

# How the Columbus Zoo Tests Its Fundraising Fitness

By DREW LINDSAY

**B**Y MOST MEASURES, the Columbus Zoo and Aquarium in Ohio is a fundraising machine. Its most recent capital campaign has raised nearly \$44 million — \$6 million more than the goal and nearly three years ahead of schedule. Annual giving this year has already topped \$1.2 million, easily clearing the \$900,000 target.

But even machines need fine-tuning. To go under the hood of its success, the zoo's fundraisers use a free data-analytics program that identifies trouble spots in its fundraising and helps them design improvements. Is retention lagging among supporters who make gifts of less than \$250? They'll find out. Is the share of lapsed donors growing? The numbers tell them.

"It spits out stuff that you wouldn't even think to ask," says Colby Falconer, annual-giving manager for the zoo as well as the Wilds, a sister venue. "These little pieces of data can reveal a weakness and help us repair it surgically."

The Fundraising Fitness Test, the analytics program the zoo uses, is a gem hiding in plain sight, fans say. It was born in 2006 of the Fundraising Effectiveness Project, a joint effort of the Association of Fundraising Professionals and the Urban Institute's Center on Nonprofits and Philanthropy. Bill Levis, then an Urban Institute scholar, and Cathy Williams, an AFP manager at the time, started the project to help nonprofits study fundraising practices and boost results.

The two created the Fundraising Fitness Tool, a spreadsheet with embedded macros (automated calculations) that turn any group's giving data — just donor identification number, gift size, and date — into easy-to-read measures of fundraising performance.

The tool has expanded over the years so that groups now can evaluate their fundraising based on more than 100 performance indicators — donor-acquisition rate, net donor gains and losses, share of donors giving less or more than the previous year, etc. — across five donation levels — under \$100, \$100 to \$249, \$250 to \$999, etc. A "what if" tool estimates potential revenue growth for improvements in, say, donor acquisition or donor retention at any of the five giving levels.



AMANDA CARBERRY, COLUMBUS ZOO AND AQUARIUM

## SMALL THINGS MATTER

**"We are being more cognizant that someone's \$250 is just as important as \$1,000," says a zoo fundraiser. The organization focused on donors contributing less than \$1,000 when data showed their numbers declining.**

Groups can benchmark their performance against that of a set of peers in their cause or geographic area. The Fundraising Effectiveness Project holds 234 million anonymized giving records from more than 31,000 groups.

## Weaknesses Revealed

Lori Overmyer, executive vice president of the Goettler Associates fundraising consultancy in Columbus, uses the fitness test with clients and in an Ohio State fundraising class and an AFP donor-retention workshop. A former chief development officer, Overmyer jokes: "If I knew 20 years ago what these reports tell me, I wouldn't have used prayer as a methodology to get to the end of the year."

The fitness test provides data for close examination of gains and losses among defined sets of donors from year to year. Fundraisers use the findings to build improvement plans — and to make the funding case for those plans to top executives and board members.

Overmyer, for instance, advis-

es clients to reinvigorate or start a major-donor program when retention rates are below 75 percent for people who give \$1,000 or more. "Those numbers tell me that you're not paying enough attention at the top," she says.

The Columbus Zoo, one of Overmyer's clients, has been using the fitness test for several years. Falconer came to the organization from a child-care nonprofit in 2017. "I had never heard of it before," he says. "I thought, This is pretty cool."

In 2020, the zoo's fitness test revealed a drop in the number of donors giving less than \$1,000 — from 583 in 2019 to 542. It was tempting to write the decline off to pandemic woes, but the fundraising staff decided they couldn't let it go at that, Falconer says. "We thought, Gosh, did we do something wrong? Do they feel like their money's not going to the right mission?"

With the data in hand, the group redoubled efforts to target and retain those donors. It rebooted its annual impact report, which it had discontinued, and built out communications that told stories of how a donor's support enhanced animal

well-being, education and conservation programs, and more. "We focused the message to bring the donor closer to the mission they are supporting," Falconer says.

In 2021, the number of donors contributing less than \$1,000 had climbed to 607 — a 12 percent increase. As 2022 was closing, that figure was approaching 650.

In 2023, the group plans to introduce a development officer as a liaison for such supporters — someone to serve as a face of the organization and a contact for donors. The zoo recently introduced such a role with donors who make gifts of \$1,000 or more, with great success.

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## Resources

AFP houses the Fundraising Fitness Test, including instructions and other information, on its website, as well as other resources from the Fundraising Effectiveness Project. It also publishes quarterly reports on giving nationally. ■