



TENDING THE VINEYARD

Stewardship of Religious Property

Educational Sessions for Strategic Property Planning

SESSION 4

List and General Description of Typical Phases of a Strategic Property Planning Process

PHASE	DESCRIPTION
<i>Planning preparation</i>	<ul style="list-style-type: none"> • The phase of strategic property planning during which: <ul style="list-style-type: none"> ○ The institute decides on a detailed strategic property planning process, ○ Basic information is gathered, ○ A planning team or committee is established, ○ Roles are defined and ○ The process is introduced to membership.
<i>Detailed assessment</i>	<ul style="list-style-type: none"> • The phase of a strategic property planning process during which data and information are gathered and analyzed in all areas relevant to the scope of the institute’s planning. These assessments define the institute’s needs, circumstances and challenges with more precision and could include assessments of: <ul style="list-style-type: none"> ○ Space utilization, including the costs to the institute associated with underutilized facilities, ○ Projections of future membership demographics, ○ Projections of future needs to provide housing and living spaces for members, given membership demographic projections and ○ Investment or other assets available to pay for the costs of member retirement, including future projections.
<i>Articulation of realities</i>	<ul style="list-style-type: none"> • The phase of strategic property planning during which critical institute realities that pertain most directly to strategic property planning are identified and defined. These realities can include: <ul style="list-style-type: none"> ○ Realities stemming from membership projections, ○ Realities based on the institute’s present and projected financial conditions, ○ Realities based on space needs and utilization,





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	<ul style="list-style-type: none">○ Realities that consider the costs to the institute associated with property ownership and operation, including the estimated cost to the institute of unused or underused facilities and○ The impact of all these realities on the institute's ability to sustain its mission and ministries into the future
<i>Setting of priorities</i>	<ul style="list-style-type: none">● The phase of the strategic property planning process during which an institute establishes specific priorities for its strategic property planning process based on the most crucial realities the institute is facing.
<i>Identification and evaluation of options and alternatives</i>	<ul style="list-style-type: none">● The phase of strategic property planning during which options and alternatives for addressing an institute's priorities are identified and evaluated, including through processes and activities such as:<ul style="list-style-type: none">○ A structured visioning process that actively involves membership in identifying options and alternatives and○ An approach to evaluation of options and alternatives based on mission, care of creation and values that are most important to the institute.
<i>Recommendations development and decision-making phase</i>	<ul style="list-style-type: none">● The phase of strategic property planning during which actions the institute will take as a result of its strategic property planning are determined. This phase ordinarily involves obtaining input and feedback from membership before final recommendations are developed and strategic property planning decisions are made.
<i>Implementation phase</i>	<ul style="list-style-type: none">● The final phase of strategic property planning during which the institute implements the decisions made in its strategic property planning process.

