

# Building Summit notes

Saturday September 27, United Lutheran Seminary in Mt Airy

Development consultants:

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## Church Development Roadmap

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### Phase 1: Visioning and Strategic Planning

**Timeline:** 3-6 months

#### 1. Define church's mission (Months 1-2)

- Revisit the congregation's core mission and values (Who have we been? Who are we today?)
- Identify how physical space supports or limits ministry goals (Where is the pain? Where are the design problems?)
- Refine and specify future ministry vision (Who do we want to become? What is God calling us to next?)
- **Led by:** Senior Pastor and Leadership Team
- **Involves:** Staff input sessions, board approval
- Our team will provide frameworks and tools to guide this process

#### 2. Internal stakeholder engagement (Months 2-3)

- Meet with ministry leaders across all departments (children, youth, worship, outreach, etc.)
- Gather input from long-term members and newer attendees
- Survey congregation about space needs and priorities

- **Form a Property Development Committee** – 5-7 congregants and leaders who will shepherd the process through the coming years
- **Led by:** Executive Pastor or Operations Director
- **Involves:** Ministry directors, key volunteers, representative congregation members
- Our team will provide survey templates and help set up the Property Development Committee

### 3. Initial site assessment (Month 3-4)

- Document current property assets, square footage, and conditions
- Review existing surveys, title reports, and property documents
- Identify physical constraints and opportunities
- Conduct demographic analysis
- **Led by:** Property Development Committee
- **Involves:** Church administrator, maintenance staff, our team
- Our team will perform comprehensive site analysis (Ken's the engineer, this is his sphere) and review all property documentation

### 4. Determine development goals (Months 4-6)

- Prioritize needs: new worship space, affordable housing, community center, revenue generation, etc.
- Synthesize community and site input into development objectives
- Establish success metrics for the project
- Identify and hire legal counsel
- **Led by:** Church Board and Property Development Committee
- **Involves:** Finance committee, strategic planning team

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## Phase 2: Feasibility Study

**Timeline:** 2-4 months

### 5. Hire development consultant

- Issue RFPs and interview 3-5 consultants with church/nonprofit experience

- Check references from other faith communities
- Negotiate scope and fee structure
- **Led by:** Property Development Committee
- **Involves:** Legal counsel (contract review), finance team

## 6. Conduct feasibility study

- Analyze market conditions for potential uses (housing, commercial, community space)
- Review zoning regulations and land use restrictions
- Assess development capacity (building envelope, parking, access)
- Evaluate congregation's financial capacity for project
- **Led by:** Development Consultant
- **Involves:** Architect (preliminary), land use attorney, financial team, Property Development Committee

## 7. Explore development options

- Present 3-5 development scenarios with pros/cons
- Model different approaches: ground lease, joint venture, sale with leaseback, self-development
- Include conceptual site plans and financial projections for each option
- **Led by:** Development Consultant
- **Involves:** Property Development Committee, architect, financial team, denominational representative

## 8. Risk and benefit assessment

- Identify financial, operational, and mission-related risks for each option
- Quantify potential revenue, community impact, and ministry benefits
- Create decision-making matrix for leadership
- **Led by:** Development Consultant and Property Development Committee
- **Involves:** Legal counsel, insurance advisor, financial planner

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## Phase 3: Decision-Making and Governance

**Timeline:** 4-8 months

### 9. Engage the congregation

- Host informational town halls presenting feasibility findings
- Provide multiple opportunities for Q&A and feedback
- Share written summaries and FAQs
- Conduct formal congregational vote (if required by bylaws)
- **Led by:** Senior Pastor, Church Board, and Property Development Committee
- **Involves:** Communications team, entire congregation, denominational representative

### 10. Legal review

- Review corporate bylaws and decision-making authority
- Assess deed restrictions, covenants, or denominational property rights
- Examine implications for tax-exempt status
- Draft preliminary agreements and governance structures
- **Led by:** Church Attorney
- **Involves:** Church Board, denominational legal counsel, tax advisor

### 11. Choose a development path

- Board makes formal recommendation based on congregation input
- Vote to proceed with specific development approach
- Set authorization levels and approval processes
- **Led by:** Church Board and Property Development Committee
- **Involves:** Congregation (for major decisions), denominational approval (if required)

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## Phase 4: Pre-Development

**Timeline:** 12-18 months

## 12. Assemble the development team

- Select architect with relevant experience
- Hire civil engineer, structural engineer, and other specialists
- Engage land use attorney and expeditor
- Retain project manager (or developer partner)
- **Led by:** Property Development Committee
- **Involves:** Developer partner (if applicable), church leadership

## 13. Site planning and concept design

- Create schematic designs showing building massing, use, and site layout
- Incorporate church needs (sanctuary, offices, parking) with development goals
- Develop preliminary cost estimates
- Refine based on stakeholder feedback
- **Led by:** Architect and Development Team
- **Involves:** Property Development Committee, ministry leaders, neighborhood input (community meetings)

## 14. Entitlements and permits

- File applications for zoning changes, variances, or special permits
- Navigate city planning and design review processes
- Attend public hearings and address community concerns
- Secure environmental clearances
- **Led by:** Land Use Attorney and Expeditor
- **Involves:** Architect, civil engineer, Property Development Committee

## 15. Develop detailed financial plan

- Create detailed project budget (hard costs, soft costs, contingencies)
- Model financing scenarios (debt, equity, grants)
- Project cash flow and return on investment
- Plan for church's financial contribution or revenue share
- **Led by:** Financial Advisor and Development Consultant
- **Involves:** Church CFO/treasurer, lenders (preliminary discussions), CPA

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## Phase 5: Financing and Partnerships

**Timeline:** 6-12 months

### 16. Negotiate terms with development partners

- Structure ground lease or joint venture agreements
- Define roles, responsibilities, and decision rights
- Negotiate financial terms (rent, profit sharing, equity stake)
- Establish protections for church mission and long-term interests
- **Led by:** Church Attorney and Property Development Committee
- **Involves:** Developer, church board, financial advisor

### 17. Secure project financing

- Submit loan applications to construction lenders
- Pursue Low-Income Housing Tax Credits (LIHTC) if applicable
- Apply for grants from denominational or community sources
- Secure bridge financing if needed
- Close on all financing agreements
- **Led by:** Developer (or church CFO if self-developing)
- **Involves:** Lenders, equity investors, grant agencies, Property Development Committee

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## Phase 6: Construction

**Timeline:** 18-36 months (varies by project size)

**Key Players:** General Contractor, Architect, Project Manager, Property Development Committee

### 18. Finalize design and construction plans

- Complete construction drawings and specifications
- Obtain building permits
- Finalize contractor selection through bidding process
- Review and approve final budget

- **Led by:** Architect and Project Manager
- **Involves:** General contractor, Property Development Committee, city building department

## 19. Construction begins!

- Site preparation and foundation work
- Structural construction
- Building systems installation (mechanical, electrical, plumbing)
- Interior and exterior finishes
- Regular progress meetings and site inspections
- **Led by:** General Contractor
- **Involves:** Project manager, architect (periodic site visits), church liaison, city inspectors

## 20. Change management for church operations (Throughout construction)

- Manage construction impacts on worship and programs
- Communicate regularly with congregation about progress
- Coordinate temporary relocations if necessary
- Plan for phased occupancy if applicable
- **Led by:** Church Operations Director and Property Development Committee
- **Involves:** Pastoral staff, ministry leaders, communications team, congregation

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# Phase 7: Completion and Operations

**Timeline:** 6-12 months initial transition, ongoing long-term

**Key Players:** Property Manager, Church Leadership, Property Development Committee

## 21. Project completion and inspection

- Final inspections and certificate of occupancy
- Contractor punch list completion
- Systems training for church staff

- Final lien releases and close-out documentation
- **Led by:** General Contractor and Project Manager
- **Involves:** Architect, city inspectors, church facilities team

## 22. Transition to operations

- Lease-up (if residential or commercial component)
- Hire or contract property management
- Establish maintenance protocols and budgets
- Move into new/renovated church spaces
- Dedication celebration with congregation and community
- **Led by:** Property Manager and Property Development Committee
- **Involves:** Leasing agents (if applicable), facilities staff, pastoral team

## 23. Evaluate financial and mission outcomes

- Assess whether project meets financial projections
- Evaluate community impact and mission alignment
- Gather feedback from congregation and tenants/users
- Document lessons learned
- **Led by:** Church Board and Property Development Committee
- **Involves:** Financial team, ministry leaders, outside evaluator (optional)

## 24. Long-term governance (Ongoing)

- Establish permanent oversight structure for development asset
- Celebrate, thank, and dissolve (finally!) the Property Development Committee
- Regular reporting to church leadership and congregation
- Maintain partnerships with developer/property manager
- Plan for capital improvements and reserves
- Monitor ongoing alignment with church mission
- **Led by:** Church Board
- **Involves:** Property manager, financial team, legal counsel (as needed)