



**SEACOAST
SCIENCE CENTER**

**CAMPAIGN PLANNING STUDY
FINDINGS AND RECOMMENDATIONS**

DRAFT

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PRESENTED BY

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INTRODUCTION

Copley Raff, Inc. (CRI) appreciates the opportunity to have conducted a Campaign Planning Study for Seacoast Science Center (SSC). The study sought to test the appeal of supporting SSC's plans to expand and refresh its facility and exhibits.

A campaign goal of \$10 million was tested with those interviewed. The Preliminary Case for Support used in the study outlined the motivation and need for the campaign and described the primary objectives: renovating and expanding public exhibition and community spaces, installing a marine mammal rehabilitation clinic, adding a marine science laboratory to support educational programs, repurposing the Sugden House as an exhibit space for NH Seacoast cultural history, and implementing environmentally conscious construction practices. (*See Attachments A & B for the Case for Support and Objectives Breakout documents*).

This report presents data and findings obtained from 21 confidential interviews conducted by project consultants Larry Raff, Sue Kinney, and Diane Blumenson. The consulting team had hoped to complete 25 interviews, but SSC was unable to schedule additional conversations. The content of this report - data, opinions, findings, and recommendations - are presented to assist SSC's professional and volunteer leaders to determine the most effective course of action for preparing to undertake SSC's first-ever capital campaign.

ACKNOWLEDGEMENTS

We extend our appreciation to those who assisted with the preparation and planning for this Campaign Planning Study. We also offer recognition and thanks to the study participants who graciously and freely shared their perceptions, thoughts, and views.

STUDY OBJECTIVES

1. Elicit the perceptions of leaders, constituents, and prospective donors regarding Seacoast Science Center's image and reputation and the potential for success of a major campaign.
2. Heighten interest in and build support for the mission, needs, and long-range plans for SSC.
3. Invite feedback and critique on the priorities, style, and content of the preliminary Case for Support and test the urgency, merits, and appeal of the campaign's purpose.
4. Consider the views of major gift donors and prospects in testing the potential to achieve a \$10 million campaign goal.
5. Explore the philanthropic interests and affiliations of study participants; assess their willingness to participate and provide leadership in the campaign; and learn the depth of their affinity for SSC.
6. Determine whether or not study participants are inclined and capable of making significant campaign commitments and identify others with the capacity and potential interest to make major gifts. Based on these findings, recommend an achievable campaign goal and time frame.
7. Identify appropriate individuals who should be considered for leadership positions in the campaign, learn about participants' experience as non-profit and fundraising volunteers, and identify others willing to engage prospective donors and help solicit gifts.
8. Provide study findings and specific recommendations regarding campaign feasibility, preparation, structure, time frame, and implementation.

METHOD AND SCOPE OF THE STUDY

This study provides both a qualitative and quantitative analysis. Forthcoming recommendations are based on the information collected and the consultants' interpretation of the data that integrates their experience with other major gift campaigns and well-executed advancement programs.

Counsel recommended that individuals invited to participate in the study have an existing level of affinity with SSC and/or possess significant philanthropic capacity with a history of giving to marine science, historical societies, land conservation and environmental organizations, museums, and other non-profits in the NH Seacoast region. SSC's leadership also felt it important to include local and state politicians in the feasibility process. Several of these conversations were conducted by President Jim Chase, accompanied by CRI counsel when requested.

A prospective interviewee list was assembled by executive leadership with input from the Campaign Planning Task Force. Following receipt of a letter of invitation, participants were contacted by SSC staff to schedule the interview. Prior to each meeting, interviewees received an email or letter of confirmation along with the preliminary Case for Support.

The survey document, consisting of 17 questions (*Attachment C*), was the primary interview instrument, although in most cases, the conversations extended beyond the scope of the survey. The interview questions represent industry standards as well as inquiries specific to Seacoast Science Center and the proposed campaign. During interviews, the consultants also presented preliminary floor plans and renderings of the proposed construction.

At the outset of each meeting or telephone call, participants were informed that the interviewer represented Copley Raff and was not a SSC employee. Individuals were encouraged to be candid and were assured their responses would be held in confidence. They were also reminded that the purpose of the interview was not to solicit funds.

Respondents provided thoughtful feedback on the preliminary Case for Support, which was well received and considered to adequately reflect Seacoast Science Center's mission, vision and philanthropy objectives. For participants who had not had an opportunity to review the Case for Support prior to the interview, the consultants summarized the document at the outset of the conversation and left behind a hard copy. Overall, 21 distinct interviews were conducted: 20 in-person and 1 by telephone. Interviews were conducted in private homes, offices, and public establishments, depending on the participants' availability and convenience.

STUDY PARTICIPANTS

1. Mary Avery
2. Geoffrey Clark
3. Simon Delekta - NHCF
4. David Ellis
5. Brian & Kathy Fitzgerald
6. Jamey French
7. Ingrid Getman
8. Rep. Jaci Grote
9. Tom Haas
10. Pam Hall
11. Bill & Julie Kath
12. Michael Labrie
13. Peter Labrie
14. Russ McCann
15. Jay & Amanda McSharry
16. Jack Sanders
17. Steve Scott
18. Bobbie Sweet
19. Nancy Taggart
20. Elaine Tefft
21. Nancy Winthrop

One individual did not show up for the meeting and declined to be rescheduled.

One couple declined to be interviewed.

ESSENTIAL ELEMENTS OF CAMPAIGN SUCCESS

The criteria used to determine Seacoast Science Center’s potential for success in a capital campaign are outlined below. Counsel’s opinions in **BOLD TYPE** are based on professional experience, effective advancement practices, and interview discovery.

Acceptance and Urgency of Need

A. Confidence by counsel that SSC can raise \$10 million over a five-year period.	<p style="text-align: center;">YES Assuming \$2M in federal funds and another lead \$2M gift.</p>
B. Unanimous agreement by SSC Board of Directors on the project needs and the strategy to undertake a major gifts campaign to meet those needs.	<p style="text-align: center;">YES</p>
C. Validation by potential donors and prospective campaign leaders of the importance of conducting a campaign to meet SSC’s funding needs.	<p style="text-align: center;">YES Nearly universal support for a campaign to fund the stated objectives, as long as ROI can be demonstrated.</p>
D. Determination and commitment by SSC’s constituents to contribute to and work for the success of the campaign.	<p style="text-align: center;">MIXED Few interviewees agreed to serve on a Campaign Cabinet.</p>
E. Recognition of the campaign as a priority and willingness of the staff, board, and key constituents to commit the necessary time, energy, and financial resources.	<p style="text-align: center;">MIXED The campaign is considered important for SSC but it is unclear whether people are willing to step up, work hard, and make the organization a philanthropic priority.</p>

Consultants’ Top Line Interpretation:

There is broad agreement that Seacoast Science Center is a highly valuable resource to the region; indeed, the state considers SSC an integral part of the educational fabric of New Hampshire. Most interviewees felt that \$10 million is an ambitious but achievable goal, assuming SSC activates professional fundraising staff and has sufficient qualified prospects. There are many competing campaigns in the region and SSC will have to work hard to differentiate itself and stake a claim to its central role

in the community. This will require demonstrating urgency, describing the transformational impact of major philanthropy, and getting more specific about plans for a broader range of STEM and marine science education programs. A majority of interviewees talked about the need for SSC to collaborate with other organizations and to develop more innovative, higher-profile programming. Little was known about the institutional partnerships that already exist.

Many interviewees were curious about the level of investment being contemplated by SSC and projections for return on that investment. Counsel received many questions about funding the increased operating overhead that will be generated by the Center’s expansion. A revised Case for Support will need to address these issues up front.

In more general terms, interviewees were seeking a clearer idea of cause and effect. If funds are raised... this will happen. If funds are not raised... this will not happen. It is incumbent upon SSC leadership to communicate urgency as well as projected impact and outcomes of the campaign.

Counsel’s primary concern regarding readiness has to do with the human resources and bandwidth (both staff and volunteer) required to conduct a successful campaign. Barely anyone interviewed self-identified as willing to join a Campaign Cabinet, but some agreed to serve as “spot players,” by screening prospect names and making introductions. Jim Chase has already followed up with these individuals.

Leadership, Sources of Support, and Giving Potential

<p>A. Identified sources for the leadership gifts required to account for approximately 50% of a \$10 million campaign goal.</p>	<p>POTENTIALLY Highly dependent on a small number of major philanthropists who are favorably inclined.</p>
<p>B. Enthusiastic support from those who will be expected to provide a major portion of the funds to be raised in the campaign.</p>	<p>TENTATIVELY ENTHUSIASTIC More detail needed on use of funds, ROI, and community impact.</p>
<p>C. Demonstrated ability to enlist volunteer campaign leaders who will assure pacesetting philanthropy.</p>	<p>MODERATE The President and staff will need a great deal of support from the Board and a newly-formed Campaign Cabinet.</p>

Consultants' Top Line Interpretation:

Seacoast Science Center is an important educational asset to the region but in preparation for a successful campaign the organization will need to elevate its profile in the community. SSC boasts a solid reputation but is widely viewed as oriented toward young children and a “one and done” experience for adults. Interviewees were relieved to hear that SSC has a long-term lease from the state, removing a key impediment to campaign success. A few people stressed the importance of SSC avoiding donor confusion by clearly differentiating itself from the state.

President Jim Chase is held in high regard by those who know him and he has been expanding his presence and raising SSC's profile through meetings with state political figures, NHCF leadership, and attendance at key community events. Jim has been successful in creating a high-level buzz about the project and the plans have been favorably received. The President will continue to be centrally important to engaging with top-tier donor candidates and providing evolving detail about the expansion initiative.

From a volunteer standpoint, the Board of Directors will be expected to assist with identifying and introducing qualified donor candidates. A working Campaign Cabinet, with co-chairs, will be assembled to drive the campaign in partnership with staff. At the moment, an insufficient number of people have self-selected to assist in this manner. Since Jim has positive relationships with many founders and original Directors of Seacoast Science Center, it will help to re-engage some of these individuals and bring them back as insiders and leaders.

There are sources of major support in the Seacoast region and several top philanthropists were included in the interview process. SSC leadership is fairly confident that a seven-figure lead gift will come through federal funds and that several other high-net-worth individuals will make six- and seven-figure commitments. Utilizing feedback from the study interviews, the Case for Support will be refined to address concerns such as ROI and impact, and to provide more specificity about programs and exhibits that will drive the facility renovation.

A key challenge for SSC is that the organization has never had a formal major donor program. There is no history of face-to-face solicitation, nor is there a 'ready' pool of engaged stakeholders accustomed to making large contributions to SSC. Accordingly, sufficient time must be allocated for engaging, educating, and cultivating major donor candidates.

Plan of Campaign, Staff, and Budget Resources

<p>A. A well-conceived and organized campaign plan that outlines strategies for bringing the project, the constituency, and the leadership together in an organized effort to achieve the campaign goal.</p>	<p>OUTLINE PROVIDED IN THIS REPORT CRI recommends a Readiness Phase for the first 6 months, overlapping with the launch of the Leadership Phase.</p>
<p>B. Qualified professional direction and adequate professional staff support to manage and direct campaign execution, volunteers and leaders.</p>	<p>INSUFFICIENT AT THIS TIME Developing appropriate institutional bandwidth and more campaign fundraising expertise and infrastructure needs to be a priority.</p>
<p>C. Sufficient campaign budget providing the financial resources needed to fund and implement the campaign plan.</p>	<p>ANTICIPATED Campaign income can fund budget.</p>

Consultants' Top Line Interpretation:

At the end of this report, CRI provides an outline for “next steps.” Staffing, volunteer leadership, prospect research, donor management systems, and budgets are critical elements of planning and time must be devoted to putting these elements in place. SSC’s personnel, infrastructure, use of technology, and donor engagement and stewardship processes are not currently oriented to properly support the execution of a multi-million-dollar campaign. These matters and more can be redressed with expert assistance.

While the President is considered the chief fundraiser during a major campaign, Jim cannot do this alone. It is critical that he assemble an experienced, sophisticated advancement team that will “manage up,” deploy throughout the community, and generate results. SSC’s external presence needs to be magnified in order to engage and cultivate prospects, and solicit six- and seven-figure gifts.

The campaign will not only raise transformational funds but it will establish a platform for SSC to transition toward a fully integrated, comprehensive, and sustainable advancement function. The development program has historically focused on an annual appeal and special events - not the most efficient or cost-effective way to raise funds. Expanding the donor pipeline is critical and SSC’s direct mail program can be enhanced through more frequent, targeted appeals, acquisition of new donors, and strategic emphasis on growing the \$1,000+ Ocean Ambassador Society.

Going forward, face-to-face major donor fundraising will become the centerpiece of the development program, with direct mail, institutional grants, special events, and planned/deferred serving supporting roles.

VISION FOR LEADERSHIP

A successful campaign will require engaged leadership from SSC's Board of Directors, the President, members of the senior administrative team, newly-recruited campaign leaders, and experienced advancement officers.

Raising money requires persistence, commitment, year-round cultivation and relationship building, board support and encouragement, a documented plan, and attainable goals. Securing major and transformational gifts requires the involvement of professional fundraising staff and a strong cadre of internal and external volunteers who are willing to become actively involved in the identification, qualification, engagement, solicitation, and stewardship of donors and prospects.

The campaign that is being considered for SSC will serve to raise millions of dollars for the expansion/renovation, and will catalyze the building of the Foundation's advancement apparatus that will result in robust and sustainable fundraising beyond campaign completion.

Members of the Board of Directors are enthusiastic about undertaking a significant campaign and want to contribute to the campaign's success. There is a role for everyone who is eager to engage and be trained in the art and science of building relationships with donor candidates. Going forward, **this willingness to participate in institutional advancement should be a requirement when choosing nominees for the Center's Board of Directors and the Campaign Cabinet.**

STUDY FINDINGS

Accolades and Deep Resonance

Interviewees consistently expressed the importance of SSC to the Seacoast region and universal respect for President Jim Chase. Most interviewees understood the need for the Center to remain relevant by expanding its educational offerings; refreshing outdated exhibits; taking a more active role in marine mammal rehabilitation; placing greater emphasis on climate change, environmental impact, and sustainability; and improving the visitor experience.

Strengths and Weaknesses

During the campaign study, the consultants sought and received unfiltered, honest feedback about Seacoast Science Center and its expressed plans. It is vital for SSC leaders to understand that while perceptions may not be accurate, they are “reality” for the individuals being interviewed. A heightened awareness of these community perceptions will be integrated into the Case for Support to strengthen the argument and assist SSC in refining its marketing and development communications. The following represents collective feedback from the study.

Seacoast Science Center	Feedback
Overall Quality of Services	High
Administration/Management	Medium-High
Facilities	Medium
Financial Stability	Medium
Communications/Public Relations/Visibility	Medium
Community Impact	Medium
Fundraising Program	Low
Overall Reputation	High

Challenges

Interview participants expressed the following potential impediments to success:

1. Many competing fundraising campaigns in and around the Seacoast region.
2. Many high-net-worth individuals are paying off pledges to other organizations.
3. No history of capital campaigns, major gift cultivation and solicitation, or face-to-face solicitation.
4. Relatively small pool of campaign prospects.

5. Limited success of leadership gift society and no high-end direct mail fundraising.
6. Philanthropy efforts with businesses and community limited primarily to event sponsorships.
7. “Leaving money on the table” with foundations.
8. Lack of institutional endowment or reserve fund to provide a financial cushion.
9. Insufficient infrastructure for growing and advancing the organization, especially during a capital campaign.
10. Concerns that current development personnel lack the experience, sophistication, and gravitas to manage and execute a successful campaign.
11. Anticipated impact and outcomes of the campaign are still not fully understood or articulated and there were questions about return on the \$10 million investment. Will visitorship and memberships increase? Does SSC have a business plan to support increased overhead? Will there be additional earned revenue streams in addition to more robust philanthropy? Will there be enough rescued animals and educational opportunities to warrant and support the addition of a Marine Mammal Rehabilitation program?

DISCOVERY AND RECOMMENDATIONS: OPERATIONS


Discovery

1. Concern that SSC is understaffed in terms of development and external relations, especially considering their plan to undertake a campaign.
2. The two full-time employees charged with fundraising lack high-level development and campaign experience. The development function is supported by a half-time assistant and office volunteers. The Director of Development has been spread too thinly with responsibilities across the organization and fundraising has suffered as a result.
3. SSC does not have a formal major donor program or personnel that are experienced in major donor identification, cultivation, solicitation, and stewardship. While there was a major gifts officer at SSC for one year, no productivity was generated in this area. With a campaign on the horizon, a donor relationship management system will need to be put into place. This will include regular screening, in-depth research, prospect portfolios, activity tracking, key performance indicators and many other elements of a high performing program.

4. At counsel's recommendation, SSC engaged DonorSearch to conduct a database wealth screen with the objective of identifying additional interview and campaign prospects. Rather than a full review of the database, staff elected to screen 800 records (prior donors, camp families, SSC members). Results that were highly scored need to be analyzed, existing relationships identified, and strategies put into place to engage these donors during the leadership phase of the campaign.
5. Currently, the Director of Development researches and writes grant proposals for prospective institutional funders, cultivates and solicits corporate sponsorships of special events, and manages third-party events. While she oversees institutional funding, counsel did not see robust or strategic activity in this area. The DOD has insufficient time to devote to the task and as a result, institutional fundraising is not on a growth trajectory.
6. The Board of Directors has been minimally involved with fundraising, but they are enthusiastic about launching SSC's first capital campaign. Directors have an important role to play in the campaign and they will benefit from ongoing fundraising training and partnering with experienced staff and counsel.
7. Gift acceptance and recognition policies are currently in draft form and need to be finalized (with input from counsel) in preparation for the campaign.
8. Advancement standard operating procedures and best practices are also needed to address day-to-day fundraising operations, information systems and database administration, coding, and maintenance.

Recommendations

New campaign staff

1. The campaign will require capable management by a seasoned, externally oriented fundraising professional. In addition to a Campaign Director, at least one more experienced full-time major gifts officer will be needed to work on the campaign and leadership-level annual giving. Additional support functions may also need to be added over time. 
JEC
2. The President must be prepared to commit at least 40% of his time to transformational gift fundraising during the Leadership Phase, supported by strong volunteer participation on the Campaign Cabinet.
JEC, Cabinet & Campaign staff
3. Establish specific development goals, benchmarks, and performance metrics for all advancement officers and evaluate progress on a quarterly basis. The guidelines that exist have not been regularly monitored.

[JEC, MarCom4, Campaign staff](#)

4. Communicate a more compelling and differentiated SSC value proposition in all printed and online materials, as will be expressed in the campaign Case for Support.

[JEC, Board](#)

5. Continue to develop legislative liaisons with political figures and influencers from across the state and establish a strong advocacy presence for ocean health and environmental responsibility.

[JEC, Kate Leavitt](#)

6. Actively pursue innovative, high-level collaborations with like-minded organizations on both a state and regional level. Publicize these partnerships and their projected impact in both print and online publications.

[JEC, Kate Leavitt, Board](#)

7. Reinforce SSC's position as a thought leader in matters of ocean education, preservation, and conservation.

[Outside development audit](#)

8. **Conduct an in-depth analysis and evaluation by a third party of the direct mail/annual appeal program.**

[SSC Staff, Board, & Volunteers](#)

9. Several existing events should be reframed to serve campaign purposes and some events may be put on hold as campaign fundraising becomes active. Targeted house parties, office parties, and gatherings at SSC should be implemented to identify and engage new potential donors.

[JEC, Campaign Staff. How to best do this is unclear.](#)

10. Undertake a more formal and vigorous institutional development effort with private and family foundations and the New Hampshire Community Foundation donor advised funds. There is untapped potential within this sector and campaign fundraising will infuse new energy into the process.

[Campaign staff](#)

11. In order to begin building a major donor pipeline, the Ocean Ambassador Society needs increased attention and strategic execution.

[Campaign Staff, JEC](#)

12. Highly rated donors that emerged from the full database screen need to be researched, qualified, screened for stakeholder relationships, and pursued with individualized engagement strategies.

[Campaign Staff](#)

13. Plans and systems must be put into place for database administration, prospect research/tracking/moves management, donor stewardship, reporting and analysis, fundraising performance, and other metrics.

[NH Center for Nonprofits? AFP?](#)

14. SSC's Board of Directors will benefit from training in the art and science of major donor fundraising in order to enhance their participation in the campaign.

Representative Citations

- *SSC is accessible, not too big or overwhelming, the familiarity is nice.*
- *They're missing the boat with pre-teens, teenagers, and young adults.*
- *SSC feels static. I've been out of the loop for 10 years and the place still looks and feels the same. It's never changed enough to motivate you to come back.*
- *SSC is known for snippet exhibits, whatever they design must provide a larger context.*
- *They need to attract and interest the adult public. They should go beyond events and make the place more enticing to an older audience through programs, lectures, and educational opportunities.*
- *SSC is unique but they haven't figured out how to effectively talk to their audience.*
- *SSC is a "motherhood and apple pie" organization with no controversy.*
- *SSC needs better database management and data mining. Their technology is archaic and doesn't have the ability to analyze donors and memberships, which in turn creates strategy.*

DISCOVERY AND RECOMMENDATIONS: CAMPAIGN CASE FOR SUPPORT

1. Positive reaction to the preliminary Case for Support, with a majority of interviewees observing that it is time for Seacoast Science Center to take a great leap forward.
2. Proposed objectives are considered legitimate and worthy of support, but interest and feedback varied according to personal interest.
3. Widespread desire for SSC to collaborate with more like-minded organizations, creating a climate of innovation, magnifying strengths, and fostering economies of scale.
4. Near universal support for the expanded and renovated public exhibition and community spaces and improved visitor amenities. The café was a very popular addition, as was the idea of a large open atrium versus the current isolated rooms. Human scale aquarium exhibits and multi-level viewing and engagement opportunities were well received and generated enthusiasm.
5. Enthusiasm among some about SSC adding Marine Mammal Rehabilitation to its current role. Interviewees see educational opportunities and public interest in following an animal from rescue to diagnosis to treatment to recovery to release.

Many felt that a rehabilitation program would provide increased media exposure for SSC.

6. An equal amount of skepticism that the MMR rehab function can be installed and operated for a \$2M investment, a number that seemed low to many. We also heard concerns about the program generating greatly increased overhead. Interviewees questioned whether there would be enough animals coming into SSC to warrant the dedicated space and personnel.
7. Multiple concerns about projected sea level rise and whether SSC has adequately considered worst-case scenarios in designing and placing the building.
8. Many interviewees expressed dissatisfaction with the visiting Smithsonian H₂O exhibit, feeling that it was boring, wordy, and difficult to find due to insufficient signage. Respondents like the idea of visiting and rotating exhibits but felt that these should be more carefully vetted in the future.
9. Desire for greater focus on the effects of global warming and climate change, creating new exhibits that incorporate modern technologies and provide an immersive, interactive experience.
10. Strong support for the utilization of environmentally conscious construction materials, increased energy efficiency, installation of solar panels, a green roof, and LEED certification. The concept of turning these features into an exhibit was appealing to many.
11. Positive reaction to the partial second floor, and especially relocating offices and support areas upstairs to free up more public space on the main level.
12. Concern that the upstairs flex function space is too small at a projected 1,100 sf. Many respondents imagined potential rental income from this space during times when it isn't being used for educational purposes, observing that SSC would be more likely to attract events if the room were considerably larger. Questions were also posed about visitor flow, given that this area is far from the other public spaces and isolated near the administrative offices.
13. More specifics are desired about SSC's plans for science learning and STEM education. Interviewees responded very positively to SSC's intent to offer deeper educational options through more hands-on opportunities for teens, young adults, and older adults. The fact that respondents pressed us for a clearer sense of what these programs will look like indicates strong interest and support for this objective.
14. History enthusiasts responded positively to repurposing the Sugden House as a repository for Seacoast NH cultural history and an exhibition space for local historical societies. Those who viewed the latest renderings did not like the fact

that the artwork makes the Sugden space look like a quiet, dull library. Suggestions were made to represent the cultural history area as vital and active.

15. Selected interest in SSC establishing an endowment or cash reserves, which will best be achieved through implementation of a planned/deferred giving program. The campaign will create an entry path for this, in that some campaign pledges may be combination current use-deferred irrevocable gift arrangements. Following the campaign, all unrestricted monies received through bequests and legacy arrangements would flow into the general endowment or reserve fund.
16. All interviewees were in favor of 10% of their pledges being allocated toward a maintenance reserve fund. Keep in mind that this carve-out would represent \$100,000 that cannot be spent on construction.
17. The Case for Support will be enhanced with updated visuals as well as site visits, virtual video tours, and mockups of Legacy Naming Opportunities.

Representative Citations

- *There's a natural resistance around buildings and high overhead; people like to support programming.*
- *Since New Hampshire owns the land, the case will have to make it clear that people's donations will not be going to the state.*
- *I like the idea of having a lab and offering more academic opportunities to people of all ages.*
- *The cultural history aspect should go beyond Odiorne Point and provide a broader perspective.*
- *The floor plans and expansion plans seem superfluous without knowing exactly what types of programs they're considering? Space considerations should be driven by programming.*
- *Their exhibits definitely need to be refreshed. SSC needs to get creative and offer some new or traveling ones about climate change, energy conservation, and how these affect the ocean and planet.*
- *SSC needs to reach out beyond the immediate geographic area. Expand the marine science message beyond NH.*
- *They need to look carefully at adding MMR rehab, which is expensive and could be a drain on ongoing operations. What if there are no animals in house and it ends up being dead space?*

DISCOVERY AND RECOMMENDATIONS: LEADERSHIP

President

1. President Jim Chase is viewed extremely positively by those who know and have worked with him. He is characterized as passionate, knowledgeable, and visionary and interviewees feel he will be a successful fundraiser.
2. Jim intends to free himself up for the campaign by hiring a CFO/COO during the first half of 2020.
3. Jim has worked tirelessly to build relationships with state politicians and influencers, securing a long-term land lease from the NH Division of Parks and Recreation. This has enabled Jim to introduce SSC's plans, secure feedback, and establish a solid foundation of support for the campaign.

Board of Directors

1. Interviews revealed an overall lack of familiarity with SSC's Board of Directors. Several respondents noted the Board's seemingly modest levels of giving and felt that SSC would benefit from a higher profile, more influential Board.
2. The Board is enthusiastic over the prospect of undertaking a campaign but some members lack experience in this area. Directors were not initially recruited with this responsibility in mind. Accordingly, there may be Board members who do not wish to be involved in face-to-face fundraising; that should be respected, and roles should be found for them to utilize their skill sets in service to the campaign.
3. Board nominating and recruitment, going forward, should pursue individuals with a stronger emphasis on philanthropy and institutional advancement. To achieve this, establish an active Nominating/Governance Committee. This group will identify, qualify and recruit new Directors based on the Center's current plans and future needs. Building a high-level, philanthropic Board will elevate the prestige and fundraising effectiveness of SSC's leadership and foster a strong culture of philanthropy.
4. Limit the Executive Committee to Board officers, including the President. While senior staff can attend general Board of Directors meetings, they should not be present at these executive sessions.

Campaign Leadership

1. A majority of those interviewed were not interested in participating as campaign volunteers, although some offered to serve as “spot players” by making referrals and introductions or screening prospect lists. It will be important for the President to cultivate close relationships with those volunteers on the periphery; these are influential, well-connected individuals who simply don’t have the time or desire to join the Cabinet. Many respondents sit on other Boards and/or are involved in other local non-profit campaigns.
2. One or two Campaign Cabinet candidates were identified through the study interviews but the majority will need to be recruited through a deliberate outreach process.
3. Interviewees did suggest names of high-net-worth individuals who may have interest in supporting the campaign philanthropically. A list has already been provided to the President outside of this report.

Representative Citations

- *Their success will be based entirely on leadership; success is driven from the top.*
- *Jim will be a great fundraiser. He needs a crack staff who can manage and deploy him to the right prospects.*
- *It would help to have a seven-figure donor be a co-chair of the campaign; someone with a high profile to attract philanthropy.*
- *Are the members of the Board prepared to step up and be major donors? The community will be watching them.*
- *Jim and his staff should look at a whole bunch of places, including Mystic, Boston, Monterey, Scripps, Shedd, Atlanta, Seattle, Tampa - see what’s new, contemporary, relevant, and appropriate for our part of the ocean. These are larger organizations but good ideas can be scaled. They should also talk to the experts in Sausalito about MMR rehab.*
- *It wouldn’t hurt their campaign to have a high powered honorary committee on a more national scale. Names and spokespeople like Al Gore could make local people pay attention. SSC needs more out-of-state visibility.*

DISCOVERY AND RECOMMENDATIONS: CAMPAIGN GOAL AND FUNDRAISING

1. A campaign goal of \$10 million was tested with those interviewed. This was considered to be among the larger campaign goals in the Rye-Portsmouth area but most respondents felt it was an appropriate number. To achieve this objective - as many think can be done - several seven-figure transformational gifts will need to be secured. Donors capable and willing to make gifts of \$2+ million have been identified and discussions begun.
2. The SSC campaign will offer significant and prominent Legacy Naming Opportunities that will be appealing to some of those interviewed as well as other leadership gift prospects.
3. There are many wealthy, philanthropic families on the New Hampshire Seacoast. This campaign, executed with confidence, pride, and passion, will serve to raise sights and elevate SSC's profile within the community.

Representative Citations

- *Is \$10M really enough to accomplish all of this? SSC should also begin building an endowment and determine the additional annual operating income that will be required for long-term sustainability.*
- *I see this as a big gift campaign with about 50 families giving the lion's share.*
- *Do they have a base of donors prepared to support a campaign of this magnitude?*
- *I definitely think it's feasible for SSC to raise \$10M, but it isn't going to be easy.*
- *There are a lot of people in this area who could contribute between \$250K and \$1M. You just have to figure out how to get in front of them.*
- *SSC is behind the curve and needs to be competing in the philanthropic marketplace. Don't they have development people? If so, they're invisible.*
- *I worry about local competition for philanthropy. It's a small pool of major donors being contacted by all the non-profit organizations.*
- *They need to move beyond event-based fundraising. It's important for friend-raising but is a very expensive way to raise money.*
- *I'm shocked that SSC doesn't have an endowment and others would be as well. Even if it's not large at first, they should have something. The lack of a financial cushion doesn't exactly instill confidence in the organization's finances.*
- *I'm concerned about their probability of success. This campaign will take very careful planning and foresight.*

- *Don't underestimate those mid-range gifts in this region. This is the core, the future stakeholders.*

FINDINGS SUMMARY

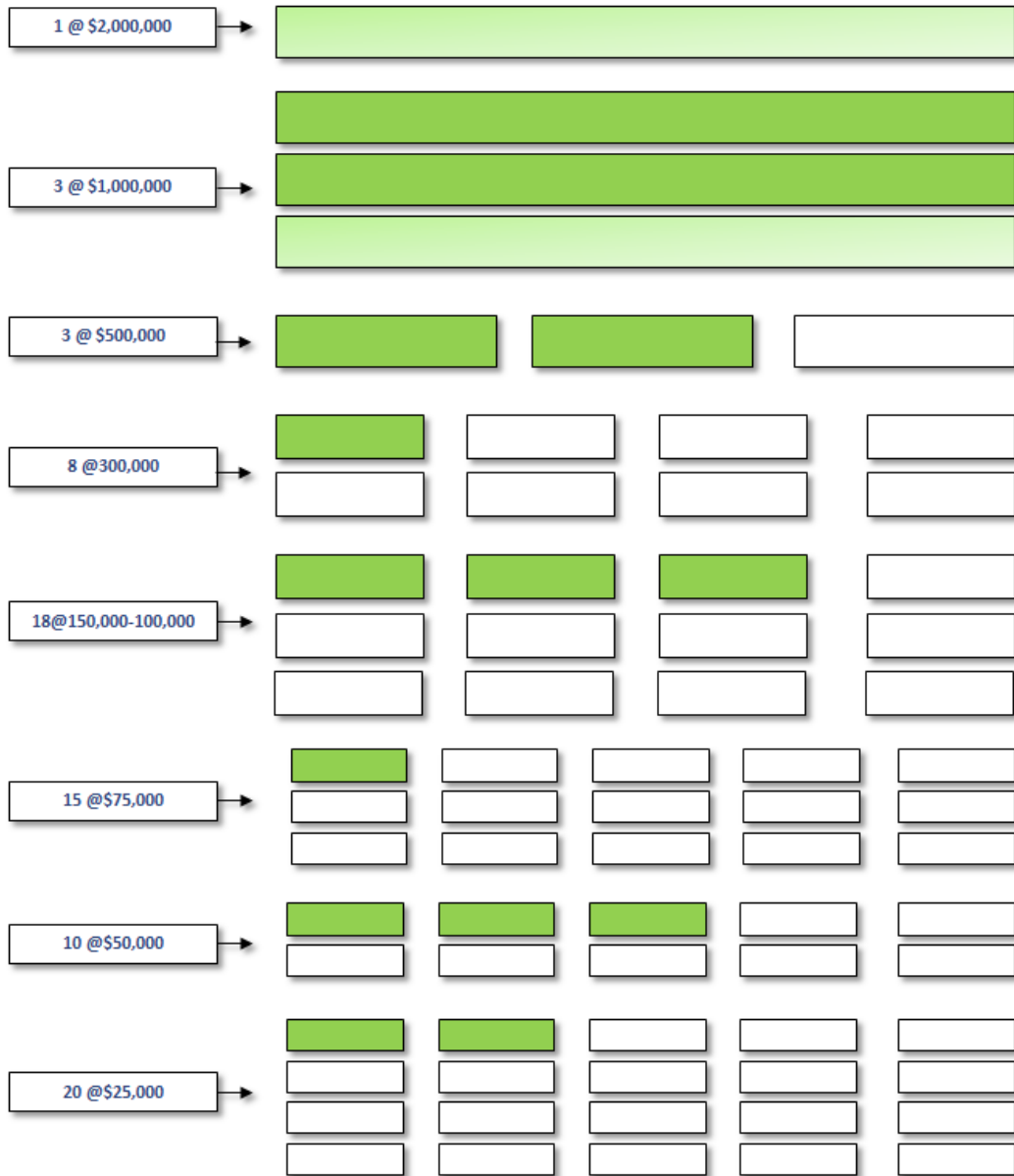
Successful advancement programs communicate the organization's vision for accomplishment and impact in the future. The greater the perceived positive effect on society, the greater the potential for philanthropic success.

Aspirational campaign fundraising requires committed leadership and a well-designed strategy and infrastructure. The study findings indicate that securing \$10 million in campaign commitments will require SSC to:

1. Build the operational capacity of Seacoast Science Center to execute a campaign and properly steward donors.
2. Undertake a methodical and vigorous person-to-person relationship building effort designed to persuade prospective donors of the need and urgency described in the campaign Case for Support.
3. Encourage authentic commitment and active involvement on the part of SSC's executive leaders, Campaign Cabinet, and Board of Directors.
4. Explain why Seacoast Science Center is a scientific and cultural asset to the community and an important educational partner to many organizations throughout New England.

TABLE OF GIFTS

The following chart indicates the size and number of gifts needed to raise \$10 million. The darkened boxes identify gifts that may be secured over time (as indicated by those interviewed) or gifts that counsel would anticipate based on interview conversations, our professional experience, and other information gathered through the study process.



Dark green boxes represent gift ranges that were stated. Lighter green boxes are inferred gifts.

CAMPAIGN RECOMMENDATIONS AND NEXT STEPS

Based on the foregoing, Copley Raff has developed the following set of recommendations specific to a potential campaign:

1. That Seacoast Science Center plan to conduct a capital campaign with an initial working goal of \$10 million.

2. The campaign be organized around the following objectives:

- | | |
|--|---------|
| • Expanded public exhibition and community spaces | \$5M |
| • Marine mammal exhibit featuring on-site rehab | \$2M |
| • Laboratory, education, and function spaces | \$1.25M |
| • Environmentally conscious construction and exhibits | \$1M |
| • Repurposing Sugden House for cultural history and visiting exhibits: | \$.75M |

WORKING CAMPAIGN GOAL

\$10 million

3. A campaign duration of approximately four years, from winter 2020 through spring 2024.

This schedule assumes that six months must be devoted to planning and readiness improvements for the campaign, including building an adequate operational infrastructure; identifying, researching, and engaging major donor candidates; and securing volunteer leadership. The timeline must respect the need for regular cash flow and not be so long as to demand an impractical level of attention and commitment, particularly on the part of the President and volunteer leaders. It is anticipated that with hard work and discipline, the campaign can be completed by spring 2024; however, if additional time is necessary or funding opportunities remain, the campaign period can be extended.

4. The campaign be conducted in three distinct phases:

- **Readiness Phase** **February 2020 - August 2020**

A three-phase schedule builds in time at the front end for the Board of Directors to review the Campaign Study, resolve to undertake a campaign, approve a budget for the campaign, continue to refine and adjust the list of campaign objectives, and review draft Legacy Naming Opportunities. The President will focus on hiring development resources to manage and execute the campaign and a CFO/COO to enable him to devote

the necessary time to the campaign; improving SSC's overall advancement infrastructure; identifying and recruiting Campaign Cabinet members; recruiting additional Board members; and building relationships with leadership-level prospects. The Planning Phase does not preclude early gift discussions with study interviewees and other prospective donors who are ready to make a commitment.

- **Leadership Phase**

March 2020 - August 2021

Leadership Phase fundraising would overlap with the Readiness Phase, at which time efforts would be focused on top-level transformational six- and seven-figure gifts. Solicitation would begin internally with the Board of Directors, Campaign Cabinet, senior staff, and a select group of top prospects who are adequately informed about SSC's plans, have been sufficiently engaged, and are prepared to make an early leadership gift commitment. Major gifts received during this phase will elevate the bar for giving to Seacoast Science Center and establish momentum for the entire campaign. The Leadership Phase will also provide an important opportunity to test the likelihood of reaching the \$10 million goal.

While the purpose of the Leadership Phase is to keep the effort internally-focused while soliciting top gifts, this should not imply that the campaign must operate in secrecy. In fact, a successful effort will demand rolling the campaign out sequentially to individuals who will become sufficiently invested in the outcome to ensure their maximum gift participation. Near the end of this phase, the Board of Directors will be given an opportunity to reconsider campaign assumptions in light of early fundraising achievement and to modify the public goal accordingly, prior to the formal announcement.

- **Public Phase**

September 2021 - May 2024

The Public Phase of the campaign will begin with a formal announcement and kick-off event in September 2021. During the remaining two and a half years, efforts will be focused on continued identification, cultivation, and solicitation of top prospects, especially those who were not approached during the Leadership Phase. As construction proceeds, early lead donors will be invited to hard hat tours and special presentations. During this period, attention will be given to the development of a general gifts program to invite broad-based campaign participation from the entire community. If necessary, the Board of Directors could decide to further extend the Public Phase, depending on campaign momentum, volunteer energy, and additional gift potential.

5. Campaign readiness efforts from February through August 2020 be focused on the following key tasks:

Board of Directors/President

- a) Review the Campaign Study report, presented at the January Board meeting.
- b) Pass a formal resolution to undertake a capital campaign.
- c) Refine campaign objectives, finalize plans and costs for renovation, exhibit installation, and new construction.
- d) Determine financing options and timetable for construction.
- e) Secure all permits and authorizations to proceed with groundbreaking and construction.
- f) Work with staff and counsel to further develop the Case for Support, providing more detail around the use of campaign funds and impact.
- g) Attend a board training session to learn about the key elements of campaign fundraising and their role in the campaign.
- h) Assist in recruitment of Campaign Cabinet and co-chairs.
- i) Communicate the following to interview participants: the study's broad findings, the decision of the Board regarding whether to move forward with the campaign, and the updated Case for Support.
- j) Begin peer solicitation for BOD campaign gifts.
- k) Build strategies and activities for and undertake early gift discussions with those interviewed for the campaign study, as appropriate.
- l) Establish an active Nominating/Governance Committee charged with identifying top-level Board candidates for the Class of 2020.

President/ Campaign Counsel

- a) Expand on this detailed campaign implementation plan.
- b) Determine and act upon needed changes to ensure the advancement department is properly structured and staffed to execute a robust campaign and ongoing fundraising activities.
- c) Hire CFO/COO as a member of the senior executive team.
- d) Identify and research top donor prospects and create systems for prospect tracking and database management.
- e) Ensure that sufficient operational infrastructure is in place: human resources, data management, reporting systems, third-party vendors.
- f) Create a menu of Legacy Naming Opportunities.
- g) Design a stewardship plan for current donors and those interviewed for the campaign study, using staff and other resources.
- h) Finalize Gift Acceptance & Recognition policies.
- i) Recruit the Campaign Cabinet.
- j) Produce early campaign materials and develop a Briefing Packet that outlines the Case for Support and will be used as the primary fundraising tool during the Leadership Phase.

- k) Draft a three-year campaign budget that provides adequate resources for the campaign, including staff, counsel, publications, data management, campaign events, and allocations to the maintenance reserve fund.

6. A nucleus fund of \$5-\$6 million be secured during the Leadership Phase, prior to public announcement of the campaign goal.

Because the upcoming campaign will be the first in SSC’s history, it is essential that the effort be deemed a success. Obtaining sufficient transformational and leadership gifts must be a priority prior to the public announcement. By the time the campaign goes public, at least 50% of the goal should be committed and the Center should have a good idea of the sources of remaining funds. A nucleus fund of not less than \$5 million will create a persuasive case and a favorable climate for success within the Seacoast community. As mentioned earlier, a principal strategy in phasing the campaign is to “field test” the potential for success of a \$10 million working target and to adjust the goal, up or down as appropriate, prior to launching the Public Phase.

7. Campaign commitments be secured in the form of outright gifts and pledges payable over a period of three years.

For SSC to achieve its campaign objective, donors will be encouraged to make gifts at “capacity” or “stretch” levels - reflecting individual resources and ability. Donors should be given the opportunity to make pledges payable over a three-year time period, a schedule that will serve as an incentive for more expansive commitments. It is anticipated that the majority of Leadership Phase donors will designate their gifts as unrestricted to the campaign objectives, providing maximum flexibility to SSC. Donors whose gifts are intended for specific construction aspects should be encouraged to compress their pledge payment schedule in order to accelerate cash flow. If necessary, longer pledge periods may be accommodated based on specific donor circumstances and to maximize giving.

8. An organized prospect identification, research, and evaluation program be undertaken and considered a priority during the Readiness and Leadership Phases.

SSC has done a partial database screen and has subscribed to DonorSearch. Prospect research is a time-consuming but fruitful process. Beginning immediately, progress must be made on the systematic identification and qualification of major donor candidates, thereby expanding the prospect pool. Research can also help clarify SSC’s gift aspirations for existing donors who appear to have high net worth but whose sights for giving to the organization have been modest.

Fundraising is a relational business. Progress will be accelerated and gifts will be higher when there is an established relationship between a SSC stakeholder and a prospective donor. In addition to staff-driven database research, prospect screening must become an ongoing responsibility of the advancement department. As names are brought forward, they should be incrementally added to the master screening list. Whenever possible, this list should be reviewed by Board members, docents, senior staff, campaign donors, and community leaders. Separate screening lists can be created for corporate/business entities and foundation trustees. We recommend that every face-to-face conversation with a donor include a request to meet again for 30 minutes to screen names.

9. The campaign emphasize face-to-face solicitation and staff and volunteers operate on the premise that all donor candidates, including Board members, will be visited personally to discuss campaign objectives and to secure their financial support.

During the first year especially, SSC leadership should focus their engagement strategies and solicitation visits on Directors, study interviewees, and selected high-net-worth donor candidates.

10. The Annual Fund maintain high visibility throughout the campaign period.

Due to SSC's ongoing and increasing operating needs, it is critical that the Annual Fund be sustained and strengthened, even while the capital campaign is underway. Care should be taken to coordinate campaign solicitations with the annual appeal in order to avoid the appearance of redundancy and to maximize gift support to both fundraising efforts.

11. Prospects be solicited for both Annual Fund gifts and a one-time, multi-year commitment to the campaign.

During the campaign period, Annual Fund solicitations and campaign asks should remain separate. Accordingly, campaign prospects will be solicited for two types of gifts during the campaign period:

- Their unrestricted Annual Fund contribution, which will continue to be requested each year and hopefully increased; and
- A multi-year capacity commitment to the campaign.

For the “double ask” strategy to be an effective solicitation tool, donors must be carefully briefed on SSC's fundraising expectations and solicitors must be trained to

incorporate discussion about the meaning and distinction of campaign gifts with all prospects under cultivation.

12. SSC include and solicit staff for gifts to the campaign.

Campaigns are most effective when they operate in an atmosphere of high expectation, optimism, urgency, and fun. During the Leadership Phase mobilization, SSC should solicit all staff members, giving them an opportunity to participate in this community-wide endeavor. While the financial results of these solicitations may not be large, staff participation will demonstrate strong internal support for the campaign and may serve to spark the interest and engagement of other prospective donors.

13. A range of appropriate and proportional Legacy Naming Opportunities be carefully developed that is consistent with SSC's culture and spirit.

Although public recognition will not hold appeal for all donors, meaningful recognition opportunities should be provided to those contributors wishing to commemorate their commitment to Seacoast Science Center. Alternatively, some donors may gravitate toward recognition opportunities that would honor others. Named program funds or positions could also be an attractive opportunity for those who wish to support human capital rather than facilities.

Central to the overall recognition program, SSC should develop a preliminary list of Legacy Naming Opportunities, which can be revised or modified during the Leadership Phase and be customized for selected donor candidates. The list should reflect the gift requirements of the table of gifts and contain opportunities associated with both physical spaces and programs. Facility naming opportunities, many of which will represent new construction and spaces, will also include unnamed existing building spaces, even if there are no plans to renovate them during the campaign.

Because naming opportunities and uses of funds can be uncoupled, there may be donors, for example, who wish to support a program area or endowment, but would like their name associated with a space within the building.

14. Appropriate, well-trained Campaign Cabinet volunteers be secured to correspond with the proposed phasing of the campaign.

It is critical to the success of the campaign that it have the support of a strong, dedicated working group of volunteers. During the Leadership Phase, a Campaign Cabinet will work closely with the President, campaign staff and counsel, serving as the chief solicitation team and providing campaign management, oversight of strategy, and advice regarding development of the nucleus fund. The Cabinet will also assist with the early identification and qualification of leadership prospects and will oversee the

appointment of additional volunteers for the Public Phase of the campaign. We anticipate that, at a minimum, the Cabinet would continue its work throughout the Leadership Phase and eventually form the core of an ongoing Advancement Committee.

Once the Public Phase is underway in late 2021, a broader committee structure will be organized to reflect community-based strategies.

15. SSC commit adequate resources to the advancement effort, for at least the duration of the campaign and that the campaign be self-financing.

It is assumed that SSC's campaign will be primarily staff-driven with strong volunteer support. A campaign organization must be built, volunteers trained, materials produced, and cultivation/solicitation expenses incurred. Substantial thought, planning, and budget investment must also be dedicated to staffing, specifically in advancement and campaign functions.

A key component of campaign planning is development of a comprehensive capital budget for conducting the effort. Costs of a typical campaign, including related staff, counsel, and hard costs, will run between 5% and 10% of total revenue (in addition to the ongoing costs of the Annual Fund), and these should be factored into the final goal.

16. The capital campaign be utilized as an educational vehicle to establish firmly and definitively Seacoast Science Center's identity, vision, and value proposition in the hearts and minds of stakeholders.

An important secondary purpose of the campaign will be to fully explain SSC's mission, vision, and future plans in a manner that can receive the enthusiastic support of the organization's stakeholders and the public at large. The campaign will signal the prominent role that enhanced philanthropy will play in the Center's future. It's important to keep in mind that despite SSC's best attempts to educate and inform all members of the community, each of the proposed campaign objectives will have supporters and a handful of detractors. Accordingly, care must be taken in the way each project is presented within the framework of the campaign and in identifying those prospects for whom each project will hold the greatest appeal.

CONCLUSION

Seacoast Science Center has established itself as a leading educational resource in the state of New Hampshire. Attracting nearly 100,000 visitors each year, SSC's reach and influence extends throughout New England. At a time of growing concern about the climate emergency and threats to our ocean environment, SSC's mission to "spark curiosity, enhance understanding, and inspire conservation of our Blue Planet" resonates more than ever. After 27 years of financial stability, steady leadership, and

successful operations at Odiorne State Park, Seacoast Science Center is now poised to fulfill its long-range vision by embarking on a first-ever capital campaign.

The consultants of Copley Raff are pleased to have had the opportunity to undertake this Campaign Planning Study to provide observations, insights and recommendations that will inform the strategy and design of the pending campaign. Focusing on the organization's strengths and addressing challenges identified through the study will enable SSC to carry out an ambitious and successful campaign and will position the Center more competitively in terms of ongoing institutional advancement.

The success of a major campaign depends upon volunteer and staff leadership in the form of personal giving and commitment of time and enthusiasm. Since Seacoast Science Center has never mounted an aspirational fundraising initiative, it will be important to create momentum and legitimacy through early transformational giving. Donors with this capability have been identified and are being engaged.

We wish to extend our appreciation to the leadership of Seacoast Science Center for the opportunity to be of assistance in this worthy undertaking. We are also grateful to those who assisted with the preparation, planning and execution of the study.

We look forward to SSC's successful implementation of the recommendations herein and stand at the ready to contribute to Seacoast Science Center's transformation and success.

**SEACOAST SCIENCE CENTER
CAMPAIGN FOR OUR BLUE PLANET
~ DRAFT ~**

Envisioning a Healthy World Ocean

All life on Earth depends on a healthy Ocean. It is up to us, our planet's only caretaker, to take action to protect this fragile resource. There is no Planet B.

At Seacoast Science Center, we believe the key to inspiring conservation of our natural resources lies in education and direct experience with marine ecosystems. Understanding the challenges, considering solutions, adapting behavior, and taking action will have a transformational impact on our New England waters. As we contemplate the future, we look to the ocean for our inspiration.

Seacoast Science Center

Seacoast Science Center is a beloved anchor of the community – a place to learn and have fun while developing an appreciation for our coastal environment and its inhabitants. At our home in historic Odiorne Point State Park, one of New Hampshire's ocean-facing treasures, we inspire visitors to discover the wonders of our natural habitats. Families are encouraged to get their feet wet in the tide pools, explore the touch tank full of wonderful creatures from the Gulf of Maine, be awed by the sea life in aquarium exhibits, and develop a deeper appreciation for the preservation and health of our oceans.

As the only ocean-centric science museum in the region, Seacoast Science Center is an integral part of New Hampshire's cultural economy and educational opportunities, attracting 90,000 visitors annually, with 30,000 participating in school-related field trips and summer camp programs. A valued public resource, we encourage social interaction, community collaboration, and the pursuit of shared interests.

We Are Part of the Solution

After 27 years of offering hands-on education to thousands of New England residents and visitors from around the world, Seacoast Science Center is poised to further its mission to spark curiosity, enhance understanding, and inspire conservation of our Blue Planet. We must advance our ability to feed the emotional and intellectual curiosity of our children while fostering a sense of environmental responsibility and personal empowerment. We must protect

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our marine mammals, whose ecosystems are threatened by climate change. We must expose more young people to marine science, encouraging them to pursue ecology-oriented careers.

As strong proponents of a conservation ethic, Seacoast Science Center plays an important advocacy role as experts in ocean matters. There is increasing urgency to our work as we are called on to amplify our commitment to the ocean.

Take Action Through Investment

To expand our mission and programs, we are considering undertaking a \$10,000,000 capital campaign. Funds raised will transform the Seacoast Science Center through a new Marine Education Annex, enhanced exhibits, an onsite marine mammal rehabilitation facility, additional gathering spaces for visitors and staff, and increased financial security. To create a transformational experience for our visitors, we will devote more resources to educational opportunities and ocean science by focusing on:

Expanded Marine Mammal Conservation and Education Opportunities

We will increase the educational impact and visibility of the Marine Mammal Rescue program with the addition of a marine mammal rehabilitation facility. The onsite facility will allow us to leverage the educational opportunity afforded by animal rehabilitation as we provide the highest standard of short-term care for rescued animals.

Larger Scale Aquarium Exhibits to Meet Contemporary Expectations

We will expand our popular Gulf of Maine Hall and touch tank exhibits with contemporary floor-to-ceiling aquaria designed to advance relevant conservation messaging. Our goal is to provide an unforgettable experience for our visitors through greater variety, a more impactful scale, and increased relevance in our rapidly changing world. These new exhibits will encourage return visits and excel as teaching resources.

Commitment to Culture and History

We will rededicate the historic Sugden House as cornerstone exhibit space for the interpretation of NH Seacoast culture and history. Through exhibits, new programs, and creative partnerships with other historically focused organizations in the community, we will advance an Odiorne-based perspective on human-marine interactions over time, pausing in the present and inviting visitors to consider the future.

Putting More “Science” in Seacoast Science Center

We will build a new teaching laboratory facilities and classroom spaces that will give students and visitors the opportunity for a deeper marine science learning experience. New laboratory teaching space will add critical experimental layers to SSC field experiences and expand internship and other educational opportunities for grade school, high school and college students.

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Environmentally Conscious Construction and Ongoing Operations

Expansion plans include improved exhibit and teaching spaces, as well as enhanced visitor amenities and meeting rooms. The entire project will be implemented using climate - sensitive, environmentally conscious plans and construction techniques. The result will be a transformed Seacoast Science Center re-engineered around sustainable energy options with a minimized operational environmental impact.

Campaign for our Blue Planet

A major capital campaign for Seacoast Science Center will be instrumental in increasing public awareness about ocean conservation and environmental responsibility. Our educational model is based on the belief that through first-hand interactions, people establish personal connections with the natural environment. Heightened appreciation of precious ocean resources and their changing ecosystems will lead to greater personal commitment to the health of our planet and motivation to take action in our daily lives.

After listening carefully to our community, we recognize that it is time to respond to external expectations by making a meaningful investment in Seacoast Science Center’s visitor experience and public programming. Our most significant long-term partner, the NH Division of Parks and Recreation is enthusiastic and supportive of our transformational vision.

Your Involvement Matters

Generous philanthropy from those who appreciate the mission and impact of Seacoast Science Center will be essential to making our vision a reality.

Campaign contributors will be recognized through Legacy Naming Opportunities that will include spaces on the renovated main floor, new second floor, and Sugden House. Your name, or the name of someone you choose to honor, can be proudly and permanently linked to the important work of the Seacoast Science Center.

Thank you for agreeing to meet with one of our consulting partners at Copley Raff Inc. and for sharing your thoughts and insights about our campaign intentions.

For more information contact:

Jim Chase, President and CEO
Seacoast Science Center
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603-436-8043 x15
978-270-4404 (Cell)

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*Draft for feasibility study purposes only. Details and numbers are subject to change.*



## **PROPOSED \$10M CAMPAIGN OBJECTIVES**

*(For feasibility study purposes only; details and numbers are subject to change)*

### **1. Contemporary expanded public exhibition and community spaces – \$5 million**

- Rescale and expand the public spaces and exhibits throughout the museum
- Utilize dramatic vertical architecture with floor to ceiling aquaria and exhibits. To include floor-to-ceiling aquarium exhibits in an atrium-style space
- Replace outdated, energy inefficient table-top tanks with larger, “human scale” in-wall exhibits, where appropriate.
- Include visitor amenities such as air conditioning, café, retail space, and restrooms
- Add rooftop observation deck
- Feature and expand children’s exploration/early learner space
- Enhance the touch tank experience, AZA (Association of Zoos & Aquariums) compliant

### **2. Marine mammal exhibit featuring actual on site rehabilitation – \$2 million**

- Space for up to 6 animals short term (96 hours)
- Longer term rehab areas for 2-4 animals (up to 3 months)
- Public viewing area/real time exhibit space where visitors can observe SSC staff work with animals in their care as they execute various rehab activities (feeding, first aid, health assessments, etc.)
- Live webcam so visitors may gain a better understanding beyond what is observed behind the one-way glass
- Quarantine tanks to ensure new potentially sick animals do not infect those already in care and on the mend

### **3. New marine science laboratory, public program, education, and function spaces – \$1.25 million**

- Dedicated marine science laboratory space (ground floor)
  - seawater tables for live animal examination and experiments
  - AV equipment that supports projected microscopy in a teaching space
  - lab suitable for quantitative science, adding a more experimental follow up experience to SSC’s camp, school and field programs
- Flex teaching space suitable for camps, school programming, meetings or functions. Expected to include outdoor deck space (second floor and ground floor)
- Teaching “nooks” throughout the building for public programming (ground floor, in exhibit halls, and in children’s exploration/early learner space)



**4. *Environmentally conscious construction and sustainability – \$1.0 million***

- To include energy efficient heating air conditioning, audio visual, digital technology, and aquaria support systems. Thoughtful energy utilization throughout.
- Roof top solar array as demonstration/exhibit & to reduce energy costs
- Construction as example of sustainability relative to:
  - design relative to sea level rise, coastal flooding
  - materials selection
  - finishes selection

**5. *Interpretation of cultural history in the historic Sugden House – \$0.75 million***

- The Sugden House was built in 1920 as a seaside cottage and is the only residence on Odiorne Point to survive construction of Fort Dearborn in 1940. Given its historic relevance, the Sugden House will be rededicated to the interpretation of the culture of seacoast NH and Odiorne Point State Park
- Cultural content to be presented with the unifying theme of human engagement with the sea
- Exhibit topics likely to include
  - Native American history
  - First settlers, colonial history
  - Victorian era usage
  - Military history
  - History as a NH State Park
- Designed to accommodate and encourage exhibitions from local historical societies so that they may display relevant content in front of up to 100,000 annual visitors
- Porch spaces will be redesigned to support temporary/traveling exhibits of art, science, and cultural programs related to seacoast NH
- Modest lecture space to accommodate intimate (25 person) programs and lectures

**SEACOAST SCIENCE CENTER  
PLANNING STUDY QUESTIONNAIRE**

**INTERVIEWEE:**

COMPANY / TITLE:

ADDRESS:

PHONE:

DATE:

EMAIL:

RELATIONSHIP to SSC:



- 
1. How did you originally become involved with Seacoast Science Center?
  
  2. Why do you remain involved / giving to SSC?
  
  3. Have you **visited** Seacoast Science Center in the past year? What features/exhibits draw you to make repeat visits?
  
  4. What do you believe SSC **does well...can improve?** (if not already covered)
  
  5. You have received a draft document that outlines Seacoast Science Center's preliminary **Campaign Case for Support**. What is your reaction to/impression of the needs and objectives as they are described?
    - Do you believe SSC's need to expand its facilities and programs is legitimate and makes sense?
  
    - What differentiates SSC and makes it special?
  
    - Which aspects of the Case do you think are the most important?

- Does the Case contain enough urgency in your opinion? The “why now?”  
If not, what do you feel could strengthen that part of the case?
  
- Is there anything missing that you believe should be articulated in the Case for Support?

6. Have you been asked to make a **financial contribution** by someone from Seacoast (staff or volunteer)? If so, please describe how that occurred and your reaction to the experience.
7. After the campaign for SSC is outlined and ready to launch, would you have interest in **another meeting** to discuss how you can support it?
8. Where do you rank SSC among your personal **philanthropic priorities**?
- At the top       Near the top       In the pack       Low

What types of organizations **rank higher** than SSC in terms of your philanthropic priorities?

9. Are you **personally involved** with fundraising efforts in support of other organizations? How?
10. Do you have **relationships** to philanthropists, business leaders or foundations that **would have interest in learning** about Seacoast Science Center, its mission, and why you are supportive?

11. Would you be willing to provide us information and/or **assist in facilitating an introduction** (not necessarily asking for a gift)?

*(SCREENING: If this subject is well received, ask whether they would be willing to, at a future meeting, review a list of philanthropists, business leaders and foundations that could be helpful to SSC's advancement goals)*

12. Would you be willing to **serve as a volunteer** for the campaign knowing that you would be well supported by advancement staff?

#### **PRESENT GIFT TABLE**

13. We consider your indication of support as a significant part of this assessment. In most campaigns, fewer than 100 individuals will give 50 to 80 percent of the total goal. A **general understanding** of the potential for your support is needed to enable SSC to set an ambitious yet realistic campaign goal. If you were to give at a generous level over 3 years, where on this table of gifts would you place yourself? (Present Gift Table)

- |                                                |                                                  |
|------------------------------------------------|--------------------------------------------------|
| <input type="radio"/> Upper 1/3 <sup>rd</sup>  | <input type="radio"/> Wouldn't say               |
| <input type="radio"/> Middle 1/3 <sup>rd</sup> | <input type="radio"/> Indicated gift not on list |
| <input type="radio"/> Lower 1/3 <sup>rd</sup>  |                                                  |

14. SSC'S expanded facilities will require funds for ongoing maintenance and long-term sustainability. In order to protect your investment, would you be supportive of 10% of your campaign gift being allocated to a **Maintenance Reserve Fund**?

15. Would your potential campaign gift to SSC be favorably affected if there were a **match offered** to double or triple your contribution?

16. Would you or your family be interested in discussing **Legacy Naming Opportunities** to enable Seacoast Science Center to show its appreciation for your philanthropy? Have you considered remembering SSC in your will?
17. Do you have **any other ideas** and comments that you would like to share with us concerning Seacoast Science Center and its fundraising potential that would be pertinent to this study?

**SUMMARY FOR INTERVIEWER ONLY:**

| <b>INTERVIEWER:</b>                    | <b>LARRY</b>                        | <b>SUE</b>                     | <b>DIANE</b>               |                                    |
|----------------------------------------|-------------------------------------|--------------------------------|----------------------------|------------------------------------|
| Interviewee's attitude:                | <input type="radio"/> Very Positive | <input type="radio"/> Positive | <input type="radio"/> Fair | <input type="radio"/> Negative     |
| Likelihood of participation:           | <input type="radio"/> Excellent     | <input type="radio"/> Good     | <input type="radio"/> Fair | <input type="radio"/> No potential |
| Leadership potential:                  | <input type="radio"/> Outstanding   | <input type="radio"/> Good     | <input type="radio"/> Fair | <input type="radio"/> None         |
| Development volunteer potential        | <input type="radio"/> Excellent     | <input type="radio"/> Good     | <input type="radio"/> Fair | <input type="radio"/> No potential |
| Source of Prospect Leads               | <input type="radio"/> Excellent     | <input type="radio"/> Good     | <input type="radio"/> Fair | <input type="radio"/> No potential |
| Personal gift:                         | <input type="radio"/> Definite      | <input type="radio"/> Probable |                            | <input type="radio"/> Not Likely   |
| Company gift:                          | <input type="radio"/> Definite      | <input type="radio"/> Probable |                            | <input type="radio"/> Not Likely   |
| Foundation /Corporate Relationship(s): |                                     |                                |                            |                                    |

**ADDITIONAL COMMENTS:**



## SEACOAST SCIENCE CENTER CAMPAIGN STUDY CITATIONS

### PERCEPTIONS OF SSC

- *SSC is a “motherhood and apple pie” organization with no controversy.*
- *SSC needs something to attract and interest the adult public, make the place more enticing to an adult audience through programs, lectures. Right now it’s only events.*
- *SSC is unique but they haven’t figured out how to talk to their audience.*
- *Because SSC is on state land, there’s a public perception that the state should support it.*
- *SSC needs to heighten their visibility and elevate their image as a Seacoast and New Hampshire resource.*
- *They’re missing the boat with pre-teens, teenagers, and young adults.*
- *Have they considered overnight “sleepovers” for scout groups and kids? These are very popular at science museums.*
- *SSC feels static. I’ve been out of the loop for 10 years and the place still looks and feels the same.*
- *They could do a better job in science education, especially with middle and high schoolers. Are they partnering with the local public and private schools? Approach the department heads, teachers, curriculum people, not the school boards. SSC can fill a void and supplement in-school STEM education?*
- *SSC feels like a place for children.*
- *SSC should be on site when the presidential candidates are campaigning in NH. Jim Chase should be at places like the Red Arrow mingling and introducing himself. An opportunity for media exposure, TV, publicity. Bring a keepsake for the candidates (whale or seal with prominent SSC logo) for photo ops and newsletter material.*
- *I have a high-net-worth friend who brought his young grandchildren to SSC. It took them 15 minutes to make it through the whole place. He was underwhelmed and considered it a “one and done” visit.*
- *They need to find a way to appeal to all ages, hold people’s interest.*
- *Right now SSC teaches science in sound bites. They need more in-depth, hands-on programming. How to make better use of this resource to make it a truly educational experience? And, by the way, their touch tanks are NOT full of wondrous creatures.”*

- *I hear Marine Shoals has a waitlist for their classes and internships. Can SSC fill some of this demand?*
- *SSC is accessible, not too big or overwhelming, the familiarity is nice.*
- *Have they thought of collaborating with commercial fisherman and lobstermen? These guys can be a huge resource and they have tons of money. There could be program tie-ins, lectures, exhibits, internships. SSC should build these relationships.*
- *The future is about collaborations and partnerships. All investigators are required to do broader impact work. SSC could consider partnering with UNH's underwater robotics lab or the UNH-Cornell group working on Appledore. Tap into these rich resources, hire grad students to run the exhibits.*
- *SSC has a wonderful track record and they need to build on this.*
- *They should aim to create a community of lifelong learners, offering programs and educational opportunities across the lifespan.*
- *Can college students intern at SSC to get J-Term credit? They need more educational opportunities outside of the summer months.*
- *SSC never changed enough to motivate you to come back.*
- *SSC is missing an opportunity to use that beautiful 100-acre park. Expand the view and look at the history of the land in addition to the ocean. Coastal habitat, bats, owls, stars, trees. They would need additional people to lead this.*
- *Their summer camps are amazing, interactive, hands-on.*
- *People are concerned about climate change, global warming, ocean health.*
- *Are they partnering with other organizations? UNH would be the logical first choice but if they already are, we don't hear about it.*
- *SSC needs to do a better job managing groups of kids and field trips. There can be up to 30 school busses in one day and it's a zoo. The schoolteachers consider it a free day and check out. SSC needs these visits for their financial survival but how can the volunteers and naturalists better engage an entire class while walking through the facility? Are there opportunities to split up the masses for smaller group engagement? Teachers provide no intro before the kids come and no follow-up when they get back. SSC sends survey forms to the teachers following a field trip. None get returned. How can SSC start to measure the educational impact of these visits and ensure that they're making a difference?*

## EXHIBITS

- *SSC is known for snippet exhibits, whatever they design must provide a larger context.*
- *Has SSC ever collaborated with the New England Aquarium? Other potential partners could include the Portland Discovery Museum, Woods Hole, Bigelow, Stellwagen Bank Marine Sanctuary.*
- *The Smithsonian exhibit was a terrible waste. Boring, wordy, and the prep time was considerable. SSC can't store the frames that were built so they had to be burnt.*
- *Their exhibits and educational programs need to be more immersive, go beyond the surface stuff. E.g. 3D immersive experiences that offer different scenarios about climate change. You can actually simulate being underwater, stuff floats by, you hear the rumble of the surf.*
- *We couldn't even find the H<sub>2</sub>O exhibit because the signage was so poor. I understand from others that we didn't miss anything.*
- *Their exhibits definitely need to be refreshed. Need some new or traveling ones about climate change and energy conservation and how that affects the ocean and planet.*
- *The Smithsonian is a big deal but that exhibit was such a disappointment, especially considering the labor and expense that SSC incurred.*
- *Jim and his staff should look at a whole bunch of places, including Mystic, Boston, Monterey, Scripps, Shedd, Atlanta, Seattle, Tampa, see what's new, contemporary, relevant, appropriate for our part of the ocean. Many are bigger organizations but good ideas can be scaled. Talk to Sausalito about MMR rehab.*
- *Their exhibits could be much more interesting and sophisticated. With greater technology and the potential for immersive/interactive experiences, capital costs go down. What about an exhibit about sea level rise, which is right out the back door? What might Odiorne Point look like in the future?*
- *Has there been an exhibit about local aquaculture? Seaweed and kelp are big right now. Mussels, oysters, scallops, fishermen, lobstermen, scientists - there are so many local resources out there.*

## FACILITY

- *There's a natural resistance around buildings and high overhead; people like to support programming*
- *SSC will need an experienced facilities committee to manage the building once it's done. Great to have a maintenance reserve fund but a facilities committee will help them avoid having to spend that money.*
- *Don't take on anything you can't afford to keep up.*
- *They're trying to jam a lot into a finite space. It's hard to put in substantial programming without expanding the footprint. I'm sad that they can only add that partial second floor.*
- *What kind of maintenance endowment will be necessary to support this?*
- *Having a long-term lease with the state is important and donors need to be educated about this before they'll make an investment.*
- *Sugden House may be historic but it's a very poor space with limitations.*
- *All the floor plans and expansion plans seem superfluous without knowing exactly what types of programs they're considering. Space considerations should be driven by programming.*
- *I'm concerned about the impact of rising sea levels upon the Center. There's a risk and they need to look into the future.*

## DEVELOPMENT/FUNDRAISING

- *I'd guess they'll need an extra \$1M per year to support the ongoing operating costs. What's the plan to raise this?*
- *They need much better development people if this thing's going to fly. Sophisticated, mature fundraisers with the right personality who excel at schmoozing, cultivating donors. The people SSC has now are very low level. Someone of the caliber of Gail Carolan at the Music Hall. She gets it done.*
- *What do the projections look like for additional overhead, higher expenses, and budget increases? They need to be able to support a larger operation.*
- *They need to move beyond event-based fundraising. It's important for friend-raising but is a very expensive way to raise money.*
- *They need to make their donors feel purposeful and engaged.*

- *SSC needs better databases and data mining. Their technology is archaic and doesn't have the ability to analyze donors and memberships, which in turn creates strategy.*
- *I'm worried about a campaign sucking money out of their regular annual donations/operating budget.*
- *SSC is behind the curve and needs to be competing in the philanthropic marketplace. Don't they have development people? If so, they're invisible.*
- *Their fundraising, especially for a campaign, could be adversely affected by an impending economic downturn.*
- *I'm shocked that SSC doesn't have an endowment and others would be as well. Even if it's not large, they should have something. Lack of a financial cushion doesn't exactly instill confidence in the organization's finances. My generation would support this.*
- *Once better science learning and STEM education are taking place at SSC, and they're serving a broader range of ages, they should get the statistics out there. This will help with foundation support and will attract attention within the community.*

## CAMPAIGN

- *I see this as a big gift campaign with about 50 families giving the lion's share.*
- *Are the members of their Board prepared to step up and be major donors?*
- *Jim will be a great fundraiser. He needs a crack staff who can manage and deploy him to the right prospects.*
- *They should look at the cost of rehabbing the place vs. the ability to attract repeat visitors and new visitors. Is there enough ROI to warrant this investment?*
- *I'm concerned about their probability of success. This will take very careful planning and foresight.*
- *The cultural history aspect should broaden the view beyond Odiorne Point. Broaden the perspective. Kittery, for example, is really an appendage to Portsmouth.*
- *I like the thought of an exhibit and programming about focusing on design to adapt to climate change, walk people through the back rooms, explain energy efficiency, conservation techniques and materials.*
- *Jim should meet with Brian LeMay, director of the Portsmouth Historical Society.*
- *It wouldn't hurt their campaign to have a high powered honorary committee on a more national scale. Names and spokespeople like Al Gore could make local people pay attention. SSC needs more out-of-state visibility.*

- *The fact that the case is mostly bricks-and-mortar based is a problem. Education has to happen there. I'm concerned they haven't reached out to who their educators are going to be and designed the programs? Marine science education plans should drive the space decisions.*
- *They need to look carefully at adding MMR rehab, which is expensive and could be a drain on ongoing operations. What if there are no animals in house and it ends up being dead space?*
- *I like the idea of having a lab and offering more academic opportunities to people of all ages.*
- *Looking at the plans, there doesn't seem to be much more in terms of exhibit space. Will it be the same gallonage? Larger aquariums, more fish, new fish? They need to get more specific. Even the current fish could use more space. Don't oversell this and infer 50% more live creatures if instead it's just giving the current residents additional room. People will get more excited if SSC clarifies and reveals their plans for the aquarium portion of the campaign.*
- *I think the MMR rehab piece is a waste of money in light of the space allocated. One or two seals at a time? They need pools, there could either be too many animals or none at all. Vets would have to come on a pro-bono basis to support the effort. If there are no animals in house, how would they find and procure animals in distress from other institutions?*
- *Will there be enough repeat/new visitors and memberships to sustain this?*
- *They need interactive educational programs geared for older kids. It's hard to keep 12-15 year olds busy and engaged over the summer. We want our kids to be busy, productive, joyful.*
- *SSC needs to reach out beyond the immediate geographic area. Expand the marine science message beyond NH.*
- *The MMR addition could be controversial. A lot of people despise seals. Will it attract enough new and repeat visitors?*
- *With the added space they should begin hosting other events here. Diversify the income streams and get some rental revenue.*
- *In projecting increased overhead have they looked at the additional staff expenses? In my opinion, each breakout bullet should have staff listed under it.*
- *Their success will be based entirely on leadership, success is driven from the top.*
- *It would help to have a 7-figure donor be a co-chair of the campaign, someone with a high profile to make people pay attention.*

- *Since the state owns the land, the Case will have to make it clear that people's donations will not be going to the state.*
- *SSC should tap Susan Labrie for the historical interface.*

## GOAL

- *\$10M seems high to me, \$7.5 or even \$5 sounds more realistic.*
- *\$10M seems light if they want to accomplish all of this.*
- *I definitely think it's feasible for SSC to raise \$10M, but it isn't going to be easy.*
- *Is \$10M really enough to do all of this? They need to build an endowment on top of this and determine the additional operating income that will be required for long-term sustainability.*
- *\$10M is a good number. More would be reaching too far.*
- *If they can't raise the entire \$10M within a few years, can the campaign be phased or extended? If so, which parts of the construction could be delayed? They need to have a Plan B in place.*
- *\$10M is a big number up here. Bigelow raised \$7M and it took them 8-10 years. The Music Hall went through hell in their campaign. It's nice now but was a slog.*

## PROSPECTS

- *Don't underestimate those mid-range gifts in this region. The core, future stakeholders.*
- *They need to know where the big gifts are and secure the first \$5M ASAP. Otherwise it would be very high risk.*
- *There is big potential private sector refurbishment at Prospect Park.*
- *There's a wealth of people in this area who could contribute between \$250K and \$1M. You just have to figure out how to get in front of them.*
- *They should go after donors who support environmental causes.*
- *I worry about local competition for philanthropy. It's a small pool of donors being contacted by all the non-profit organizations.*
- *The philanthropic community in this area has changed. There's a new surge of deep-pocketed people - a younger Rye crowd with money.*

- *Downtown Portsmouth is booming, tons of development, new hotels, office parks. How to tap these companies? There are HQ's of companies that started in this area.*
- *Around here, a limited pool of people are hit up with increasing frequency and for larger gifts.*
- *Find the people with money who are interested in science.*
- *Do they have a base of donors prepared to support a campaign of this magnitude?*
- *Coming from out of state, I can say that this is a strange area for philanthropy. Full of provincial New Englanders who can be very cheap. You have to offer a lot for small dollars to satisfy these people.*
- *Rye is not that generous. Old-time Yankees. There's new money but older people get the votes.*
- *There's lots of new money and affluence in the area but many of these folks are not that generous - more materialistic.*
- *The corporate opportunities around here are extraordinary and SSC needs to tap into this. Enough with golf sponsorships, it's time to have conversations with the decision makers about big philanthropy. Put their names on spaces and exhibits. Jim and the Board need to get out there and work the community.*

#### **INTERVIEWEES ALSO MENTIONED COMPETING CAMPAIGNS IN THE AREA**

- *Strawberry Banke - in the midst of a \$13M campaign*
- *NHSPCA - in public phase of a \$9.2M campaign*
- *Nature Conservancy - \$40M "Future of Nature" campaign. Entered public phase in August 2019 with \$33M in hand*
- *SE Land Trust - Their \$40M "A Promise for People and Nature" campaign is nearly done with over 90% in hand. Look at their annual report*
- *Portsmouth Music Hall "Treasure the Future" campaign completed. Get the Music Hall playbill, donors of \$2,500+. Look at their lobby donor wall of donors of \$25K+*
- *York Wildlife Center in Maine - latter stages of a \$4-5M campaign. Broke ground for expansion project in April 2019.*
- *Rye Library - early planning stages*
- *Food Bank - not currently in campaign*
- *Ogunquit Playhouse - \$40M campaign being contemplated*
- *Gundalow - not currently in campaign*
- *Kittery Land Trust - not currently in campaign*