

## POSITION DESCRIPTION:

### SECTION A: Position Context

Position Title	Planned Giving Manager (Job-share 0.4 EFT 12 month contract)
Position Number	
Classification	Professional Level 7 / Level 8
Location	85 Commercial Road Melbourne
Effective Date	April 2018

#### Purpose:

The Planned Giving Manager is responsible for securing and managing bequests and other planned gifts from individuals for Burnet Institute. The manager will build upon and further develop the Institute's Planned Giving strategy to research, cultivate and solicit qualified prospects for planned gifts and provide support to a small team of donor relationship officers.

#### Supervision Reporting Relationships:

This positions' supervisor/manager	Head of Public Affairs and Development
Other positions reporting to <u>this</u> position	None

### SECTION B: Key Responsibility Areas

The key responsibility areas (KRAs) are the major outputs for which the position is responsible and are not a comprehensive statement of the position activities.

Key Responsibility Areas	
1.	<p><b>Planned Giving and Major Gifts</b></p> <p>Review, further develop and implement the Institute's Planned Giving Strategy, with the aim of growing the number of confirmed bequestors to the Institute.</p> <p>Work together with a small team of donor relationship officers to maximise their skills and knowledge in planned giving and provide support in the identification, cultivation, solicitation and stewardship of prospective and confirmed bequestors through a range of donor engagement activities.</p> <p>Actively manage a portfolio of prospective and confirmed bequestors and potential major gift prospects, with the aim of maximising the value of their gifts and deferred gifts to the Institute.</p> <p>Develop an integrated approach to attracting new bequest prospects through targeted supporter communication, media promotion and direct marketing.</p> <p>Maximise the financial value of received bequests through proficient deceased estate administration.</p> <p>Develop and maintain Institute-wide policies and procedures for the financial management, acquittal and recognition of planned gifts.</p> <p>Build internal relationships with relevant administrative, research, public</p>

Key Responsibility Areas		
		health and international health staff to ensure Institute-wide knowledge and support of Burnet's philanthropy program.
2.	<b>Financial and Office Administration</b>	Work within allocated budgets. Maintain and update database of donor contact, also electronic and hard copy bequest records. Carry out administration tasks associated with the above activities
3.	<b>Occupational Health &amp; Safety</b>	Refer to the "Burnet OHS responsibilities and roles" document for full details on specific OHS obligations and responsibilities of Employees.
4.	<b>Training</b>	Responsible for completing all required training in line with the position / role.

### Occupational Health and Safety

The Burnet has a commitment to providing a safe and healthy workplace in accordance with the Occupational Health and Safety Act 2004. All staff are obliged to take all reasonable care to ensure that their actions do not place themselves or others at risk.

### SECTION C: Key Selection Criteria

Qualifications		Essential/ Preferable
	A relevant tertiary qualification with extensive experience in a similar role with a significant bequests component, or an equivalent combination of equivalent experience and training.	Essential

Experience / Knowledge / Attributes		
1.	Demonstrated understanding of fundraising and philanthropy, particularly the traditional and evolving field of planned giving.	Essential
2.	Proven track record in securing bequests from individuals and/or organisations in a not-for-profit setting.	Essential
3.	Exemplary interpersonal skills, including effective listening, empathy, discretion, diplomacy and the ability to build and sustain relationships.	Essential
4.	Highly developed written and verbal communication skills, and high level presentation skills, with the maturity and capacity to communicate with a diversity of audiences including Institute leaders (senior faculty and administrators), donors, bequestors and their legal representatives.	Essential
5.	Affinity for the Institute and commitment to its mission, with demonstrated capacity to champion its humanitarian values among various constituents.	Essential
6.	Experience in developing and/or implementing an integrated bequest strategy incl. direct marketing, internal and external stakeholder communications, media promotion, donor engagement events, website and social media.	Essential
7.	Experience working with Wills and estate planning professionals such as solicitors, financial planners and trust companies in the preparation of Wills, and the realisation of planned gifts.	Essential
8.	Sound knowledge in the use of a relationship management database, including administration, segmentation and analysis.	Essential
9.	Sound knowledge in the use of standard office software packages.	Essential
10.	Capacity to work independently or in teams to meet demanding time lines and expectations	Essential

## Other Requirements

The Burnet Institute is a child safe organisation. The incumbent of this position may be required to undergo a Police Check or Working with Children Check as a condition of their employment.

## SECTION D: Burnet Overview

Burnet Institute is a leading Australian medical research and public health organisation focused on achieving better health for vulnerable communities in Australia and internationally by accelerating the translation of research, discovery and evidence into sustainable health solutions. The Institute is headquartered in Melbourne with programs that operate across Asia, the Pacific and in Africa.

Burnet's culture links innovative discovery-oriented research and implementation research with development and humanitarian action. World-class laboratory and field-based research is integrated into multidisciplinary programs aimed at the prevention, detection and treatment of diseases of global significance. This unique approach allows the Institute to make a tangible and sustainable impact on health in both developed and developing countries.

The Institute has three major thematic programs – Disease Elimination, Behaviours and Health Risk, and Maternal and Child Health, and two expansion programs – Healthy Ageing and Health Security. Staff within these Programs are supported by cross-cutting communities of practice; the disciplines of Life Sciences, Public Health and International Development.

### Further Information:

For further information, please contact Paul Rathbone on telephone 03 9282 2113 or email [paul.rathbone@burnet.edu.au](mailto:paul.rathbone@burnet.edu.au).

---