

**Person Specification – Relationship Manager (Wills & Legacies)**

Requirement	Essential	Desired	How Assessed*
Education/Qualifications	Educated at degree level or significant work experience at a similar level	Member of the Institute of Fundraising.  STEP Advanced Certificate in Administration of Estates	Application Form
Experience	Ability to understand and present financial information accurately.  Direct experience of preparing high quality written work in a professional environment.  Experience of developing and nurturing relationships with key supporters and individuals.  Experience of using a CRM system to manage workflow and communication.	Experience of working with the Legal profession  Experience of administration of estates and applicability of charity law to legacies	Application Form/ Interview/Presentation
Knowledge and Skills	Demonstrable knowledge of 365 suite.  Intelligent communicator with excellent writing and presentation skills  Skilled at developing and maintaining internal and external working relationships at all levels.  Ability to work on own initiative and cooperatively.  Ability to adopt a creative and proactive approach to all aspects of the work.		Application Form/ Interview/Presentation

<p>Values and personal attributes</p>	<p>Empathy with the charitable aims of the Hospice.</p> <p>Significant experience of showing empathy and demonstrating resilience under pressure whilst dealing with supporters and patients.</p> <p>Commitment to involvement with all areas within the hospice</p> <p>Evidence of honesty, reliability and enthusiasm in work settings</p> <p>Professionalism at all times</p> <p>Calm and objective.</p> <p>Proactive in suggesting new ways of working and embraces change.</p> <p>Assertive, confident and approachable with the ability to be a decision maker.</p> <p>A commitment to working with and supporting volunteers.</p> <p>Ability to adopt a flexible approach to working to support evening and weekend events and activities</p>		<p>Application Form/ Interview</p>
<p>Other requirements</p>	<p>Enhanced DBS Disclosure (supervise child/vulnerable adult volunteers)</p> <p>Full UK driving licence and access to own vehicle during working hours (Business use insurance required)</p> <p>Physically fit and capable of regularly lifting and carrying equipment/materials up to approx. 10 kilos.</p>		<p>Post appointment</p> <p>Documentary evidence post appointment</p> <p>Occupational Health</p>

\* **Shortlisting candidates for interview** – We will shortlist candidates for interview by scoring against the above essential and desired criteria. Please tell us in your application and ‘Supporting Information’ section how you meet the requirements we are asking for.