



## Summary of Church Services: A to Z

Development Advisors (“Advisors”) provide the following A to Z services in four phases for its church real estate clients:

### PHASE 1

### FACILITY GOAL

**PROJECT VISION.** *God implants the future vision into the church’s leaders. Advisors take this vision and conceptually articulate the future facility program (building size, parking and related space configurations). This facility program starts with the ministry needs and desires for worship, teaching, discipleship, recovery, fellowship and evangelism.*

**FINANCIAL PLAN.** *Advisors document existing and future financial resources and predict the likely capital giving potential and the future capacity of your church’s budget to support debt resources. We help estimate the right amount of debt financing necessary to accomplish the Project Vision without hamstringing the church’s future ministry goals.*

**BUDGETING.** *We create a pro-forma budget based upon the Project Vision, reconciled to the church’s Financial Plan, resulting in a “3R” report defining the church’s Facility Goal. This report, for all to see, predicts the most likely outcome that your church can expect to attain.*

### PHASE 2

### REAL ESTATE

**EXISTING PROPERTIES.** *Advisors identify all possible alternatives including non-traditional commercial properties. Should a desired property not allow a church use-by-right, we ascertain the likelihood of re-zoning, and if desired, we take on the responsibility of conducting the municipal and public relations campaign to secure approval. Once a property is under contract, we orchestrate all of the due diligence including planning for the future design and construction changes.*

**LAND SITES.** *Advisors identify every possible land site in the target area, including those not on the market, based on price, zoning, access and development costs. We evaluate, negotiate and eventually consummate the purchase (should land become the preferred alternative). We obtain a test fit of the site and perform a site cost analysis to prepare the site for construction. We coordinate all of the necessary entitlement tasks (with the municipality) to secure the needed approvals to be able to develop a church on the land.*

### PHASE 3

### RESOURCES

**CAPITAL CAMPAIGN.** *Advisors create a new Facility Report for top donor and lender candidates supplementing the Facility Goal report with specific project and financial data. We help your church to select and oversee a fund raising organization that will create an attractive campaign to raise monies for expansion. We recommend content for the campaign and are available to meet with church members prior to them making pledge commitments.*

**SALE OF EXISTING PROPERTY.** As agents, Advisors lead the effort to sell the current real estate for the highest possible selling price. As experienced developers, we might contemplate a higher and better use for the property that might yield a higher selling price and then present it to a select audience of developer candidates. It might make sense to sell the property and lease it back allowing you to retrieve the equity from a sale prior to vacating the property, in order to help pay for the construction of the new facility.

**PROJECT FINANCE.** Advisors create a Loan Package for lender candidates supplementing the Facility Report with specific historical, staff, membership, competitive and risk data. We lead the effort to identify and present the project to possible lender candidates. Debt resources include bond underwriting, conventional financing or both. Once a finance commitment has been obtained, Advisors coordinate the due diligence required by the lender to close the loan.

## PHASE 4

## PROJECT MANAGEMENT

**PROJECT MANAGEMENT (INCLUDING CONSTRUCTION MANAGEMENT).** Advisors perform a comprehensive coordination of all project tasks starting with a collaborative selection of the appropriate professionals (engineers, architects, attorney, accountant, capital campaign, etc.); orchestrating the entitlements, engineering, design, and pre-construction tasks; analyzing construction methods (hard bid, design-build, negotiated, etc.) and helping to select the right general contractor for the project. We oversee the project scheduling, budgeting, cash flow and disbursements. We resolve problems and changes during construction and stay involved until every punch list item has been completed.

**IN-KIND GIVING.** In order to avoid the potential for well-intended church members from getting sideways with the church, Advisors removes the responsibility by church staff and takes on all of the interaction and vetting of possible in-kind contributions of product and services.

**FURNITURE, FIXTURES & EQUIPMENT.** We assist with the planning and procurement of furniture, fixtures and equipment for the new facility. This includes seating for the sanctuary, audio/visual/lighting, playground equipment, food service equipment, IT (computers, telephones, security), etc.

**MOVE COORDINATION.** We lead the effort to relocate all of your stuff to the new facility!

**COMMUNICATIONS.** We collaborate with church leadership and staff to assure the timely and accurate dissemination of information (to the church's congregation) while preventing the untimely leak of inaccurate information that can be divisive or cause momentum setbacks.

---

Advisors is passionate about serving churches. Our passion is consistent with the Principals' personal values and goals. In today's environment, finding the best solutions to a church's real estate needs often requires creative, outside-the-box thinking and execution. Advisors provide this highly specialized expertise. We appreciate the opportunity to be considered for your church expansion vision.

