

2018 SDIS  
BEST PRACTICES  
PROGRAM

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SPECIAL DISTRICTS  
INSURANCE SERVICES



DISTRICTS WITHOUT PROPERTY



# 2018 SDIS Best Practices Program

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***Receive up to a 10% discount on your general liability, auto liability, and property insurance contributions for your district.***

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The SDIS Best Practices Program was designed to assist districts with implementing best practices to mitigate risk in areas of high exposure. This year's program offers each district up to a 10% credit on 2019 general liability, auto liability, and property insurance contributions by completing requirements in the following five credit categories.

## **1. AFFILIATE ORGANIZATION MEMBERSHIP | CREDIT: 2%**

You will receive a 2% credit for being a member of any of the following affiliated organizations:

- Cemetery Association of Oregon
- Oregon Economic Development District Association
- Oregon PRIMA
- Oregon APCO-NENA
- Oregon Fire Chiefs Association
- Oregon Public Ports Association
- Oregon Association of Chiefs of Police
- Oregon Fire District Directors Association
- Oregon Recreation and Park Association
- Oregon Association of Clean Water Agencies
- Oregon Library Association
- Oregon Rural Health Association
- Oregon Association of Conservation Districts
- Oregon Mosquito & Vector Control Association
- Oregon Transit Association
- Oregon Association of Hospitals/Health Systems
- Oregon People's Utility Districts Association
- Oregon Water Resources Congress
- Oregon Association of Water Utilities

As we have several district types, this is **not** a comprehensive list. If you are a member of an organization that is not listed above or has qualified in prior years, please contact Jaime Keeling at [jkeeling@sdao.com](mailto:jkeeling@sdao.com).

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## 2. CHECKLIST | CREDIT: 2%

Your district will need to complete the Internal Control Checklist which is available within the Best Practices Survey online. (Available this spring.)

## 3. ONLINE TRAINING | CREDIT: 2%

To receive the credit for this category, you must have **all** board members **and** district staff who are responsible for handling district funds (check signing, deposits, bank reconciliations and other accounting responsibilities) view ONE of the following online training videos:

[www.youtube.com/watch?v=750q-ADn8Bg](http://www.youtube.com/watch?v=750q-ADn8Bg)

OR

[www.youtube.com/watch?v=ErB5bwjVsYo](http://www.youtube.com/watch?v=ErB5bwjVsYo)

## 4. SDAO/SDIS TRAINING | CREDIT: 2%

To receive credit, at least one board member or district staff needs to attend one of the following: SDAO/SDIS spring, summer or fall regional training, the 2018 SDAO Annual Conference, any SDAO/SDIS on-site risk management training conducted by SDAO risk management staff or management consulting staff during the current policy year (2018), or any SDIS/OFDDA or OWRC joint trainings. Current trainings being offered can be accessed via SDAO's website at [www.sdao.com/events](http://www.sdao.com/events).

## 5. POLICY | CREDIT: 2%

Your district must have or adopt a financial management policy. If you do not have one in place, you may download a sample policy from <http://ref.sdao.com/bestpractices/fmpolicy.pdf>

## RECEIVING CREDIT

Completion of the Best Practices Survey (located online on the SDIS Insurance Site) is required to receive credit. The survey will be available online this spring and should be reviewed with the district's board of directors and submitted by a district representative. The district representative will verify completion of the credit requirements within the survey.

*Please note, SDAO does not mark off any credits. Each district is responsible for completing their own survey.*

If you have any questions regarding the Best Practices Program, please contact Jaime Keeling at [jkeeling@sdao.com](mailto:jkeeling@sdao.com) or 800.285.5461, ext. 122.

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# SD|IS

SPECIAL DISTRICTS  
INSURANCE SERVICES

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