



VACANCY

Database and Data Management Contractor

Contract Period: End of July – October 2026 (Approximately 12 Weeks)

Only suitable qualified candidates are encouraged to apply. A detailed CV, application letter and qualifications (certificates) should be emailed to **vacancies@waterford.sz** with the subject line **“Application – Database and Data Management Contractor”**. Please make sure to label your application letter and cv with your first name e.g. **Application letter – Name, CV – Name**

Closing date for applications: Friday 24th July 2026

1. Background

The Advancement Office uses DevMan3 CRM as its principal Constituent Relationship Management (CRM) platform to manage alumni, parents, donors, volunteers, partners, scholarships, fundraising campaigns, events, and stakeholder engagement activities. As the Advancement Office continues to expand its fundraising, alumni engagement, communications, stewardship, and institutional reporting functions, there is a need to strengthen the quality, structure, governance, and usability of the CRM. Working under the supervision of the Director of Advancement, the contractor will undertake a comprehensive review, cleaning, optimization, and reconfiguration of the DevMan3 database to ensure that it supports current operational needs and future strategic growth. The assignment will also establish sustainable data governance standards and strengthen staff capacity to maintain high-quality constituent data.

2. Objective

To improve the quality, integrity, usability, governance, and reporting capacity of the DevMan3 CRM through comprehensive database cleaning, reconfiguration, standardization, documentation, and staff capacity building, ensuring that the CRM effectively supports fundraising, alumni relations, communications, stewardship, prospect management, and institutional decision-making.

3. Scope of Services

A. CRM Assessment and Database Audit

Conduct a comprehensive review of the existing DevMan3 CRM, including:

- Constituent records
- Relationship mapping
- Duplicate records
- Data quality and completeness
- Campaign and fund structures
- Event management configuration
- Scholarship records
- Gift management
- Communication preferences
- User permissions and access levels
- Existing reports and dashboards
- Data entry workflows
- Integration with other institutional systems such as Adam and Toddle



B. Data Cleaning

Identify, review, validate, and resolve:

- Duplicate constituent records
- Incomplete records
- Obsolete information
- Missing constituent relationships
- Incorrect stakeholders relationships
- Inconsistent naming conventions
- Address inconsistencies
- Invalid email addresses
- Telephone formatting
- Communication preferences
- Incorrect donor classifications
- Legacy data inconsistencies

C. CRM Reconfiguration

Review and optimize the configuration of:

- Stakeholders categories
- Alumni classifications
- Parent classifications
- Relationship mapping
- Gift coding
- Campaign coding
- Fund structures
- Scholarship structures
- Event structures
- Volunteer records
- Corporate and Foundation records
- Major donor categories
- Communication preferences
- User permissions

D. Data Standardization

Develop and implement institutional standards for:

- Naming conventions
- Stakeholders records
- Address formatting
- Country standards
- Relationship codes
- Constituent categories
- Gift types
- Campaign names
- Event naming conventions
- Scholarship coding
- Volunteer coding
- Notes and interaction records
- Contact reports
- Data validation procedures



4. Collaboration and Stakeholder Engagement

The contractor will work collaboratively with key stakeholders throughout the assignment to ensure that DevMan3 reflects our institutional needs, supports operational workflows, and promotes long-term sustainability.

Director of Advancement

The contractor will report directly to the Director of Advancement and will:

- Develop and agree on a detailed work plan and timeline.
- Provide regular progress updates and recommendations.
- Seek approval for major system changes and data governance decisions.
- Present interim findings and final recommendations.
- Align DevMan3 improvements with the Advancement Office's strategic priorities.

Alumni Engagement Officer

Working closely with the Alumni Engagement Officer, the contractor will:

- Review alumni data quality and constituent classifications.
- Improve alumni relationship mapping and engagement records.
- Support the development of meaningful alumni segmentation.
- Ensure event attendance, communications, and engagement activities are accurately reflected in DevMan3.
- Develop reports that support alumni communications, reunions, volunteering, and fundraising initiatives.

DevMan Support Team

The contractor will liaise directly with the DevMan technical support team to:

- Confirm system capabilities and recommended configurations.
- Request technical assistance where required.
- Validate proposed customizations and workflows.
- Resolve technical issues affecting system performance.
- Ensure all configurations follow DevMan best practices and remain compatible with future software updates.

Information Technology (IT) Department

The contractor will collaborate with the IT Department to:

- Ensure secure access to DevMan3 and related systems.
- Coordinate data backups before significant changes.
- Maintain compliance with institutional cybersecurity policies.
- Support user account management and permissions where applicable.
- Advise on any integration requirements with other institutional systems.

School Community

Where appropriate, the contractor will engage with members of the wider school community, including:

- Admissions
- Finance
- Marketing and Communications
- Human Resources
- Academic departments
- Boarding
- School Leadership

This engagement will help validate constituent information, improve data accuracy, strengthen relationship mapping, and ensure that institutional records reflect current operational realities.



E. Reporting Framework

Design and configure reporting tools and dashboards supporting:

- Annual Fund performance
- Fundraising pipeline
- Donor retention
- Alumni engagement
- Parent engagement
- Volunteer engagement
- Event participation
- Scholarship funding
- Prospect management
- Major gift pipeline
- Campaign performance
- Executive management reporting

F. Documentation

In collaboration with the Director of Advancement and the DevMan Team, develop comprehensive documentation including:

- Waterford Data Dictionary/glossary
- Data Entry Standards Manual
- Standard Operating Procedures (SOPs)
- Data Quality Checklist
- Reporting Guide
- User Permissions Matrix

G. Capacity Building

Provide practical coaching and knowledge transfer to the Alumni Engagement Officer covering:

- Data entry standards
- Database maintenance
- Reporting
- Dashboard usage
- Searches and segmentation
- Constituent management
- Gift entry
- Event management
- Alumni management
- Scholarship tracking
- Quality assurance



5. Methodology

The contractor shall follow internationally recognized CRM, fundraising, and data governance best practices.

Phase 1 – Discovery and data quality review

- Stakeholder consultations
- Database audit
- Duplicate detection
- Integrity checks
- Relationship validation
- Coding review
- Risk assessment

Phase 2 – Database cleaning and system optimization

- Data cleansing
- Configuration updates
- Taxonomy improvements
- Constituent restructuring
- Relationship mapping
- Reporting improvements
- Dashboard development

Phase 3 – Testing and validation

- Quality assurance
- Data validation
- Performance testing
- Feedback incorporation

Phase 4 – Documentation and Knowledge Transfer

- User manuals
- SOPs
- Governance documentation
- Staff training
- One-on-one coaching
- Final handover

6. Deliverables

Database audit review

Including:

- Current state assessment
- Risks identified
- Opportunities for improvement
- Prioritized recommendations



Clean Database

Minimum targets:

- 98% duplicate reduction
- 98% standardized constituent records
- 100% active donor records reviewed
- 100% active alumni records reviewed (where feasible)
- Complete relationship mapping for priority constituents
- Updated household structures
- Standardized constituent classifications

DevMan3 Configuration

Updated:

- Constituent categories
- Campaign structures
- Fund structures
- Event records
- Scholarship records
- Relationship coding
- Gift coding
- Communication preferences
- Dashboards
- Saved searches

Reporting Suite

Development of standardized reports including:

- Executive Dashboard
- Fundraising Dashboard
- Donor Dashboard
- Alumni Engagement Dashboard
- Parent Engagement Dashboard
- Volunteer Dashboard
- Scholarship Dashboard
- Event Dashboard
- Campaign Dashboard
- Data Quality Dashboard

Documentation

- CRM User Guide
- Data Dictionary
- CRM Governance Manual
- Standard Operating Procedures
- Data Standards Manual
- Reporting Guide
- User Permissions Guide

Staff Capacity Building

- Practical coaching sessions
- One-on-one support
- Knowledge transfer documentation
- Final recommendations workshop



7. Key Performance Indicators (KPIs)

Indicator	Target
Duplicate records removed	≥98% of identified duplicates
Constituent records reviewed	100% of active records and priority legacy records
Relationship mapping completed	100% of priority constituents
Standardized coding implementation	100%
Automated reports created	Minimum 12
Dashboards developed	Minimum 8
Documentation completed	100%
Advancement staff trained	100%
User satisfaction	Positive feedback from Advancement team following implementation
DevMan 3 performance	Improved search accuracy, reporting efficiency, and usability

8. Required Qualifications

The contractor should demonstrate:

- Extensive experience implementing or optimizing DevMan3 CRM or comparable advancement platforms such as Blackbaud Raiser's Edge, Salesforce Nonprofit Cloud, or Blackbaud CRM.
- Strong expertise in CRM administration, database management, and data governance.
- Demonstrated experience supporting fundraising, alumni relations, advancement, or higher education institutions.
- Knowledge of fundraising and constituent relationship management best practices.
- Excellent analytical, documentation, and problem-solving skills.
- Experience in data migration, deduplication, reporting, and system configuration.
- Ability to facilitate workshops, train users, and produce clear technical documentation.
- Strong interpersonal skills with the ability to collaborate effectively across departments and engage with technical and non-technical stakeholders.

Expected Outcomes

At the conclusion of the assignment, the Advancement Office will have:

- A clean, accurate, and well-governed DevMan3 CRM database.
- Standardized constituent, relationship, campaign, gift, event, and scholarship records aligned with institutional data standards.
- Enhanced dashboards and automated reports that support strategic planning, fundraising, alumni engagement, stewardship, and executive decision-making.
- A documented CRM governance framework and standard operating procedures to ensure long-term data quality and consistency.
- Advancement staff equipped with the knowledge and tools to maintain the CRM effectively and confidently.
- Stronger collaboration between the Advancement Office, IT Department, DevMan support team, and other school departments, ensuring the CRM remains a reliable institutional asset that supports Waterford Kamhlaba's long-term advancement strategy.

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