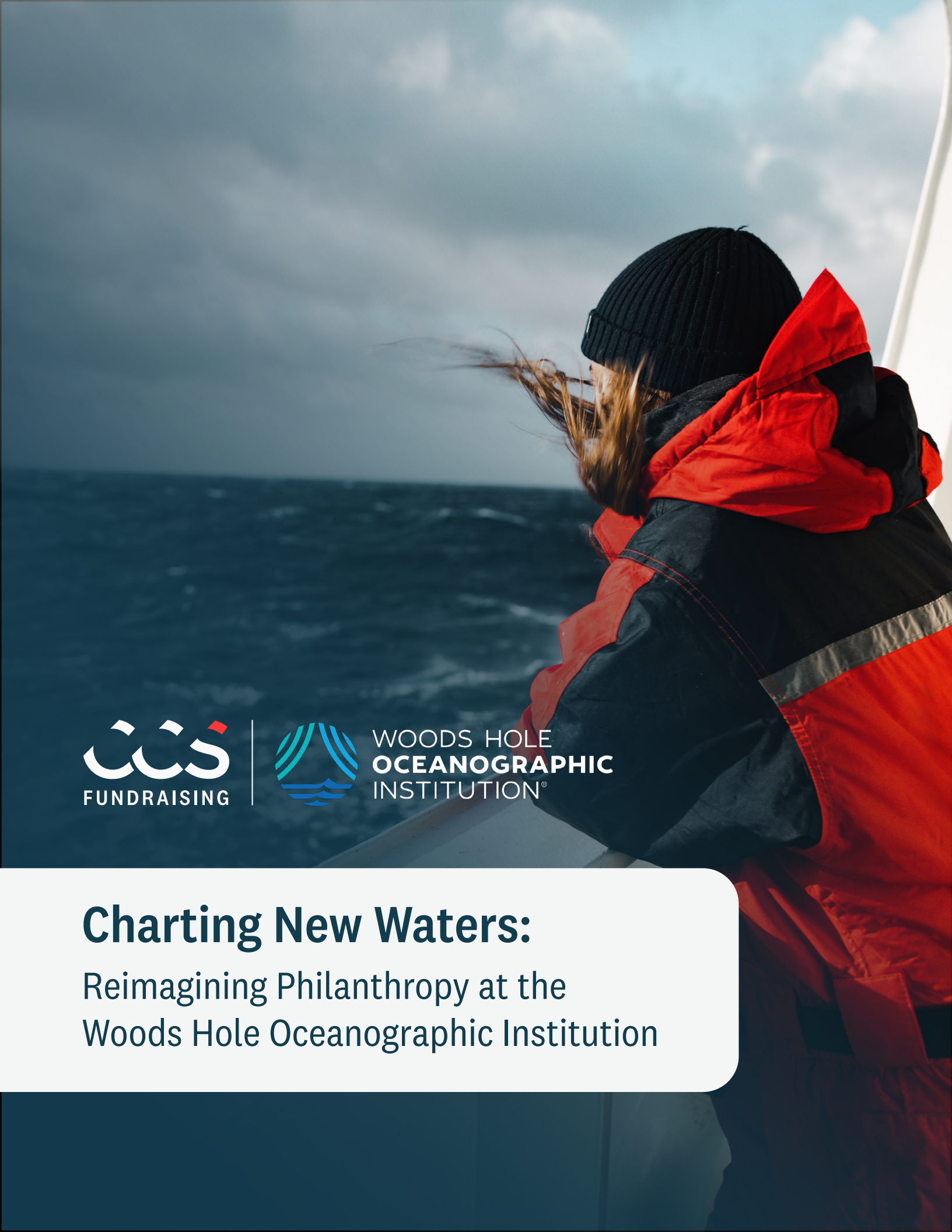


FUNDRAISING

WOODS HOLE OCEANOGRAPHIC INSTITUTION®

Charting New Waters:

Reimagining Philanthropy at the Woods Hole Oceanographic Institution

The Woods Hole Oceanographic Institution (WHOI) has long stood at the forefront of ocean science. Yet by the late 2010s, its philanthropic strategy no longer matched the scale of its scientific ambition or the realities of its funding model. With federal research dollars comprising 85% of annual revenue, growing pressures on federal budgets, a widening gap in unrestricted resources, and an outdated development structure, WHOI faced increasing risk to its resilience and long-term impact.

What followed was a multi-year transformation—initiated by board leadership, supported by institutional investment, and driven by cultural change. This case study explores that evolution: how WHOI restructured its advancement operations, redefined board expectations, and ultimately positioned itself to launch the most ambitious philanthropic campaign in the history of ocean science: a $500 million campaign going public in October 2025, a scale that was unimaginable just four years earlier.

When Tradition Meets Limitations

For decades, WHOI's fundraising approach had been shaped by a culture of loyalty and tradition. Board members were deeply committed, but giving expectations were modest and development resources limited. Development, marketing, and communications operated in silos, with relatively little strategic planning or investment, reflecting WHOI's reliance on federal research funding as its primary financial engine.

That model came under strain as WHOI faced persistent structural deficits in unrestricted funds. Concerns about layoffs and internal morale signaled that the institution needed not just a stronger fundraising function, but a more holistic, institution-wide approach to inphilanthropy.

Trustee Joyce Moss, then chair of the Development Committee, saw these signs clearly. During one period of heightened internal anxiety over budget cuts, she mobilized her peers to raise $1 million in immediate unrestricted support. The effort was not only successful, but catalytic.

"There was a tangible change in the atmosphere," she recalled. "It was clear the board cared—and that we had more capacity than we were using."

This realization set the stage for a deeper, more strategic conversation about WHOI's long-term advancement trajectory.

Funding the Future: A Board-Led Bet on Advancement

The board's increasing awareness culminated in a significant decision: a $5 million, board-led fundraising initiative to build a professional, integrated advancement team that would unite development, communications, and marketing under one structure. This investment enabled key leadership hires and the creation of a coordinated advancement function capable of aligning fundraising, communications, and institutional positioning around a shared strategy.

In 2018, Sam Harp—formerly Chief Marketing and Communications Officer at the Harvard T.H. Chan School of Public Health—joined WHOI as its first Vice President for Advancement and Chief Marketing Officer. He emphasized to the board that meaningful growth in unrestricted giving would require structural changes, a clear brand identity, and a pivot toward major gift fundraising. Drawing on past experience, Sam understood that substantial philanthropic gains depend on tightly coordinated campaign elements, including messaging and visual identity, communications, events, staffing, infrastructure and technology, external partners, organizational leadership, and volunteer committees. He began laying this foundation by focusing on WHOI's visual identity, messaging, and systems for managing marketing and digital content—positioning the institution to tell a refreshed story about its mission.

> ***In advancement, we've always had the ethos that we are more 'start up' than academic institution. We've been successful, but once again need to grow into our next level of performance."***
>
> *- Sam Harp, VP for Advancement and Chief Marketing Officer*

The next step was to reorient the fundraising team toward major gifts and multi-year commitments. Since completing a fundraising campaign in 2008, WHOI had concentrated primarily on its annual fund and current-use donations. To expand and diversify philanthropic revenue, Sam recruited Court Clayton in March 2019 as Chief Development Officer. Court had led a successful campaign at the Harvard T.H. Chan School of Public Health and driven major revenue growth at Habitat for Humanity International and the London School of Hygiene & Tropical Medicine. He began implementing processes and KPIs to raise performance standards across the development team and secure large-scale philanthropic gifts.

Joyce Moss again played a pivotal role, securing multi-year commitments from fellow trustees to fund this new approach. “If you want to hire someone exceptional, you have to give them the resources to succeed,” she said. “We couldn’t expect results without making that commitment first.”

Aligning Governance and Ambition

In 2020, the arrival of Dr. Peter de Menocal as President and Director generated additional momentum. As founding director of the Center for Climate & Life at Columbia University, de Menocal understood the role of philanthropy in seeding scientific initiatives that could later attract substantial sponsored research funding. His leadership strengthened alignment between scientific priorities and philanthropic strategy, making a major campaign not just feasible, but necessary.

Board recruitment also evolved considerably during this period. Historically, WHOI’s board was composed of dedicated, thoughtful members, but few had experience with or expectations for campaign leadership or major philanthropic contributions. To refresh and reorient its membership, the Board took a bold and calculated risk to recruit new leadership with stronger experience in significant philanthropy. With an articulated vision, elevated sights, and a maturing advancement operation, de Menocal successfully recruited several new Board members, including one who was recruited to be WHOI’s incoming Board Chair, and another who would later become WHOI’s campaign chair. Both were new to WHOI and would ultimately make pacesetting eight-figure commitments.

> ***Having thought partners like Paul Salem and Sarah Johnson, who share my vision for the future of WHOI, has turned out to be one of our driving superpowers of this Campaign. As committed partners, they have not only made extraordinary investments in this vision, but they have also opened doors to new donors who also see WHOI as big bettable!”***
>
> *- Dr. Peter de Menocal, President and Director*

Assuming a Campaign Posture

WHOI had previously completed a major campaign from 2000–2008, raising $194.6 million—at the time, a meaningful achievement that strengthened research programs, facilities, and scientific capacity across the institution. But the philanthropic landscape evolved dramatically in the years that followed. By the mid-2010s, large-scale giving to science had reached unprecedented levels, with nine-figure "mega-gifts" becoming more common at leading American universities and research enterprises. These gifts were reshaping entire fields, accelerating climate research, and enabling institutions to launch bold, high-impact initiatives at speeds that traditional funding models could not match.

In this new environment, competition for major philanthropy intensified, donor expectations had become more sophisticated, and the institutions that excelled were those able to articulate ambitious, long-term visions supported by coordinated advancement teams. For WHOI, this shift represented both challenge and opportunity. While the institution had a powerful mission and global reputation, capitalizing on the new era of high-impact philanthropy required a different approach—one that moved beyond incremental fundraising toward a mindset capable of inspiring transformative investments.

WHOI needed to rethink how it positioned its science, how it engaged donors, and how it organized its advancement efforts to reach its full philanthropic potential.

In 2021, WHOI retained CCS Fundraising to undertake a campaign feasibility study, which tested a goal of $350 million, a number reflecting the institution's long-term scientific ambitions and programmatic needs.

Yet the study's test of that goal was inconclusive, emerging in a recommended goal range of $250 million to $350 million. While there was clear philanthropic enthusiasm for WHOI's work, and strong early indications of momentum for giving to WHOI's priorities at the seven-figure gift level, the institution had not yet secured the kinds of lead gifts — mid- to high-eight or nine figures — that typically serve as cornerstones for campaigns of that size. There was a clear need for WHOI to identify and acquire new donors capable of supporting its mission at transformational levels.

Rather than interpreting this as a limitation, WHOI and CCS framed it as an opportunity: to assume a campaign posture and grow into the campaign goal.

Leveraging Momentum

"Starting" a campaign can take many forms; for most institutions, it begins by shifting to a growth mindset. Lifting WHOI to a higher tier of fundraising on an ongoing basis is just one critical outcome of a campaign. When done well, a campaign enables new ways of advancing the organization that extend well beyond the campaign's official close.

TALK DIFFERENTLY

A campaign posture is a repositioning. It facilitates big ideas, and new ways of thinking and messaging. It is vision-oriented and frames the organization as parts of a strategic whole.

ENGAGE DIFFERENTLY

A campaign posture levels up donors and vounteers. It drives activity, inspires giving, and builds relationships. The Board grows as well-recruitment, development, and goal-setting.

LEAD DIFFERENTLY

A campaign posture influences decision-making. It creates culture, fostering alignent around a goal. Leadership and staffing evolve, resources are allocated, and cross-functional collaboration increases.

Excerpt from 2021 Campaign Feasibility Study Report: "A Campaign Posture"

Growing into a Goal:
From Capacity to Confidence

Growing into a goal meant acknowledging that transformational fundraising potential was not fully visible at the outset. Years of underinvestment in developing WHOI's pipeline had meant that finding a path to a goal of $250 million or greater would require time, pacing, and investment in relationships as well as an intentional strategy to acquire new prospects and donors.

WHOI's plan advanced on two tracks:

1

Elevating existing donor relationships: Key supporters signaled willingness to stretch in a campaign environment when presented with compelling, investment-grade opportunities. Two early $5 million gifts from long-time board members set a new tone and created confidence.

2

Expanding the donor base: WHOI repositioned itself around big, solvable challenges in climate science, ecosystem health, and ocean innovation, opening doors to new high-capacity donors. Two eight-figure commitments from newly recruited trustees helped lift sights across the board.

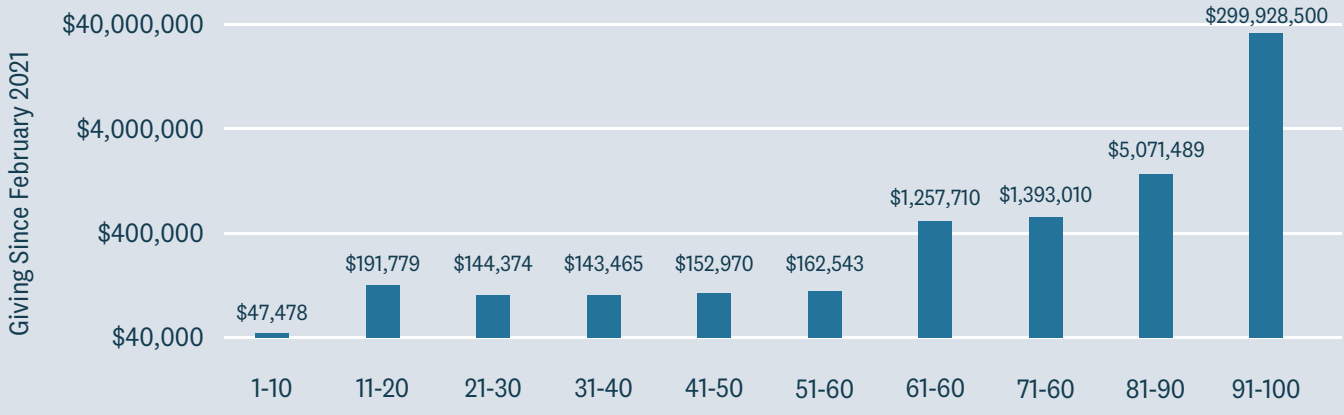
PREDICTIVE MODELING FOR MAJOR GIFTS

As part of the campaign feasibility exercise in 2021, CCS used AI to conduct a predictive modeling analysis and developed scores that would help prioritize WHOI's major gifts prospects in advance of a campaign. Scores ranged from 1-100, with 100 being the highest score. Using a combination of these modeling scores and wealth capacity screening, CCS segmented 456 previously unassigned households for WHOI's major gifts pipeline.

CCS found a strong positive relationship between score level and giving. The 456 people that were identified gave a total of $32.1 million in the first four years of the campaign, or 38 times more than they had given prior to 2021, indicating that subsequent strategic engagement by the gift officers under Sam Harp and Court Clayton in the campaign had paid off.

CCS also examined WHOI's assigned prospect portfolios. Since 2021, prospects identified by CCS for strategic re-engagement gave 15 times more than the preceding five years.

Relationship of New Giving to Major Giving Model Score, 2021-2015

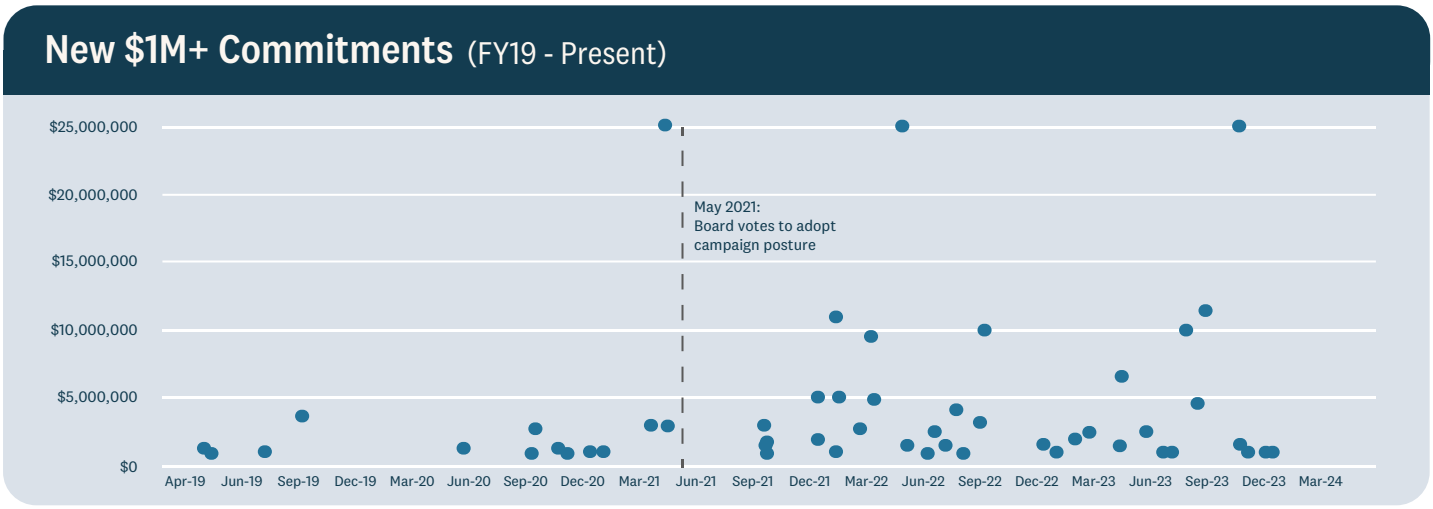


Excerpt from 2025 evaluation of CCS model scoring of WHOI prospects

Perhaps most importantly, the idea of "growing into a goal" reinforced a culture of strategic patience, reducing pressure to define campaign success by a single number. Instead, it invited the institution to define success by alignment, momentum, and long-term capacity.

Creating the conditions for this approach required a thoughtful campaign timetable. The campaign feasibility study recommended that WHOI begin with a 12–18 month Seed Phase: a quiet, exploratory period focused on case refinement, early principal gift identification, and continued momentum building. Rather than moving too quickly with incomplete information, this approach allowed WHOI to hone the campaign case for support to better reflect donor interests and scientific priorities and test big ideas through individual conversations and concept papers. Doing so helped WHOI to build deeper partnerships with existing donors who were ready to consider more ambitious commitments.

In 2022, WHOI reached its first-ever $100 million+ fundraising year, a milestone that shifted internal and external perceptions of what was possible. This breakthrough performance changed the conversation, proving the institution could operate at a new level of philanthropy. Over time, WHOI gained a clearer view of what a true stretch goal could look like, ultimately setting its working goal at $400 million. And in October 2025, WHOI announced a $500 million campaign goal publicly – a scale not even visible during the feasibility study, in part because nearly 50% of six-, seven-, and eight-figure gifts had come from donors who were new to WHOI as of 2018.



Excerpt from May 2024 Campaign Cabinet presentation, demonstrating the momentum built through seven- and eight-figure commitments. To date, WHOI has closed 92 seven- and 13 eight-figure gifts.

What It Takes to Transform

WHOI's journey offers a compelling case study for legacy institutions seeking to grow philanthropic scale:

- **Strategic investment must come before expectations.** WHOI funded the transition towards an integrated advancement team and system before asking it to deliver results.
- **Culture change requires both structure and story.** A shared narrative of growth and a phased approach created discipline, patience, and momentum.
- **Pace and ambition matter.** Sequenced activity and breakthrough performance milestones (like the first $100 million+ year) shifted what donors and the institution believed was possible.
- **Access to prospective donors is not enough.** True seven- and eight-figure philanthropy demands more than access—it requires bold, investable opportunities and the enterprise strength to deliver impact.
- **Campaigns should fuel growth, not just measure it.** WHOI used campaign planning to strengthen policy influence, diversify revenue streams, and deepen engagement with major ocean funders.

As WHOI prepares to meet the next set of urgent scientific challenges, its leadership remains mindful that campaigns are about more than reaching the destination of a top line number.

LESSONS FROM WHOI'S CAMPAIGN EXPERIENCE

The last five years of WHOI's journey toward a public announcement of its campaign contain important lessons that other organizations might consider to significantly elevate philanthropy. These mindsets helped WHOI to outline and ultimately successfully achieve a fundraising goal that was not immediately visible at the outset.

1. **Define impact outward when developing your message.**
   Internal needs, while pressing, are less inspiring when articulated to a donor audience. Be clear about the explicit ways your fundraising initiative will help achieve objectives beyond your organization and its challenges.

2. **Design interactions with your donors and constituents as a special experience.**
   Each moment and touchpoint you may have — especially those that are online or virtual — are opportunities to delight and engage, and opportunities to generate new leads. Integrated advancement operations can strengthen pathways to donor acquisition.

3. **Think long term with your board about the power of philanthropy.**
   Combining the right volunteer leadership with the right conversation topics is critical. Your board members can be key strategic partners in growing your organization's fundraising potential.

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