

A more equitable world through better health.



POSITION DETAILS

TITLE	Salesforce CRM and Analytics Manager
CLASSIFICATION	Professional Level 8: \$113,115 - \$122,434 + 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 CRM Administrator (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 CRM will be further expanded to support other areas of the Strategic Funding, Partnerships, Innovation and Communication (SF PIC). This role will manage the related database, including governance, administration, analytics and insights. It will provide database management and analysis to support a strong, compelling and customer-driven Strategic Funding and Partnership program in order to generate and grow revenue, build brand awareness, and acquire and retain supporters, funders and partners.

KEY RESPONSIBILITY AREAS

1. DATABASE ADMINISTRATION & CUSTOMISATION	<ul style="list-style-type: none"> All aspects of user and license management including new user setup/deactivation, roles, profiles, permissions, public groups. System configuration changes, including (but not limited to): Workflow, Process Builder, fields, page layouts, record types, custom settings, dashboards and reports Identify and gather requirements and ensure that the overall database architecture meets the needs of users and stakeholders. Monitor user adoption and provide training and support where necessary. Maintain, update, document and communicate business rules and procedures that comply with best practices in database management. Data management to improve data quality, implementing rules and automation as needed. Assist in the development of data security and restoration policies, procedures, and controls. With IT/Information Management, coordinate database software updates and backups. With Information Management co-ordinate relationships with third-party vendors to make improvements to our data management system. Manage system resources including licenses, application storage usage and API usage. Keeping up to date with CRM developments and trends.
2. DATA INTEGRITY & ACCURACY	<ul style="list-style-type: none"> Maintain data integrity by coordinating data cleansing exercises and implementing system checks to identify record errors. Handle global database changes such as bulk imports and coding changes. Assist Salesforce users in keeping records up-to-date. Oversea data flow via third party integrations. Conduct monthly reconciliation between CRM and finance system.
3. DATA SUPPORT FOR DIRECT MARKETING COMMUNICATIONS, EVENTS AND OTHER ACTIVITIES	<ul style="list-style-type: none"> Prepare data brief. Generate accurate, segmented files with variable for communications, events and activities. Extract or facilitate extraction of data from CRM. Assist in review appeal lives for accuracy. In conjunction with the Donor Direct Marketing Manager, maintain a registry of proforma letters for donors. Set-up campaigns and core-functions in CRM.

	<ul style="list-style-type: none"> Update finance on new and existing campaigns. Update Salesforce campaigns and segments with recipient details. Update appeal reports and dashboards to monitor campaign. Monitor donations during appeal. Prepare post campaign analysis.
4. REPORTS, DASHBOARD & ANALYTICS	<ul style="list-style-type: none"> Campaign monitoring and analysis. Donor segmentation. Stewardship activities and relationship management reports. Income and portfolio tracking. Board reporting and dashboards. Management of reporting tools and systems. Prepare data reports as required. Support the team to conduct research, analysis and segmentation of supporter base to provide an insightful 'customer view' and evidence base for strategy.
5. TEAM COACHING AND SUPERVISION	<ul style="list-style-type: none"> 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). Handle general donor enquiries and contact donors when Fundraising Administration Officer not available.
6. PEOPLE LEADERSHIP	<ul style="list-style-type: none"> Ensure participation of all staff in the People Development Framework (PDF) to enhance performance and identify training, professional development and career coaching needs. Ensure compliance within the group in relation to all required compliance training including online and face to face training. Manage HR issues with the support and guidance of HR as needed. Manage leave within the group to ensure leave balances are kept within institute policy guidelines. Coach and support staff and students.
7. ASSISTING WITH INTERNAL TEAM OPERATIONS AND PROCEDURES	<ul style="list-style-type: none"> Regularly review and update the Fundraising Procedures document as a central source of team practice and procedures. Perform any other database / administrative tasks that support team activities as required.
8. TRAINING	Responsible for completing all required training in line with the position / role.

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.	Extensive experience in management of Salesforce database, including administration, segmentation and reports. (NPSP experience preferable)	Essential
3.	Strong problem-solving and analytical skills, with ability to interpret data and provide insights and recommendations.	Essential
4.	Strong interpersonal skills, including effective listening, empathy, discretion, diplomacy.	Essential
5.	Sound organisational skills and attention to detail, with the ability to handle multiple tasks simultaneously and under pressure.	Essential
6.	Excellent computer literacy, including advanced experience with Microsoft Excel and/or other data analysis software.	Essential
7.	Capacity to work independently and as part of a team to meet demanding time frames and expectations.	Essential
8.	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