

A more equitable world through better health.



POSITION DETAILS

TITLE	Planned Giving Manager
CLASSIFICATION	Professional Level 8.1 – 8.3: \$118,771 - \$123,565 + super + salary packaging
TIME FRACTION	0.8 - Full Time (Optional)
CONTRACT TYPE	Ongoing
LOCATION	85 Commercial Road, Melbourne 3004, Boonwurrung Land
REPORTS TO	Senior Manager, Philanthropy
DIRECT REPORTS	Nil
LAST UPDATED	October 24

POSITION SNAPSHOT

As a key function Burnet's Philanthropy and Supporter Engagement Team, the Planned Giving Manager is responsible for securing and managing gifts in Wills and other planned gifts (estate trusts and sub-funds of Burnet Endowment Fund) from individuals, in addition to deceased estates administration. The manager will develop and implement Burnet's Planned Giving strategy and operational plan to steward confirmed donors, and identify, qualify, cultivate and solicit planned gifts. The manager will work closely with major gifts program, supporter engagement, and provide technical and coaching support to the broader team on soliciting gifts in Wills, plus act as an internal champion for gifts in Wills across Burnet.

KEY RESPONSIBILITY AREAS

- 1. PLANNED GIVING**
 - Build the bequest pipeline to maximise gifts in Wills (GIW) to Burnet Institute.
 - Implement and further develop existing gifts in Wills strategy (2024-26), with the aim of growing the number of confirmed gifts in Wills to the institute.
 - Develop annual operational plan to deliver the strategy.
 - Meet KPI's and targets related to the annual operational plan.
 - Collaborate with the Supporter Engagement Manager to develop an integrated approach to lead-generation and attracting new gift in Will prospects through existing and dedicated supporter communications via digital and non-digital channels.
 - Collaborate with team members across Burnet's marketing and communications and external suppliers to develop the GIW marketing and brand collateral used to support the GIW strategy.
 - Maximise the financial value of realised bequests through proficient deceased estate administration.

	<ul style="list-style-type: none"> Oversee the resolution of disputed estates with support from internal legal and finance colleagues and external expertise as required. Support and coach Burnet relationship managers to maximise their skills and knowledge in planned giving. Provide support in the identification, cultivation, solicitation and stewardship of prospective and confirmed bequestors, including the integration of planned giving options in donor conversations, events, and donor recognition strategies.
2. DEVELOPING RELATIONSHIPS	<ul style="list-style-type: none"> Develop and implement personalised engagement plans for an assigned caseload of prospective and confirmed bequestors (some with potential major gift potential), to build strong relationships and maximise the value of their gifts to the Burnet. Represent Burnet at events where relevant donors are invited Champion the organisation-wide understanding and buy-in to gifts in Wills to ensure institute-wide knowledge and support of Burnet's philanthropy program.
3. FINANCIAL & OFFICE ADMINISTRATION	<ul style="list-style-type: none"> Help set annual income and expenditure budget for your program, and work within the allocated budget. Track and report on planned giving program performance, including lead generation, prospect conversions, and revenue projections. Maintain and update database with donor contact information, including all communications, agreements and future commitments. Maintain electronic records of estate and endowment information, including all communication with executors and solicitors. Develop and maintain institute-wide procedures related to Planned Giving. Ensure all gifts comply with the <i>Burnet Philanthropy and Fundraising Policy</i> and <i>Burnet Naming Rights Policy</i>. Always adhere to all Burnet policies.
4. TRAINING	<ul style="list-style-type: none"> Responsible for completing all required training in line with the position / role.

KEY SELECTION CRITERIA

QUALIFICATIONS / EXPERIENCE / KNOWLEDGE / ATTRIBUTES		
1.	Experience and demonstrated success in developing and/or implementing an integrated gift in Will strategy including direct marketing, internal and external stakeholder communications, media promotion, donor engagement events, website and social media.	Essential
2.	Proven track record in relationship management and securing gifts in Wills from individuals and/or organisations in a not-for-profit setting.	Essential
3.	Highly developed communication and interpersonal skills including the capacity to communicate with diverse audiences including senior leaders, donors, bequestors and their legal representatives.	Essential
4.	Ability to gather market intelligence/ best practice strategies from diverse sources and use this information for business benefit	Essential
5.	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

6.	Sound knowledge in the use of a relationship management database, including administration, segmentation and analysis.	Essential
7.	Capacity to work independently or in teams to meet demanding timelines and expectations.	Essential
8.	Affinity for Burnet and commitment to its mission, with demonstrated capacity to champion its humanitarian values among various constituents.	Essential
9.	Sound knowledge in the use of standard office software packages, including Microsoft Office products (Word, Excel, Outlook)	Essential
10.	Sound knowledge of donor CRM systems (Salesforce in particular)	Preferrable

About Burnet Institute

Vision

A more equitable world through better health.

Purpose

Create and translate knowledge into better health so no-one is left behind.

Values

Respect, Equality, Inclusiveness, Diversity.

Who we are

Burnet Institute is an Australian-based medical research and public health institute and international non-government organisation that is working towards a more equitable world through better health.

What we do

We are committed to creating and translating knowledge into better health so no-one is left behind. We do this through engaging with and understanding the needs of a broad range of communities and stakeholders to develop laboratory-based and social research programs, policies and products that deliver better health outcomes.

Where we work



Priority countries:

Australia | Papua New Guinea | Myanmar

We also support and contribute to research and public health programs in other Asian, Pacific and African countries.

Australian Institute for Infectious Disease (AIID)

Burnet Institute is a foundation partner of the AIID, a visionary initiative designed to protect Australia and the wider Asia-Pacific region against major global health issues and pandemics. The state-of-the-art facility is expected to be open in 2028 and will be home to Burnet Institute, Doherty Institute and The University of Melbourne, with funding from the Victorian Government. In joining this exciting initiative, Burnet will remain an independent medical research institute.



BURNET 2030 STRATEGY

The Burnet 2030 Strategy focuses on growing our impact, placing equity at the centre of what we do, and paying close attention to the effects of a rapidly changing climate and environment. Our point of difference is our technical breadth—from laboratory-based discoveries to field research, to commercialisation to development programs; all to progress toward a more equitable world. This is what sets us apart. Our Strategy will also see us invest in our people, building our position as the aspirational workplace within the sector with ethical values and a culture committed to fostering talent for future leadership and rewarding careers.

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.

OTHER REQUIREMENTS

Burnet Institute is a child safe organisation. The incumbent of this position will be required to undergo a Police Check and possibly a Working with Children Check as a condition of employment. The types of contact with children can be viewed [here](#). This position involves the following contact with children (any individual aged under 18 years):

CONTACT TYPE	No Contact With Children
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ENQUIRIES

For enquiries, please contact Lorelle Lake 0411 488 506 or email lorelle.lake@burnet.edu.au