



TENDING THE VINEYARD

Stewardship of Religious Property

Educational Sessions for Strategic Property Planning

SESSION 3

Glossary of Key Terms Used in Session 3

The following terms are associated with Session 3 of Tending the Vineyard’s educational sessions for strategic property planning.

TERM	DEFINITION
<i>Architect</i>	A specially trained and licensed professional who plans for, designs, reviews and guides the construction of buildings and surrounding spaces.
<i>Billing rates</i>	A common basis individuals, groups or professional firms use to value their services, usually expressed as a rate per hour or per day. Billing rates may or may not be “comprehensive,” i.e., include overhead costs such as supplies, phone, copying costs, etc.
<i>Consultant</i>	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).
<i>Contract</i>	A legally binding agreement between two or more parties through which each party acquires rights, duties and obligations. Religious institutes sometimes but not always enter into a contract for professional services. A contract may be prepared initially by either the institute’s attorney or the attorney representing the professional advisor.
<i>Deliverable</i>	A specific product or outcome a professional service advisor agrees to prepare or produce. A written report is an example of a deliverable.
<i>Disclaimer</i>	A formal statement(s) sometimes included in a Request for Proposals (RFP) intended to preserve rights or set specific conditions. An institute’s right not to accept any proposals submitted pursuant to an institute-issued RFP is a common disclaimer.
<i>Elder care specialist</i>	An expert dedicated to improving the personal care, social, spiritual and emotional lives of older adults as they age and their needs for care and support increase.
<i>Engagement letter</i>	A letter signed by both the religious institute and the professional advisor that defines their mutual understandings regarding the services





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	to be provided, including the compensation arrangements for those services.
<i>Estimated fees</i>	The amount a professional advisor anticipates will be charged to the religious institute for the services it provides. Generally, estimated fees are set out in a formal document such as a price proposal.
<i>Evaluation criteria</i>	Specific factors a religious institute will take into account in its review of proposals. These factors may or may not be weighted and may or may not be specified in an RFP.
<i>Facilitator</i>	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.
<i>Hours of effort</i>	The number of hours a professional advisor believes the scope of services to be provided will require. Estimates may be given for each individual advisor composing a professional service team or in total.
<i>Out-of-pocket expenses</i>	Costs such as airfare, lodging and meals that a professional service advisor may incur in conjunction with providing services to a religious institute.
<i>Physical plant</i>	The mechanical systems and infrastructure that support the operation of buildings and facilities in a given location, such as religious institute campus or other setting.
<i>Price proposal</i>	The amount a professional advisor offers for the services described in a proposal. A price proposal always accompanies a technical proposal describing the services to be provided, and may or may not be submitted separately from this technical proposal.
<i>Procurement</i>	A structured process through which the services of professional advisors are competitively obtained.
<i>Professional engineer</i>	A trained and licensed professional who applies scientific principles of engineering to the design, construction and assessment of building materials and systems.
<i>Proposal</i>	A written description of services prepared for a professional advisor often, but not necessarily, in response to an institute's formal RFP.





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<i>Proposal review team</i>	A group of individuals who are members of or closely affiliated with a religious institute assembled for the purpose of reviewing and evaluating proposals submitted in response to a formal RFP.
<i>Real estate broker</i>	A person who acts as an intermediary between buyers and sellers of real estate, trying to match interested buyers with interested sellers.
<i>Request for Information (RFI)</i>	A precursor to an RFP used as a device to screen and identify the individuals, groups or professional service firms to whom a religious institute will subsequently send a formal RFP based on qualifications and experience.
<i>Request for Proposal (RFP)</i>	A method used to competitively procure the services of professional advisors. An RFP describes an institute's service needs and provides instructions for how proposals in response to those needs are to be structured and submitted.
<i>Request for Qualifications (RFQ)</i>	A precursor to an RFP, similar to an RFI, designed to identify and screen those who will be invited to submit a proposal in response to a formal RFP.
<i>Scope of work statement</i>	A written description of a religious institute's needs for outside professional assistance, including the major conditions, factors or circumstances giving rise to those needs.
<i>Subcontractor</i>	A subordinate individual, group or professional service firm that augments or supplements the services provided by a primary service team. A subcontractor's relationship and formal agreement is with another professional advisor not directly with the institute itself.

