



TENDING THE VINEYARD

Stewardship of Religious Property

Educational Sessions for Strategic Property Planning

SESSION 4 **Summary Information on Components of a Detailed Strategic Property Planning Process**

COMPONENT	KEY ELEMENTS
<i>Goals</i>	<ul style="list-style-type: none"> • Connecting strategic property planning with the institute’s mission and its sustainability should be a primary goal • Other goals could include: <ul style="list-style-type: none"> ○ Improving finances by generating additional income and/or reducing expenses to assure adequate funding of member retirement ○ Reducing complexity and simplifying administration and management of the “business” of the institute ○ Freeing institute leadership to be more attentive to the pastoral needs of members ○ Freeing membership to focus on service to the institute’s mission without major worry about the institute’s financial condition or its ability to care for members throughout their retirement
<i>Values and guiding principles</i>	<p>Values and guiding principles the institute articulates could include:</p> <ul style="list-style-type: none"> • Grounding strategic property planning in the institute’s mission and charism • Explicit recognition that strategic property planning will take place within the context of the institute’s realities • A clear focus on the institute’s needs and challenges, whether immediate or off into the future • Recognition of the essential importance of substantive engagement of institute members in the strategic property planning process • A commitment to transparency and openness with members • Acknowledgement that the institute’s interdependence requires collaboration and partnerships with others





TENDING THE VINEYARD

Stewardship of Religious Property

Educational Sessions for Strategic Property Planning

<i>Phases</i>	<ul style="list-style-type: none"> • The discrete phases in which strategic property planning will occur based on the specific approach the institute adopts
<i>Major activities</i>	<ul style="list-style-type: none"> • A description of the major activities, steps and actions that will be undertaken in each phase • A schedule of planning team or committee meetings along with a brief description of the anticipated purpose of each meeting • A description of when and how small and large gatherings of members will occur during the strategic property planning process and the purpose of each gathering
<i>Roles</i>	<ul style="list-style-type: none"> • Articulation of roles of all those directly involved in a strategic property planning process, which ordinarily include the roles of: <ul style="list-style-type: none"> ○ Institute leadership ○ The strategic property planning team or committee ○ The chair of the property planning team or committee ○ Individual members of the institute ○ Existing institute committees that may have a close connection to strategic property planning ○ The institute’s consultant • Clarity as to when strategic property planning decisions will be made and who will have responsibility for making them
<i>Member engagement plan</i>	<ul style="list-style-type: none"> • A description of how, when and why individual members will actively participate in the strategic property planning process • Identification of the most critical points in a strategic property planning process when feedback and input from members will be invited
<i>Comprehensive timetable</i>	<ul style="list-style-type: none"> • A summary depiction of the beginning and ending dates for strategic property planning • The estimated period of time required for each phase of the institute’s strategic property planning process

