

# CASE STUDY

[www.zielinskico.com](http://www.zielinskico.com)



## Fund Development

- Annual Planning
- Board Development
- Capital Campaign Planning
- Development Office Assessment
- Development Office Management
- Development Office Start-Up
- Major Donor/Planning Gift Programs
- Solicitation Strategies
- Training and Mentoring
- Vision Planning

“They dealt with our problems and understood our goals.”

— Sister Rosemary Lynch, IBVM



## Loretto Sisters Revitalize Development Office

**The Challenge:** The Loretto Sisters, United States Province had a pressing problem with their development office. The income from their fundraising activities had decreased each year over a three-year period, while fundraising expenses were increasing at an alarming rate.

The Sisters depend heavily upon their development activities to fund their ongoing mission which includes their commitment to retreat centers, educational activities, an on-site child care center, missionary work, and an inner city Spanish outreach mission in Chicago. It was clear that if the Sisters were to continue to meet the growing needs of the communities they served and the funding demands of their mission, something had to be done.

**The Solution:** After participating in a CORT presentation conducted by Zielinski Companies titled “Working with Development Officers to Fulfill the Mission,” the Community’s treasurer, Sister Jean Frye, began to talk with the firm about the concerns and some of the issues facing her Community’s development office. As a first step, Zielinski Companies began a comprehensive audit of the Community’s fundraising efforts.

During the audit, it became clear that the development office lacked leadership, fundraising expertise, and an overall plan. Working in consultation with the fundraising experts at Zielinski Companies, the Loretto Sisters selected one of their members, Sister Rosemary Lynch, to take charge and revitalize their fundraising efforts. Sister Rosemary had the necessary drive, management capability, personal contacts, analytical ability, and warm personality to turn around the Community’s fundraising office. There was only one major problem with this strategy. Sister Rosemary lacked the required fundraising experience and expertise to make the Community’s office successful.

Zielinski Companies, however, had the answer to the Community’s dilemma—a one year intensive mentoring program developed specifically to meet the needs of the Sisters of Loretto and Sister Rosemary.



2150 Hampton Avenue • St. Louis, Missouri 63139  
1-800-489-2150 • 314-644-2150 • Fax: 314-644-7132  
[www.zielinskico.com](http://www.zielinskico.com) • [mail@zielinskico.com](mailto:mail@zielinskico.com)

# CASE STUDY

## Fund Development

“The fact that Zielinski Companies was very aware of the nature religious organizations and had a sense of our particular mission was very significant to me...”

— Sister Rosemary Lynch, IBVM

The program featured development training through the creation of a complete annual plan for the first year, 24-hour on-call assistance via phone or e-mail, monthly visits for the first six months, and visits every other month during the second six months.

**The Outcome:** The results of Zielinski Companies’ intensive mentoring program were impressive. “The fact that Zielinski Companies was very aware of the nature of religious organizations and had a sense of our particular mission was very significant to me,” says Sister Rosemary. “They dealt with our problems and understood our goals.”

A detailed and highly successful annual fundraising plan was developed, and a development board was put in place with its members having a clear understanding of what was expected of them. A new donor “Welcome” packet was developed. The Community’s direct mail efforts became more frequent and more efficient. One annual appeal was replaced with two annual appeals to the entire donor base and two or three targeted mailings per year.

Measurement baselines were also established. These baselines allow the community to critically determine the effectiveness of current and future funding initiatives.

The success of the mentoring program is exemplified by several key statistics. The cost per dollar raised dropped from 65 cents to 43 cents—a decrease of over 33%. This dramatic decrease means that more of the money raised goes directly into ministry rather than being spent on development overhead and expense. The number of new donors also increased by 19%, and overall income increased by over 7%.

“The customized one-on-one mentoring program” said Sister Rosemary, enabled us to quickly learn the development process, develop our case, and advance our development program.”



ZIELINSKI COMPANIES

2150 Hampton Avenue • St. Louis, Missouri 63139  
1-800-489-2150 • 314-644-2150 • Fax: 314-644-7132  
[www.zielinskico.com](http://www.zielinskico.com) • [mail@zielinskico.com](mailto:mail@zielinskico.com)