

BASIC REVIEW CRITERIA FOR EVALUATING LOSS HISTORY  
FOR POTENTIAL PROVIDERS

Overall: Description of current risk management program with emphasis on Workplace safety; Vehicle maintenance and Operation, confirmation of background, MVR checks, etc.

Automobile: Complete vehicle schedule (year, make, model, Gross Vehicle Weight (GVW) Vin.#; garage location of overnight)

Workers Compensation: Current WC classification(s), Estimated annual payroll by classification  
Current year and prior year experience modification factor (provide copies of actual worksheet(s))

Loss History: Provide 5 years (including current year) of currently valued Insurance Company loss reports specific by line of insurance, premium and detailed losses. Request specific detail on any large or unusual losses (\$25,000. or higher)

**Excellent Resource:**

<http://www.nonprofitrisk.org/default.asp> New publications available

\$25 — Ready...or Not: A Risk Management Guide for Nonprofit Executives (ebook) [Click here.](#)

\$35 — (\$25 plus \$10 S&H) Ready... or Not: A Risk Management Guide for Nonprofit Executives (book) [Click here.](#)

\$179 — My Risk Management Policies — create custom policies for your nonprofit in a matter of minutes! [Click here.](#)

\$179 — My Risk Management Policies AND Ready...or Not: A Risk Management Guide for Nonprofit Executives (printed book and ebook)

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