

# A more equitable world through better health.



## POSITION DETAILS

TITLE	Salesforce CRM and Data Analytics Manager
CLASSIFICATION	Professional Level 8: \$113,115 - \$122,434 (Pro-rata) + super + salary packaging
TIME FRACTION	0.8 – Full Time (Optional)
CONTRACT TYPE	Ongoing
LOCATION	85 Commercial Road, Melbourne 3004, Boonwurrung Land
REPORTS TO	Executive General Manager, Philanthropy & Supporter Engagement
DIRECT REPORTS	Salesforce Analyst (Direct) and Fundraising Administration Officer (Indirect)
LAST UPDATED	July 24

## POSITION SNAPSHOT

Burnet Institute is implementing an integrated, institute-wide Management Information System to support multiple departments, teams and activities. This includes a CRM to support the activities of the Philanthropy & Supporter Engagement team, the Commercialisation and Research Translation team, and other teams that migrate to Salesforce in the future.

Fundraising and philanthropy plays a pivotal role in enabling data-driven fundraising strategies through effective data analysis, campaign list generation, and Salesforce CRM reporting. This position supports donor engagement, direct marketing campaigns, fundraising appeals, and internal reporting by managing data segmentation, creating dashboards, and responding to ad hoc data requests.

The role requires strong experience in Salesforce reporting and campaign management, combined with sound analytical and data wrangling skills. You will work closely with fundraising, donor support, and communications teams to ensure the right data drives the right engagement.

## KEY RESPONSIBILITY AREAS

1. DATABASE ADMINISTRATION & CUSTOMISATION	<ul style="list-style-type: none"><li>Act as the first point of contact for Salesforce data queries.</li><li>Identify and gather requirements and ensure that the overall database architecture meets the needs of users and stakeholders.</li><li>Maintain documentation of data definitions, segmentation logic, and naming conventions.</li><li>Collaborate direct report to enhance data usability, fields, and workflows supporting fundraising.</li><li>Manage all aspects of user and license management including new user setup/deactivation, roles, profiles, permissions, public groups.</li><li>System configuration changes, including (but not limited to): Workflow, Process Builder, fields, page layouts, record types, custom settings, dashboards and reports</li><li>Monitor user adoption and provide training and support where necessary.</li><li>Maintain, update, document and communicate business rules and procedures that comply with best practices in database management.</li><li>Assist in the development of data security and restoration policies, procedures, and controls.</li><li>With IT/Information Management, coordinate database software updates and backups.</li><li>With Information Management co-ordinate relationships with third-party vendors to make improvements to our data management system.</li><li>Manage system resources including licenses, application storage usage and API usage.</li><li>Keeping up to date with CRM developments and trends.</li></ul>
2. DATA SUPPORT FOR DIRECT MARKETING COMMUNICATIONS, EVENTS AND OTHER ACTIVITIES	<ul style="list-style-type: none"><li>Collaborate with Fundraising and Communications teams to generate precise campaign mailing and digital engagement lists.</li><li>Use dynamic segmentation strategies to personalize outreach based on supporter behaviour, giving history, and preferences.</li><li>Ensure all campaign lists meet business and compliance rules (opt-outs, preferences, exclusions).</li></ul>
3. CAMPAIGN SUPPORT & INSIGHTS	<ul style="list-style-type: none"><li>Contribute to campaign planning with data-informed insights and historical campaign performance trends.</li><li>Provide accurate supporter metrics, donor profiles, and forecasting inputs.</li></ul>

	<ul style="list-style-type: none"> <li>Monitor appeal responses and donation flow across channels (email, digital, mail).</li> </ul>
4. REPORTS, DASHBOARD & ANALYTICS	<ul style="list-style-type: none"> <li>Build and maintain Salesforce reports and dashboards for campaign performance, donor journeys, and pipeline tracking.</li> <li>Support internal stakeholders with custom report requests and regular reporting schedules.</li> <li>Use data visualization techniques to communicate key insights to non-technical users.</li> <li>Develop income and appeal tracking tools to support real-time and post-campaign analysis.</li> <li>Support the team to conduct research, analysis and segmentation of supporter base to provide an insightful 'customer view' and evidence base for strategy.</li> </ul>
5. DATA QUALITY AND GOVERNANCE	<ul style="list-style-type: none"> <li>Maintain high-quality data by supporting regular data hygiene processes and validating list extracts.</li> <li>Handle global database changes such as bulk imports and coding changes.</li> <li>Assist Salesforce users in keeping records up-to-date.</li> <li>Data management to improve data quality, implementing rules and automation as needed.</li> <li>Oversee data flow via third party integrations.</li> <li>Participate in reconciliation processes between the CRM and finance platforms.</li> </ul>
6. TEAM COACHING AND SUPERVISION	<ul style="list-style-type: none"> <li>Supervise the Fundraising Administration Officer in the processing and receipting of all donations and creating and updating Salesforce records (including adding newly acquired donors, change of contact details and communication preferences).</li> <li>Handle general donor enquiries and contact donors when Fundraising Administration Officer not available.</li> </ul>
7. PEOPLE LEADERSHIP	<ul style="list-style-type: none"> <li>Ensure participation of all staff in the People Development Framework (PDF) to enhance performance and identify training, professional development and career coaching needs.</li> <li>Ensure compliance within the group in relation to all required compliance training including online and face to face training.</li> <li>Manage HR issues with the support and guidance of HR as needed.</li> <li>Manage leave within the group to ensure leave balances are kept within institute policy guidelines.</li> <li>Coach and support staff and students.</li> </ul>
8. ASSISTING WITH INTERNAL TEAM OPERATIONS AND PROCEDURES	<ul style="list-style-type: none"> <li>Regularly review and update the Fundraising Business Rules document as a central source of team practice and procedures.</li> <li>Perform any other database / administrative tasks that support team activities as required.</li> </ul>
9. TRAINING	<ul style="list-style-type: none"> <li>Responsible for completing all required training in line with the position / role.</li> </ul>

## KEY SELECTION CRITERIA

QUALIFICATIONS / EXPERIENCE / KNOWLEDGE / ATTRIBUTES		
1.	A relevant tertiary qualification (management information systems (MIS), computer science, information systems, or information technology) and/or equivalent combination of appropriate experience.	Essential
2.	Proven experience working in a CRM system (Salesforce preferred), including reporting, segmentation, campaign setup, campaign lifecycles and customer stewardship principles.	Essential
3.	Strong understanding of relational databases, contact segmentation, and source tracking.	Essential
4.	Demonstrated ability to translate business needs into data-driven outputs.	Essential
5.	Strong problem-solving and data analytical skills with tools such as Excel, Power BI, or similar, with ability to interpret data and provide insights and recommendations.	Essential
6.	Strong interpersonal skills, including effective listening, empathy, discretion, diplomacy.	Essential
7.	Sound organisational skills and attention to detail, with the ability to handle multiple tasks simultaneously and under pressure.	Essential
8.	Capacity to work independently and as part of a team to meet demanding time frames and expectations.	Essential
9.	Experience of working in fundraising and philanthropy or NGO or medical research sector	Desirable

# 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**

## ENQUIRIES

For enquiries, please contact Rob Daly on 0405 824 840 or email [rob.daly@burnet.edu.au](mailto:rob.daly@burnet.edu.au)