



# TENDING THE VINEYARD

## Stewardship of Religious Property

### *Educational Sessions for Strategic Property Planning*

#### **SESSION 3** Description of Typical Outside Professional Assistance Needs

PROFESSION	GENERAL DESCRIPTION AND WHEN NEEDED
<i>Architect</i>	<p>A specially trained and licensed professional who plans, designs, reviews and guides the construction of buildings and surrounding spaces. Generally, the services of an architect are needed when a religious institute engaged in a strategic property planning process has decided to:</p> <ul style="list-style-type: none"> <li>• Construct new spaces or renovate or remodel existing spaces, and/or</li> <li>• Conduct a study of specific spaces to assess their condition, needs or the feasibility of alternative uses.</li> </ul>
<i>Consultant</i>	<p>An expert by training, education and experience who provides advice in a specialized area or field (e.g., management, human resources, finance, development or planning). Generally, the services of a consultant are needed when a religious institute:</p> <ul style="list-style-type: none"> <li>• Decides to initiate a strategic property planning process, and/or</li> <li>• Determines that an outside professional is required to plan, organize, advise, guide and facilitate the institute’s strategic property planning process.</li> </ul>
<i>Elder Care Specialist</i>	<p>An expert dedicated to improving the social, spiritual and emotional lives of older adults as they age and their needs for care and support increase. Generally, the services of an elder care specialist are needed during a strategic property planning process when a religious institute:</p> <ul style="list-style-type: none"> <li>• Desires to clarify or articulate a comprehensive elder care philosophy and approach, including the role of individual members in making health care decisions,</li> <li>• Requires better and more detailed information about the current and future care needs of its aging members and the costs of meeting those needs, and/or</li> <li>• Needs assistance in planning for how the care needs of its aging members can best be met in the future, including resources and tools that can assist members as they transition into elderhood.</li> </ul>





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<b><i>Professional Engineer</i></b>	<p>A trained and licensed professional who applies scientific principles of engineering to the design, construction and assessment of building materials and systems. Generally, the services of a professional engineer are needed during a strategic property planning process when a religious institute:</p> <ul style="list-style-type: none"><li>• Needs professional guidance and advice regarding the condition, operation and maintenance or replacement costs of its real estate assets, and/or</li><li>• Requires feasibility or other studies pertaining to alternative uses being considered during or as a result of a strategic property planning process.</li></ul>
<b><i>Facilitator</i></b>	<p>A neutral and disinterested individual whose focus is process, not content, and who helps a group function effectively, accomplish a task or achieve its goals. Typically, religious institutes involved in strategic property planning require the services of a facilitator to:</p> <ul style="list-style-type: none"><li>• Plan and lead members through a process designed for a large gathering, such as a chapter, assembly, community day or other times when members of the institute come together as a body, and/or</li><li>• Help assure that the emotions that strategic property planning evokes in membership are acknowledged, addressed and otherwise tended to in conjunction with strategic property planning.</li></ul>
<b><i>Real Estate Broker</i></b>	<p>A person who acts as an intermediary between buyers and sellers of real estate, trying to match interested buyers with interested sellers. Generally, a religious institute requires the services of a real estate broker in a strategic property planning process when:</p> <ul style="list-style-type: none"><li>• The institute has decided to divest itself of a real estate asset through a sale, and/or</li><li>• Desires advice or an opinion on the marketability or estimated value of a particular real estate asset.</li></ul>

