



TENDING THE VINEYARD

Stewardship of Religious Property

Educational Sessions for Strategic Property Planning

SESSION 3 Tips for Preparing a Good Scope of Work Statement

1. Make sure there is a good understanding of the reasons why the religious institute has decided to initiate a strategic property planning process

2. Define the specific goals the institute wishes to achieve through its strategic property planning process

3. Be clear about the specific properties that will be included in the institute's strategic property planning process

4. Explain clearly the connection between the religious institute's properties and its overall circumstances and situation

5. Decide who within the institute will have lead responsibility for the strategic property planning process (e.g., an ad hoc planning team or committee)

6. Decide on any specific process components or features that the institute desires to be included in its strategic property planning process (e.g., the engagement of members)

7. Balance the institute's desire to be prescriptive about specific process features with flexibility and an openness to suggestions

8. Define the specific services required of the outside professional and the role the institute desires the outside professional to play in the strategic property planning process

9. Be as clear as possible about the institute's expectations of the outside consulting professional, including expectations regarding collaboration with a planning team or committee or direct engagement with membership

10. Identify the type of outside professional assistance the religious institute needs

