

# CASE STUDY

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## Fund Development

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

**“To have our Board  
and the development  
office combining efforts  
was a great benefit.”**

— Sister Patricia Wilson, SC  
Vice President of Advancement



**ZIELINSKI COMPANIES**

## The Sisters of Charity of Seton Hill Exceed Fundraising Goal by 20%

**The Problem:** The Sisters of Charity of Seton Hill in Greensburg, Pennsylvania, had a modest development program, but it was not producing the expected results. While the Sisters continued to minister in education, healthcare, and pastoral and social service in Western Pennsylvania, Arizona, and the Far East, critical revenues from fundraising activities were not sufficient to support their needs.

“We retained the services of the fundraising professionals at Zielinski Companies to study our development efforts and pinpoint the weaknesses,” explains Sister Patricia Wilson, Vice President of Advancement. “Specifically, Zielinski Companies reviewed our fundraising structure and explained how such a structure should work.”

After an in-depth study of all facets of the Sisters’ fundraising efforts, Zielinski Companies found that the Sisters had a poorly constructed case and no structured annual plan. Zielinski Companies also observed that the development staff was not working as a team. Sister Pat realized that although the findings were important, it was more important to correct these shortcomings.

**The Solution:** The Provincial Leadership of the Sisters of Charity of Seton Hill hired the professional fund development team at Zielinski Companies to implement the recommended solutions. Through its full service mentoring program, Zielinski Companies guided the Province’s Board of Directors and the development officers in crafting a case that would be used for all development activities—from direct mail to newsletters to major donors and special events.

Sister Pat notes, “To have our Board and the development office combining efforts was a great benefit.”

After the case was written, the professionals from Zielinski Companies worked with the development officers to craft an annual plan that outlined all development activities for the upcoming year with projections for income, expense, cost per dollar raised, and donor numbers.



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The Zielinski team also worked with the congregation’s public relations director to weave her activities into a support position for the development initiatives. The team helped the staff begin to use the Raiser’s Edge database to full capacity, including segmentation, tracking, and analysis.

After the Provincial Board approved the case and annual plan, implementation was the next stage. When two key positions became open on the development staff, Zielinski Companies helped with the interviewing and hiring of replacements.

**The Results:** For fiscal year 2005, the Sisters set a goal to raise \$770,000 or 20% more than the previous year’s goal. This goal was surpassed in the third quarter! By the end of the fiscal year, a total of \$968,042 was raised (with no estate gifts or trusts included). This was 20% above the original goal. Likewise the average gift has gone up a full \$65 from \$178 to \$243.

One major initiative this year produced a two-fold success. It was important for the Sisters to bring the entire community into the fundraising loop. To this end, an entire portion of the annual plan focused on the development and education of the internal constituency.

A first step was to invite Sisters living at the motherhouse to help with a special mailing to Tier 2 donors, those who had given a distinctive but not yet significant gift. An appeal was prepared for 233 of these donors—and the Sisters were asked to write personal notes on these letters to any donors they knew. Some letters had four or five notes!

The outcome was incredible. For a cost of only \$120.60, the Sisters received 42 gifts for a total of \$54,439. The Community—especially the Sisters who helped—were overjoyed!

Now in year two of the Zielinski comprehensive mentoring program, Sister Pat says, “We and our staff are revising our case and writing the annual plan ourselves with ongoing input and supervision from Zielinski Companies. We have a strong, knowledgeable, functioning development office that is producing significant fiscal results with buy-in from our entire community.”



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