



October 28, 2010

## Project Update

### Continuous Improvement Model for School Risk Management

**Packet Notes:** The material in the packet is intended to show the progress so far in creating a “*best practices continuum*” for use in self-assessment of risk management. Unlike some best practice models, there is a series of process benchmarks, indicating four levels of achievement. Many models rely on a single “best” standard and force the user to try to determine a “yes” or “no” response. (See the example of the International Loss Control Institute Municipal Safety Rating System)

The color-coded prototype “scorecard” is merely intended to suggest a vision for a complete model. It is not the final product. Changes have already been made as a result of the initial work of the task forces.

**Introductory Paper:** An introductory paper published in May 2010 is available online at [www.schoolrisk.org](http://www.schoolrisk.org) Go to Resources/Helpful Links/Continuous Improvement Model to download the introductory paper.

#### **Highlights of the presentation October 19 during the Fall Conference of the Association of Governmental Risk Pools:**

- A full room of people representing school risk group staff and trustees, brokers, reinsurers and other risk management service providers turned out for the 45-minute session held at the end of a long day.
- 35 information packets of information were distributed.
- Mark McKinney of Florida School Boards Insurance Trust opened the session and gave a short history and overview of the project and people involved.
- Catherine Bennett, CPCU, Cost Control Concepts described the work that has taken place since the first task forces were mobilized in early June. She recognized the individuals and groups that have taken part on task forces and the steering group.
- Lee Gaby discussed some of the project benefits and possible uses for the assessment instrument and scorecard. He described other models, including one being used by the New Jersey School Boards Association Insurance Group. (Sample document included in packet) He thanked the sponsors and everyone who has been willing to share ideas and information.
- The presentation stressed the fact that the project is intended to develop an open access tool for managing risk that represents a consensus from a nationwide community of school risk management professionals. Everyone was encouraged to participate on a task force, with a new round of task forces starting in November.

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- There were several questions about the project including: Is it finished already; is it needed? Is it too complex? What are the deliverables? Can anyone modify the material and use it in their own model? Is the Public School Risk Institute acting as a “resource center?”

**Timetable:** The project is nearing the midpoint of the first phase. A second presentation is expected in March 2011 to mark the start of phase two. Most of the task force work should be done by July 2011. This will be followed by testing and pilot use. The expected completion date for the project is November 1, 2011.

**Need:** Several risk managers in large school districts and school risk group staff provided the initial inspiration for the project. Support has been expressed from a broad cross-section of professionals. Balanced scorecards are being used throughout public education, yet risk management is seldom assessed in a comprehensive manner. Different groups have developed several benchmarking instruments for different purposes. The project director is seeking ideas and suggestions for creative applications. The project team envisions use of the model for loss prevention and underwriting functions by risk groups. Districts may want to use the model in their marketing/insurance placement efforts. The project manager is seeking ideas and suggestions to make the model as useful as possible to benefit the interests of districts and school risk groups.

**Complexity:** A broad comprehensive approach was chosen, integrating as many elements as possible at the outset. The fourteen major categories were organized into four sections. The sections and elements can be re-arranged, reduced or expanded. The project manager will address the model’s complexity with the steering group and task forces.

**Deliverables:** Work documents will be made available for use in formats that should allow modification or reproduction. The steering group and project manager will be exploring ideas for online applications and linkage of the model to risk management resources.

**Flexibility:** The model is intended to be highly flexible and adaptable for different scale operations. Customization for different purposes is expected.

**Resource Center:** The Public School Risk Institute is a national resource center and seeks to support districts and risk groups with relevant and credible information. Search services and assistance in collecting, compiling, editing and publishing are provided.

**Project Manager:** Catherine Bennett can provide additional information and will orient new task force volunteers.



# PUBLIC SCHOOL RISK INSTITUTE

## SPECIAL THANKS TO

### **Task Force Members**

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Ron Allen	Durham PS (NC)
Tony Jones	NJSBAIG (New Jersey)
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### **Steering Group**

Stephen Finley	Denver School District
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Greg Trout	Bickmore
Dennis Chandler	Company Nurse
Brian Taylor	Safe Schools
Aaron Masson	Hour Zero
Jill Eaton	Genesis Underwriting Mgt (PSRI Board)
Mike Florio	Dekalb County Schools (PSRI Board)

Please contact the Institute to find out more about opportunities to serve as a member of the steering group or a task force.

Thank you.

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