

## POSITION DESCRIPTION:

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### SECTION A: Position Context

<b>Position Title</b>	Planned Giving Manager
<b>Position Number</b>	
<b>Classification</b>	Level 7/8
<b>Centre</b>	Public Affairs & Development Unit
<b>Location</b>	85 Commercial Road Prahran
<b>Effective Date</b>	January 2017

### Burnet Overview

Burnet Institute is a leading Australian medical research and public health organisation focused on improving the health of vulnerable populations. Burnet's culture links innovative discovery-oriented research with development and humanitarian action. The Institute integrates world-class laboratory and field-based research into multidisciplinary programs to prevent, detect and treat diseases of global significance. This unique approach enables a tangible and sustainable impact on health in both developed and developing countries.

The medical research programs conducted in Burnet's Australian laboratories encompass five major programs which include: maternal and child health, disease elimination, behaviour and risk, healthy ageing, and health and biosecurity which operate across the disciplines of life sciences, public health and international development

Burnet undertakes innovative epidemiological research, including surveillance and modelling complemented by participatory social research and works at international and regional levels, and with governments, civil society and communities across Asia and the Pacific and in eastern Africa. The Institute is headquartered in Melbourne with offices in Papua New Guinea and Myanmar.

### Position 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 position's supervisor/manager	Head of Public Affairs and Development
Other positions reporting to <u>this</u> position	Nil

**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.	<b>PLANNED GIVING AND MAJOR GIFTS</b>	<ul style="list-style-type: none"> <li>Review, further develop and implement the Institute's Planned Giving Strategy, with the aim of growing the number of confirmed bequestors to the Institute.</li> <li>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.</li> <li>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.</li> <li>Develop an integrated approach to attracting new bequest prospects through targeted supporter communication, media promotion and direct marketing.</li> <li>Maximise the financial value of received bequests through proficient deceased estate administration.</li> <li>Develop and maintain Institute-wide policies and procedures for the financial management, acquittal and recognition of planned gifts.</li> <li>Build internal relationships with relevant staff to ensure Institute-wide knowledge and support of Burnet's philanthropy program.</li> </ul>
2.	<b>FINANCIAL &amp; ADMINISTRATION</b>	<ul style="list-style-type: none"> <li>Work within allocated budgets.</li> <li>Maintain and update database of donor contact, also electronic and hard copy bequest records.</li> <li></li> </ul>
3.	<b>OH &amp; S</b>	<ul style="list-style-type: none"> <li>Comply with all occupational health and safety instructions, policies and procedures including departmental safety manuals.</li> </ul>

**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 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.	Essential
4.	Demonstrated ability to build and sustain relationships.	Essential

5.	Highly developed communication skills including the capacity to communicate with diverse audiences including senior leaders, donors, bequestors and their legal representatives.	
6.	Affinity for the Institute and commitment to its mission, with demonstrated capacity to champion its humanitarian values among various constituents.	Essential
7.	Experience in developing and/or implementing an integrated bequest strategy including direct marketing, internal and external stakeholder communications, media promotion, donor engagement events, website and social media.	Essential
8.	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
9.	Sound knowledge in the use of a relationship management database, including administration, segmentation and analysis.	Essential
10.	Capacity to work independently or in teams to meet demanding time lines and expectations.	Essential

**Further Information:**

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