

Updating Addressees and Salutations for Today's Cultural Environment: The Fundraising and Technical

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Definitions

- Addressee
 - Example: *Mr. and Mrs. John W. Smith, Jr.*
 - Envelopes, tops of letters, reports, lists, ...
 - Includes at least first name (or version thereof) and last name
- Salutation
 - Example: *Mr. and Mrs. Smith*
 - What follows *Dear* in a letter or merged at the beginning of an email
 - Includes either first name (or version thereof) or last name
- “Name formats” in the web view

Brief History

- Through the 1980s into the 90s
 - *Mr. and Mrs. John W. Smith, Jr.*
 - *Mr. and Mrs. Smith*
 - Assuming *John* must be “Mr.” and *Betty* must be “Mrs.” or “Ms.”
- But then changes
 - Pushback against women being defined as “and Mrs.”
 - A move towards informality
 - A move away from gender binaries, gender assumptions, and relevance of gender

Approaches

- Leaders asking for the global change to fix this...no!
- A better approach
 1. Decide on the go-forward approach for new constituents
 2. Determine and implement an approach for existing constituents



*Document as both P&P and a data entry cheat sheet.

Add/Sals Needed

- Typical needs met with
 - Primary Addressee and Salutation (always the couple)
 - Main Constituent Only Addressee and Salutation, only if married/partnered and needed (board, alum, vols, contacts)
 - Donor Recognition (an addressee format) when expressed and different
- Unlikely you need any named by formality or all possible variations of formality
 - Select the one format you use regularly and set that up (e.g., *no* single formal and informal, couple formal and informal,...)

Beginning Matters

1. Make an institutional decision, not a departmental one
2. Throw out expectations that names in lists “must” or “should” be formatted the same way
3. Policy-wise, the organization always retains the last say, but...
4. Donors’ expressed preferences are what we use regardless of their format
 - E.g., Mrs. Robert Hernandez
 - Document who asked for what and when (and why, if you know and it’s appropriate)

Beginning Matters cont'd

4. Consider your organization's
 - Culture (e.g., an opera in a big city vs. a grass roots environmental org)
 - Geography
 - Constituency
 - Leadership

5. Start simple, one topic at a time (of course related, but focus)
 - Single people, Addressee
 - Single people, Salutation
 - Couples, Addressee
 - Couples, Salutation

Single People, Addressees

Start with Addressees for single people

1. Titles (Prefixes)

- Miss and Master
- Mr., Mrs., Ms., and gender assumptions
- Mx.
- What about earned and honorific titles such as Dr., Professor, Reverend, Rabbi, Colonel, Governor, etc.? Don't dismiss so quickly
- Title 1 *and* Title 2

2. First names, but what about nicknames?

- Bill instead of William, but Bubba?
- First names that are recorded as initials?

Single People, Addressees cont'd

3. Middle names and middle initials
 - Sometimes used instead of first and nicknames

4. Suffixes: Jr., Ph.D., USNA (Ret)
 - Suffixes have more importance than gender-based titles
 - Not all suffixes have equal importance, e.g., Jr. vs. Esq.
 - Suffix 1 *and* Suffix 2
 - Never “Dr. Barbara Lee, M.D.” for doctors

5. Class Year and Parent Class Year designations for educational institutions (e.g., '85, P'25)

Single People, Salutations

Then do Salutations for single people

- Should work in conjunction with the Addressee; no:

Bob Smith

1234 Main Street

San Francisco, CA 94114

Dear Dr. Smith:

➔ Formality

Couples, Addressees

Then do Addressees for couples: influenced by work on Singles, with these added decisions

1. Who's a couple

2. Who goes first

- When same last name, and with different last names
- Most important, closest to the organization?
- Lowest class year?
- Alphabetically by first name and/or last name?
- Gender? Traditional etiquette:

<https://kaylaprice.com/2016/05/22/never-separate-a-mans-first-and-last-names/>

Couples, Addressees cont'd

3. Use of “and” or &
 - Marie Kondo and Kawahara Takumi
 - Marie Kondo & Kawahara Takumi

4. Same and different last names
 - See link above re: traditional approach by Gender
 - There may be times when it’s best to separate the names even with same last name

5. In some situations: same way in both records or different in each?

Couples, Salutations

Then Salutations for couples

- Should work in conjunction with the Addressee; no:

Mary and Bob Smith

1234 Main Street

San Francisco, CA 94114

Dear Mr. & Mrs. Smith:

➔ Formality, and/&

New Constituents Summarized

- Anything else left out here?
- Four primary decisions *documented* in these details
 - Single people, Addressee
 - Single people, Salutation
 - Couples, Addressee
 - Couples, Salutation
- This is your go-forward approach with new constituents

Raiser's Edge Tools for New Constituents

- Use formulas whenever you can, Editable/Custom as a last resort only
- Create new formulas in database view > Configuration > Add/Sals
 - Blackbaud Knowledgebase (kb.Blackbaud.com) article 41476
- Sort the formulas in order of most used to least used, logically grouped
- Default sets for data entry in database view (article 46148)

Changing Existing Constituents

But what about existing constituents with this new policy?

- Do not do a simple, single global change.
- Do you know the reason constituents have the current values they do? Are you able to tell which add/sals are there because of constituent preferences which need to continue to be honored?
- Be careful about assumptions, such as “all Raiser’s Edge editable/custom add/sals indicate a constituent-stated preference and all non-editable add/sals were assigned by a staff person.”

Changing Existing Constituents cont'd

- The formula to calculate the policy just developed would be hard to write when you consider nicknames, titles, suffixes, class years, spouses and partners with same and different last names...
- Are you getting complaints about the current formats used?
- Do you have to change what's already there, or just use the new policy going forward and make changes when asked?
- Ask your constituents what they prefer and update accordingly (e.g., postcard or email)?

Changing Existing Constituents cont'd

- Prioritize on most important constituents, handle manually?
- Handle in small groups rather than all at once?
- Make the change as best you can, include notices in communications, and then respond to requests/complaints?

Changing Existing Constituents Summary

- I'm not saying, "it's so hard, don't do it," I'm saying, "it's not as easy as many think, do it thoughtfully"
- Whatever you do, review, review, review.

RE Tools for Changing Existing Constituents

- Queries and global changes, *but be careful!*
 - See KB articles 37735 and 41563
 - Hint: this is best done as a *Constituent* global change, not Individual
 - Hint: in most cases, add checkmark to **Overwrite existing value**
- Export, Modify, and Update Import
 - Both formula-based and Editable are possible
 - Exporting the values as RE Add/Sal IDs: see KB article 38293 (get IDs: 48203)
 - Exporting values as text: see KB article 49275
 - Importing: see KB articles 46166 and 37834

Q&A? Thanks! Contact Information:

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You can also sign up for my e-newsletter there as well.

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