



### SESSION 3

#### **Considerations for Matching a Religious Institute's Professional Assistance Needs with a Profession**

- 1. If a religious institute has decided to initiate a strategic property planning process but doesn't know how to begin, then the services of a CONSULTANT can help the institute:**
  - a. Identify goals for a strategic property planning process,
  - b. Define the scope of a strategic property planning process, and
  - c. Choose process features matched to the institute's goals, needs and desires, including for membership participation and engagement in the strategic property planning process.
  
- 2. If a religious institute has a good understanding of how it wishes to approach a strategic property planning process but believes the presence of a neutral non-member will be beneficial, then the services of a FACILITATOR can help the institute:**
  - a. Plan and organize large group gatherings of members convened for the purpose of addressing the institute's strategic property planning issues,
  - b. Guide members through large group gatherings, including through times dedicated to prayer and contemplation, and
  - c. Assure that the emotions that a strategic property planning process can evoke in members are identified, acknowledged and addressed.
  
- 3. If a religious institute has determined that technical information or data is needed before a strategic property planning process can be initiated, then the services of an ARCHITECT or PROFESSIONAL ENGINEER can help the institute:**
  - a. Obtain data and information on physical plant maintenance, repair or replacement needs,
  - b. Identify immediate, short-term and long-term costs associated with physical plant maintenance, repair or replacement, and





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## Stewardship of Religious Property

### *Educational Sessions for Strategic Property Planning*

- c. Identify significant structural features or limitations of buildings or facilities that may have a significant effect on the institute's strategic property planning process, such as utility services shared with others or zoning restrictions.

4. **If a religious institute needs a better understanding of the current and projected care needs of members or has major concerns about its ability to care for members in the future that it wishes to address before or in conjunction with initiating a strategic property planning process, then the services of an ELDER CARE CONSULTANT can help the institute:**

- a. Understand more fully the range of member care needs,
- b. Evaluate, define or establish a continuum of care appropriate to the care needs of all members, and
- c. Identify and assess options and alternatives for meeting the health care needs of members.

5. **If a religious institute has concluded that a property sale is the best approach to strategic property planning, then the services of a REAL ESTATE BROKER can help the institute:**

- a. Find a buyer for the specific property or real estate assets it has decided to sell,
- b. Understand better the estimated value, marketability or best approach to selling a particular real estate asset, and
- c. Establish realistic expectations regarding the length of time that may be required to sell a given real estate asset.

