



SESSION 1

Checklist to Determine the Right Time to Initiate a Strategic Property Planning Process

It may be time for a religious institute to consider initiating a strategic property planning process if:

- 1. The institute has a strong desire to dedicate financial assets to mission sustainability
- 2. The institute currently has an unfunded past services liability of 40% or greater
- 3. Institute membership is projected to decline significantly in the next fifteen years
- 4. The institute relies heavily on member earnings for income
- 5. A significant decrease in member earnings is projected in the next fifteen years
- 6. The institute's capacity to provide living spaces for members exceeds its current need
- 7. The future need for member living spaces is projected to decrease significantly
- 8. The institute has facilities, buildings and spaces that are unused or seriously underutilized
- 9. The institute commits significant time to managing spaces leased to outside entities
- 10. Major decisions are needed about investing in the repair and upkeep of institute facilities
- 11. The cost of care for members is projected to increase significantly in the next 15 years
- 12. The annual cost of operations is accelerating while income is declining
- 13. The number of members requiring a greater level of nursing care is projected to increase
- 14. The demands of administration are taking away from leadership's pastoral responsibility
- 15. The demands of leadership fall disproportionately on a few members

