



SESSION 1

Tips to Help Religious Institutes Overcome Obstacles to Initiating a Strategic Property Planning Process

OBSTACLE	TIP
1. The institute's current financial circumstances and future financial needs are not clearly understood.	✓ Use TRENDS to develop membership and financial projections for the future (<i>to be covered in Session 2</i>).
2. Everything is perceived as being so complex and interconnected, the institute doesn't know where to start.	✓ Ask NRRO if one of their consultants is available to talk through the institute's circumstances.
3. The institute is not sure if it has the resources needed to obtain the services of professional advisors.	✓ Consider accessing other resources NRRO makes available.
4. The institute is not sure now is a good time to initiate a major planning process.	✓ Look out into the future to ask if institute members who will be the ones left to do major planning will be better at it than those who would do it now.
5. The institute has never undertaken a major planning process before.	✓ Research the many resources to assist institutes made available through NRRO, LCWR and other groups.
6. Significant investments have been made in the recent past to improve or expand facilities.	✓ Ask whether these facilities are being fully used now and what the annual operating expenses are.
7. A strong belief is that the answer is for members living elsewhere to return to the institute's main facility.	✓ Poll members not now living at a main facility to ask their views on relocating.
8. Sponsored or supported ministries located on the institute's main campus continue to do good works.	✓ Evaluate where these ministries would be sustainable if financial support from the institute were reduced or eliminated.
9. Membership is reluctant to consider making major changes.	✓ Begin to educate members now about institute finances and other decisions that will be required at some time in the future.
10. The potential loss of major institute properties evokes fears and concerns among membership about mission sustainability and lost legacy.	✓ Remember that the institute's mission is much more than buildings and properties.

