



# TENDING THE VINEYARD

## Stewardship of Religious Property

### *Educational Sessions for Strategic Property Planning*

#### SESSION 2

#### **Top Ten Ways TRENDS can be Helpful to a Religious Institute in a Strategic Planning Process**

**TRENDS information helps a religious institute identify:**

**1.** The number of members for whom the religious institute will need to provide housing for up to 30 years into the future

**2.** The expected level of need an institute will have to care for frail and infirm members for the next fifteen years, including how this level of need compares to any spaces the religious institute dedicates to the care of members

**3.** Significant changes in income the religious institute can expect in the fifteen years ahead

**4.** Significant changes in expenses the religious institute can expect in the fifteen years ahead

**5.** Staffing adjustments that may be warranted given future membership projections

**6.** The need for action to increase income and reduce expenses if an institute's projected investment assets will be insufficient to care for all members into and through their retirement

**7.** The specific year in the future at which the religious institute is projected to fully deplete its investment assets absent action by the institute to increase income or reduce expenses

**8.** The future impact of the religious institute's available investment assets if the institute were to sell a property at a specific price in a given year or take other action to increase institute income

**9.** The future impact on the investment assets available to the religious institute if it were to reduce its operating expenses by a hypothetical amount or percentage beginning in a given year

**10.** The future financial impact of alternative decisions or divestiture scenarios the religious institute is considering

