

Diocesan Risk Managers Forum

A Networking Group for Diocesan Risk Managers, Started in 2007

May 22, 2024



John Cavallaro
Diocese of Portland
in Maine

Director of Risk
Management



Michael Scarpato
Diocese of Austin

Director of Risk
Management &
Diocesan Facilities



Peter Persuitti
Gallagher

Global Managing
Director, Religious |
Nonprofit Practices

Who are We?

Diocesan Risk Managers Forum

A Networking Group for Diocesan Risk Managers, Started in 2007

- *A national gathering* of diocesan leaders who aspire to learn more about risk management – how can we network more effectively and learn from each other?
- *A group of professionals* working in dioceses/archdiocese with the ‘risk manager’ designation – how can we elevate the profession?
- *A co-creation* with professional firms like Gallagher that specialize in serving the diocesan enterprise and her risks

Quarterly Connections



- Over time mostly virtual
- We inserted an in-person for Winter quarter in concert with the TNCRRG Winter Meeting
- We added this FORUM to the agenda of the bi-annual Convocation as a 2nd in-person
- We are looking at partnering with TNCRRG on its regional risk management meeting for late October or early November 2024
- 2024 Dates
 - Winter Tuesday – Wednesday February 8-9 in Ft. Myers, FL
 - Spring Wednesday, May 22nd @ Notre Dame
 - Summer TBD (let's get a date – virtual)
 - Fall November 6-7 @ Archdiocese of Cincinnati with TNCRRG

Co-Creator



Mike Witka
Chief Risk Officer, Archdiocese of Indianapolis

Mike passed away on
Christmas Day 2023 just a few
days prior to retiring.



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Your Co-Hosts since 2007 and our last time together 2023!

Mike Witka
Archdiocese of Indianapolis

Peter Persuitti
Gallagher Religious Practice

2023 Plan

- ✓ 1st Quarter | In Person
TNC Winter Mtg - February (Savannah, GA)
- ✓ 2nd Quarter
Thursday, April 20th, 2023 @ 3 pm Central
- ✓ 3rd Quarter
Thursday, August 10, 2023 @ 10 am Central
- 4th Quarter
Monday, November 20th @ 2 pm Central

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How Do We Organize | Prepare for Each Session?

“Meeting before the Meeting”!

- We call a meeting a month in advance to shape an AGENDA
- New Leadership – John & Mike - We are pivoting a bit to bring in more ‘conversation’ versus total ‘pedagogy’
- Who is on that prep call?
 - ✓ DRMF - John, Mike & Peter
 - ✓ Gallagher P&C Broker - Mark Noffert
 - ✓ GB - Kay Jones
 - ✓ Gallagher National Risk Control Religious Practice Committee – Austin Lyon, Aaron Aragon

Today's Topic – PROPERTY

AKA “Building Confidence in Retaining Property Risk”

Risk Managers talking to Risk Managers
Pre-Loss and Post-Loss Subject Areas

*Brokers talking to the Markets --□
Note Diocesan Leaders Joining us*



*April Meeting in London including Diocesan Leaders,
Brokers & London syndicates!*

Let's Get Started

Attention Risk Managers

Dots



- Write the Initial for your diocese/archdiocese on the red dot (e.g. Diocese of Austin – A)

Place that dot in the category that ...

- best matches your current PROPERTY SIR \$
- reflects the number of large losses that exhausted your property SIR in the past 5 years

Does the scatterplot go up to the right?

Size of Property SIR	+								
	\$2M								
	\$1.5M								
	\$1M								
	\$750K						A		
	\$500K								
	\$250K								
	\$100K								
	\$0								
		0	1	2	3	4	5	6	+
Number of Large Losses that Exhausted Your Property SIR in the Past 5 Years									

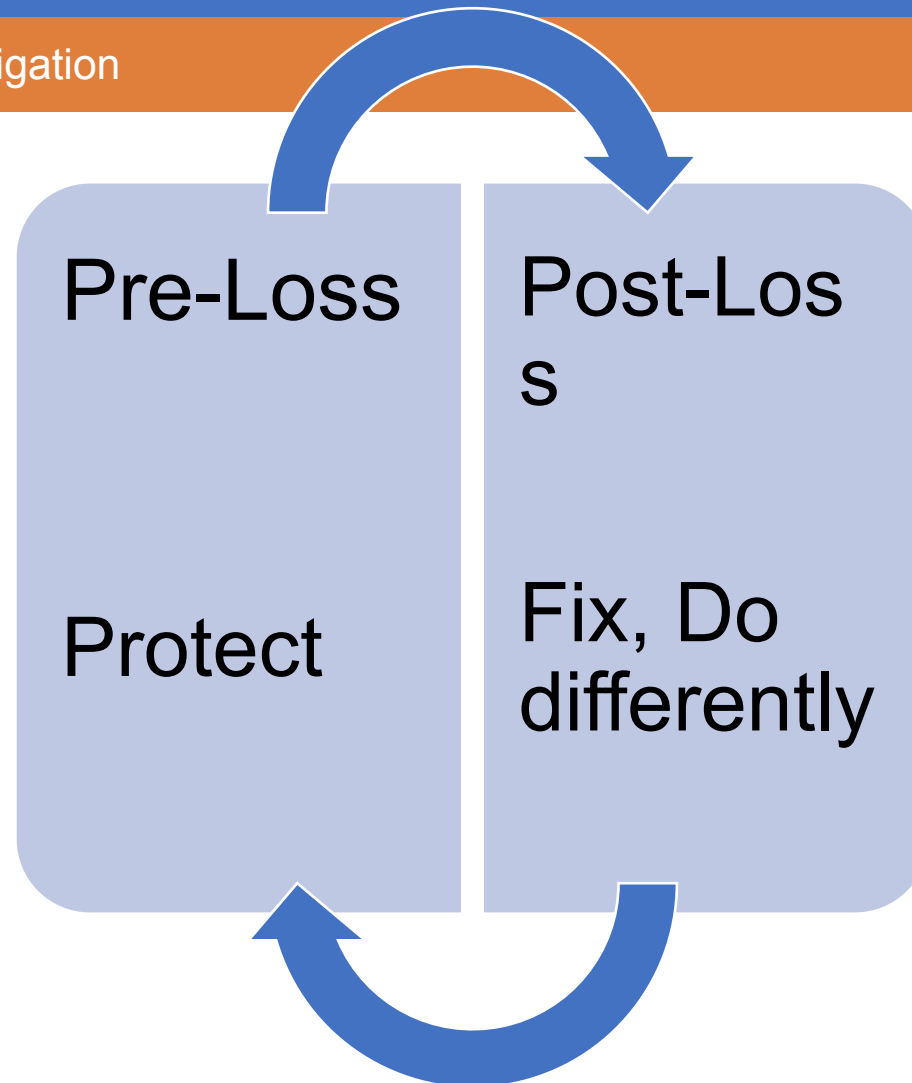
What Are YOU Doing Differently to Counter Escalating Costs?

Property is a 'driver' of costs

- Analyze Causes of Loss – Take Action
- Property Structure Changes
- Increasing SIRs
- Deploying Corridors
- Mobilizing your captive as a Q/S of excess layers
- Join / Leverage a Group Purchasing Group
- Reduce Property Portfolio

Building Confidence in Retaining Property Risk

Discussion | Property Risk Mitigation



Property – Best Practices

John Cavallaro, Diocese of Portland in Maine

What percentage compliance/adherence do you experience with parishes/ schools?

Pro-active measures relating to Property to minimize losses.

- Roof replacement – Require selecting extra high-wind resistance shingles along with hurricane nailing new best practices.
- Heat pumps (with operational back-up systems)
- Wi-Fi - Heat & Water sensor along with cameras connected to phones.
- LED lights, etc. – less heat and once replaced eliminates workers from going up heights to replace bulbs.
- Reviewing all projects over \$5,000 for compliance, quality material, proof of insurance for contractors, and contractor is good standing.
- We have approved and non-approved contractors.

Property – Best Practices

John Cavallaro, Diocese of Portland in Maine

Pro-active measures relating to Property to minimize losses.

- **Bi-monthly Business Coordinator** meetings with speakers discussing the importance of pro-active maintenance topics and new products.
- **Fall workshops** with maintenance and business cord staff covering training / safety / winter maintenance.
- Conduct **onsite inspections** with the Director of Property Management identifying risk or maintenance concerns. We target 12-14 per year.
- We have a **Diocesan Best Practice Manual** on our website as a resource for self-inspections and other risk management information to minimize losses and best prepare business coordinators with resources.
- We conduct an **orientation for new business coordinators** to provide all chancery contacts and service each department provides.

Diocesan Managers Forum

Working Group for Diocesan Risk Managers, Started in 2007



Convocation

The Spirit of Collaboration

UNIVERSITY OF NOTRE DAME

Thank you.

Congratulations....

Derek Gaskin

Director, Office of Safety and Emergency Services



Archdiocese of San Francisco



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