



**Envisioning Excellence for
Mission Driven Success**

Implementing DEI in Your Fundraising Database: A Case Study Using Constituent Names

Bill Connors, CFRE , bCRE-Pro
(he/him)

Independent Consultant on Raiser's Edge

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Session Introduction

- The origin for this presentation
- The intent and objective
- I am not an expert on DEI
- Not database/CRM specific

DEI Data

How do we define “DEI Data?”

- Data that connotes or denotes a description of a person’s identity, particularly as a minority or having minoritized status, is considered DEI data
- This can include (but is not limited to) race, ethnicity, national origin, gender identity, sexual orientation, caste



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

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

Approaches cont'd

- Do it right:
 1. Draft
 2. Discuss
 3. Decide
 4. Document
- Unlikely you need all possible variations for a constituent's name on formality
 - Select the one format you use regularly and set that up (e.g., *no* single formal and informal, couple formal and informal,...)
- But you might need other formats as well, such as Donor Recognition

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. Prefixes

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

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 prefixes
 - Not all suffixes have equal importance, e.g., Jr. vs. Esq.
 - Never “Dr. Barbara Lee, M.D.” for doctors
5. Class Year and Parent Class Year designations for education 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 & or stacked names
 - Marie Kondo and Kawahara Takumi
 - Marie Kondo & 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 Records 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

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 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, prefixes, 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 Constits 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 the results.

Q&A? Thanks! Contact Information:

Bill Connors, CFRE, bCRE-Pro
Independent Consultant on Raiser's Edge
(NXT and v7)

billconnors.com

bill@billconnors.com
415 377 9197