

Effective Risk Management at Scale

A Diocesan Case Study



Welcome



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**“You can not fix
what you do not
acknowledge”**



A snake slithers into the room...

What are the snakes in your Diocese?

The Risk Management Scale Problem

Limited ability to prioritize capital and risk resources

Uneven Risk Management capability

Inconsistent safety and risk support

Hundreds of autonomous Entities/Locations



Discussion

What are your biggest obstacles in scaling risk management?



Diocesan Safety Committees



SAFETY COMMITTEE DIOCESE OF OAKLAND

Membership

Oversight:

Bishop Barber, CFO, Chancellor

Committee Chair:

Derek Gaskin

Membership:

Finance, Property and Risk Management Team, Insurance Partners, Trusted Parish Representatives

- Meets bi-weekly to discuss claims and emerging issues
- Provides Quarterly In-person/Virtual Workshops based on emerging topics
- Develop or review Diocesan policies and procedures

Mission Statement



**SAFETY
COMMITTEE**
DIOCESE OF OAKLAND

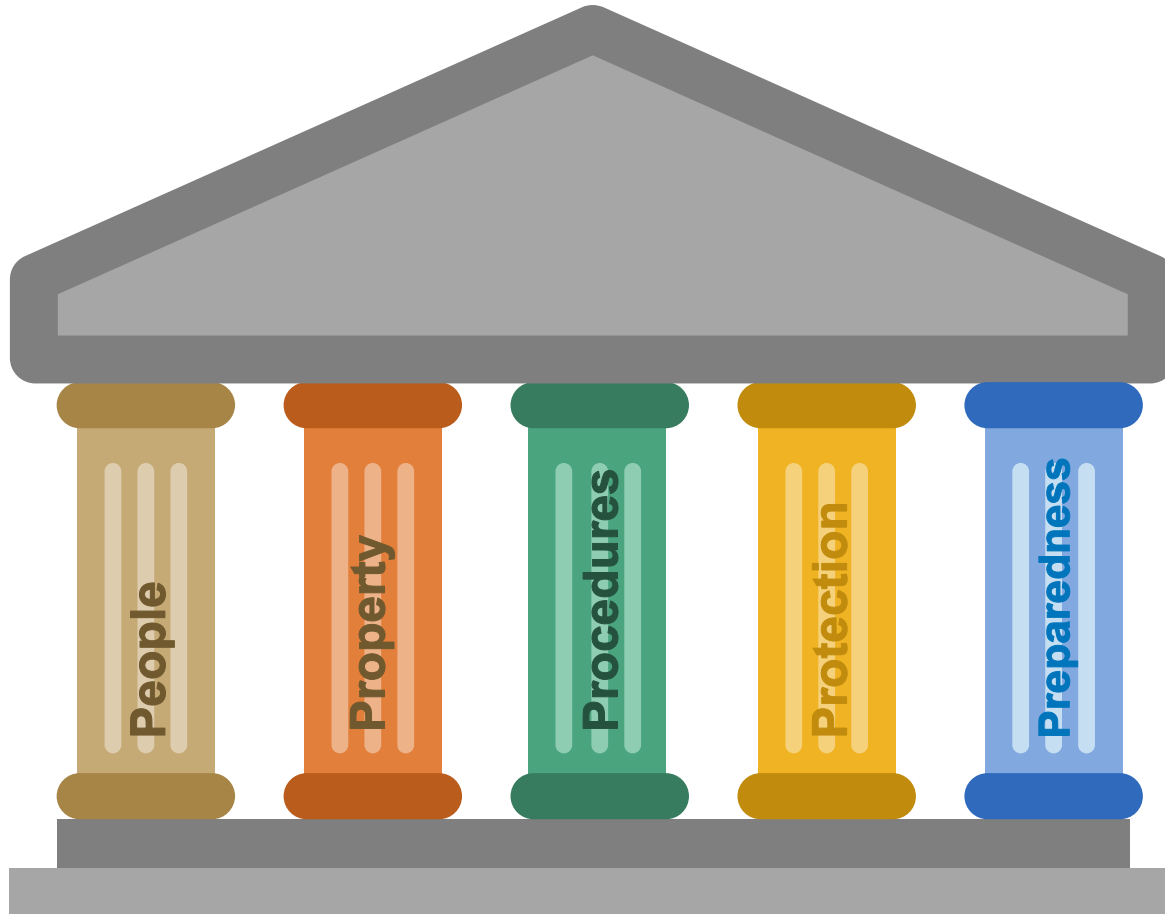
“Our Mission is to promote the **safety and well-being of all parishioners, employees, volunteers, and guests** in an environment where everyone can worship, gather, and learn in peace. We do this by endeavoring to mitigate risk through collaboration with schools and parishes, promoting best practices to protect people, property, and assets.”

Pillars of Safety and Risk Management

Focus for each Safety and Risk Management Workshop



**SAFETY
COMMITTEE**
DIOCESE OF OAKLAND



People

Property

Procedures

Protection

Preparedness

Risk Management Workshops



Sharing what works best

Highlight best practices



Parishes are more likely to follow through if they have seen It in action.

Take the time to showcase best practices from throughout the diocese

Emphasize parishes from different areas and capabilities

Safety as a Ministry





Law Enforcement

Engaging Law Enforcement



- What are the first steps a parish or school should take to establish a relationship with local law enforcement?
- What types of security assessments or walkthroughs can law enforcement provide, and how can we request them?
- How can law enforcement help facilitate or participate in lockdown, evacuation, or active shooter drills?

Discussion

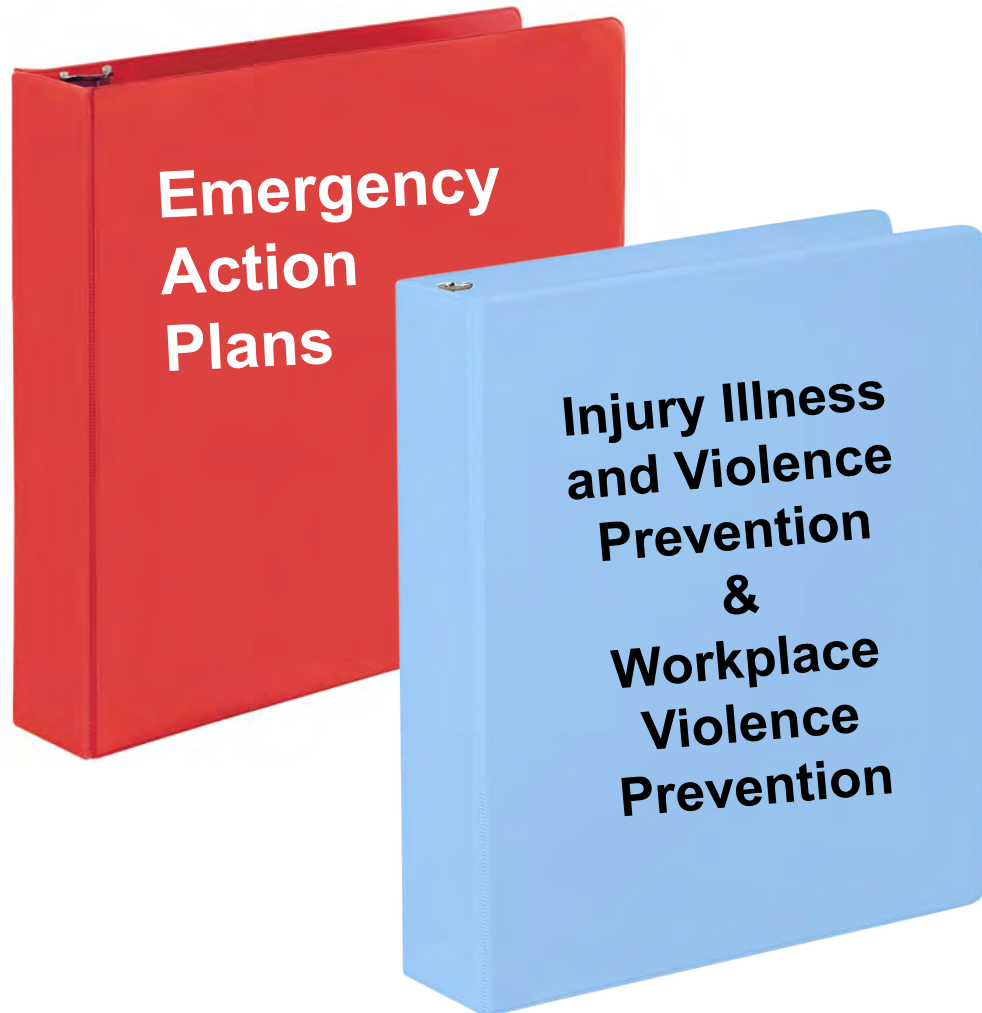
How do you promote Safety
and Risk Management?

04:00



Location Risk Expectations

Minimum Compliance Requirements

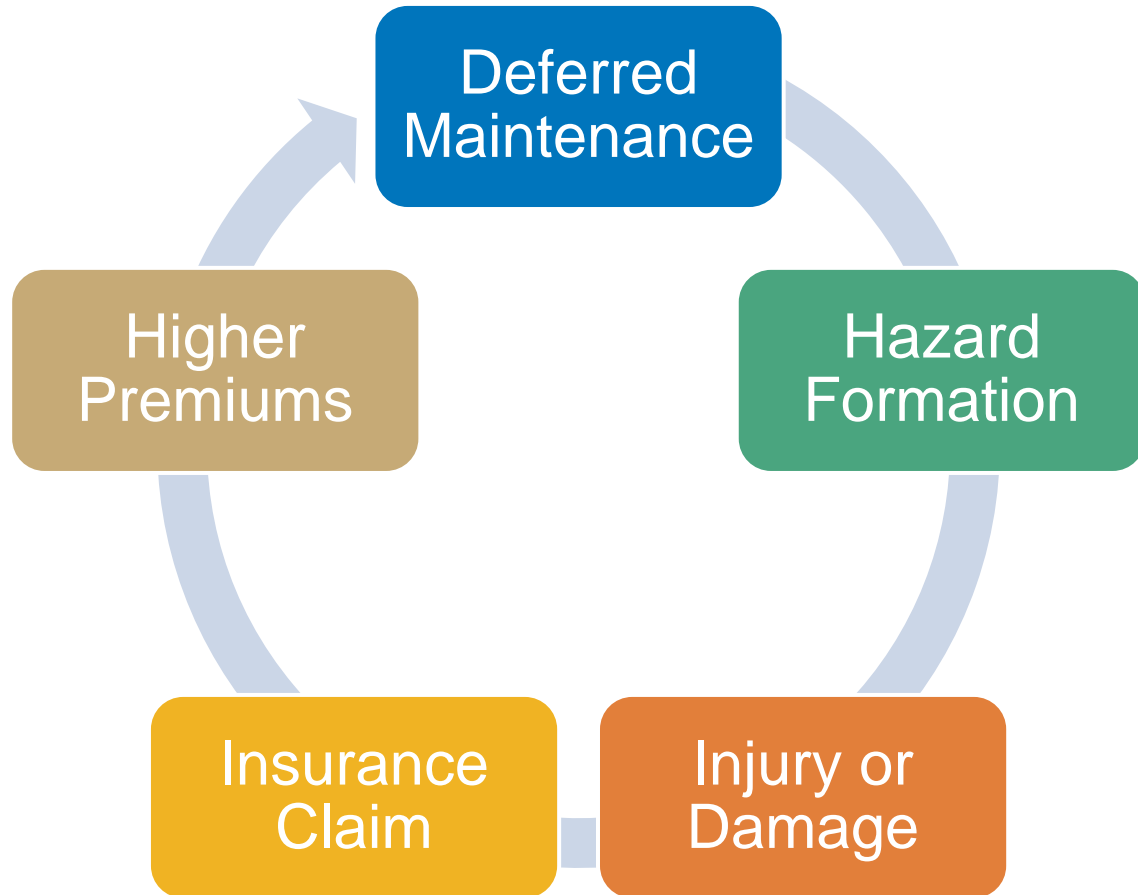


Additional Site Exposures:

- Kitchen Safety Programs**
- Youth/Student Activities**
- Large Event Planning**
- Long term planning for safety issues**

Emphasizing Long Term Planning

Deferred maintenance compounds risk and cost



One cracked sidewalk could lead to a serious fall.

A roof leak ignored could lead to structural rot, mold, and a \$100K+ claim.

Broken playground equipment could lead to an injury

Unchecked nighttime lighting could lead to theft or vandalism

Deferred maintenance weakens your claim defensibility and may reduce payout.

Real-World Cost Examples

Issue	Fix Cost (Preventive)	Possible Claim Cost (After Incident)
Roof leak	\$2,500	\$45,000 (water damage + mold remediation)
Sidewalk crack	\$900	\$32,000 (trip & fall settlement + legal fees)
Playground repair	\$1,200	\$60,000 (child injury + lawsuit)
Lighting fix	\$350	\$28,000 (theft, break-in, or injury in dark area)
Tree trimming/removal	\$1,000	\$25,000 (storm damage + blocked access + cleanup fees)
Gutter cleaning/repair	\$400	\$12,000 (water backup + internal ceiling/wall damage)
Fire extinguisher recharge	\$25	\$75,000 (minor fire spreads due to nonfunctional extinguisher)

Preventive costs are a fraction of potential claim outcomes!

- Improves safety & prevents future incidents.
- Ensures legal compliance (*e.g., for OSHA*).
- Protects location reputation.
- Provides data for risk assessments.
- Activate Diocesan Safety Committee for Support

Incident Reporting and Investigations

Discussion

How do you handle near misses or incident reports?

04:00



Risk Management starts from the top!



Discussion

How do you engage your clergy?

04:00



Considerations for your Diocese

Identify key members and develop a Diocesan Safety committee

Highlight Parishes that stand out

Communicate Risk and Safety information in ways they can understand!

Incorporate your Bishop and other Clergy members

**Risk
Management
Resources**



**Scan to access
Sample
Resources**

Select continue to website, then enter your information. Lastly, select to continue to website.

General DISCUSSION





Convocation
The Spirit of Collaboration
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