

WELCOME

Tuesday, April
14th, 2026



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How
FORTUNATE
 we are to have
 these
 generous and
 talented
 partners



Convocation
 The Spirit of Collaboration
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 **Convocation**
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History of Convocation



Tuesday's FLOW



Convocation Diocesan SURVEY 2026 and Today's Fireside Chat

Thank YOU GBS Survey Team led by Michelle Barrett

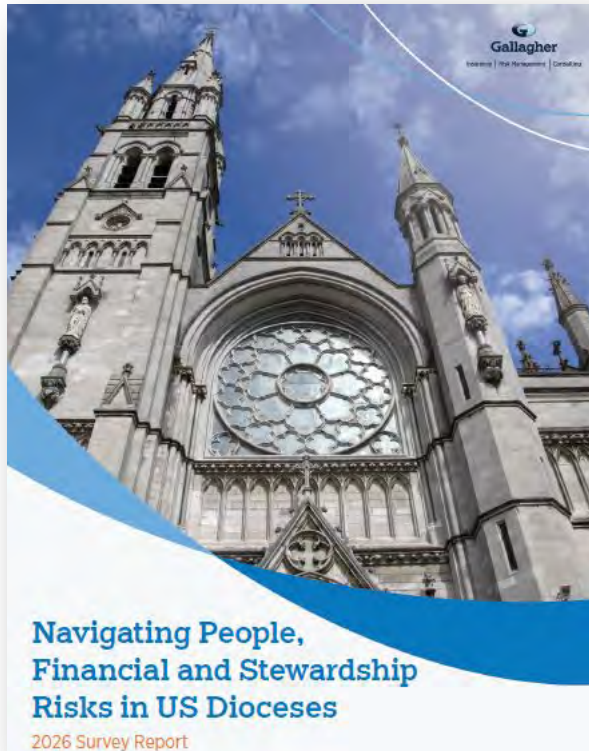


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Opening Plenary Panel moderated by
Gallagher's Kathleen Shultz

- **Sister Worley**
COO Archdiocese of Miami
- **Delaney Clement**
COO Archdiocese of St. Louis
- **Kevin Kiley**
Chancellor and CFO
Diocese of Fall River

Navigating People, Financial and Stewardship Risk in US Dioceses

2026 Survey Report Results and Panel Discussion



Kathleen Schulz, MS, CHES

Divisional Vice President
Global Innovation Leader,
Organizational Wellbeing

Survey Demographics & Discussion Flow

1 Survey live from Jan 12, 2026 to Feb 3, 2026

3 3 Areas of Risk Focus
People, Financial, Stewardship

2 59 Dioceses Participated
From 34 states across the US

4 Q&A

Thank you to the Survey Leaders & Advisory Group

Survey Leaders



Michelle Barrett
Senior Vice President,
Survey Operations



Stacy Silkaitis
Director,
Global Publications

Survey Advisory Group



Peter Persuitti
Global Managing Director,
Nonprofit | Religious Practices



Dan Romanski
Area Vice President



Michael Levin
Area Senior Vice President



Kathleen Schulz
Global Innovation
Leader, Organizational Wellbeing



Meet Our Panel



Kevin R. Kiley
Chancellor and Chief Financial Officer
The Diocese of Fall River



Sr. Elizabeth Worley, SSJ
Chancellor for Administration and COO
Archdiocese of Miami



Delaney Clement
Chief Operating Officer
Archdiocese of St. Louis



People Risk

Top Findings: Culture and Employee Engagement

Engagement level of diocesan and archdiocesan staff?

Nearly

2 in 3

Describe their workforce as very extremely engaged

Most significant cultural challenges facing the Diocese?

Resistance to change

27%

Adapting to demographic shifts

22%

Engaging younger generations

22%

Barriers to building/sustaining an empathy-centered culture:

Limited time or heavy workload

59%

Resource constraints

54%

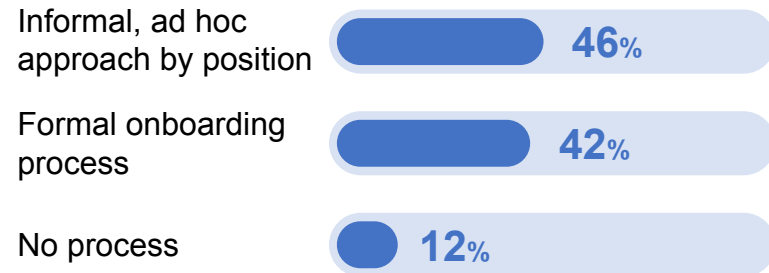
Insufficient training

29%

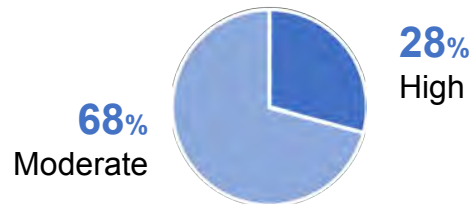
People Risk

Top Findings: Lay Leader Onboarding, Retention, and Succession Planning

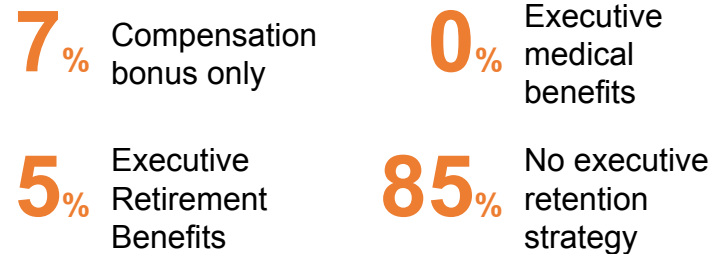
Onboarding and acclimation process for new leadership hires:



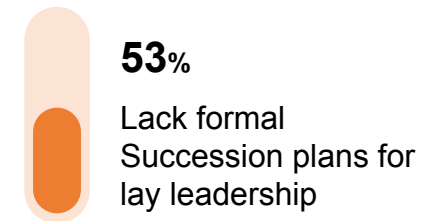
Quality of onboarding



Retention strategies for key lay leaders



Approach to lay leadership succession planning



Investment in Leadership Development

59% expect to invest in leadership development and training in the next 12 months.

People Risk

Top Findings: Benefits and Training

Employee Benefits with the Greatest Impact on Staff:



Health Insurance



Paid time off



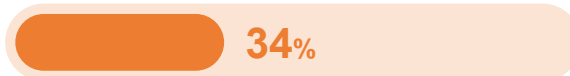
Retirement savings plans

Greatest financial wellbeing obstacle for employees:

Managing day-to-day expenses



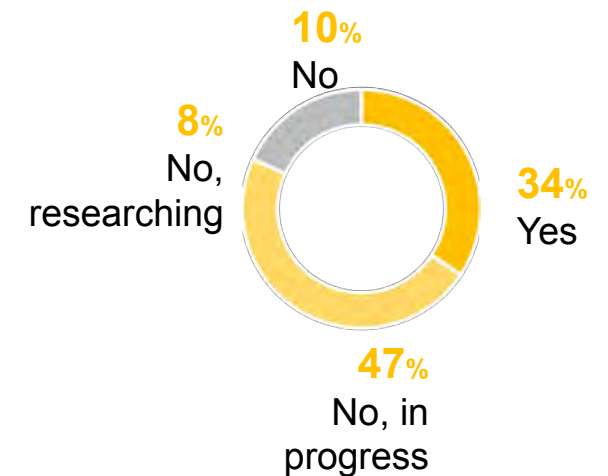
Saving for retirement



Managing personal debt



Training for parish and school staff on risk management and safety responsibilities?



DISCUSSION



Financial Risk

Top Findings: Expense Challenges

Most challenging Diocesan Expense to Manage Effectively



1. Employee health insurance benefits

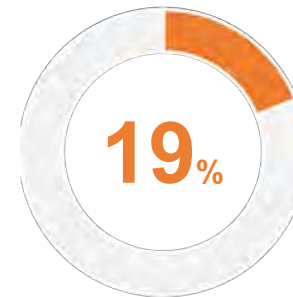


2. Facility maintenance and operations

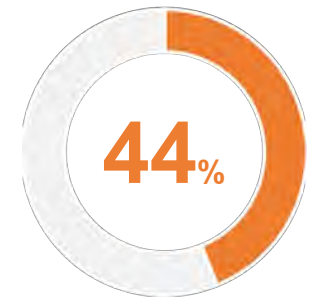


3. Education and school funding

Deductibles fairly stable, but some foresee increases:



Property or SIR

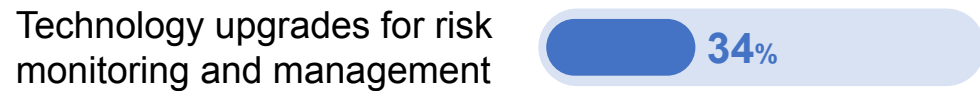
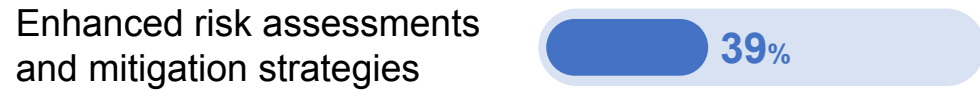


Liability or SIR

Financial Risk

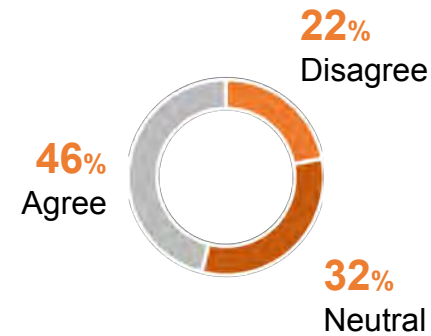
Top Findings: Cost Reduction & Collaboration Opportunities

Areas with the Greatest Potential to Reduce Fixed Costs Each Year

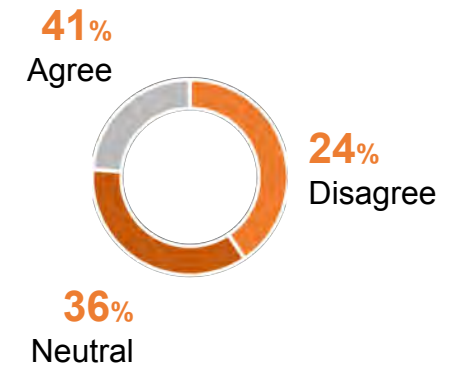


Agreement on collaboration opportunities for:

P&C insurance (joint purchasing, pooling)



Employee benefits (e.g. pooling, captives)



Financial Risk

Top Findings: Challenges to Catholic School Sustainability

63%

Teacher recruitment, retention and compensation pressures

44%

Enrollment decline or demographic shifts

44%

Facilities and capital needs

41%

Insufficient funding

32%

Tuition affordability

20%

Leadership pipeline shortages

19%

Competition from school choice, charter or private alternative

7%

Lack of system-wide data or technology infrastructure

5%

Other

2%

Insufficient focus on high-quality education for all students

DISCUSSION



Stewardship Risk

Top Findings: Data Accuracy

Areas with Challenges in Data Accuracy, Completeness or Consistency



46%

Inconsistent handling of shared roles



36%

No consolidated eligibility determination for multi-location employees



30%

Incorrect or missing mapping of employees to all work location

Stewardship Risk

Top Findings: Preparedness Actions

Emergency Action Plans

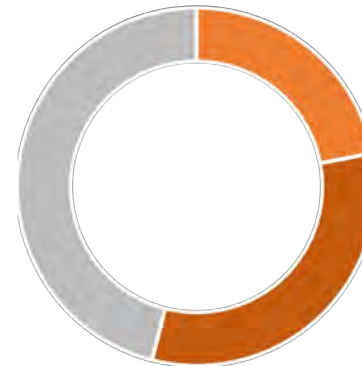
Less than

1 in **3**

Have OSHA-required emergency action plans across all locations

Policy for armed security in the diocese

38%
Yes



24%
No, not considering

38%
No, but considering

Stewardship Risk

Top Findings: Prioities and Recommendations for the next 12-24 months

Top operational priorities for the next 12-24 months:



1. Expand fundraising efforts



2. Address clergy shortages



3. Enhance risk management

Recommendations for Diocesan leaders to navigate the next 12 months:

61%

Prioritize financial planning & resource allocation

59%

Invest in leadership development & training

56%

Strengthen communication

44%

Emphasize spiritual growth & pastoral care

Areas with significant ROI from technology implementation:

61%

Online donations and fundraising platforms

54%

Automated payroll systems

42%

Cybersecurity and data protection solutions

42%

Financial reporting and analytics software

DISCUSSION



Thank you. |



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