

# InSpired Associates

## Case Study: FACILITIES MASTER PLANNING

This article describes the master planning process used recently at a large, downtown, mainstream church in upstate New York. In order to put things in perspective, a brief, abstracted history of the church follows.

Asbury First United Methodist Church in Rochester, NY, is a dynamic, growing church of 2300 members. Located at 1040 East Avenue, the church building was constructed in 1953-55 on property previously acquired from the City of Rochester. This property had an aging mansion on it, which was demolished to make way for the new church. Also acquired at the same time was an adjoining property, 1010 East Avenue, which has a lovely 1908 brick mansion on it that still stands as part of the Asbury First campus. The church was constructed with an Indiana limestone façade according to plans developed by the Reverend Dr. Weldon Crossland and the architectural firm of Wenner and Fink, Methodist Church Architects, located in Philadelphia. While the original master plan for the church campus included a variety of additional spaces such as a chapel, community hall, parlors, youth space, library, banquet hall, bowling alley, game rooms, and Sunday school classrooms, all adjoining the church proper, budget constraints at the time prevented the construction of these additional areas. Moreover, realizing this complete plan would have resulted in the demolition of the mansion at 1010 East Avenue. In 1950, Asbury First acquired the adjoining property to the east at 1050 East Avenue from the City of Rochester for back taxes. This landmark building, also known as the Wilson Soule House, was designed by H. H. Richardson and constructed in 1892. The house was the penultimate residence of George Eastman, founder of Eastman Kodak Company, while his mansion was being constructed a few blocks to the west. Finally, a two-story addition containing Sunday school classrooms, known as the education wing, and a narrow cloister linking this wing with the east side of the Sanctuary were added in 1960. More about Asbury First's history can be found at the church's website.<sup>1</sup> The entire Asbury First campus is located in the East Avenue Preservation District of Rochester; thus, changes to the exterior of any of the structures require the approval of the local Preservation Board prior to implementation.

Over the years, as the congregation grew and needs evolved, an emerging desire to add new space for meeting and greeting before and after church services and special events began to take hold among members of the congregation. While this kind of space was included in the original campus design, the only space available for fellowship today is the narrow cloister connecting the Sanctuary and the education wing. In light of this growing desire to augment the campus, a new committee was established in January 1999, at the annual meeting of the congregation, to develop a new master plan to address the future facilities needs of the church; this *ad hoc* committee, which I was privileged to chair, reported to the Board of Trustees.

Our committee was composed of a cross-section of the congregation, and numbered around twelve—a good size for small group work. Fortunately, Asbury First had recently updated its mission and vision statements, which anchored the work of our planning committee. **It is essential that any strategic planning initiative—facilities-related or otherwise—begin with well-articulated mission and vision statements.** They are the basis for any organization's existence and future direction. Without these statements in place, all planning efforts are unanchored and may become wasted or never fully embraced and implemented.

Our process began with a thorough needs assessment of the congregation. We developed a short, open-ended questionnaire that was used to interview our major stakeholders—all committees, boards, and work areas in the church, as well as key individuals who were interested

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<sup>1</sup> <http://www.asburyfirstumc.org/>

and capable of offering unique perspectives. The committee compiled the responses and sorted them by frequency, nature of the sources, and four broad categories entitled “new space,” “modifications to existing space,” “infrastructure improvements,” and “other.” The “other” category picked up input such as more parking—a subject outside the scope of the master planning because of current real estate constraints.

Emerging from this process were three significant needs. With the exception of a rather unsightly but functional ramp at the front of the church, and an elevator between the Sanctuary and the lower level, the entire campus is not accessible to the handicapped. This was the number-one priority for the master plan. The second priority was a “gathering space”—adjacent to the Sanctuary, where people could meet before and after Sunday services, memorial services, concerts, weddings, etc. The third need was adequate space for our rapidly growing youth population, who are currently limited to a small room in the basement of the education wing. The youth are the future of any organization, and serving them well helps enable and secure a bright future for the church. All the identified needs were prioritized and grouped into the four categories mentioned above. The “modifications to existing space” category was expanded to include several maintenance items that were identified in a condition report developed by the Board of Trustees with the help of our architect. We verified that the identified needs were all consistent with and in alignment with the church’s mission and vision statements.

Essential to any successful planning process is checking with your members frequently to see if you have it right. Consensus in churches and other nonprofits is extremely important; I cannot overemphasize how essential it is to seek and obtain frequent buy-in to what you are doing. We met with all the groups and individuals that participated in interviews and reviewed with them what we thought they had told us. We held several informal sessions to play back to the congregation what we heard them tell us we needed in the master plan. We then held one special “charge or church conference” (the United Methodist term for a full church membership decision-making meeting) in the fall of 2000, wherein we asked for and received affirmation of our work and permission to continue developing the master plan.

Realizing that we now needed an architect to help us move the plan forward, we also asked for and obtained approval to hire Bero Architecture, a local firm specializing in churches and other existing, historic, institutional-quality structures. The real work now began!

I should include here a word about selecting and hiring architects and other professionals in general. We developed a detailed questionnaire that we used in interviewing all four firms that responded with interest to our RFP. We scored each firm quantitatively on each of the elements of the questionnaire, and obtained several references and comments from their current and former clients. This allowed us to be very objective in making our decision and recommendation of a firm to the church conference. Don’t shoot from the hip on this, or act impulsively. You will regret it later. Be thorough, be quantitative, be objective.

The next phase of our work consisted of reviewing seven different design concepts that would meet most, if not all, of our identified needs. The projected costs of these schemes differed by a factor of two from the least expensive to the most expensive. While we were not yet sure how much we could ultimately raise in a capital campaign, we had an intuitive sense that we had to be somewhere in the middle of the range of these projected costs.

Each of the schemes had its pros and cons. We asked the committee members to rate individually the major design elements of each scheme as to how they perceived that element would meet our needs. When these ratings were compiled, the committee saw that certain parts of one scheme could be combined with certain parts of other schemes to produce the preferred design—at least in the committee’s mind. Since the architects participated in all our committee meetings, they could readily formulate this hybrid scheme that the committee had created, which was the result of careful deliberation and reaching consensus.

The campus maintenance items noted above were reviewed, cost estimates for their implementation were updated, and the overall project plan was expanded to include these items. A preliminary schedule for maintenance implementation was developed based on the apparent urgency of the various items, with water-related problems and potential safety issues clearly becoming top priority for implementation.

The estimated cost of the project was then determined; the plan, with projected costs, was shared with the congregation in a variety of meetings beginning in January 2002, including one in Florida for our snowbirds who are wise enough to escape Rochester in the dead of winter! Part of our assurance to the congregation was that we would see to the maintenance items either before we built new space, or at least concurrent with new construction. This congregation has a strong sense of its heritage and the importance of caring for and preserving what earlier generations have sacrificially provided for the present generation. During these presentations, we engaged in consensus-building conversations that increased understanding and support for this undertaking. We did not ask for formal approval at these meetings, but rather for a sense of agreement with the overall concept.

We allowed ample time for the congregation to assimilate our proposed plan over the next full year. We had a scale model of the church with the adjoining new space constructed and placed on prominent display in our overcrowded cloister area. At our annual "Together in Ministry Sunday," which begins the new fall season each year, we erected several large tents adjacent the church to simulate the footprint of the proposed addition. We marked off new driveways and other exterior aspects of the plan that couldn't be "tented." This enabled many to visualize how our new space would function and how traffic might flow when the addition was actually constructed.

The Reverend Dr. Robert A. Hill, Senior Pastor of Asbury First, developed a preliminary case statement for the project and shared this with the congregation. A feasibility study conducted by an outside professional indicated the probability that the estimated total project cost of \$6.8M would not be raised in a single campaign. The master plan was thoughtfully separated into two phases: Phase I to be implemented as soon as practicable; Phase II to follow completion of Phase I. This is easier said than done; significant and painful conversations were necessary to align the phases with perceived funding capabilities. Both phases included maintenance items according to their urgency. Frequent informal meetings along the way for the entire congregation ensured ongoing engagement and consensus with the committee's thinking and emerging final recommendations.

In May 2003, the congregation overwhelmingly (nearly 90%) approved the entire master plan and implementation of Phase I at an estimated cost of \$3.74M. The hiring of a professional fundraiser was also approved, as was the completion of the remaining steps of the architectural process. I personally doubt that such an overwhelming level of support by the congregation would have been obtained in the absence of ongoing dialog and consensus building. Shortly after this May meeting, we obtained preliminary approval of our plans from the Preservation Board. Their positive comments and affirmations of the architectural beauty of our proposed addition and how it blended perfectly with the existing Indiana limestone façade were a joy to hear!

The planning committee at this juncture metamorphosed into two new committees, the Building Committee and the Capital Campaign Committee, and both were augmented with new members. Because the master plan had progressed through only the schematic design phase of the architectural process, the Building Committee began the design and development phase after the above approvals were obtained. Concurrent with this work was the continuation of conversations with our major stakeholders about how they would use our new space programmatically—both to augment existing programs and to launch new ones. This served two purposes: one, to make sure that the committee and the architect designed the right interior and exterior details consistent with the church's needs; and two, to engage the congregation further in the impact the new

addition would have on our ability to carry out our mission and achieve our vision. This is essential.

The design and development work was completed in early 2004, and again shared with the congregation for feedback and consensus. Further refinements and embellishments were requested by the congregation to improve the overall Phase I plan; this updated plan was again overwhelmingly affirmed and approved in mid-April at a formal church conference. For those interested, the plans are available on Asbury First's website.<sup>2</sup> Subsequent final approval of our plans was obtained from the Preservation Board and from the Rochester District Committee of the United Methodist hierarchy, an essential step in the United Methodist system.

In the fall of 2003, Douglas Himes Associates LLC were engaged as consultants to the Capital Campaign Committee. The leadership gifts phase of the campaign was conducted throughout the fall and early 2004; the formal kick-off of the general phase of the campaign occurred in late April 2004. As of this writing, nearly 60% of our funding target has been committed in pledges to the campaign, with many more visits and pledges to be realized over the next few months.

We hope to complete our capital campaign and construction documents and let the project out for bidding in the late fall of this year. The result of the campaign will tell us our actual available capital for the project, and the bidding process will tell us the real cost of the project. Any gaps will need to be closed by similar thoughtful processes. Assuming success, we hope to start construction in the spring of 2005.

Lessons learned are significant. The importance of consensus and alignment of any initiative with an organization's mission and vision cannot be overstated. Without these, what you are doing is tantamount to "a noisy gong or a clanging cymbal." Give yourself ample time to let processes play out and to develop consensus. Having worked for a number of years in the impatient corporate world, where cycle time is of the essence in everything, I have a penchant for wanting to get things done quickly. The church measures cycle time in terms of eternity. Give yourself ample time when embarking on a significant initiative such as a facilities master plan in the religious sector. Follow a well-planned process from beginning to end, but have the wisdom to modify the process if circumstances dictate you must. Insist that your architect and other professionals you engage attend your meetings regularly. Listen carefully to your membership. Make sure major maintenance items are part of your plan, if you are working with an existing facility, regardless of the facility's age. Finally, consider hiring outside experts to help with the planning process, the architectural work, and the fundraising parts of the overall initiative. All three components are essential to optimal outcome; don't try to skip any of them.

The success of any major building project for a nonprofit organization will be determined by the extent to which the organization's stakeholders are inspired to invest in the programmatic vision enabled by the project. The more buy-in you develop, the more successful you will be.

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<sup>2</sup> *Ibid.*