

Case study

National Galleries of Scotland Capital Appeal

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In 2000 the National Galleries of Scotland (NGS) unveiled an ambitious project to refurbish the Royal Scottish Academy Building and to build an underground link adjacent to the National Gallery of Scotland, in the centre of Edinburgh. **The Playfair Project**, named after the original architect of the two buildings William Henry Playfair (1790 – 1857), was a £32 million project of which £10 million had been pledged by the Scottish Executive, £7,390,000 by the Heritage Lottery Fund with the remaining £14 million to be generated through fundraising.

Private phase

With the appointment of the first Director of Development, Victoria Dickie, in 1998 the groundwork for the quiet phase of the Playfair Project began to take shape. This was extended with the appointment of the first Capital Projects Manager, Claire Beattie, who was to **focus** exclusively on the Playfair Project. At this time the Development Department established a **Friends' scheme** to encourage a broad base of support, a corporate hire initiative and continued with a successful corporate sponsorship programme.

As the private phase of the campaign was launched in 2000, the **Playfair Campaign Council** was established, charged with the task of making contact with wealthy prospective donors, business leaders and trustees of foundations. By 2003 just over 100 individuals had provided generous lead donations totalling £10 million.

Public phase

The public phase of the campaign involved raising the final £4 million through the **widening** of the identification, research, solicitation processes. The position of Head of Fundraising was created. Peter Thierfeldt, formerly the head of sponsorship and development at the Royal Scottish National Orchestra and membership and fundraising manager at the Royal Opera House, was asked to take on the role to achieve this goal.

Research and data management

The need for research and database administration grew rapidly during the public phase as the number of donations being made increased. The department changed databases to Raiser's Edge, a well-known fundraising management software system and hired a database manager to assist in the introduction of prospect tracking and overall management of the database.

Data from the Friends, donors was transferred without difficulty whilst the external Mailing List database was imported and the data de-duplicated and cleaned. This database was used as the basis of donor and prospect management for the remainder of the campaign.

Donor prospects

An initial **prospect list** of over 500 potential major and middle-sized donors was refined by desk research and discussion with contacts of the prospects, leaving a 'hot' major gift prospect list of 151 individuals. By the time the campaign concluded in 2005, 80 of these individuals had given, many at substantial levels. Geo-demographic data obtained from Experian was used in refining the prospect list but NGS did not use conventional wealth-screening as most of the relatively small number of prospects was known personally by the Campaign Council or NGS.

Campaign Council

During both the private and public phases, the **Playfair Campaign Council** was central to the success of the Appeal. The Hon. Randal Noel-Paton, chaired the Campaign Council and other prominent members included Professor Ewan Brown CBE, Chairman of Lloyds TSB Scotland, Gavin Gemmell CBE, Chairman of Scottish Widows and the previous Chairman of the Trustees of the NGS, The Rt. Hon the Countess of Airlie DCVO. The Campaign Council facilitated by the Head of Fundraising, generated many mid-sized gifts in the range of £1,000 to £40,000 and a number of major donations over £50k.

Individual giving

Most of the **individual donations** came from individuals in Scotland, but some fundraising was also carried out abroad. For example, an event in Hong Kong in November 2003 attended by the Chairman of the Campaign Council, Director of the National Gallery of Scotland and Head of Fundraising, raised over £50,000 as a result of a drinks reception and a number of meetings from fewer than 50 prospects.

Fundraising scheme

A main **fundraising scheme** and **theme** was developed for the public phase of the Playfair Project fundraising campaign. This was to help restore the landmarks that helped earn Edinburgh the name "Athens of The North". This innovative scheme encouraged donations not for the interior of the gallery, which one would expect from an art gallery, but for the exterior architectural features of the Royal Scottish Academy Building. Individuals could help

restore an acanthus leaf for £500, a wreath for £1,000, support a column for £5,000, adopt a sphinx for £15,000 or give to the general Playfair Project fundraising fund. One of the lead donations to the public phase was as a result of this initiative. The statue of Queen Victoria by sculpture Sir John Steele which crowns the North Entrance of the Royal Scottish Academy Building sponsored by a donor who gave on the first day of the **telemarketing campaign** seeking wider support for the project.

Telemarketing campaign

Much of the fundraising effort was devoted to personal relationship development with prospective major and middle-sized donations, but NGS also utilised the telephone and mail to contact approximately 2000 Members of the Friends scheme. Although these contacts had not been identified as prospects for major donations (as defined by NGS) it was expected that they could make gifts of some thousands of pounds. The Phone Room Ltd. was engaged to carry out a special campaign whose opening 'ask' was for £5,000 with discussions around that amount relating to supporting a Pillar or a Wreath. With Gift Aid, the telephone campaign generated £190,000 (at a cost of £9,000) including a gift of £100,000, which NGS believes is one of the highest ever solicited by telephone in the UK. Mail and personal approaches added a further £36,000 from the Friends of the National Galleries of Scotland.

Friends and Patrons

The **Friends** of the National Galleries of Scotland were very helpful and many gave several times individually and some through group initiatives. The **Patrons** of the National Galleries of Scotland, which is a separate charity supporting NGS, had been established specifically to focus on acquisition of works of art. The Appeal Office worked closely with individual Patrons, many of whom became major donors. Prior to the opening of the first phase of the Playfair Project in August 2003, all Patrons who had not contributed during the private phase were invited to do so by a personalised letter from the Campaign Council Chairman and over £180,000 was raised from 51 Patrons.

Difficulties

The Playfair Project Fundraising Campaign eventually exceeded expectations, but there were two particularly demanding periods. In March 2004, following a long and thorough application process, The Kresge Foundation in Detroit awarded a Challenge Grant of \$600,000 to NGS. This time-limited challenge was to help raise the remainder of the project from individuals by December 2004 in order to release the Challenge Grant. This

opportunity re-ignited the major gift solicitation programme with a first time gift of £200,000 from an individual in America and a £100,000 gift from a European individual, along with 2 upgraded gifts from Scottish individuals of £500,000 and £150,000. Many past donors also upgraded their support at this time and took features at £5,000, £1,000 and £500. Overall, 454 gave to the **Direct Mail** and **Telemarketing Campaign** and an additional 50 gifts were secured through the **Major Gift programme**. The true challenge came following the opening of the final phase of the Playfair Project in August 2004 when many of the remaining prospective donors felt the campaign was closed as the facility had opened.

Knowing that donors might not want to give following the opening, the Appeal Office was anxious to secure a final major gift prior to the opening. The organisation, meetings and negotiations for this gift had extra adrenalin as the donor only agreed two days prior to the official opening. This £500,000 gift was received from Sir Tom Farmer (the founder of Kwik Fit), who had originally contributed at the start of the campaign. NGS had been in discussion with Sir Tom for some time; he has a great interest in younger people, especially in encouraging them to embrace wealth creation and entrepreneurship and wanted his naming of the main concourse of the newly created underground area of the gallery to act as an inspiration to the many young people who use the new facilities (which include a specially designed education area).

Conclusion

Since the opening of the refurbished Royal Scottish Academy Building and Weston Link there has been a significant increase in visitors, leading to an award from Visit Scotland. The public campaign which ran from June 2003 – February 2005 was so successful that it received two awards from the Institute of Fundraising (Scotland), Campaign Award and Telephone Campaign Award.

The Campaign Council was dissolved in February 2005 after the successful conclusion of the Appeal. There was some regret that the Council was not restructured to assist with the challenge of revenue fundraising, although a new committee is now under consideration. The Playfair Project benefited from a **willing partnership** between the public and private realms. The Scottish Executive and the Heritage Lottery Fund came up with over £17 million but it was private donations of over £14 million which has delivered Scotland's biggest ever fundraising effort in the arts to date.

The Private Campaign ran from Autumn 2000 to May 2003 and raised £10 million from over 100 individuals, trusts and companies. The Public Campaign of the Playfair Project which ran from April 2003 to February 2005 strategically raised almost £4 million from individuals, trusts and companies in an innovative manner, meeting all of its objectives. This effort marked many "firsts" for the National Gallery of Scotland: the first direct mail campaign, the

first telemarketing campaign, the first ever Scottish recipient of a Kresge Foundation Challenge Grant, and the first time raising funds from abroad. Sound planning, project management and a strong communication strategy enabled this ambitious project to flourish. Over 2,400 contributions were received over the total campaign, with 2,300 during the Public Campaign. Gifts ranged from £2 to over £2,000,000. A small appeal campaign team of three delivered the public campaign just in time for the opening of the Weston Link in July 2004, which was itself 8 months ahead of schedule. The building project and the fundraising campaign have been lauded as “determined, quiet and efficient” by an editorial in the Scotsman on 4 August 2004 – but also as setting a benchmark for future fundraising campaigns in Scotland.