

CASE STUDY

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Headquarters – St. Louis, MO

Organizational Management & Planning Services

Facilities Design and Construction Management

Facilities Utilization and Planning

Member Perceptions

Mergers of Provinces and Congregations

Organizational Structure

Real Estate and Property Planning

Resource Assessment and Management

Retirement Studies

Sponsorship/Governance

Strategic Planning

Zielinski Companies Partners with Worldwide Congregation to Implement Directional Statement

The Challenge: A worldwide congregation of women religious desired to develop and implement a strategic planning study to gauge the attitudes of its members concerning its newly written and adopted Chapter Directional Statement. The leadership also wanted a process to implement the Vision Statement throughout the congregation in tangible and meaningful ways.

The congregation, however, faced a unique set of opportunities and obstacles, including:

- The congregation had 7,000+ members in 30 different countries, speaking 10 different languages and representing numerous different cultures
- The General Council was truly representative of the congregation's membership
- Many provinces had a history of communication/collaboration through a regional governance structure
- Several provinces were located in countries that were then "behind the Wall"
- Provinces were at different stages regarding their own provincial planning.

Because one of the major goals expressed by the congregation's leadership involved developing tangible strategies and ways to carry out the new Directional Statement, the congregation (individually and as a whole) had to be knowledgeable about the limited resources of the congregation and understand that these resources were a key element in future decision-making.

Another major goal was to have each member, or as many as possible, take "ownership" of the Vision Statement and have input regarding "living out" the principles embodied in the Statement.

The Solution: The congregation's leadership chose Zielinski Companies as its partner to develop and implement the planning study and program related to its new Chapter Directional Statement. The firm was selected not only because of its knowledge and experience with religious communities, but also because of its reputation for "bridging the gap" between mission and resources.



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Zielinski Companies began the process with a Planning Orientation/ Education Workshop involving the congregation’s General Council and key Zielinski team members. This day and a half dialogue focused on:

- Identifying the congregation’s perceptions and experiences regarding planning
- Zielinski Companies’ approach and experiences related to planning
- Defining the specific scope, timeline, and action plan for this planning study
- Initial information gathering concurrent with defining the scope of study.

The timeline and action plan evolved around a two-step combination of visits by the Zielinski team of professionals to each of the congregation’s major areas for in-depth meetings with each provincial leadership team and key members as well as staff. The focus of the first round of visits was resource information collection and analysis. This included demographic, financial, property, ministry, and mission related data.

From these meetings a questionnaire was developed by the General Council and Zielinski Companies designed to explore and seek input from each member regarding the use of the congregation’s limited resources in light of the new Chapter Directional Statement.

Zielinski Companies organized the data, including the responses to the membership questionnaire, into province and congregation resource profiles which were disseminated to each province around the world. The second round of meetings focused on analysis, synthesization, and development of strategies for each province as well as on a congregation-wide basis.

Meetings were then held with the General Council to develop a finalized Strategic Planning Document that included strategies and action plans for each province, major area, and the congregation as a whole.

The Outcome: After a three-year process of study design, education, data collection, analysis, in-depth discussions, discernment, prioritization, and decision-making, the congregation had a blueprint and action plan with which to move into the future. This blueprint included a comprehensive plan for using the congregation’s resources to effectively carry out their Chapter Directional Statement individually and collectively.



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