>
2. We understand and have made note of what type of information the subpoena is requesting.	<input type="checkbox"/>	<input type="checkbox"/>
3. We've promptly contacted our local attorney to notify him or her that the subpoena was received (contact made within a day of receiving the subpoena).	<input type="checkbox"/>	<input type="checkbox"/>
4. We've shared the following information with our local attorney: (a.) the nature of the legal claim; (b.) what's been requested; and (c.) when the response is due.	<input type="checkbox"/>	<input type="checkbox"/>
5. With the help of our local attorney, we've decided whether and how we should respond to all of the requests in the subpoena.	<input type="checkbox"/>	<input type="checkbox"/>
6. Our attorney helped us determine who will gather the information or records requested.	<input type="checkbox"/>	<input type="checkbox"/>
7. Our attorney confirmed that he or she will respond to the subpoena on behalf of our ministry.	<input type="checkbox"/>	<input type="checkbox"/>
8. We've notified our insurance agent about the situation.	<input type="checkbox"/>	<input type="checkbox"/>
9. Communication about the details of the lawsuit has been limited to only those who need to know about it and those who will be responsible for gathering the requested information.	<input type="checkbox"/>	<input type="checkbox"/>
10. All employees, staff, and volunteers who deal with our ministry's documents and records have been notified that a subpoena has been received.	<input type="checkbox"/>	<input type="checkbox"/>
11. All employees, staff, and volunteers who work with our ministry's documents and records have been asked to avoid destroying any documents, including electronic communications, that may relate to the request.	<input type="checkbox"/>	<input type="checkbox"/>

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8 | DIGITAL AND WEB

Technology gives churches access to communicate with an ever-broadening audience. These tools can be used to make a powerful and positive impact, but they also come with unique risks.

The checklists in this section can help you keep data secure, comply with copyright laws, and protect your ministry when communicating online.

- Cyber Security
- Copyright and Fair Use
- Social Media Risk Management
- Social Media Disclaimer

 Organization Name

Cyber Security Checklist

	Yes	Needs Attention
1. Do you perform monthly backups of business and financial information and store it in a secure, off-site location, such as a safe deposit box or a reputable cloud-based storage service?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you have policies in place to protect confidential information like contribution records, counseling notes, and other sensitive information?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you have policies in place to report a data breach in accordance with state law and to protect your ministry from legal action?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you have policies in place to maintain compliance with Payment Card Industry (PCI) rules for use, processing, and storage of credit card information?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you appoint a senior staff member who has responsibility to ensure security policies are in place and followed?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you limit access to sensitive data and systems to authorized individuals and is that data password protected and/or encrypted?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you change passwords for user accounts and cloud services on a regular basis and when an employee leaves?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you enforce or encourage the use of two-factor authentication for access to email, church records, and other sensitive data?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you provide or encourage the use of a password manager (like LastPass, 1Password, Dashlane, etc) so those who login to your systems can use unique and complex passwords?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you work with a qualified staff member or computer support company to secure your computer systems?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you update your operating system for security reasons?	<input type="checkbox"/>	<input type="checkbox"/>
12. Do you update virus and spyware protection on systems, devices, and applications?	<input type="checkbox"/>	<input type="checkbox"/>

(Continued next page)

	Yes	Needs Attention
13. Have you installed firewalls that are designed to prevent unauthorized access to your computer network?	<input type="checkbox"/>	<input type="checkbox"/>
14. If you offer wireless internet access to your attendees, have you created a separate, private network for the church's administrative computers?	<input type="checkbox"/>	<input type="checkbox"/>
15. Do you protect against objectionable or illegal WiFi use by blocking questionable websites, password-protecting the wireless network, and asking users to agree to an Internet Usage Policy?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Copyright and Fair Use Checklist

When sharing the intellectual property of others (photos, music, video, etc.) in print, in newsletters, or via websites or social media—churches must follow copyright laws to avoid the risk of costly fines. The following questions can help you review your ministry’s copyright compliance efforts.

	Yes	Needs Attention
1. Do you look for copyright information and obtain the appropriate permissions or licenses before sharing a photo, song, video, printed work, etc.?	<input type="checkbox"/>	<input type="checkbox"/>
2. When a work’s copyright information isn’t readily available, do you avoid using it until finding and following the owner’s copyright requirements?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you have the appropriate permissions or licenses to display copyrighted song lyrics on projection systems?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you obtain the appropriate permissions or licenses before making photocopies of copyrighted sheet music?	<input type="checkbox"/>	<input type="checkbox"/>
5. When purchasing stock images for use on websites (including social media sites) or newsletters, do you check the terms of the license to make sure your intended use of the photo is allowed?	<input type="checkbox"/>	<input type="checkbox"/>
6. When copying written works (including the Bible) into ministry publications, do you follow the publishing company’s copyright policies?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you obtain the proper licensing before playing copyrighted video content in a group setting?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you obtain the additional copyright permissions that are often needed when broadcasting or offering recordings of your ministry’s activities or worship songs?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you purchase blanket licenses in an effort to comply with copyright laws?	<input type="checkbox"/>	<input type="checkbox"/>
10. When necessary, do you use your own original work, or non-copyrighted work, instead of copyrighted material?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you understand the narrow Fair Use exception to copyright law and stay within its guidelines when applicable?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Social Media Risk Management Checklist

Social media offers a great way to interact with people from your ministry and engage in conversation with your community. If mismanaged, however, social media conversations and posts can actually damage your ministry's reputation. That's why it's important to examine your social media policy and put safeguards in place to protect your ministry.

	Yes	Needs Attention
1. Do you have a written social media policy to guide the people who are in charge of the ministry's social media accounts?	<input type="checkbox"/>	<input type="checkbox"/>
2. Have you selected a trusted group of people – staff members or other church leaders – and determined the responsibilities when posting and regularly monitoring the ministry's social media pages?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you have procedures for quickly responding to questions posed to your organization via social media?	<input type="checkbox"/>	<input type="checkbox"/>
4. If someone posts comments about a negative experience or a situation that includes sensitive information, do you have a point person in your organization who will coordinate resolution of the issue privately by way of a meeting or phone call?	<input type="checkbox"/>	<input type="checkbox"/>
5. Have you crafted a social media disclaimer that outlines your expectations for interactions as well as terms for removing content? (Obscene, embarrassing, or abusive material, advertising, and spam will likely fall into this category.) (For more information on disclaimers, please review the social media disclaimer checklist.)	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you obtain at least verbal permission or a signed photo release from each person who is personally identifiable in images posted to your social media page(s)?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you disable photo tagging on your page and remove location information from photos to protect the privacy of those who are photographed?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you consistently obtain permission from original sources before posting content that isn't the ministry's original work? (For more information on this issue, please review the copyright and fair use checklist.)	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Social Media Disclaimer Checklist

Once you've established a policy and procedures for managing your ministry's social media risks, it's important to communicate how they will affect the people using your ministry's social media page(s). This will typically come in the form of a legal disclaimer. Here are some questions to ask while creating your ministry's social media disclaimer.

	Yes	Needs Attention
1. Does your disclaimer inform visitors that you reserve the right to delete any post for any reason?	<input type="checkbox"/>	<input type="checkbox"/>
2. Does your disclaimer inform visitors that you may block anyone who posts sensitive or inappropriate content, advertisements, or spam?	<input type="checkbox"/>	<input type="checkbox"/>
3. Does your disclaimer encourage visitors to refrain from posting their phone numbers, email addresses, home addresses, or other personal information to your social media page?	<input type="checkbox"/>	<input type="checkbox"/>
4. Does your disclaimer let visitors know that by posting on your social media page they consent to letting you feature their posted information elsewhere?	<input type="checkbox"/>	<input type="checkbox"/>
5. Does your disclaimer state that the ministry assumes no liability for any damages suffered by anyone accessing the ministry's social media site or any other Internet site to which the social media page links?	<input type="checkbox"/>	<input type="checkbox"/>
6. Does your disclaimer let visitors know that your page is not monitored 24 hours a day and give them a way to contact your ministry in case of an emergency?	<input type="checkbox"/>	<input type="checkbox"/>
7. Did an attorney licensed in your state review and approve your social media disclaimer before you posted it to your page?	<input type="checkbox"/>	<input type="checkbox"/>
8. Is your social media disclaimer also posted to your ministry's primary website?	<input type="checkbox"/>	<input type="checkbox"/>

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9 | VEHICLES AND DRIVERS

In many ways, vehicles and drivers are a ministry's weakest link. Accidents and mechanical breakdowns are common, and while certainly undesirable, they are often viewed as unavoidable.

Fortunately, there are ways to prevent accidents and provide safe transportation for your ministry. You can begin by carefully choosing and training your drivers, following safety precautions, and performing regular maintenance.

Use the tips and checklists in this section to help ensure the safety of your drivers, passengers, and vehicles.

- Driver Screening
- Loaning or Renting Church Vehicles
- Ministry-Owned Vehicles
- Non-Owned Vehicles
- 15-Passenger Van Safety
- Vehicle Inspection Checklist
- Auto Accident Checklist

 Organization Name

Driver Screening Checklist

If your ministry owns or operates vehicles, it's important to develop a strict driver eligibility policy. Screening drivers before they get behind the wheel is critical to ensuring that those in your care are transported safely. The following questions can help you screen driving candidates.

	Yes	Needs Attention
1. Does each driver hold a valid state driver's license?	<input type="checkbox"/>	<input type="checkbox"/>
2. Does each person who drives a bus or large van (16+ people) hold a valid commercial driver's license in accordance with applicable state laws?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you avoid using drivers under age 21?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you obtain candidates' driving records and insurance coverage information?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you avoid using drivers who have reckless driving citations or multiple moving violations?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you train drivers on backing up, loading/unloading passengers, handling breakdowns, evacuation, passenger behavior, refueling, and conducting safety checks?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you have written proof that drivers have received behind-the-wheel training and practice handling large vans or buses?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you have at least one primary qualified driver for each vehicle your ministry owns?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you keep a list of all approved, trained drivers?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you avoid putting people who are not on your drivers' list behind the wheel?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Loaning or Renting Church Vehicles Checklist

Has your church ever been asked to loan or rent one of your vans or buses to another organization? Brotherhood Mutual doesn't recommend making your vehicles available to others. Consider aiding them financially in renting or chartering a vehicle from a rental agency rather than running the risk of loaning or renting your vehicle. If you do choose to allow another organization to use your vehicle, consider the following:

	Yes	Needs Attention
1. Does the vehicle user know that your insurance policy may not adequately cover others outside your organization?	<input type="checkbox"/>	<input type="checkbox"/>
2. Does the vehicle user know that any damage to the vehicle while in his or her possession must be paid out of his or her organization's pocket or own insurance, if the organization has such coverage?	<input type="checkbox"/>	<input type="checkbox"/>
3. Will you specify in a written agreement with the user who is responsible for damage to your vehicle as well as any other points of understanding?	<input type="checkbox"/>	<input type="checkbox"/>
4. Does the agreement make the user responsible to defend, indemnify, and hold your church harmless for any losses resulting from their use of your vehicle?	<input type="checkbox"/>	<input type="checkbox"/>
5. Does the agreement specify that the user is responsible for purchasing special liability and vehicle damage protection to cover damage to your vehicle?	<input type="checkbox"/>	<input type="checkbox"/>
6. Is the vehicle you plan to loan or rent in top mechanical condition?	<input type="checkbox"/>	<input type="checkbox"/>
7. Is the other organization going to use your vehicle for church or church school activities?	<input type="checkbox"/>	<input type="checkbox"/>
8. Have you consulted with your attorney before allowing another organization to borrow or rent your vehicle?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Ministry-Owned Vehicles Checklist

Owning buses and vans gives your ministry the ability to transport people wherever and whenever you want. Use this checklist to help evaluate the safety of your fleet.

	Yes	Needs Attention
1. Do you have a written policy that addresses such issues as vehicle usage rules, driver eligibility, storage, and security?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you limit vehicle use to official business or ministry activities?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do your buses and vans contain every warning and safety device required by state codes?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you document all repair and maintenance work performed on each vehicle?	<input type="checkbox"/>	<input type="checkbox"/>
5. Are all vehicles inspected regularly and maintained by a qualified mechanic?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do all drivers perform pre-trip and post-trip inspections, noting any mechanical problems?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you require all drivers and passengers to wear seatbelts?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

Non-Owned Vehicles Checklist

Sometimes your ministry may need to borrow or rent a vehicle for a special event. If there's an accident and the vehicle owner doesn't carry enough insurance to cover the resulting damage, the driver's insurance could come into play. Use this checklist to help you avoid unpleasant surprises when operating borrowed or leased vehicles.

	Yes	Needs Attention
1. Does your church have non-owned auto liability insurance coverage?	<input type="checkbox"/>	<input type="checkbox"/>
BORROWING		
2. Do you make sure that all employees, volunteers, and others who use their vehicles for church or ministry activities have auto insurance coverage in place, and that they understand that their auto insurance policy (not the church's) is responsible for covering any damage in the event of an accident?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you make sure that all drivers understand that their auto insurance may become involved, especially if an accident is their fault?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you give vehicle owners the opportunity to approve or disapprove of the drivers who operate their vehicles on the ministry's behalf?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you verify that the borrowed vehicle is in good working order?	<input type="checkbox"/>	<input type="checkbox"/>
RENTING		
6. Do you know how much liability and physical damage protection the rental agency provides with the vehicle?	<input type="checkbox"/>	<input type="checkbox"/>
7. If the rental agency provides no physical damage protection (comprehensive or collision), do you buy supplemental coverage before picking up the vehicle, or confirm with your insurance agent that your policy provides such coverage (including loss of use)?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you make sure that the only people who operate the vehicle are the ones registered with the rental agency?	<input type="checkbox"/>	<input type="checkbox"/>

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 Organization Name

15-Passenger Van Safety Checklist

If your church or ministry operates 15-passenger vans, you should be aware that these vehicles are prone to rolling over during emergency maneuvers, such as swerving. However, you can take several steps to lower your risk of rolling over. Use this checklist to help you follow the National Highway Traffic Safety Administration's recommendations.

	Yes	Needs Attention
1. Do you enforce a written policy requiring all occupants to wear seatbelts?	<input type="checkbox"/>	<input type="checkbox"/>
2. Have you removed the rear seat?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you carry no more than nine passengers?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you keep the rear area free of luggage and equipment?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you avoid using 15-passenger vans to pull trailers?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you avoid carrying luggage or equipment on the roof?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you inspect tires monthly to make sure they're properly inflated and have enough tread?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you ban driving between midnight and 6 a.m. when drivers are tired and visibility is poor?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you prohibit drivers from operating the van for more than 10 hours (with periodic breaks) during any 24-hour period?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you allow only experienced drivers with safe driving records to operate 15-passenger vans?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you train drivers on backing, loading/unloading passengers, handling breakdowns, evacuation, passenger behavior, refueling, and conducting safety checks?	<input type="checkbox"/>	<input type="checkbox"/>
12. Do you have written proof that drivers have received behind-the-wheel training and practice handling large vans?	<input type="checkbox"/>	<input type="checkbox"/>

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Organization Name _____

Driver Pre-Trip/Post-Trip Inspection Checklist

Vehicle (Make/Model/Year): _____

 Odometer Reading: _____ Date: _____ Time: _____ AM PM

Check any item that needs attention and include the details under "comments." Don't drive the vehicle until the defects you've discovered have been corrected.

Start the engine and test the following:

Noises (unusual) OK NEEDS ATTENTION

 Noises

Gauges OK NEEDS ATTENTION

 Fuel

 Temperature

 Dashboard warning light

Lights OK NEEDS ATTENTION

 Headlights

 Brake lights

 Turn signals

 Hazard lights

Other OK NEEDS ATTENTION

 Windshield wipers

 Fans and defroster

 Brakes (and parking brake)

 Mirrors

 Horn

 Exhaust system

(muffler, tailpipe)

Tires OK NEEDS ATTENTION

 Proper inflation

 Adequate tread

 Spare inflated

Leaks (look underneath) OK NEEDS ATTENTION

 Oil

 Other

Safety equipment OK NEEDS ATTENTION

 Fire extinguisher

 First aid kit

 Reflective triangles

 Flares

 Spare bulbs/fuses

 Map

 Emergency contact info

 Cell phone/two-way radio

 Seat belts

(one for each passenger)

Comments: _____

Vehicle Condition Following Driver's Inspection

- Acceptable:** Vehicle can be driven without further inspection.
- Requires Attention:** Vehicle can be driven, but should be inspected by a mechanic in the next 30 days.
- Requires Immediate Attention:** Vehicle should **not** be driven until it has been inspected by a mechanic.

Driver's signature _____ Date _____

Mechanic's Repair Report

- Defects noted above have been repaired.
- Defects noted above need not be repaired for safe operation of vehicle.

Mechanic's signature _____ Date _____

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Organization Name _____

Auto Accident Checklist

When an Accident Happens:

- Stop immediately and turn off your ignition. Don't obstruct traffic. Ask a responsible person to warn oncoming traffic.
- Don't move your vehicle until instructed to do so by police.
- Stay calm, don't argue, don't admit fault, and don't accuse anyone of fault.
- Obtain first aid if needed and ask someone to call police.
- Record the make, model, and license plate number of all vehicles. Ask for the driver's license numbers of those involved.
- Secure the names and addresses of all parties, as well as any witnesses and/or injured parties.
- Make a diagram of the accident showing the position of the two vehicles during and after the crash.
- At the accident site, don't make any settlement offers or volunteer to pay damages.
- Make sure the attending officer files a police report.
- Report the accident to your insurance agent or company as soon as possible.
- File a financial responsibility report with the state or local police if required by law.

Accident Scene Diagram:

Driver's Name: _____

Church/Ministry Name: _____

Policy Number: _____

Record of Events:

Date/time of accident: _____

Road conditions: _____

Weather conditions: _____

Accident location: _____

Other driver's name and phone number: _____

Other parties' vehicle description/driver's license number, and insurance company: _____

Were there any passengers in your vehicle? _____

Other vehicle? Names, ages, injuries: _____

Did EMT respond? Injuries treated: _____

Did the police respond? If so, officer's name and badge number: _____

Was a police report made? If so, report number: _____

Damage to vehicles: _____

Comments made by other drivers: _____

Agent's Name: _____

Telephone: _____

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 Organization Name

Roadside Emergency Preparedness Checklist

From local youth group outings to distant mission trips, your ministry vehicle needs to safely transport you and your passengers. Routine inspections and maintenance will help prevent many roadside emergencies, but unforeseen incidents are always a possibility. Prepare by asking the following questions before any trip.

	Yes	Needs Attention
1. Have you performed a pre-trip inspection of your vehicle?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you or another passenger in your vehicle have a cell phone and charger?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you have emergency contact information and medical release forms available for all passengers?	<input type="checkbox"/>	<input type="checkbox"/>
4. Is a fully stocked first aid kit in the vehicle?	<input type="checkbox"/>	<input type="checkbox"/>
5. Have you checked to be sure that none of the items in your first aid kit have expired?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you have reflective triangles, flares, battery-powered warning lights, and/or other supplies that boost visibility in your vehicle?	<input type="checkbox"/>	<input type="checkbox"/>
7. Have you packed enough food and water to provide at least one meal for you and your passengers?	<input type="checkbox"/>	<input type="checkbox"/>
8. Is your vehicle equipped with the following:		
Flashlight/Spare batteries	<input type="checkbox"/>	<input type="checkbox"/>
Jumper cables	<input type="checkbox"/>	<input type="checkbox"/>
Spare fuses	<input type="checkbox"/>	<input type="checkbox"/>
Basic tools	<input type="checkbox"/>	<input type="checkbox"/>
Fire extinguisher	<input type="checkbox"/>	<input type="checkbox"/>
Spare tire and jack	<input type="checkbox"/>	<input type="checkbox"/>
9. When traveling in the winter, does your vehicle have the following supplies:		
Blankets	<input type="checkbox"/>	<input type="checkbox"/>
Extra clothing (wool socks, gloves, hats)	<input type="checkbox"/>	<input type="checkbox"/>
Road salt or kitty litter to help with traction	<input type="checkbox"/>	<input type="checkbox"/>
Small shovel	<input type="checkbox"/>	<input type="checkbox"/>
Ice scraper	<input type="checkbox"/>	<input type="checkbox"/>

Notes: _____

Completed by: _____ Date: _____

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10 | GENERAL RISK MANAGEMENT FORMS

- Reference Response Information Form
- Activity Participation Agreement Form
- Notice of Injury Form
- Photo Use Agreement Form

Sample Reference Response Information Form

To: _____
Name of Ministry

From: _____
Address

Subject: _____
Name of Worker Candidate

The individual named above has expressed an interest in working with children or youth in our ministry. The candidate has listed you as a reference. In order for our organization to properly evaluate the qualifications of this worker candidate, we are asking you to complete this form with your honest opinions and impressions of the candidate.

Please return the completed form to our organization in the enclosed envelope. Thank you for your assistance.

1. How long have you known the ministry worker candidate? _____

2. In what capacity have you come to know this individual? (i.e. coworker, neighbor, friend, etc.) _____

3. In your opinion, is the above worker candidate fully qualified to work with children and youth?
Yes No (If no, please explain)

4. What concerns, if any, would you have in allowing this individual to work with children or youth? _____

5. Are you aware of anything in the candidate's background, personality, or behavior that could in any way pose a threat to children or youth?
Yes No (If yes, please explain)

Additional comments or explanations:

The above information is true and correct to the best of my knowledge.

Signature: _____ Date: _____

Please return this form at your earliest convenience to: (name of church, individual)

Thank you.

This is a sample document only. Your organization is responsible for compliance with all applicable laws. Accordingly, this form should not be used or adopted by your organization without first being reviewed and approved by a licensed attorney in your state. Brotherhood Mutual Insurance Company assumes no liability in the preparation and distribution of this form.

Sample Activity Participation Agreement

ACTIVITY INFORMATION (TO BE COMPLETED BY THE ACTIVITY SPONSOR)

Name of sponsoring organization: _____

Address: _____ Phone: _____

Name of sponsor's coordinator: _____ Phone: _____

Description of activity: _____

Date(s) and location of activity: _____

PARTICIPANT INFORMATION (TO BE COMPLETED BY PARTICIPANT OR AUTHORIZED GUARDIAN)

Name of participant: _____

Name of parents/guardians: _____

Address: _____ Phone: _____

Name of emergency contact: _____

Telephone (daytime): _____ Phone (evening): _____

List allergies or medical conditions: _____

Is sponsor authorized to approve medical treatment? Yes No

Is participant covered by personal/family medical insurance? Yes No

If yes, name of insurer: _____

Policy or group number: _____

PARTICIPATION AGREEMENT

I acknowledge that participation in the activity described above involves risk to the participant (and to the participant's parents or guardians, if the participant is a minor), and may result in various types of injury including, but not limited to, the following: sickness, exposure to infectious/communicable disease, bodily injury, death, emotional injury, personal injury, property damage, and financial damage.

In consideration for the opportunity to participate in the activity described above (the "activity"), the participant (or parent/guardian if the participant is a minor) acknowledges and accepts the risks of injury associated with participation in and transportation to and from the activity. The participant (or parent/guardian) accepts personal financial responsibility for any injury or other loss sustained during the activity or during transportation to and from the activity, as well as for any medical treatment rendered to the participant that is authorized by the sponsor or its agents, employees, volunteers, or any other representatives (collectively referred to as the "activity sponsor"). Further, the participant (or parent/guardian) releases and promises to indemnify, defend, and hold harmless the activity sponsor

(Continued next page)

for any injury arising directly or indirectly out of the described activity or transportation to and from the activity, whether such injury arises out of the negligence of the activity sponsor, the participant, or otherwise.

If a dispute over this agreement or any claim for damages arises, the participant (or parent/guardian) agrees to resolve the matter through a mutually acceptable alternative dispute resolution process. If the participant (or parent/guardian) and the activity sponsor cannot agree upon such a process, the dispute will be submitted to a three-member arbitration panel for resolution in accordance with the rules of the American Arbitration Association.

Signature: _____ Date: _____

Signature: _____ Date: _____

Signature: _____ Date: _____

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Sample Notice of Injury Form

Organization	Name: _____ Address: _____
Time and Place of Injury	Date of Injury: _____ Time: _____ <input type="checkbox"/> AM <input type="checkbox"/> PM Where did the injury occur? _____
Person Injured	Name: _____ Age: _____ Address: _____ Phone: _____ Name of parents/guardians (if a minor): _____ Employer: _____ Injuries sustained: _____ Where was injured taken? (hospital/doctor): _____ Relationship to organization: <input type="checkbox"/> Member <input type="checkbox"/> Visitor <input type="checkbox"/> Volunteer <input type="checkbox"/> Employee <input type="checkbox"/> Student/Camper <input type="checkbox"/> Tenant/Resident <input type="checkbox"/> Other If injury occurred on insured's premises, for what purpose was the injured on the premises? _____ Who was responsible for supervision at the time of injury? _____ If injury occurred elsewhere, what connection did it have with the insured's operations or activities? _____ Does the injured party have personal medical insurance that could apply? <input type="checkbox"/> Yes <input type="checkbox"/> No Name of medical insurance company: _____ _____
Full Description of Incident	_____ _____ _____ _____
Witnesses	Name: _____ Phone: _____ Address: _____ Name: _____ Phone: _____ Address: _____

Signature: _____ Date of report: _____

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Sample Photo Use Agreement

This sample agreement should be reviewed and approved by your attorney prior to use.

I, _____ (“Licensor”), hereby grant, voluntarily and with full understanding, to _____ (“Church”), a license to the following:

1. Use and storage of my name and image, by means of digital or film photography, video photography, audio recording or other documentation, with respect to the activity, namely _____ (“Activity”), of Church.
2. Use of any stored data including my name and image in printed publications of Church.
3. Use of any stored data including my name and image in electronic publications of Church.
4. Use of any stored data including my name and image in any Web site created by or for Church for its sole benefit.
5. If I am signing this agreement on behalf of a minor child, I hereby warrant that I am the legal parent or guardian of the child and that I have the legal authority to sign this agreement on behalf of the child.
6. If a dispute over this agreement or any claim for damages arises, I agree to resolve the matter through a mutually acceptable alternative dispute resolution process. If I cannot agree with Church upon such a process, the dispute will be submitted to a three-member arbitration panel for resolution in accordance with the rules of the American Arbitration Association for final resolution.

Full name of person in photo (please print): _____

Address: _____

City: _____ State: _____ ZIP: _____

Signature: _____ Date: _____

Parent’s or guardian’s signature: _____ Date: _____

(if the above named person is under 18)

Parent’s name (please print): _____

This is a sample document only. Your organization is responsible for compliance with all applicable laws. Accordingly, this form should not be used or adopted by your organization without first being reviewed and approved by a licensed attorney in your state. Brotherhood Mutual Insurance Company assumes no liability in the preparation and distribution of this form.



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