

**Deploying
Impactful
Technology at
a Diocese**



Art Taylor

Benefit Allocation Systems, LLC

President/CEO



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The Spirit of Collaboration
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Practical Technology for Diocesan Leadership

Why Impactful Technology Matters

- for Diocesan CFOs and Leadership



Reduces Risk & Protects Trust

Effective technology helps diocesan leaders reduce operational risks and maintain trust with clergy and employees.



Complex Governance Challenges

Diocesan environments face complexity from diverse parishes, vendors, and multi-layered governance responsibilities.



Preserving Institutional Knowledge

Technology safeguards valuable knowledge often trapped in documents, emails, and staff memories — before it walks out the door.



Supporting Practical Use Cases

Technology must support existing governance and reduce dependency on key individuals, enabling strategic focus.

The Real Problem: Institutional Knowledge

- Scattered across many formats



01 Fragmented Knowledge Sources

Operational knowledge is spread across emails, Word files, spreadsheets, and undocumented staff experience — with no single source of truth.

02 Operational Friction and Risk

Difficulty accessing rules in real-time causes delays, errors, and dangerous over-reliance on key individuals who may not always be available.

03 Need for Accessible Knowledge

Technology should make policies and exceptions easy to find, search, and apply consistently — removing guesswork from day-to-day decisions.

A Governance-First Insight

- What AI should — and should not — decide



01 Clear AI Boundaries

Define specific AI roles to ensure critical decisions remain rule-based and fully auditable by leadership — with no ambiguity about who is accountable.

02 Role of AI as Assistant

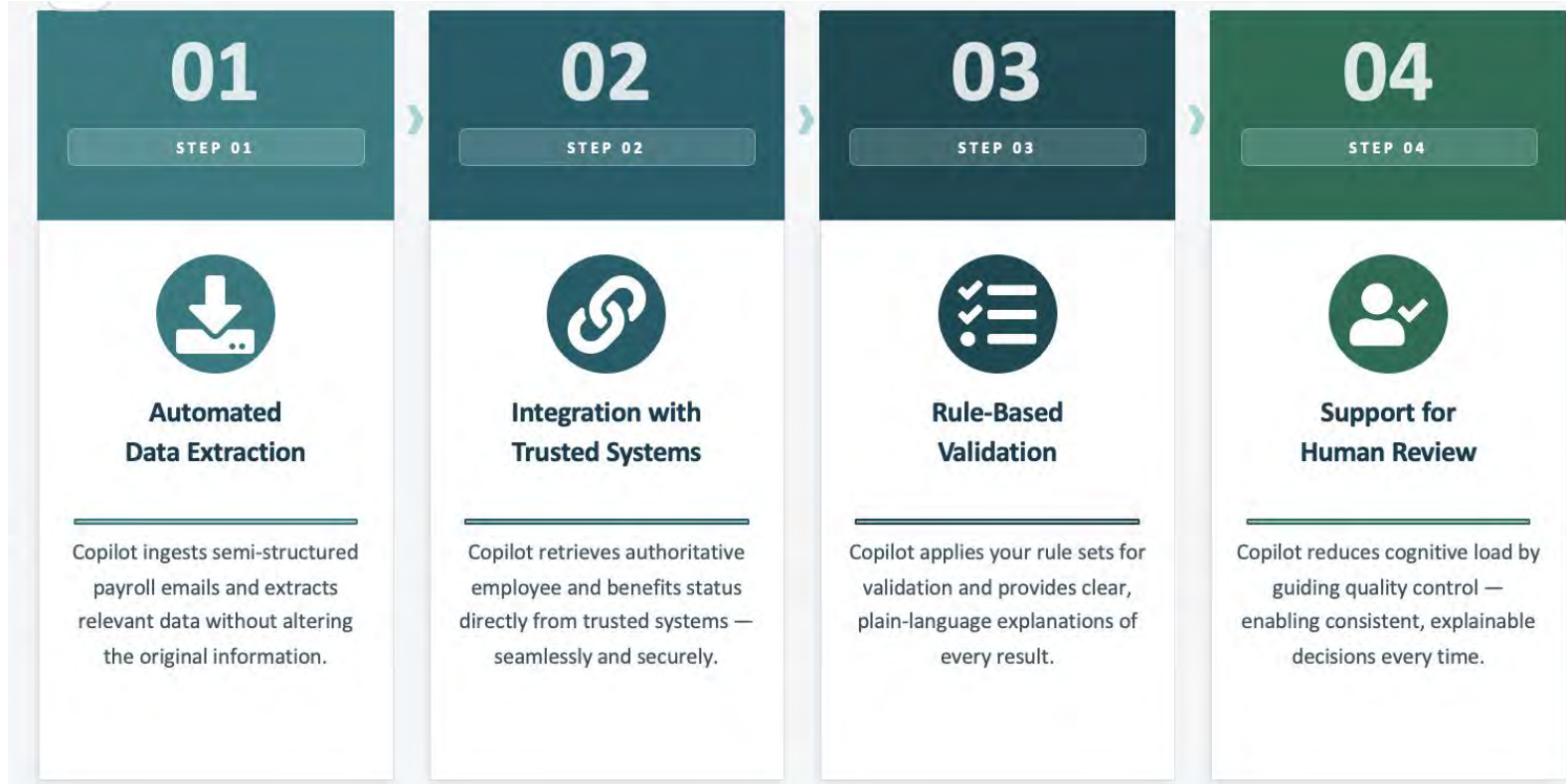
AI should focus on interpreting unstructured information, surfacing relevant policies, and explaining rule application clearly — never autonomously deciding.

03 Enhancing Confidence and Transparency

Using AI as an assistant supports trust by linking every outcome to an approved policy — giving leadership a clear, auditable rationale for each decision.

How an AI Agent Supports

- Payroll and benefits quality control



Why This Approach Delivers Value

- Specifically for dioceses



Respect for Local Realities

Leverages existing diocesan rules and practices, avoiding forced uniformity and honoring the differences that make each parish community unique.



Improved Staff Onboarding

Making institutional knowledge accessible reduces risks and dramatically speeds up onboarding of new diocesan staff — from months to days.



Enhanced Financial Governance

Audit readiness is strengthened by documenting every exception and approval with a clear rationale tied directly to approved rules and policies.



Operational Resilience and Efficiency

Reducing manual rework and review fatigue frees your team to focus on strategic priorities, ensuring long-term process reliability.

Technology shouldn't replace good judgment... It should **protect it...** and **scale it.**

- *Because today... a lot of that judgment is trapped:*

| In emails

| In documents

| In memories

DISCUSSION



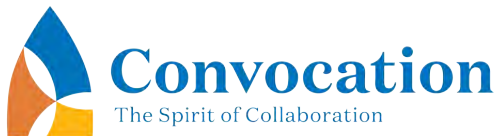
• Thank you. |

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President/CEO

ATaylor@BASusa.com



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- **Ashton Balch,**
CAWC, CCIC
*Senior Client
Service Manager*

- **Gallagher
Bassett**

Leveraging Technology Solutions For Dioceses

April 2026



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Valued Resource for Diocesan & Risk Management

- ✓ **Simplified Buying Decisions**
 - Single RMIS Solution Source
- ✓ **Special Pricing for Diocesan Clients**
- ✓ **Comprehensive Feature Streams**
 - Complimentary Functionalities
 - Efficient Data Management
- ✓ **Rapid Implementation Timelines**
 - Standardized Module / Feature Offerings
 - Dedicated Implmentation, Training Teams





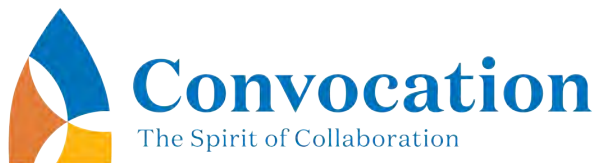
- Gallagher Bassett's religious sector specification virtual to better align with our diocesan client's risk management goals
- Our award winning Luminos product suite offers diocesan clients a comprehensive array of RMIS tools to effectively manage "Total Cost of Risk" (TCOR) across the entire enterprise

Luminos Religious (Diocesan) RMIS Bundle

- ✓ Claim Self-Administration:
 - Coverages Managed by Client
- ✓ Fleet Module:
 - Maintenance Records
- ✓ Employee Module:
 - Training, Certification Records

Value Proposition

- Substantial Cost Savings vs a La Carte Buying Options
- Integrated Total Cost of Risk (TCOR) Data Management



Property Driven Technology Solutions

- ✓ **Location Pyramid:**
 - Building Location Level Hierarchy, Exposure Values
- ✓ **Property (COPE) Module:**
 - Building Characteristics
 - Appraisal Data
- ✓ **Exposure Tracking**
 - Student Count, Parish Member Count, Fleet Count



DISCUSSION





FACTS[®]

A @elnet Company





Deploying Technology in Dioceses: Beyond Software

How connected systems drive smarter operations, growth, and family experience

THE REAL PROBLEM

Schools don't experience *tools*, they experience workflows, people and outcomes

WHAT SCHOOLS ARE MANAGING



Enrollment Pressure

Rising competition for students



Financial Complexity

Tuition, aid, scholarships & multiple funding sources



Family Expectations

Higher demands for transparency & outcomes



Staff Bandwidth

More work, same (or fewer) people

BUT THE SYSTEMS AREN'T KEEPING UP

Disconnected Systems

Technology tools don't talk to each other, forcing manual handoffs

Teams in Silos

Admissions, finance, and operations work independently

Underutilized Data

Schools capture data but rarely leverage it across teams for decision-making





FACTS Reach in Catholic Education

88%+

Dioceses served in
some way

174

Dioceses with active
relationships

4,408

Catholic Schools we
partner with

1.4M

Catholic Students
served

OUR VANTAGE POINT

We don't just sell software to Catholic Schools, we see how they operate every day

That means enrollment workflows, financial complexity, and academic operations across schools in every kind of diocese.

FACTS Intelligence Framework

Powered by data, supported by AI, and designed around the student and family experience.



FACTS IQ

ADMISSIONS INTELLIGENCE

ENGAGEMENT INTELLIGENCE

FINANCIAL INTELLIGENCE

SUCCESS INTELLIGENCE

FACTS IQ

CORE INTELLIGENCE LAYER

SIS (System of Record)

Analytics & Dashboards

AI Models

Integrations

Academic Management

ADMISSIONS INTELLIGENCE

FIRST TOUCH

Application Builder

Enrollment Management

Website Services

Online Payment Collection

Admissions Yield Predictions

Family First Impressions

ENGAGEMENT INTELLIGENCE

COMMITMENT, ONBOARDING, & COMMUNICATION

Family App

Family Alerts (SMS/Email)

Family Experience

Customized School Onboarding

FINANCIAL INTELLIGENCE

AFFORDABILITY & SCHOOL STABILITY

Payment Plans

Financial Aid

Incidental Billing & Prepay Accounts

Advanced Accounting

Giving/Fundraising

Payment Forms

Scholarship Application & Eligibility Verification

Federal Funding/E-Rate Consulting

SUCCESS INTELLIGENCE

EDUCATOR/FAMILY OUTCOMES & ADVOCACY

Professional Development

Educator Coaching

Instructional Services

Online User Community

Elevate User Conference

Regional Customer Trainings

A Diocese Managing Growth + Aid + Retention

WITHOUT CONNECTED SYSTEMS & WORKFLOWS

- ★ Admissions sees increased demand from school choice & scholarships
- ✗ Finance has no visibility into family affordability
- ✗ Schools can't predict which families will actually enroll
- ✗ Communication is fragmented across teams

WITH FACTS INTELLIGENCE

- ✓ Admissions data directly informs financial decisions
- ✓ Tuition, aid & payments align in one seamless workflow
- ✓ Families receive clear, consistent communication
- ✓ Diocese sees trends & patterns across all schools

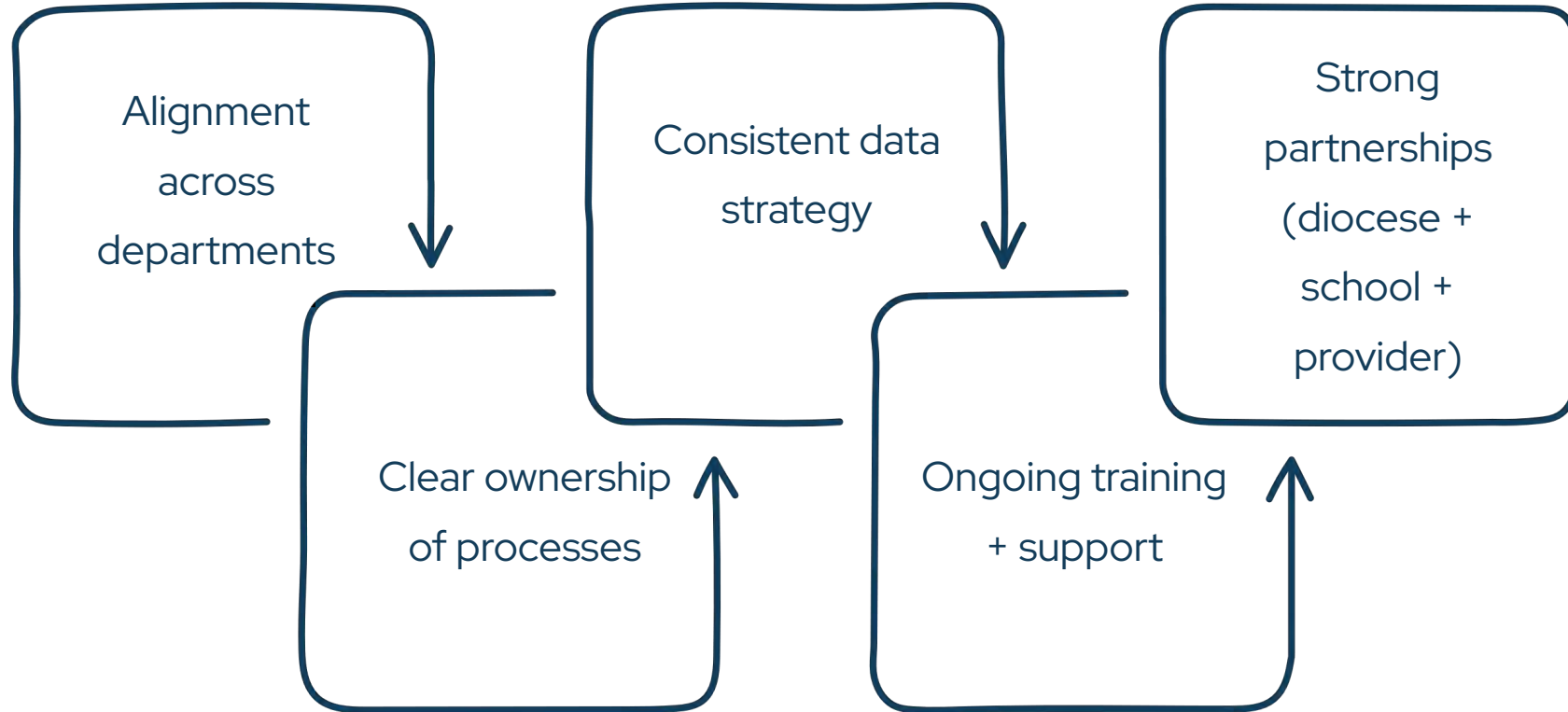
That's not a product, that's a *coordinated system*.





What Success Looks Like In Technology Deployment

Not just implementing software....



Gallagher STEP

Risk Management Center

Key Benefits:

- Risk Management Tools
- Sample Programs
- Training Materials / Posters
- Safety Videos
- SDS Tracking
- COI Tracking
- Incident Tracking

Connect with your Gallagher team for additional info!

The screenshot shows the Gallagher STEP Risk Management Center dashboard. At the top, there are logos for Gallagher, STEP, and Risk Management Center, along with a 'Powered By KPA' logo. A navigation bar includes 'Dashboard', 'Applications', 'Resources', and 'Administration'. A search bar is labeled 'Search the Risk Management Library'. Below this is a large blue banner with the Gallagher logo and the text 'Insurance | Risk Management | Consulting'. The main content area is titled 'What would you like to do today?' and features six action cards: 'Risk Management Content', 'Schedule Audit', 'Schedule Online Training', 'Report Possible Claim', 'Video Training Library', and 'Add an Employee'. To the right, a 'Your Open Items' section lists various tasks with counts and arrows, such as '53 Online training courses past due', '1 Document pending review past...', '15 Received certificates already ex...', '13 Invalid certificates', '2 Offline training courses past due', '1 Issued certificate already expired', and '4 Safety videos assignments past...'.

Simple But Needed

Inspection and Audit Partner

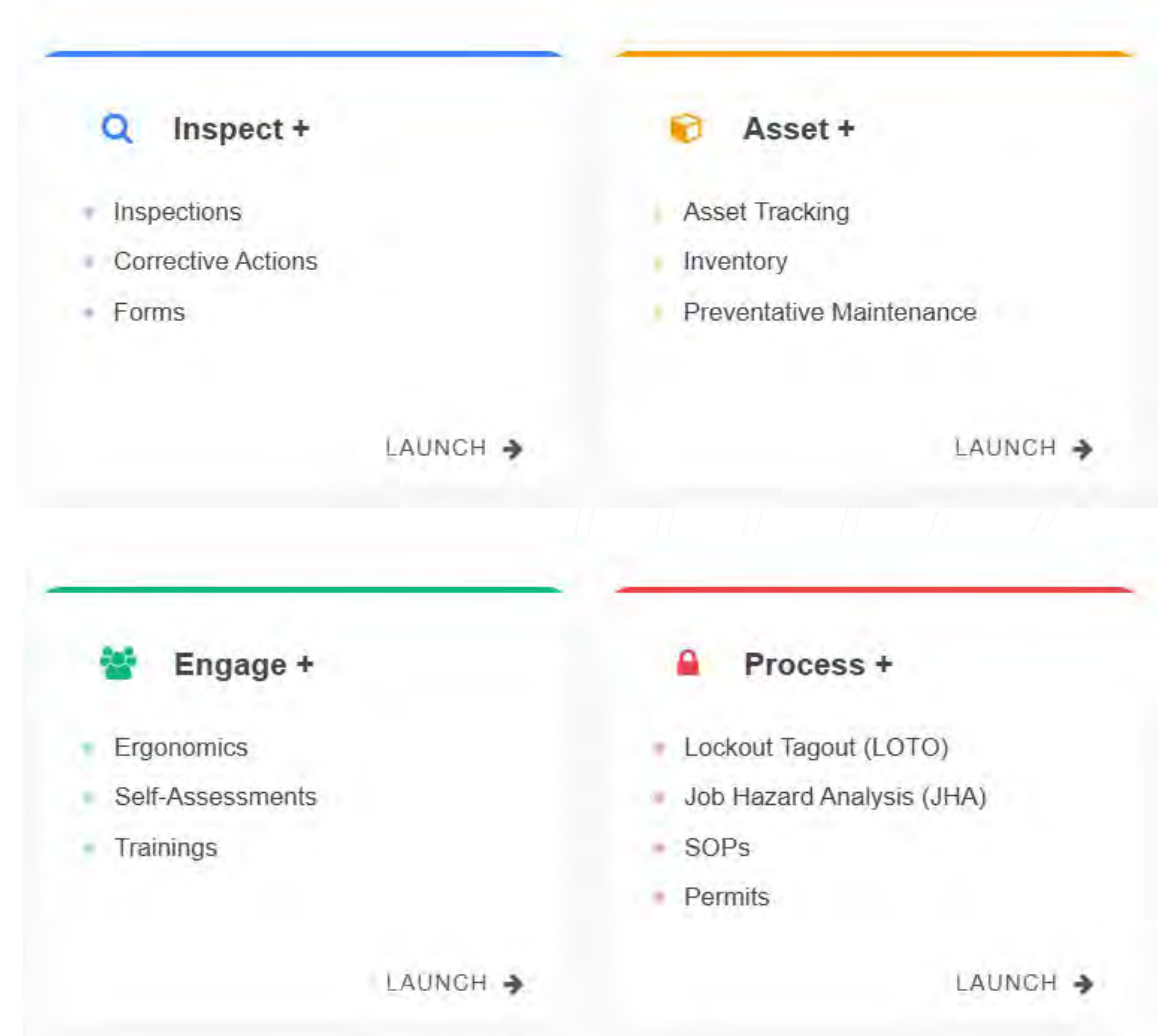


Key Benefits:

- Simple platform for inspections/audits
- Easy implementation for site via QR codes
- Monitor and view results online
- Asset Tracking
- Generate metrics for your organization
- Customizable for any needs

<https://sbnsoftware.com>

Connect with your Gallagher team for Preferred Pricing



DISCUSSION

