

Sample Start for Policy and Procedure for Raiser's Edge Name Formats/Addressees & Salutations

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[The following is an example start – not the entire document, but a start – of how policy and procedure documentation can be written for name formats (web view) and addressees and salutations in Raiser's Edge NXT. This is a supplement to Bill's aasp and bbcon presentations from September and October 2023. This is being provided in a PDF format for easiest distribution and access but is not protected, so you are welcome to copy and paste anything from here that you wish, as well as change the material and add to it.]

Our organization values our constituents. One way we do that is by referring to constituents in communications with them and reporting about them using their names the way they prefer them to be listed, in combination with other values of our organization for equality and diversity.

This document is our policy and procedure for how constituent names are set up in Raiser's Edge (RE).

Policy statements:

1. The head of development and the institution always have final say in allowing or disallowing a name format to be entered and used in RE if there are questions about the appropriateness of a constituent's requested format. These two executives also are empowered to define "appropriateness" and retain final say, without question, should any request be questionable.
2. However, acknowledging that it is unlikely there will be inappropriate requests from constituents, the constituent's preferred format will be honored regardless of our general guidelines below.
 - a. All special requests from constituents for name formats will be recorded in RE in a constituent note with a note type of "Name Format Details." The note should include the who, what, when, and why of the request.
3. We understand that the aforementioned policy and that which follows will create a variety of name formats across our database. It is fine that lists we produce, for donor listings or any other purpose, will not have consistent formats or structure of the names.

4. Our overall approach will be to:

- a. Be informal: Given the culture of our institution and location, this is more in alignment with how our constituents expect to be communicated with and listed.
- b. Drop the use of gender-based prefixes (RE “Titles”): Mr., Mrs., and Ms.
 - i. We do not believe in relegating women in couples to “and Mrs.” – the woman’s name is as important as the man’s.
 - ii. We do not believe in assuming gender from first names.
 - iii. Gender-based titles are inconsistent with the aforementioned informal approach.
 - iv. Gender is irrelevant to our mission and work and not needed to code, address, or list our constituents.
 - v. Consistent with the aforementioned policy, if a donor wishes us to use a gender-based title, we happily will.
 - vi. If a constituent prefers the use of the non-binary alternative, Mx., we will honor that.
 - vii. We will, however, use prefixes (titles) that are not gender based (e.g., Dr., Rabbi, Colonel) and suffixes that a constituent shares with us. Our assumption is that if they are shared by the constituent, they want us to use them.
- c. Include the spouse or partner if there is one and create additional name formats for “coupled” people when the main constituent has a unique relationship to us (e.g., volunteer, board member, alum, organization contact).

Procedure notes:

1. We have the following add/sal types in our system:
 - a. **Primary Addressee and Salutation:** should include the spouse or partner, to be used in all cases except when it is known one of the others below should be used, and always the backup (“otherwise use” in RE) value when using one of the other options below.
 - b. **Main Constituent Only Addressee and Salutation**
 - i. “Main Constituent” refers to the person on the Bio 1, never anyone under the Spouse/Partner button. See our constituent data entry guide...
 - ii. Only to be entered when both the following are true:
 1. The person has a spouse/partner
 2. We have a unique relationship with this person separate from the couple and we need to be able to communicate to or list the main person only. Examples here include alumni, board members, volunteers, and organization constituent contacts who also have individual constituent records.

- c. **Donor Recognition Name:** only to be added if a constituent expressly requests to be publicly listed different than the Primary Addressee format (in which case the change should be documented).
- 2. Add/Sals should be thoughtfully set up on every Individual constituent record. They only need to be added on relationships, and must be added for relationships, when the relationship is a tribute “acknowledgee” or when the relationship is a contact.
 - a. For relationships that are not also individual constituents, use the Relationship Primary Addressee and Salutation
 - b. For relationships that are also individual constituents:
 - i. If the person is not married or partnered and the Primary Add/Sals in the person’s record works for the relationship role, no further effort is needed.
 - ii. If the person is married or partnered, their individual constituent record must be given the Main Constituent Only Add/Sals.
 - c. When pulling data from RE for contacts, we will choose “Use Main Constituent Only Add/Sal if present, otherwise use Primary Add/Sal.”
- 3. In most cases, we prefer formula-based add/sals on records rather than making them Editable and manually typing in the needed format. More formulas can be added by the database manager at any time. Constituent add/sals should only be made Editable when (1) the needed format cannot be created by a formula (e.g., a third person’s name needs to be included) or (2) the need is clearly unique and such an outlier that it can be reasonably guessed that the formula would never be needed again and is therefore not worth the setup work and additional value on the list.

Single Constituents’ Addressees

Single means unmarried and unpartnered. See our constituent data entry guide for more clarity on how this decision is made and who is entered as a “spouse” or “partner” in RE.

- 1. Titles (prefixes)
 - a. Note: What RE calls a Title refers to what is generally called a prefix, such as Ms. or Dr. It does not refer to what is generally called “title” such as President or Vice President of Marketing, which RE calls Position.
 - b. We do not assume, enter, or use gender-based titles (Mr., Mrs., Ms.) unless specifically requested by a constituent.
 - i. For transgender constituents, we use whatever title (gendered or not) or no title as they wish. We should ask, not assume, and in the case of no direction from the constituent, do not use a title.
 - c. We make available the non-binary Mx. for those that request it, but we don’t actively make it available. Our preference is to eliminate titles, not provide an alternative to gender-based titles.
 - d. We do use all other titles (prefixes) provided to us by a constituent or through reputable means, though we do not actively solicit them.

- e. If we have a constituent's title and the constituent indicates they do not want us to use it, of course we do not use it.
 - f. For those who have a Dr. title, we prefer to not use it if we have the corresponding suffix instead, such as M.D. or Ph.D. If we don't have the suffix, we use the Dr. title.
2. Of course, we use First Names or first name alternatives as indicated by constituents.
 - a. At data entry, data goes into the appropriate fields, first, nick and middle – no jury rigging. See our constituent data entry guide.
 - b. We use nicknames when they are common alternatives to first names such as Beth for Elizabeth or Charlie for Charles. We do not use hyper-informal nicknames such as Bubba or Buffy. If in doubt, someone doing data entry should check with their manager.
 - c. We prefer not to use initials in place of a first name unless that is what the constituent wants.
 - d. Middle names used by constituents as first or nick names are, of course, acceptable and should be used if that's the constituent's preference.
 3. Except when used as a first name alternative as noted above, middle names and middle initials are not used.
 4. Suffixes: if provided by the constituent, they should be used unless the constituent indicates otherwise. We do not actively seek suffixes, but if they are provided by constituents we assume they are important to them and use them.
 - a. M.D., Ph.D., and other doctor-indicating suffixes should not be used if the Dr. title has been used but should be used if the Dr. title has not been used. However, our preference is to use the suffix and not Dr.

Example of addressees for single constituents that reflect our general policy:

- Robert Hernandez
- Beth Ramirez
- Charlie Oh, Jr.
- Dr. Tyrone Washington
- Cecily Lee, M.D.
- Col. Martha Smith
- The Honorable Barbara White

Single Constituents' Salutations

Salutations follow the same principles as for addressees.

1. We use the first name or first name alternative for those without prefixes. For those with prefixes, we use them followed by the last name.

2. As is the nature of salutations, of course middle names and suffixes are not used.
 - a. Because of this, the Dr. title will need to be used for the salutation where it might not have been used in the addressee because a suffix was used instead. See Lee above and below.

Example of salutations for single constituents that reflect our general policy:

- Robert
- Beth
- Charlie
- Dr. Washington
- Dr. Lee
- Col. Smith
- Judge White

This last example is accomplished by using the RE Title 2 field instead of Title 1 for those constituents where the Title changes from addressee to salutation (e.g., The Honorable Barbara White but Judge White).

...continue this as directed in the presentation and illustrated above...