

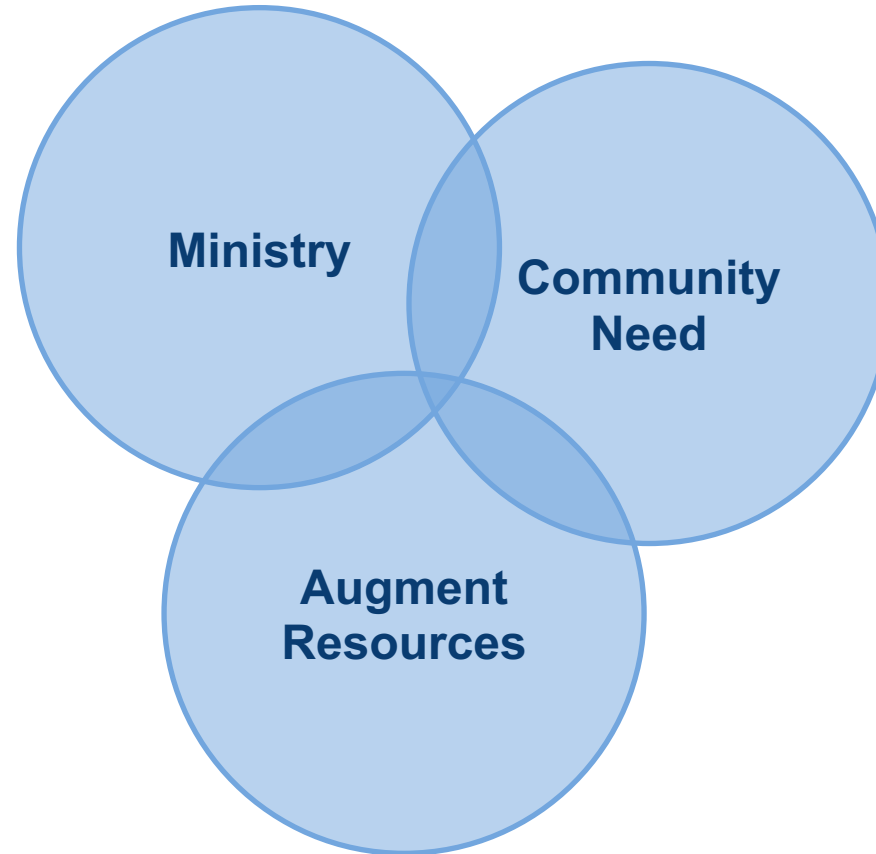


# MISSION REAL ESTATE PORTFOLIO

November 15, 2023

# OUR PURPOSE

**Support congregations** throughout the Diocese of San Diego to use church real estate assets to **bring God's good news into the world** through mercy, justice, and evangelism



# ST. LUKE'S, NORTH PARK



# OUR DIOCESAN LANDSCAPE

- Analyzed real estate portfolio
- Monitored land use, zoning changes, and funding opportunities at state and local levels

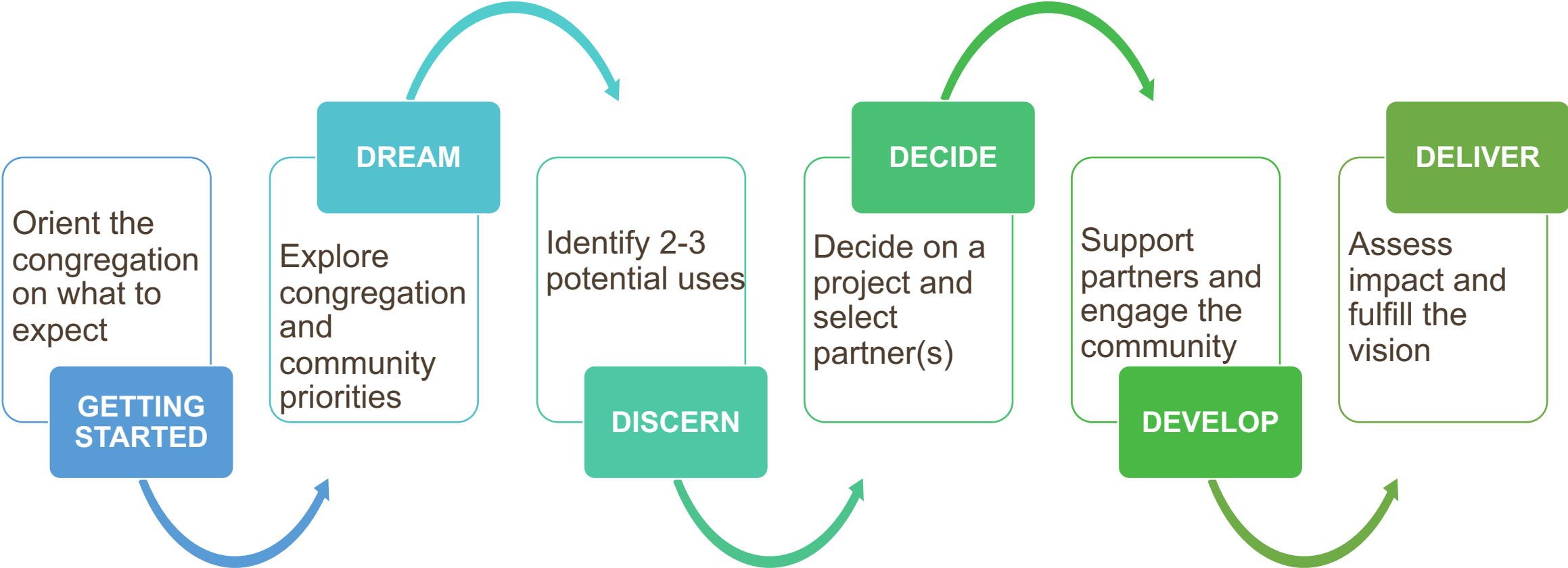


# CONGREGATIONAL ENGAGEMENT



- 2021-2022 Diocesan Convention
- 2022 Good News Festival Workshop
- One-on-one meetings with clergy and vestry
- 2023 Mission Real Estate Workshop
- 2023 Diocesan Convention

# MISSION REAL ESTATE PROCESS



# GETTING STARTED

## OUTCOMES

Diocese and church leaders have a shared understanding of a missional approach to real estate development

## ACTIONS

- Initial meeting to understand the congregation's interests and need for support

## APPROACH

- Share the development process using the guiding questions to identify the church's actions to date and future plans

## TEAM

- Rector or vicar
- Warden
- Mission and outreach committee chair

## DELIVERABLES

- Getting started workshop, preliminary timeline, launch team staffing plan

# DREAM

## OUTCOMES

The congregation has a list of both congregational and community priorities

## ACTIONS

- Congregational leaders and members explore their aspirations for mission stewardship of their real estate, as well as the concerns and hopes of the surrounding community.

## APPROACH

- Gather data and stories through listening sessions, surveys, church records, demographic studies, information interviews
- Actively engage in community activities

## DELIVERABLES

- Congregational skills and talent inventory
- Community stakeholder/partner inventory



# COMMUNITY ENGAGEMENT TOOLS



External Relationships: (with people, not already church members)	Name the key people you know:	Rate these relationships: (weak, okay, strong)	What does this relationship offer? (expertise, experience, relationships, funding)
<b>Religious</b> (clergy and lay leaders from other traditions)			
<b>Education</b> (principals, teachers, librarians, childcare directors)			
<b>Community/Cultural</b> (civic club leaders, community organizers)			
<b>Communications</b> (journalists, radio dj's, podcasters)			
<b>Services</b> (officers, fire fighters)			
<b>Health</b> (social workers, physicians, nurses)			
<b>Economic</b> (business owners, realtors)			
<b>Civic</b> (council members, mayor, community liaisons)			
<b>Regular Folks!</b>			

**Signs of Hope**  
Where do you see evidence of God's grace and God's people at work? Look for churches and nonprofit organizations, children playing, uplifting artwork, symbols of faith, social gatherings, gardens. Look especially for the assets that could be connected to neighborhood needs.

**Signs of Need**  
Look for evidence of hardship, hurt or injustice. Is that you see specific to areas or affecting the neighborhood as a whole? Be aware of the marginalized people and social problems are often hidden, especially in communities that appear well-off.

# DREAM

## GUIDING QUESTIONS

- What is the mission of the congregation?
- What spaces or services are lacking in the community?
- What is already a focus of the community?
- How does the church imagine they may be involved in addressing these community needs (space, service, funding)?
- What ministries are thriving in the community?
- How can church real estate support that mission?
- What does the church need?

## TEAM

- Clergy and Vestry
- Congregation

## COMMUNITY PARTNERS

- Residents
- Local Businesses
- Local Nonprofit Organizations
- Elected Officials and Agency Staff Serving the Community

# DISCERN

## OUTCOMES

The congregation has narrowed their list to two or three potential uses of their available real estate.

## ACTIONS

- The congregation researches the ideas to identify those that are most feasible for the congregation.

## APPROACH

- Congregation conducts an internal inventory of its assets for the identified projects
  - Congregational enthusiasm
  - Professionals/experts in the pews/network
  - Available land and funding
  - Resource development capacity

## DELIVERABLES

- Evaluation criteria checklist
- Organizational capacity assessment
- Neighborhood engagement study
- Market study
- Land feasibility analysis

# DISCERN

## GUIDING QUESTIONS

- How enthusiastic is the congregation about these different ideas?
- What do you know/need to learn about the feasibility of each of these types of projects?
  - Project location? Urban, rural, etc.?
  - Population and anticipated growth?
  - Special characteristics about the development process?
  - Laws and/or market trends that should be factored into the decision process?
- What professional expertise, land, and financial resources do you have within the congregation ?
- What resources are available within the community?
- What resource development capacity do you have within the congregation (fundraising, relationship building)?

## TEAM

- Clergy and Vestry
- Congregation
- Professionals in the Pews

## COMMUNITY PARTNERS

- Real Estate Appraiser
- Planning and Zoning Expert
- Subject Matter Experts
- Aligned Funders

# DISCERNMENT TOOLS

St. Stephen's Menifee |  
26704 Murrieta Rd, Menifee, CA 92585

APN	331-040-042
Description	<ul style="list-style-type: none"> <li>Open yard and labyrinth</li> <li>Sale of women's shelter pending</li> </ul>
Lot Acres/SF	4.66/202,989
Building SF	16,133.85
Assessed Land	\$140,946
Assessed Improvements	\$3,385,443
Assessment Year	2023
Zoning	<ul style="list-style-type: none"> <li>Low density residential (LDR-10); Single-family <u>detached</u> residences;</li> </ul>

**St. Stephen's Menifee |**  
26704 Murrieta Rd, Menifee, CA 92585

	with a minimum parcel size of ten thousand (10,000) square feet. Limited agriculture and <u>animal</u> keeping is permitted.
Permitted Land Use	<ul style="list-style-type: none"> <li>Permitted: accessory dwelling unit, duplex, small or large family day care home, group residential facility &lt;6 people, guest house, home occupation, manufactured house, single-family, parks and recreation</li> <li>Conditional: bed and breakfast, congregate care, group residential facility 7+ people, mobile home park, residential care facility, supportive housing, transitional housing, educational or religious institution, <u>farms</u> and agricultural operations</li> </ul>
Nearby Amenities	<ul style="list-style-type: none"> <li>1.1 miles to nearest bus stop</li> <li>1.3 miles to nearest pharmacy</li> <li>1.8 miles to nearest grocery</li> </ul>
TCAC Scores	<ul style="list-style-type: none"> <li>Opportunity Map - High Resource</li> <li>Economic Score - 6</li> <li>Education Score - 88</li> <li>Environment Score - 79</li> </ul>
Census Tract	042371
Tax Rate Area	026-199
Potential Use	<ul style="list-style-type: none"> <li>Senior Housing, potentially in partnership with St. Paul's Senior Services</li> </ul>
Ownership	<ul style="list-style-type: none"> <li>Episcopal Diocese of San Diego</li> </ul>
Background Information	<ul style="list-style-type: none"> <li>Anticipated population growth of 22.4% from 94,518 to 115,690 between 2020-2035.</li> <li>25.4% under age 18, 56.3% ages 18-65, and 18.3% over age 65 as of 2018.</li> <li>64.9% white non-Hispanic, 16.4% some other race, 6.3% black, 5.8 % Asian, and 5.4% two or more races. 35.9% of the population identifies as Latino or Hispanic of any race.</li> <li>Menifee anticipates nearly doubling its employment growth between 2016- and 2035. Most of the growth is in low- or very low-wage jobs.</li> <li>36.3% of households have low incomes, including 8.8% extremely low-income households.</li> <li>40.4% of households live in overcrowded conditions, pay more than 50% of their income for housing, or <u>live</u> in a home with physical defects.</li> <li>In 2018, 84% of the 30,533 households in Menifee were single family detached homes, 2.8% were single family attached homes, 5.5% were multifamily, and 7.3% were mobile homes. 76.4% of homes were owner-occupied and 23.4% were <u>renter-occupied</u>.</li> </ul>

Leveraging Property Owned by  
Faith-Based Organizations to Create  
Affordable Homes and Public Benefit

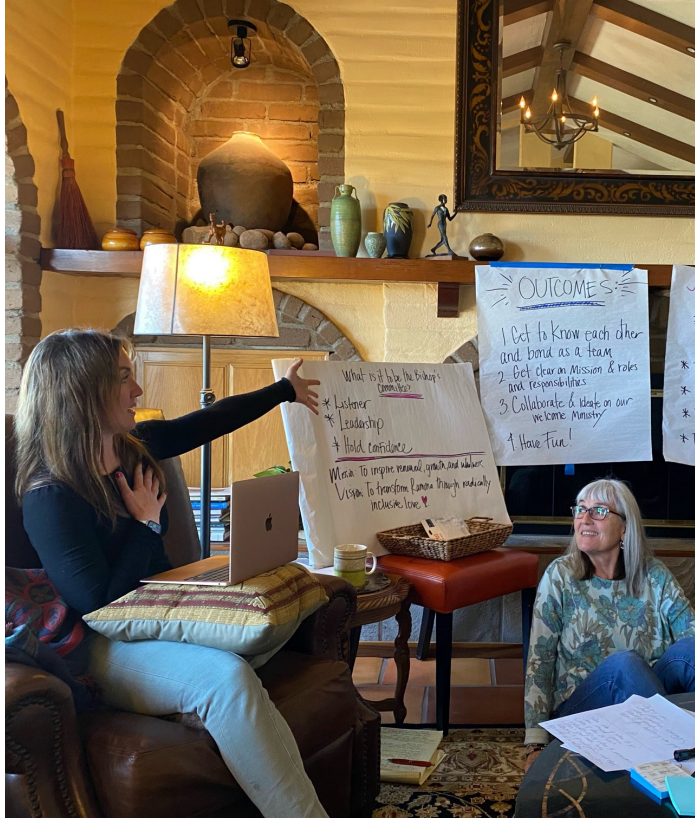
BY AHMAD ABU-KHALAF

Foreword by Rev. David Bowers

Enterprise

JANUARY 2020

# DISCERNMENT STRATEGIES



# LEGISLATIVE ADVOCACY

The **Affordable Housing on Faith and Higher Education Lands Act of 2023** allows faith institutions to build housing on faith-based land by right.

FEBRUARY 17 2023

**CALIFORNIA BISHOPS SUPPORT AFFORDABLE HOUSING ON FAITH LANDS ACT**

by Susan Brown Snook  
Category: #Advocacy, #Bishop's Blog

Dear California State Senate,

We are six Episcopal Bishops, whose dioceses cover the state of California. Our dioceses include 370 congregations serving 98,345 members. We write in support of Senate Bill (SB) 4, the Affordable Housing on Faith Lands Act. This measure would make building affordable housing easier, faster, and cheaper on land owned by faith-based institutions and nonprofit colleges.

Across California, faith-based organizations and non-profit colleges are seeking to partner with affordable housing developers to build critically needed affordable homes on their own land. These faith-based organizations are long-standing community anchors and are driven by their values to support those most in need and help address our homelessness crisis.

## 6 CONSIDERATIONS FOR PARTNERSHIPS

- Shared mission and values
- Aligned vision and goals
- Complementary strengths
- Proven track record
- Financial solvency
- Clear commitment to expectations



# POTENTIAL PARTNERS



# FUTURE PHASES

<b>DECIDE</b>	<b>DEVELOP</b>	<b>DELIVER</b>
<p>The congregation decides to proceed with a specific project that fulfill the gifts, needs, and desires of the congregation and surrounding community and is considered sustainable.</p>	<p>The congregation develops a project that aligns with congregational and community priorities and contributes to their shared well-being</p>	<p>The congregation understands the impact of its project, its feasibility and what changes need to be adapted to keep it sustainable.</p>

# ST. MARY'S RAMONA





**EDSD**  
COURAGEOUS LOVE

**THANK YOU!**