

Course Title: **Case Study for Continuing your Mission by Repurposing or Divesting of Religious Institute or Diocesan Properties**

Course Number: MSP1908

Company Name: Sisters of Mercy
Speaker Name: Lori Pinkerton

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Sisters of
Mercy



Hermanas de la
Misericordia

**Continuing Your Mission by Repurposing or Divesting of
Religious Institute or Diocesan Property**

CCFM May 16, 2019

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COURSE DESCRIPTION

This course will present a case study addressing the repurposing and/or divesting of Religious Institute and Diocesan properties. It will include a discussion of the associated process, engagement and planning methods, as well as provide an example of how to honor the legacy and mission of the religious community to serve a function that will be ministry-focused long after the majority of the religious members are gone.

LEARNING OBJECTIVES

At the end of this course, participants will be able to:

1. Understand how to engage vowed religious members or parishes in a visioning process to identify options for the future use of property, using case studies from the Sisters of Mercy San Francisco Campus.
2. Understand the process for either repurposing or divesting of property to serve the Diocese's or Religious Institute's mission, using case studies and examples.
3. Identify opportunities for collaboration with others in repurposing property for a mission-centric purpose, using case studies and examples.
4. Understand how to project vowed member care needs based on internal demographic projections, and identify options for how care will be provided in the future on or off of religious property, using case studies and examples.

Session Objectives

- ✓ Process Overview Based on a Case Study
- ✓ Visioning
- ✓ Community Engagement
- ✓ Stakeholder Collaboration
- ✓ Master Site Planning
- ✓ Environmental Impact



Sisters of Mercy WMW Community Planning Activity



Burlingame, CA



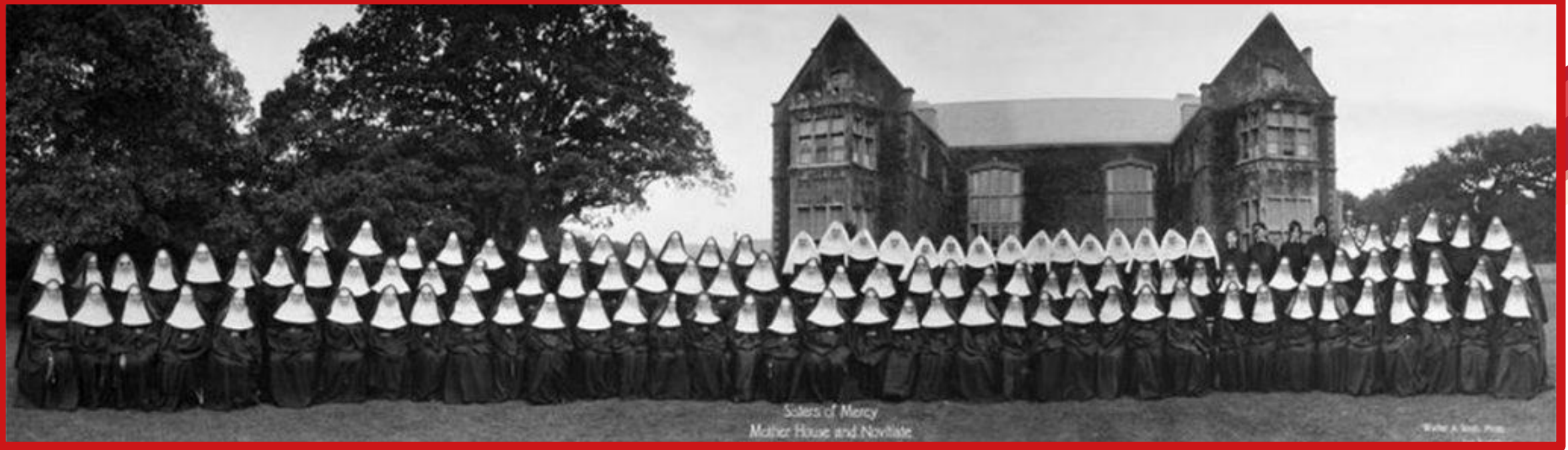
Detroit, MI



Omaha, NE

"Planning for a future you will no longer be in" Sister Carol Zinn, SSJ

Sisters of Mercy Case Study: Burlingame, CA



Purchased Kohl Estate and 40 Acres in 1924 to Serve as the First Motherhouse
sistersofmercyburlingame.com



EVERY SITE PROJECT HAS COMMON KEY COMPONENTS

PHASE ONE:

- Assessing *potential* of the site to meet desired goals
- Developing *possible* “concept(s)”
- Gaging key stakeholder *initial* buy-in
- Finding *if* needed next-step resources exist



***HOWEVER... EVERY SITE DEVELOPMENT
PROJECT WILL BE UNIQUE***



OUR FIRST SIX MONTHS...

- Centered on developing the planning process / team
- Committing to **Visioning** as Foundation
- Assessing possible opportunities, challenges, partnerships
- Identifying/meeting with stakeholders - internal and external

Visioning Process

Sister Carol Zinn, SSJ

Tending the Vineyard Property
Planning Workshop
March 14-15, 2016



Keynote Address – Leading Today to Sustain Tomorrow

Carol Zinn, SSJ

Link: https://youtu.be/9-p_HoP-WeE





***Goal: To engage members in reflection,
dialogue and input on the care of our
Sisters and our mission and charism
relating to the future use of the
campus properties.***



VISION for the Burlingame Campus

The Sisters of Mercy recognize we have been gifted with people, property and financial resources to enable our members to minister to those in need. The Burlingame campus is one of these precious resources.

As our Community declines in numbers and our Sisters age we desire to provide housing and supportive services to our Sisters who have labored for many years to bring mercy and compassion to those who are poor and/or marginalized in our society. We are committed to care for our Sisters as they age and to ensure the Burlingame campus is a welcoming place to retire.

We are aware of the critical unmet need for housing in San Mateo County and want to collaborate with the City to do what we can to address that need.

We will provide educational and spiritual enrichment ministries for ourselves and others on an environmentally sustainable campus.





We will dare to open doors of Mercy!

We will ensure a welcoming and supportive living environment for our Sisters into the future, honoring their legacy of service and enabling continued use of their gifts.

We will provide educational and spiritual ministries where women and men can become more attentive to the presence of the Divine in their lives and in the world, and then respond more fully in care of the Earth and service to others – especially the poor and the vulnerable.



PLANNING PROCESS:

- **NON-LINEAR!**
- Involving the primary stakeholders, i.e. the Sisters, from the beginning
- At the same time as Visioning: Developing Some Early Possible Concepts, Assessing Possibilities & Partnerships

Environmental Enhancements

Calling for
“swift and unified global action”

Laudato si' second encyclical, May
2015

PARTNERS

- EPA- Jerry Lawson
- CCC/CE
- JAT Energy Services
- Mercy Institute

Justice Team



A Mercy Critical
Concern:
Care for the Earth



Environmental Options



- LED Lighting
- Systems Improvements
- Solar Panels
- Awareness / Education
- Cars
- Water Conservation



ASSESSING POSSIBLE OPPORTUNITIES



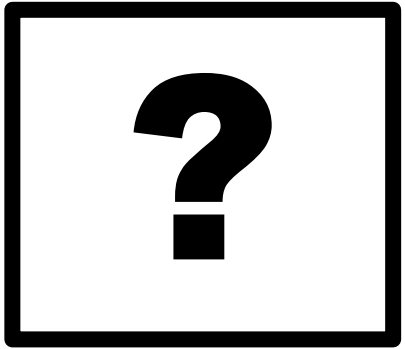
ASSESSING OPPORTUNITIES

- Made a realistic assessment of what is existing
 - 40 Acres in a combined “campus”
 - Mercy Convent/Mercy Center Building = 156,098 sf
 - Marian Oaks (Assisted Living Convent) = 36,132 sf
 - Russell Hall (Shared with High School) = 32, 750 sf
- *Square footage only a tiny factor in determining possible opportunities*



ASK: “WHAT IS” *COULD* BECOME?

- GATHER ALL BLUEPRINTS, INSPECTIONS, HISTORY ETC.
- BRING IN APPLICABLE EXPERTS TO HELP ASSESS CURRENT CONDITION/POSSIBILITIES
 - Repurposable, able to add-on-to, other?
 - Experts add realistic *non-emotional input* on how complicated to make changes to site or building *and if do-able*





ASSESSING PARTNERSHIPS

- Mercy Housing *our* perfect partner

Since the early 1980s, Sisters of Mercy and Mercy Housing have worked together to help the homeless and those who need better and affordable living places.

*Today, Sisters of Mercy remains one of eight
Congregations of women religious
who sponsor Mercy Housing.*

ASSESSING POSSIBLE OPPORTUNITIES/CHALLENGES

- **Mercy Housing brought its expertise and shared needed expert external resources:**
 - ❖ **Land Developers**
 - ❖ **Architects**
- **Additionally, Sisters of Mercy contracted with a Real Estate Appraisal Expert and a Land Use Attorney**

ASSESSING FINANCIAL RESOURCES

- Early on and on-going, the Chair of the project researched possible partners for various aspects of financial needs
 - ❖ Resources for affordable public senior housing exist
 - ❖ Public/private funds for new Sister housing or renovation of on-campus Retreat Center unlikely

IDENTIFYING/MEETING WITH OTHER KEY STAKEHOLDERS

- City Planning Staff: Met with twice for “generic” conversations about *possible* future campus changes
- City Council Members: Individually or in twos
- High-profile neighbors, business leaders, and other town residents to help with future “buy-in” – Some of these became members of an Advisory Committee
- Mercy Housing met with County Department of Housing to discuss whether any financing available

PROGRESS FROM FIRST SIX MONTHS

- **Sisters' visioning led to creating three committees to further explore possible concepts:**
 - ❖ **Housing for Sisters and Others, Spirituality and Sacred Space and Bold Directions**
- **Created a short list of possible options**
- **Continued to meet with and build relationships with City Planners**

MORE PROGRESS...

- Architect able to create visuals for *“realistic” possible* use of existing buildings
- Planning-to-date revealed that land space availability and neighbor acceptance indicated a *strong potential for* additional housing for Sisters and others

MOVING INTO PHASE TWO...

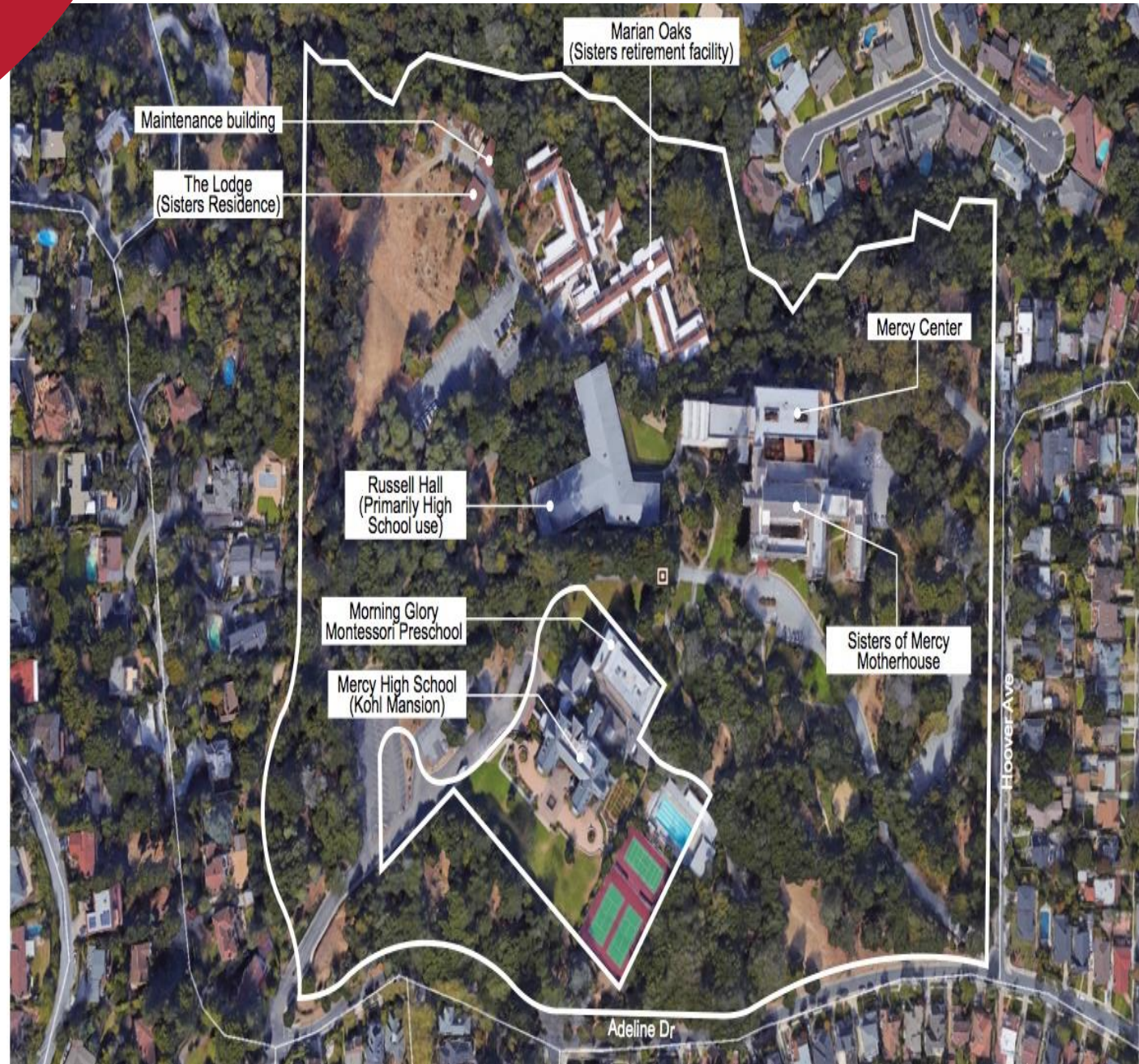
- **Important Next Step: Environmental Impact Report**
- **Continued Transparency with Stakeholders**

WHAT WE LEARNED FROM PHASE ONE

- SITE DEVELOPMENT IS A LINEAR EXPERIENCE
 - ❖ Flexibility, transparency, and patience are key
- LOOK FOR ALL POSSIBLE OPTIONS TO FIND THE BEST ONE
 - ❖ Hold no pre-conceived solutions
 - ❖ Know that there will be surprises
- THAT EVERY FACET TAKES MORE TIME THAN EXPECTED

WHAT WE THINK WILL HAPPEN...

- NEW HOUSING FOR SISTERS IN THE MEADOW + MARIAN OAKS
- PUBLIC SENIOR HOUSING IN CONVENT + SOME SMALL RESIDENCES
- HIGH SCHOOL REMAINS AS IS, WITH NEW/ GYM



The background image shows the interior of a church. In the foreground, there are rows of dark wooden pews. The church has high ceilings with arched windows, some of which are stained glass. Several ornate, multi-tiered hanging lanterns are suspended from the ceiling, casting a warm light. In the background, a striped organ screen is visible. A large, yellow, rounded rectangular text box is superimposed over the center of the image.

Mercy lives here today through the presence, ministries, and prayers of the Sisters.

Mercy will live here forever through this campus development project.



This concludes The American
Institute of Architects Continuing
Education System course.



At this time, the course participants
are free to ask questions.

**Sisters of Mercy West
Midwest Community**



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Facility Management
("CCFM")**



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