



citycounty insurance services
cisoregon.org

Elective Service Roles

**CIS offers this as an OPTIONAL tool for agents to discuss roles with CIS members.
Not all services are needed by the member or offered by the agent or CIS.**

P = Primary Web = CIS Website
S = Support RMC=CIS Risk Management Consult
Member **Agent** **CIS** **CIS Resource**

Potential Roles

General Risk Management

Member **Agent** **CIS** **CIS Resource**

	Member	Agent	CIS	CIS Resource
Risk Management Policy & Procedures	P	S	S	Web/RMC
Executive Risk Management Team	P	S	S	Web/RMC/Bonus
CIS Best Practices Survey	P	S	P	RMC
Risk Management/Loss Control Budget	P	S		
Prepare Cost Allocation	P	S		
Regular Reports to Management/Board	P	S	S	Membership Report

Renewals/Interim Changes

Member **Agent** **CIS** **CIS Resource**

	Member	Agent	CIS	CIS Resource
Provide expertise on insurance coverage and markets		P		
Provide stability and institutional knowledge for members		P		
Provide budget for insurance		S	P	Annual Meeting
Handle on-line renewals		P		
Recommend appropriate limits		P		
Analyze schedule for flood exposures needing national flood insurance		P		
Provide coverage agreements		S	P	Web
Mid-term additions/deletions	S	P		
Issue Certificates of Insurance		P		
Place coverage not offered by CIS		P		
Maintain insurance schedules (Property & Auto & Mobile Equipment)	S	P	S	Web
Advise on retro's, deductible and limits decisions	S	P	S	
Appraisals	S	S	P	Underwriting

Contract Administration

Member **Agent** **CIS** **CIS Resource**

	Member	Agent	CIS	CIS Resource
Contract approval process	P	S		
Insurance & indemnity in contracts	P	S	S	Underwriting
Vendor certificate of insurance management	P	S		
Bonding		P		

Risk Management Policies

	Member	Agent	CIS	CIS Resource
Ongoing policy review	P	S		
Risk related policies:				
• Sidewalk & inspection	P	S		
• Snow removal	P	S		
• Weed control	P	S		
• Club cctivities	P	S		
• Cross walks	P	S		
• Youth & senior centers	P	S		
• Foreign travel	P	S		
• Food services	P	S		
• Health clinics	P	S		
• Waivers	P	S		
• Red flag & Oregon Consumer Protection Act	P	S	S	eRiskHub
• Record management & IT security	P	S	S	eRiskHub
• Financial controls	P	S		
Volunteer policy & management	P	S	S	Web/Underwriting
Risk identification in construction projects	P	S		
Workplace violence policy/team	P	S	S	Public Safety Manager
Environmental compliance	P	S		
Facility use agreements	P	S		

Incident & Claims Tracking & Reporting

	Member	Agent	CIS	CIS Resource
General & Auto Liability internal claims process to report to agent	P	S		
Claims reporting to CIS (Liability and Property)	S	P		
Claims reporting to CIS (Workers' Comp)	P	S		
Auto Physical Damage (member vehicles)	P	S		
Claims review	S	P	S	IT reports and claims staff
Investigate and adjust claims			P	Claims staff

Workers' Compensation

	Member	Agent	CIS	CIS Resource
Training & employee consultation	P	S	P	RMC
801 completion and reporting	P	S	S	On-line 801
Return to Work	P	S	P	Moir
EAP funds	S	S	P	Melissa
Leave management	P	S	S	H2R
OSHA 300 Log	P	S		
Payroll & field audits	P	S	P	Underwriting
Class codes	S	S	P	Underwriting
Volunteer time tracking & reporting	P		S	Web/UW
Volunteer coordinator	P	S		
Volunteer resolutions	P	S	S	Web/UW
Claims review	P	S	S	IT reports and claims staff
Investigate and adjust claims			P	Claims staff

Special Events

	Member	Agent	CIS	CIS Resource
Special event application	P	S	S	Web
Special event insurance & indemnification from users	P	S	S	Web
Special event checklist			P	Web
Alcohol liability insurance	S	P	S	Web
Assess high risk activities	S	P	S	RMC/UW

Safety

	Member	Agent	CIS	CIS Resource
Safety coordinator	P	S		
Safety policy	P	S	S	Web/RMC
Safety committee management	P	S	S	Training
Employee orientation on safety policy	P	S		
Management responsibilities	P	S	S	Web
Accident investigation	P	S	S	Web
Annual evaluation of safety program	P		S	Web
Record keeping	P	S	S	Web
Facility inspections	P	S	S	RMC
Air & noise monitoring	P	S	S	RMC
Hearing conservation	P	S		
First aid & CPR training	P	S		
Fire extinguishers training/inspections certifications	P	S		
Hazardous communication program	P	S	S	Web
Lockout/tagout program	P	S	S	Web
Respirator protection	P	S	S	Web
Personal protective equipment	P	S	S	Web
Inspections	P	S	S	Web
General office safety	P	S	S	Web
Equipment use	P	S		
Confined spaces	P	S	S	Web
Contractor safety notification policy	P	S	S	Web
Cranes, derricks & hoist operations	P	S	S	Web
Fall protection	P	S	S	Web
Electrical safety	P	S	S	Web
Emergency response	P	S	S	Web
Excavation safety	P	S	S	Web
Bloodborne pathogens	P	S	S	Web
Forklift	P	S	S	Web
Fire drills	P			
Playground inspections	P	S	S	RMC
Asbestos policy & management	P	S	S	Web
Ergonomics	P	S	S	Web/Grant
Driving training	P	S	S	Training
Bleacher & grandstand inspections	P	S	S	RMC
Ladder safety	P	S	S	Web
Industrial hygiene	P		S	Grant

Emergency Management

	Member	Agent	CIS	CIS Resource
Emergency management policy	P	S	S	Web/RMC
Emergency management exercises	P	S	S	Web
Business continuity planning	P	S	S	Web/Bonus
Populate Agility with critical member information	P		S	RMC

Security Management

P	S	S	Public Safety Manager
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Employment

	Member	Agent	CIS	CIS Resource
Employee handbook	P		S	H2R
Supervisor training	P		S	H2R
Accurate job descriptions	P		S	H2R
Seek advice from CIS Pre-Loss	P		P	Pre-Loss
Human resource audits	S		P	H2R
New employee orientation	P		S	H2R
Posting of labor notices	P		S	H2R
Discrimination and harrassment training	P		S	H2R
Substance abuse policy	P		S	H2R
ADA, FMLA, OFLA training	P		S	H2R
Due process and name clearing hearings	P		S	Pre-Loss

Police**Member Agent CIS CIS Resource**

CIS Police best practices	S	S	P	Public Safety Manager
Lexipol	P	S	S	Grant

Corrections**Member Agent CIS CIS Resource**

CIS Corrections Best Practices	S	S	P	Public Safety Manager
Lexipol	P	S	S	Grant

On-Line Learning**Member Agent CIS CIS Resource**

Learning management plan	P		S	Learning Center
Implementation of on-line learning	P		S	Mary

Elected Officials Training**Member Agent CIS CIS Resource**

Onsite training	P	S	S	Kirk/LOC & AOC
Elected officials short video about CIS			P	Learning Center
Online elected officials training course			P	Learning Center

Land Use Planning**Member Agent CIS CIS Resource**

Accurate land-use policy	P			
Changes to comprehensive plans notice requirements met	P			
Measure 56 notice to land owners for zoning changes	P			
Land use training to elected officials	P			
Provide appeal procedures for land-use decisions	P			

Inspections**Member Agent CIS CIS Resource**

Sidewalks	P	S	S	RMC
Crosswalks (site distance, lighting, markings)	P	S	S	RMC
Streetlights and signals	P	S	S	RMC
Owned parking lots	P	S	S	RMC
Vegistation	P	S	S	RMC
Exterior lighting of owned buildings	P	S	S	RMC
Stairwells, exits, and exit signage	P	S	S	RMC
Boilers, pumps, equipment	P	S	S	RMC
Electrical panals, outlets, and cords	P	S	S	RMC
Parks and playground equipment	P	S	S	RMC
Skate & BMX	P	S	S	RMC

Fleet**Member Agent CIS CIS Resource**

Vehicle use policy	P	S	S	Web/RMC
Driver's license DMV reporting (ARS)	P	S		
Drivers safety training	P	S	S	Web/RMC

Water and Sewer Lines**Member Agent CIS CIS Resource**

Maintenance program	P			
Annual priority plan	P			
Video lines once every 5 years	P			
Train staff on emergency response	P			
Backflow advice ordiance	P	S		
Policy on lateral lines	P			

Financial Controls**Member Agent CIS CIS Resource**

Compliance with annual audits	P			
Division of responsibilities: receipts, deposits, checks, AP, signatures	P			
Separate log-in for incoming checks	P			
Monthly bank reconciliations	P			
Training to spot irregular financial activities	P			
Critical records in locked fireproof cabinets	P			