



RISK MANAGEMENT SERVICES

My Risk Management Plan

Chartis specializes in providing risk management services to our insureds. We understand the issues and will work with you to help minimize the potential for loss to your organization.

We are pleased to offer our insured customers access to ***My Risk Management Plan***, a risk management program that has been developed by the Nonprofit Risk Management Center. This web-based program helps you to develop a customized risk management plan that brings your existing policies into a format that can be easily shared with key staff and leaders.

Focus is on you! With ease, this program can help you develop a risk management plan that reflects *your* organization's needs, priorities and culture. It allows you to choose from template language or to draft and insert your own language.

Easy to use! After an introduction, the program takes the user through a suggested Table of Contents for a risk management plan. To further customize, you may cut out sections you do not want to feature – only the modules that you choose to include will appear in your final document.

- Introduction
- Risk Management Program
- Governance
- Human Resources
- Programs and Services
- Client Safety
- Financial Management
- Fundraising and Public Relations
- Facility/Site Safety and Security
- Technology and Information Management
- Transportation
- Crisis Management
- Volunteer Management
- Insurance Program
- Your Custom Module

Although the program is designed for non-profit organizations, a for-profit organization may take advantage of this tool by modifying or omitting the Governance and Fundraising modules.

My Risk Management Plan

Absolutely free! Like many of our other risk management services, My Risk Management Plan is available at no additional cost to you.

Accessible at any time! The program saves your work as you proceed through the modules. Return at any time to revise or update current policies, procedures, and plan segments.

Asks questions you may not have addressed! The program focuses on both current measures in place and preventative measures for the future. It offers suggestions such as creating a log to provide historical evidence that an organization fulfilled its duty of care and acted responsibly.

You may not be aware of some of the building codes and safety regulations found in the module “Facility/Site Safety and Security.” In this section you may find questions such as “are you responsible for the space occupied by other tenants within your building?”

Did you know transportation includes not only carrying people, but also hauling cargo or property to and from service sites, or pick-up and delivery services? Updated information on the risks associated with transportation activities can be found in the Transportation segment. For example, although once the most common vehicle used to transport people, a 15-passenger van is now known to have a wide range of concerns resulting in recommended risk management modifications.

