Welcome
Objectives of Today’s Meeting

1. Meet the Diocesan Property Committee
2. Meet colleagues and expand your network
3. Learn about other property resources
AGENDA
• Opening Prayer & Overview
  – Canon Linda L. Grenz, Canon to the Ordinary

• Introduce Diocesan Property Committee
  – Jim Rezendes, Convener

• Avoiding Property Issues & Dealing with Insured Losses
  – Lianne M. Limoli, Vice President, Client Services
    Church Insurance Agency
• Diocesan Risk Manager
  – Joan Collins (St. James, North Providence)

• Property Basics
  – Canon Linda L. Grenz, Canon to the Ordinary
  – Jim Rezendes, Convener of Diocesan Committee

• Best Practices
  – John Gelati & Spence Harber, Members of Diocesan Property Committee

• LUNCH & Networking
Diocesan Property Committee
Who’s Who

• Jim Rezendes, Convener (St. Luke’s, East Greenwich)
• Peter Bak (St. James, North Providence)
• Mike Brito (St. Peter & Andrews, Providence)
• Bob Bergstrand (Epiphany, Rumford)
• John Gelati (Emmanuel, Cumberland)
• Spence Harber (Grace, Providence)
• Jim Kelliher (Trinity, N. Scituate)
• Bishop’s Staff:
  – Linda L. Grenz, Canon to the Ordinary
  – Chris DeCelles, Maintenance Supervisor
Mission

• Assess issues for each diocesan property
• Establish strategies for each property
• Recommend & advise the Commission on Finance or staff on how to address property issues
## Diocesan Properties

### General Properties
- Diocesan House
- Diocesan House Annex
- Church of the Beloved (Pascoe)
- Church of the Advent (Coventry)
- Cathedral of St. John
- May House & Cottage
- Episcopal Conference Center (ECC)

Owned by Diocese but managed by Episcopal Housing Foundation
- Hallworth House
- Edwards Homes

### Mission Churches (advisory)
- St. James, N. Providence
- St. Paul’s, Portsmouth
- St. George’s, Central Falls
- St. John’s, Newport [T]
- St. Peter’s & Andrew’s, Providence
- St. Augustine’s, Kingston
- St. Mary’s, E. Providence
- Holy Cross, Middletown
- Holy Spirit, Jamestown
- St. Thomas, Alton
- St. Elizabeth's, Hope Valley
- St. Ann's, Block Island
- St. Francis, Coventry
- St. Paul’s, Pawtucket [T]
- St. James, Woonsocket [T]
Church Insurance Companies

- Church Insurance Company
- Church Insurance of New York
- Church Insurance Company of Vermont
- Church Insurance Agency Corporation

Provides churches, dioceses, and institutions with multiple coverages for protecting their people and property. Also provides risk management tools and strategies.
Church Insurance Companies

- Avoiding property problems
- When to contact CIC
- Types of insurance we offer
- How to be added to the CIAC newsletter
- Forms and Publications
- Q&A
Church Insurance Companies

www.cpg.org

www.cpg.org/administrators/insurance/property-and-casualty/forms-publications
Diocesan Risk Manager
Joan Collins
What Is The Program?

• “The Episcopal Safety Program is a proactive approach to helping congregations maintain a safer environment for worship and mission while being good stewards of property and people. The program is funded by CIC-VT and managed by the Church Insurance Agency Corporation (CIAC).”

-Church Insurance Agency Corporation
Who Is the Diocesan Safety Manager?

“We work in cooperation with your diocese to appoint and train a Diocesan Safety Manager. Together, the DSM and a member of our ESP team perform specialized safety reviews of the congregations we serve in that diocese. The review is free of charge, and is conducted at a time convenient for the congregation.”

- Church Insurance Agency Corporation
What Does the Review Cover?

• All Parish-owned Properties
  – Asset Documentation
  – Safety Policy Review
  – Crisis Management
  – Electrical Safety
  – Hazard Assessment
  – Fire Safety
  – Chemical Management
  – Housekeeping
How Does It Work?

- Contact the Parish.
- Visit and Conduct a Site Survey
- Complete Documentation
- CIAC Follow-up
What Are the Goals?

• Create Awareness
  – Fresh Eyes
  – Relationships
• Provide a Safe Environment for Worship.
• Develop a Safety Policy Baseline
Progress To Date

- 4 Churches Visited
- Findings:
  1. Crisis Management
  2. Parish Inventory
  3. Slip/Fall Hazards (Seasonal)
  4. Housekeeping
  5. Electrical Safety
Contact Information

• **Church Insurance Agency Corporation**

• Joannie Collins, Diocesan Safety Manager
  - Phone: 401-368-8151
  - Email: **jocowriter@gmail.com**
  - St. James Episcopal Church-NP
    - 401-353-2079
CHURCH PROPERTY BASICS

“COMMON SENSE,” BUT.....
Problem Identification

• Parishioners are always happy to flag issues
• Obvious items: cracks in walls, gaps in trim, stained ceilings
• Regularly walk the property & keep track of “things”
• Keep a list of items & prioritize it
• Recognize and schedule repairs & periodic maintenance
Problem Solving

• Meet with the problem owner (water is leaking in my office)
• Committee discussions
• Consult with any “in-house” experts
• Touch base with other diocesan property committee members (via our “PROPERTY NETWORK”)
• Meet with contractors
Contractor or Volunteer?
Contractors

• Necessary and can provide quality solutions
• Licensed and insured is critical, DOES NOT guarantee quality or reliability
• Working “under the table”
• Identify and avoid conflicts of interest (let’s use my brother-in-law, a parishioner, etc.)
Contractors

• Why should you get three bids?
• Ask contractors for a discount
• Diocesan Contractor List
BEST PRACTICES
Property Ministry

Current Goals

Future Goals
Current Goals

• Perform Routine Maintenance
• Provide Annual Systems Service
Current Goals
• Perform Routine Maintenance
• Provide Annual Systems Service

Future Goals
• Capital Improvements
• Stable Congregation
• Acquisition/New Building, or Sale/Demolition
Property Ministry

TOOL BOX
Property Ministry

TOOL BOX

- Advocacy
- History
- Documentation
- Strategy
- Negotiation
• Role of the Property Committee
• Who is on the Property Committee
• Provide Budget Recommendations
• Develop Capital Reserve Policy for Vestry/Bishop’s Committee to adopt
• Endowment goes to Capital Reserve
• Advocacy
Property Ministry

TOOL BOX

• History

• Development Documents
• Identify Prior Maintenance or Improvements
• Create Timeline of Improvements
Property Ministry

**TOOL BOX**

- **Documentation**
  - **Municipal Records**
    - Property Record Card (Assessor’s Office)
    - Site Map/Plat Map (Assessor or Engineering Office)
    - Deed(s) to Property (Recorder of Deeds/Town Clerk)
      - Easements
      - Adverse Possession
Property Ministry

TOOL BOX

- Documentation
- Municipal Records
- Documentation of Services and Repairs Performed
- Inspection Certificates
Property Ministry

TOOL BOX

• Strategy

• Sudden System Malfunction or Structural Destruction
  • Contact Church Insurance
  • Contact Local Services
  • Notify the Bishop’s Office (Canon to the Ordinary)
Property Ministry

**TOOL BOX**

- **Strategy**
  - Sudden System Malfunction or Structural Destruction
  - Ten Year Strategic Plan
    - Scheduled Periodic Maintenance
    - Planned Capital Improvements
Property Ministry

TOOL BOX

• Negotiation

• Communications to find common ground
  • Price Comparison
  • Terms of Contract – Timeline and Payment
Property Ministry

TOOL BOX

• Negotiation

• Communications to find common ground
• Resolution of Differences by Agreement
Property Ministry

TOOL BOX

- Advocacy
- History
- Documentation
- Strategy
- Negotiation
PROPERTY NETWORK
Purpose

To connect all of us so we may benefit from others good and bad experience.
Property Network

• Is a list serve
• Consists of all “property folks” in the diocese
• Is maintained by Ruth Moulton, Diocesan Administrator (ruth@episcopalri.org)
Doing Your Best Work

• Form a Team
• Meet when necessary
• Communicate what you are doing and what needs to be done
• Say “Thank you.”
• Remember: It’s a ministry!

Come and Join Us!
QUESTIONS?
LUNCH & NETWORKING