



### SESSION 1

## **Major Considerations When Determining the Scope of a Strategic Property Planning Process**

- **1. Strategic property planning does not occur in a vacuum, so placing the process into a proper context is essential. This may require an initial analysis that is broader than assessing the institute's owned properties. Context considerations could include:**
  - a. Projections of future institute membership and what these projections imply for the institute's future,
  - b. The viability of the institute's financial circumstances, including the adequacy of financial assets available to provide for the future care of all members,
  - c. Challenges to sustainability of the institute's mission into the future stemming from membership projections, financial situation or other factors, and
  - d. A desire to establish or secure a lasting legacy for the institute.
  
- **2. Clarity about the specific properties that are and are not included within the scope of strategic property planning is also essential. Some questions for the institute to ask when deciding on the properties within the scope of a strategic property planning process are:**
  - a. Is a main campus (e.g., motherhouse, friary or abbey) the sole or primary focus of strategic property planning?
  - b. Are both buildings and land on a main campus included within the scope of the strategic property planning process?
  - c. Are *all* buildings and land on a main campus included within the scope of the strategic property planning process?
    - 1. Are spaces that may be occupied by a sponsored ministry or other activity closely affiliated with the institute included?
    - 2. Are spaces that may be leased to any outside organization or entity included?
    - 3. Is land that may be being actively farmed or otherwise in use included?
  - d. What other properties away from a main campus will be included within the scope of the strategic property planning process?
  - e. What is the rationale for the exclusion of *any* institute-owned property from the scope of the strategic property planning process?





# TENDING THE VINEYARD

## Stewardship of Religious Property

### *Educational Sessions for Strategic Property Planning*

- **3. The religious institute's openness to significant change is also a major factor in determining the scope of a strategic property planning process. Included is whether the institute is open to:**
  - a. Considering a sale of all or part of the buildings and land that comprise its main campus,
  - b. Repurposing unused or underutilized spaces for other uses that align with an institute's mission and values, or
  - c. Collaboration with others, including those with whom the institute does not have a history of collaboration.
  
- **4. Identifying and articulating essential values of the religious institute (e.g., eco-justice) and "non-negotiables" are also crucial to defining the scope of the strategic property planning process.**

