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Standard Addressee and Salutation Formats

(some terminology specific to Blackbaud products)

1. Primary Addressee
2. Primary Salutation
3. Formal Joint Addressee
4. Formal Joint Salutation
5. Informal Joint Addressee
6. Informal Joint Salutation
7. Tax Receipt/Legal Name

1. Primary Addressee – this is usually done in a formal format which includes titles and/or professional suffixes as warranted. This is the “name” that will appear at the top of the record* and is often seen on reports.
 - a. Format is: <Title 1, First Name, Middle Initial, Maiden Name (for female alumnae only) Last Name, Suffix 1, Class Year>.
 - b. Special considerations: people who prefer to use their middle name; people with a professional (Suffix 2) addend not using a title.
2. Primary Salutation – this is usually done in an informal format and is the preferred (or nickname) of the constituent. Institutions may opt for the formal salutation or even a mixture of formal and informal based on marital status or constituency.
 - a. Format is: <Nickname>
 - b. Special considerations: Widows, Emeriti, VIPs, unflattering nicknames
3. Formal Joint Addressee – Most commonly seen as the classic “Mr. and Mrs. John J. Jones Jr ‘80”
This format is not included in the informal set
Note: fewer institutions are including the class year as some alumni feel it “dates” them
 - a. Format: <Title 1, “and”, Spouse Title 2, First name, Middle initial, Last Name, Suffix 1, Class Year>
 - b. Special Considerations: people who prefer to use their middle name; couples whose last names do not exactly match, Female titles of higher consideration than the spouse, couples who are both alumni
4. Formal Joint Salutation – classic “Mr. and Mrs. Jones”
This format is not included in the informal set
 - a. Format: <Title 1, “and”, Spouse Title 2, Last Name>
 - b. Special Considerations: people who prefer to use their middle name; couples whose last names do not exactly match; Female titles of higher consideration than the spouse
5. Informal Joint Addressee – More commonly in use and seen as “Jane and John Jones Jr”

- a. Format: <Spouse Nickname, “and”, Nickname, Last Name, Suffix 1>
 - b. Special Considerations: VIPs, etc.; couples whose last names do not exactly match
6. Informal Joint Salutation – More commonly in use and seen as “Jane and John”
 - a. Format: <Spouse Nickname, “and”, Nickname>
 - b. Special Considerations: VIPs, etc.
7. Tax Receipt/Legal Name – Used only on tax receipts
 - a. Format: <First Name, Middle Name, Last Name, Suffix 1, “and/or” Spouse First Name, Spouse Middle Name, Spouse Last Name, Spouse Suffix 1>

Other formats that may be deemed necessary –

- Donor Recognition – specific to donor wishes
- CEO’s format (used when the HOS list is mixed formal and informal)
- Volunteer Recognition - <Nickname, Last Name, Suffix 1, Class Year>
- Primary Org Contact – could be the Primary Addressee or another format

All formats should be built to include a “mirror” instance so spouses exactly match

Sample screenshot from a live database

