

Patrons and Legacies Manager

Candidate information pack

Role: Summary

Department:	Development
Status:	Permanent, part-time post subject to the Library's general employment policies
Salary Band:	£38,929.50 - £45,417.75 FTE per annum, plus benefits
Hours:	28 hours per week (0.8 FTE), worked between Monday and Friday
Location:	14 St James's Square, London SW1Y 4LG, (with flexibility in line with hybrid working policy)
Reports to:	Director of Development
Key relationships:	Development Team, with line management of a Development Officer Director / PA to the Director Library staff including Collections/Archive, Member Services, Membership, Marketing and Communications, Programmes, Finance, Building & Facilities Management Trustees, Donors, patrons, prospects, members Various external contacts, suppliers and visitors to the Library

Purpose:

- Oversee and manage the Library's regular giving patrons programme, develop and implement strategies to maximise patrons' income, retain and increase the number of patrons
- Oversee and manage the Library's legacy giving programme, develop and implement strategies to promote legacy giving, steward legacy pledgers and grow the number of legacy pledgers
- Support with the management of international giving programmes including leading on the US patrons programme.

Role: Key Duties

PATRONS REGULAR GIVING (approx. 70% of time)

Growing and maximising income and patrons' numbers

- Strategy: Oversee, strengthen and deliver the Patrons Regular Giving strategy and enhance the programme to grow the number of patrons, maximise income and achieve targets in line with the strategy overseen by the Director of Development.

- Cultivation, stewardship and recruitment: Create and assist with organising cultivation and stewardship events (working closely with the Fundraising Events and Venue Hire Manager), implement and identify strategies to recruit and engage new patrons, respond to requests for information and lead in the cultivation of prospective patrons
- Promotion: Update and review patron promotional materials and actively promote the patrons scheme through tailored events and communications capitalising on the Library's communications vehicles including magazine, newsletter and social media
- Research and Review: undertake an annual review of the benefits and costs associated to ensure compliance with Gift Aid and VAT regulations, and industry benchmarking of the Library's patrons programme
- Prospect Research: Identify potential patrons from the Library's membership and externally, working with volunteer leadership, and undertake accurate prospect research on individuals in coordination with the Senior Fundraising Operations Manager
- Pipeline Management: Manage a pipeline of patron and legacy prospects, working closely with the Senior Fundraising Operations Manager, Senior Major Gifts Manager, and DD to identify prospects for higher levels of giving and project support

Stewardship and events

- Stewardship: Steward patrons to ensure a high level of retention in line with the delivery of advertised patrons' benefits, identify opportunities for increased giving, manage the patrons group and build relationships through a series of events and communications, including one to one meetings
- Patrons Event Programme: Work closely with the Fundraising Events and Venue Hire Manager to develop and deliver an imaginative and distinctive annual event programme for patrons in line with the advertised benefits, identifying tactical opportunities for additional events, stewardship and cultivation opportunities and attending patrons and other events as required
- Event Profiles: With the Individual Giving Officer, compile accurate supporter profiles and briefings for cultivation and stewardship meetings and events

Admin and processes

- Renewals and administration: With the assistance of the Individual Giving Officer, manage the patron's renewal process including reports, administrations, renewal and thank you letters and updating the CRM
- Budget: Manage the patron income and expenditure budget effectively and efficiently, monitor the return on investment from different activities and produce accurate reports on income, and appropriate KPIs as requested
- Individual Giving Officer: Oversee their work, delegating as required, and support them to achieve their objectives for the year.
- CRM: Ensure that appropriate and accurate records and statistics are kept up to date to inform understanding of the effectiveness of the fundraising operation
- Acknowledgment: Ensure patrons are acknowledged in line with the acknowledgement policy and guidelines in the fundraising strategy, with the support of the Individual Giving Officer

LEGACIES (APPROX. 30% OF TIME)

- Strategy: Develop, implement and oversee the Legacy Giving strategy to increase legacy pledgers and the Library's legacy income long-term, based on a legacy assessment, recommendations and strategy, with an understanding of the wider legacy giving landscape, promotional trends, and tax and legal issues relating to gifts in wills (Development team has membership of the Institute of Legacy Management)
- Legacy Event Programme: Work with the Fundraising Events and Venue Hire Manager to develop and deliver an annual legacy recruitment, stewardship and legacy awareness raising event programme
- Stewardship: Manage legacy pledgers and build relationships with legacy pledgers through a series of events and communications, including one to one meetings
- Promotion: Update and review legacy promotional materials as required, and actively promote legacy giving through tailored events and communications in the Library's magazine, e-newsletter and other promotional tools
- Budget and KPIs: Manage and monitor the legacy income and expenditure budget liaising with finance, monitor KPIs to assess promotional activity and progress in line with the strategy and produce accurate reports as requested
- Administration: Monitor incoming Smeed and Ford notifications, and manage and monitor the open legacy cases, liaising with solicitors and lay executors to ensure timely and accurate distribution of legacy estates by examining estate accounts and following up at appropriate intervals.
- CRM: Ensure that appropriate and accurate records and statistics are kept up to date to inform understanding of the effectiveness of the legacy fundraising programme
- Acknowledgment: Ensure legacy gifts are acknowledged in line with the acknowledgement policy and guidelines in the fundraising strategy, with the support of the Individual Giving Officer

INTERNATIONAL GIVING

- IFLL Administration: With the Director of Development, liaise with the co-Chairs and board of directors of the US-based International Friends of The London Library (IFLL) to manage the US patron's renewal process, deliver benefits and steward effectively providing information, research and administrative support
- International Events: Support the DD with the event planning of US-based and other international events, and work closely with the Development Events and Venue Hire Manager to deliver these events
- TGE Administration: Act as the primary contact for Transnational Giving Europe (TGE) and provide reports as required
- Assist with the implementation of any other international giving where appropriate

OTHER DUTIES

- Contribute to the development and implementation of the wider Development Strategy and assist the DD with the compilation and KPIs to help assess the effectiveness of the fundraising operation
- Acquire knowledge of the Library and its membership to answer queries and give tours to prospective members as required
- Participate in breakfast and evening events or tours as required
- Attend and contribute to Development Team and other meetings

- Attend and support Library activities, both onsite and offsite
- Attend appropriate training courses to improve and extend skills base as recommended
- Work in any part of the Development Office as the demands of the service require, ensuring the provision of a seamless and high quality service at all times
- Other duties as may be required at the discretion of the DD or Library Director

The job description set out above does not form part of the contract and may be subject to amendment at the discretion of the Director of the Library.

February 2025

Person Specification

Desirable Essential

Qualifications

- Good numeracy: GCSE Maths (Grade A-C) or equivalent ✓

Experience and Knowledge

- Demonstrable experience of fundraising from individual donors ✓
- Demonstrable experience of donor or patron management and administration preferably within a cultural organisation ✓
- Demonstrable experience of legacy management and an understanding of legacy giving ✓
- A knowledge and interest in the cultural sector, ideally including literature and libraries ✓
- Demonstrable experience of using research techniques ✓
- Demonstrable experience (project) managing donor promotional programmes and communications ✓
- Demonstrable competence in the use of specialist fundraising/membership software ✓
- Familiarity with the Library's incoming CRM, MS Dynamics ✓

Skills and Abilities

- Ability to work with absolute discretion, tact and confidentiality ✓
- Excellent diplomacy, interpersonal and communications skills ✓
- High degree of literacy, with excellent writing skills, and demonstrable ability to draft written communication with donors and senior volunteers, including promotional literature ✓
- Ability to draft cases for support and produce accurate supporting documents ✓
- Ability to convey information orally in a clear, concise, and friendly manner ✓
- Ability to present information effectively to groups of people ✓
- Sound judgment in using initiative and taking responsibility ✓
- Ability to plan, prioritise and carry out work effectively to meet deadlines ✓
- Attention to detail and meticulous concern for accuracy ✓
- Ability to facilitate and co-ordinate work of others to achieve common goals ✓
- Ability to contribute constructively to departmental discussions ✓
- Ability to work independently and supportively as part of a team ✓
- Excellent IT skills (MS Office, email, Internet) and a proven ability to learn new systems quickly ✓

Teamwork and Personal Impact

- Self-motivated and confident ✓
- Ability to play a proactive role in a small office ✓
- Presentation of a positive and professional image at all times ✓
- Flexible and adaptable to change ✓
- Pleasant, approachable and helpful, even under pressure ✓

Application and selection procedures

Selection process

If you have any queries or wish to have an informal discussion about the role before applying, please contact Claire Rudman (HR Manager) on 020 7766 4754; claire.rudman@londonlibrary.co.uk.

Timetable

Vacancy advertised

w/c 3 February 2025

Deadline for applications to be received

2 March 2025 @ midnight

Interviews

w/c 10 March 2025

To Apply

Please download the application form from our website, complete all three sections and send them.

by email to: *vacancies@londonlibrary.co.uk*

by post to:

Vacancies

The London Library

14 St James's Square

London SW1Y 4LG

Key Information: Hours of Work, Pay and Benefits

Hours of Work, Pay and Benefits

Hours of work

This is a part-time position of 28 hours per week, excluding lunch breaks, from 09:30am to 5:30pm, worked between Monday and Friday.

Salary

£38,929.50 - £45,417.75 FTE
(£31,143.60 - £36,334.20 pro-rata) per annum, depending on experience.

Holiday

28 days including 3 days when the Library is closed, plus public holidays (pro rata).

Pension

The Library operates a Group Personal Pension Scheme. Details may be seen at the Library. Eligibility to join and entitlement to benefits is subject to the rules of the scheme.

Life Assurance

The Library operates a Group Life Assurance Scheme, which in the event of death whilst employed by the Library, will pay out a lump sum of 4 x annual salary to the employee's nominated beneficiaries.

Cash Health scheme

All employees will be enrolled into our cash health scheme which allows members to reclaim the cost of medical expenses such as dental fees and prescription charges as well as access to a 24-hour employee assistance service.

Season tickets and bicycle loans

(subject to a qualifying period)
Interest-free loans for the purchase of season-tickets and/or bicycles for travelling to and from work.

Access to collections

The facility to make full borrowing use of the Library's collections (up to 10 books at a time) and online resources.

Book binding

Discounts on binding personal books may be arranged.

Training & Development

The Library is committed to the support and development of all staff. We aim to ensure that all members of staff not only have the knowledge, skills, and experience necessary to be successful in their jobs, but also to fulfil their career potential.

Rest facilities

Staffroom with small kitchen and dining area offering free tea and coffee-making facilities.

Appendix – GDPR Privacy Notice

This notice explains what personal data (information) we will hold about you, how we collect it, and how we will use and may share information about you during the application process. We are required to notify you of this information, under data protection legislation. Please ensure that you read this notice (sometimes referred to as a 'privacy notice') and any other similar notice we may provide to you from time to time when we collect or process personal information about you.

Who collects the information?

The London Library ('Company') is a 'data controller' and gathers and uses certain information about you.

Data protection principles

We will comply with the data protection principles when gathering and using personal information.

About the information we collect and hold

The table set out in Part A of the Schedule below summarises the information we collect and hold up to and including the shortlisting stage of the recruitment process, how and why we do so, how we use it and with whom it may be shared.

The table in Part B of the Schedule below summarises the additional information we collect before making a final decision to recruit, i.e. before making an offer of employment unconditional, how and why we do so, how we use it and with whom it may be shared.

We seek to ensure that our information collection and processing is always proportionate. We will notify you of any changes to information we collect or to the purposes for which we collect and process it.

Where information may be held

Information may be held at our offices and those of our third party service providers.

How long we keep your information.

We keep the personal information that we obtain about you during the recruitment process for no longer than is necessary for the purposes for which it is processed. How long we keep your information will depend on whether your application is successful and you become employed by us, the nature of the information concerned and the purposes for which it is processed.

We will keep recruitment information (including interview notes) for no longer than is reasonable, taking into account the limitation periods for potential claims such as race or sex discrimination (as extended to take account of early conciliation), after which they will be destroyed. If there is a clear business reason for keeping recruitment records for longer than the recruitment period, we may do so but will first consider whether the records can be pseudonymised, and the longer period for which they will be kept.

If your application is successful, we will keep only the recruitment information that is necessary in relation to your employment. For further information, see *our data protection privacy notice (employment)*.

Your right to object to us processing your information.

Where our processing of your information is based solely on our legitimate interests (or those of a third party), you have the right to object to that processing if you give us specific reasons why you are objecting, which are based on your particular situation. If you object, we can no longer process your information unless we can demonstrate legitimate grounds for the processing, which override your interests, rights and freedoms, or the processing is for the establishment, exercise or defence of legal claims.

Please contact vacancies@londonlibrary.co.uk if you wish to object in this way.

Your rights to correct and access your information and to ask for it to be erased.

Please contact vacancies@londonlibrary.co.uk if (in accordance with applicable law) you would like to correct or request access to information that we hold relating to you or if you have any questions about this notice. You also have the right to ask our HR team for some but not all of the information we hold and process to be erased (the 'right to be forgotten') in certain circumstances. Our HR team will provide you with further information about the right to be forgotten, if you ask for it.

Keeping your personal information secure

We have appropriate security measures in place to prevent personal information from being accidentally lost, or used or accessed in an unauthorised way. We limit access to your personal information to those who have a genuine business need to know it. Those processing your information will do so only in an authorised manner and are subject to a duty of confidentiality. We also have procedures in place to deal with any suspected data security breach. We will notify you and any applicable regulator of a suspected data security breach where we are legally required to do so.

How to complain

We hope that our HR team can resolve any query or concern you raise about our use of your information. If not, contact the Information Commissioner at <https://ico.org.uk/concerns/> or telephone: 0303 123 1113 for further information about your rights and how to make a formal complaint.

**THE SCHEDULE
[ABOUT THE INFORMATION WE COLLECT AND HOLD]**

Part A

Up to and including the shortlisting stage.

The information we collect	How we collect the information	Why we collect the information	How we use and may share the information
Your name and contact details (i.e. address, home and mobile phone numbers, email address)	From you	Legitimate interest: to carry out a fair recruitment process Legitimate interest: to progress your application, arrange interviews and inform you of the outcome at all stages	To enable HR personnel or the manager of the relevant department to contact you to progress your application, arrange interviews and inform you of the outcome To inform the relevant manager or department of your application
Details of your qualifications, experience, employment history (including job titles, salary and working hours) and interests	From you, in the completed application form and interview notes (if relevant)	Legitimate interest: to carry out a fair recruitment process Legitimate interest: to make an informed decision to shortlist for interview and (if relevant) to recruit	To make an informed recruitment decision The person making the shortlisting decision will receive pseudonymised or anonymised details only; if you are invited for interview, the interviewer will receive non-anonymised details
Your racial or ethnic origin, sex and sexual orientation, religious or similar beliefs	From you, in a completed anonymised equal opportunities monitoring form	To comply with our legal obligations and for reasons of substantial public interest (equality of opportunity or treatment)	To comply with our equal opportunities monitoring obligations and to follow our equality and other policies
Details of your referees	From your completed application form	Legitimate interest: to carry out a fair recruitment process	To carry out a fair recruitment process To comply with legal/regulatory obligations Information shared with relevant managers, HR personnel and the referee
Information about your health, including any medical condition, health and sickness records	From you	Legitimate interest: to carry out a fair and non-discriminatory process Necessary for performance of rights and obligations in connection with employment	To carry out a fair and non-discriminatory recruitment process – to see if there are any adjustments that can be made to the recruitment process

Part B

Before making a final decision to recruit

The information we collect	How we collect	Why we collect the	How we use and
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	the information	information	may share the information
Information about your previous academic and/or employment history, including details of any conduct, grievance or performance issues, appraisals, time and attendance, from references obtained about you from previous employers and/or education providers Δ	From your referees (details of whom you will have provided)	<p>Legitimate interest: to make an informed decision to recruit</p> <p>To comply with our legal obligations</p> <p>Legitimate interests: to maintain employment records and to comply with legal, regulatory and corporate governance obligations and good employment practice</p>	<p>To obtain the relevant reference about you</p> <p>To comply with legal/regulatory obligations</p> <p>Information shared with relevant managers and HR personnel</p>
Information regarding your academic and professional qualifications Δ	From you, from your education provider, from the relevant professional body	Legitimate interest: to verify the qualifications information provided by you	To make an informed recruitment decision
Your nationality and immigration status and information from related documents, such as your passport or other identification and immigration information Δ	From you and, where necessary, the Home Office	<p>To enter into/perform the employment contract</p> <p>To comply with our legal obligations</p> <p>Legitimate interest: to maintain employment records</p>	<p>To carry out right to work checks</p> <p>Information may be shared with the Home Office</p>
Information about your health, including any medical condition, health and sickness records	From you	<p>Legitimate interest: to ensure intrinsic elements of the role can be met</p> <p>To enter into/perform the employment contract</p> <p>Necessary for performance of rights and obligations in connection with employment</p>	<p>To ensure intrinsic elements of the role can be met</p> <p>To establish if any reasonable adjustments can be made</p>

You are required (by law or in order to enter into your contract of employment) to provide the categories of information marked 'Δ' above to us to enable us to verify your right to work and suitability for the position.