



**Post:** Legacy & Individual Giving Administrator  
**Reference:** TG1917  
**Band:** 5L  
**Department:** Major Gifts  
**Contract:** Permanent  
**Hours:** Full-time  
**Reporting to:** Development Manager, Collections and Legacies  
**Location:** Millbank, London

## **Background**

Tate aims to be the most artistically adventurous and culturally inclusive global art museum. We deliver this aim through activities in our four galleries across the UK (Tate Liverpool, Tate St Ives, Tate Britain and Tate Modern), our digital platforms and collaborations with our national and international partners. At the heart of Tate is our collection of art, which includes British art from the 16th century to the present day, and international modern art from 1900 to the present day.

The Tate Development Office was founded in 1990 and is one of the most established and successful fundraising teams in the UK. It continues to expand to meet the growing needs of our four galleries and their respective programmes. The Development Office is responsible for all public and private fundraising at Tate, implementing strategies to raise support for all projects, including growing the collection, funding capital projects and supporting the core programme.

The Major Gifts and Public Sector team is responsible for securing major gifts and grants from individuals, trusts, foundations and public funding sources in support of Tate's activity. Within the department, the Collections Development team works with Tate's curators and major donors to raise funds for acquiring new works of art for Tate and to support the programmes and activities the collection inspires. You can find further information about Tate on our website: [www.tate.org.uk](http://www.tate.org.uk)

## **Purpose of the Job**

The Legacy & Individual Giving Administrator will provide full administrative support for the Development Manager, Collections and Legacies, and additional support to the Tate Fund programme.

## **Main Responsibilities**

### **Legacy Administration**

#### **Administration of Legacy Donors and Prospects**

- To act as first point of contact for legacy donors and prospects, including answering phone calls and e-mails in a timely and appropriate manner
- To administratively assist the Development Manager, Collections and Legacies and keep accurate diary records
- To manage the process for thanking legacy donors

- To manage the process for notifying donors when works of art secured through legacy gifts go on display at all Tate sites or elsewhere
- To be responsible for coordinating, processing and tracking legacy gifts in liaison with the Operations team and Finance department
- To accurately and consistently log donor and prospect information onto the Development office database, Raiser's Edge, and other Tate-wide databases, ensure all records are accurate and maintained to a high standard, and run regular reports
- To work with budget holders to accurately monitor the legacy expenditure and budgets, and to support Major Gift colleagues as necessary
- To manage the electronic and paper filing for lifetime and legacy gifts
- To undertake research into supporters, donors and prospects using relationship management databases and external resources

### **Legacy messaging, communications and events**

- To work with the Tate Media team on the legacy website pages, ensuring they are kept updated with new content, including news of gifts, acquisitions and events
- To coordinate and produce the biannual legacy club newsletter
- To support the Development Manager, Collections and Legacies in implementing legacy strategies, related marketing activities and coordinating their stewardship of all respondents
- To work closely with the Advocacy and Events team on the organisation and delivery of an annual programme of Legacy stewardship and cultivation events, and to assist with wider events related to Collection Development
- To administer Tate's legacy club, *The 1897 Circle*, coordinating all communication with the members and Ambassadors
- To work alongside the Development Manager, Collections and Legacies in providing support for the Legacy Ambassadors, liaising directly with them on an annual programme of events from planning to delivery
- To work directly with the Advocacy and Events team, as well as the Development teams across all Tate sites, on an annual programme of legacy events across the galleries

### **Individual Giving Administration**

- To ensure timely processing of Tate Fund donations in liaison with the Development Operations team
- Draft correspondence and thank you letters for Tate Fund donors
- To run reports from the Development and Membership databases for income reporting purposes
- To ensure effective stewardship of Tate Fund donors through regular event invitations and relevant mailings
- Manage the delivery of mailings and materials for the Friends for Life scheme

### **General Administration for the Collections Team**

- Adhere to best practice in prospect cultivation, solicitation and stewardship, ensuring that the appropriate ethical policies and practices of Tate are followed
- To work with the Development Manager, Collections and Legacies and other Development colleagues to ensure fundraising messages and updates are communicated effectively to donors and prospects

- To work with budget holders and the Finance team to accurately maintain and update the expenditure and commitment logs and be responsible for making sure that commitment logs are accurate and updated in a timely manner across the Collections team.
- To research images and copyright permissions and credit lines for use in campaigns, newsletters and website pages
- Collect information on Legacy activities for fortnightly updates and reports to Trustees
- In liaison with colleagues in the Development department and with donors, to ensure that crediting tables are regularly updated, and that supporters' crediting requirements are met
- To manage the event nomination process for the Legacy donors and Tate Fund each season
- To assist the wider Collection Development team in meeting operational deadlines, such as event nominations each season and crediting donors for art work acquisitions
- To assist with various Major Gifts group mailings when required
- Ensure donor records are kept current and accurate
- Assist at out-of-hours events as necessary

## **Person Specification**

### **Essential**

- Excellent administrative skills, with the ability to set up and maintain administrative systems and procedures (paper-based and electronic)
- Strong organisational skills, with the ability to prioritise and multi-task to meet deadlines
- Excellent attention to detail when dealing with data input, correspondence and numbers as well as timely processing of such information
- Fast and accurate word-processing skills and the ability to use effectively MS Word, Excel, Outlook, databases and internet applications
- Excellent written skills with the ability to draft letters, reports and presentation material accurately
- Excellent verbal communication and interpersonal skills with the ability to engage effectively and confidently at all levels, internally across departments and with external contacts
- Methodical but flexible approach to duties and the ability to work unsupervised and under own initiative, with a pro-active approach to problem solving
- Ability to be part of a team and to work well within a busy office environment and with people at all levels
- Awareness of and commitment to the principles of diversity and inclusion
- An interest in and commitment to the work of Tate
- Ability to work outside of standard office hours when required

### **Desirable**

- An interest in developing a career in fundraising
- Knowledge of Raiser's Edge

## **Summary of Terms and Conditions of Employment**

### **Type of Contract**

This appointment is offered on a permanent contract.

## **Working Hours**

This post is offered on a full-time contract working 36 hours per week – Monday to Friday.

## **Salary**

This post is graded on Band 5L of the Tate pay scales.

An appointment to this post will be made at the minimum of the band at £22,450 per annum.

## **Annual Leave and Public Holidays**

Annual leave is 25 working days per annum rising to 27 working days per annum after three years' service. In addition, we offer paid time off for the 8 public holidays and 1 Tate day (on 24 December when the galleries are closed).

## **Pension Benefits**

An important part of the pay and reward package Tate offers employees is the option to join the Civil Service Pension arrangements. These arrangements currently offer a choice of two types of pension:

- **Alpha.** This is a defined benefit occupational pension scheme that currently has a member contribution rate which ranges from 4.6%-8.05% dependent on your salary. As your employer we meet the rest of the cost of the scheme. Further information about this can be found at [www.civilservicepensionscheme.org.uk](http://www.civilservicepensionscheme.org.uk)
- **Partnership** pension account. This is a stakeholder pension with a contribution from ourselves. How much we pay is based on your age. We pay this regardless of whether you choose to contribute anything. You do not have to contribute but, if you do, we will also match your contributions up to 3% of your pensionable earnings. The contributions are in addition to the age-related contribution mentioned above.

If you have previously worked for an employer who participated in the Civil Service Pension scheme or other Public Service pension schemes different conditions may apply.

## **Other Discretionary Benefits**

- Interest-free Season Ticket Loan.
- Cycle to Work scheme – enabling you to buy a bike in a tax efficient way, for travelling to and from work.
- Rental deposit scheme – an interest free advance to help towards the cost of a deposit for privately rented accommodation
- Subsidised staff catering arrangements and discounts in the Tate Restaurants and Cafes.
- Access to Tate Benefits which offers access to discounts in high street stores.
- Access to a 24/7 Employee Assistance Programme to support you with any work, personal or family issues. This includes telephone-based support, as well as comprehensive online resources.
- Free entry to paying exhibitions at Tate Galleries. Opportunities for family and friends to visit the major exhibitions out-of-hours.
- Discounts on items purchased in the Tate shops.
- Free access to a number of other galleries and museums throughout the UK on production of a valid staff pass.

## Safer Recruitment

Tate is committed to providing a safe environment for all those who work at Tate and all those who come into contact with Tate as visitors to the galleries, as participants in Tate activities, and online. The safe recruitment of all those who undertake work on behalf of Tate is the first step to ensuring that we are fulfilling this commitment.

All positions at Tate are offered subject to the following conditions:

- Receipt of satisfactory references covering the last 3 years of your employment or education.
- Health clearance
- A satisfactory Disclosure Check.
- Proof that you are legally entitled to work in the UK

You can find out more information about our pre-employment checks and what they mean for you in our 'Guidance Notes for Applicants' document.

## Diversity and Inclusion

Our aim is to become a truly inclusive organisation with a workforce and audience as diverse as the communities we serve. This is fundamental to Tate's future success and our ability to continue to contribute to culture and society in the UK.

We want our workforce to be more representative of all sections of society at all levels in the organisation. The range of perspectives and experience diversity brings is an asset to our organisation and we want to create an inclusive, welcoming environment for visitors, artists and all those who work at Tate. Tate expects all employees to contribute to this aim as part of their role. More information about diversity and inclusion at Tate can be found on our [website](#).

## How to apply

Our opportunities are open for you to apply online. Please visit: [www.tate.org.uk/about/workingattate/](http://www.tate.org.uk/about/workingattate/) to create an account by registering your details or, if you are an existing user, log into your account. For all opportunities we ask candidates to complete an online application form for the vacancy they are interested in. If you need an application form in an alternative format please call us on 020 7887 4997. Once you have submitted your application you can keep track of its progress by logging into your account.

The closing date for the submission of completed application forms is **Sunday 9 December 2018 by midnight.**

*Our jobs are like our galleries, open to all.*

