My email below is in repsonse to a question first posed in an earlier email. You might wish to read that email, at the end of this document, first, and then come back and read my response.

From: Fund raising services technical discussion on behalf of Bill Connors
To: FUNDSVCS@LISTSERV.FUNDSVCS.ORG
Subject: Re: "Former" Constituent Codes
Date: Wednesday, January 05, 2011 10:14:47 PM

Let me preface my comments to this discussion by saying I generally prefer short answers and dislike long answers on this list so I can get in and out quickly, but this question is a long-time RE issue that I don't think is well understood and is difficult to explain well quickly. So I apologize for this long answer, but I hope it really helps those who struggle with this since there seem to be many that do (everyone else feel free to delete, I understand ☺)…

In summary, Anita, while the way you were doing it DOS might have been right (I don't know, before my time with RE), the way you are doing it now is the "right way" in RE 6 and RE 7 (I use "right" based on my time at Blackbaud with programmers and designers and my understanding and work with RE, though I'm willing to be corrected if I'm wrong). This is true, however, only if you are using Constituent Codes for its intended purpose. Due to the questionable naming of this functionality and most trainers' and others' lack of understanding of this field's intent, it often becomes a code dumping ground and ends up with all kinds of miscellaneous codes. If that's more helpful and works better for organizations than the intended use of this field, no problem.

The primary intent of constituent codes is reporting by donor type such as board, staff, faculty, "friends" (nicer than "miscellaneous individuals"), corporations, foundations, etc. This is a big deal for educational institutions (think VSE and other like reporting and needs), typically not so much for other organizations. Most RE users get overly preoccupied with Query in RE and don't use Reports sufficiently, so most strategies with constituent codes seem to be based on using them for querying. But due to their intended purpose, the real value of cons codes is not in querying but in reporting, again to answer those questions of reporting by donor type: What percent of our giving comes from what kinds of donors? What participation rates do we have? Etc. The best illustration —that ever-present pie chart in non-profit annual reports that breaks out giving by kind of donor. RE has a canned cons code report that will quickly give you those stats to prepare that pie chart.

RE does a much more sophisticated analysis and reporting this way than most people know or realize. If you don't care about that, truly that's fine, folks can do whatever they want, but if you care to do that reporting (and I see that you are from a school, which usually does care about this), you should be careful.

The point of cons codes and their dates is *to define the category for giving by donor type you want donors included in* ***during the time that code was true.*** So if someone joins your board on 1/27/2008 they should be assigned a cons code of Current Board (or something to that effect, most people just use "Board Member") with a Date From of 1/27/2008. When they leave the board they should be assigned a Date To as of that date. The same procedure is typically true for students, faculty, staff, parents, and sometimes grandparents for educational institutions.

So to answer what you've been told, you definitely do not want to change the code to BoT-Former with the dates they were current on the board if you want reporting to work right. Otherwise RE is going to report what was current board member giving as former board member giving.

Other than closing off with a date to their “current” cons code, what should you do?

Some would argue that you need do nothing, that we can tell they’re former board by looking at them (obviously, we’re smart people and looking at the Bio 2 tab we can infer that from a code assigned a Date To) or by query (and yes, you can do that too). But that doesn’t help with reporting by cons code. If you’re going to do reporting by cons code, RE needs to know what category you want them included in NOW. It doesn’t infer a “former” from previously entered “current” codes because it doesn’t want to assume how you want to classify “former” constituents’ CURRENT giving.

For example, when someone leaves your board, hopefully they still give, right? (Other issues to address if not unless they died. ☺) So how in your cons code (giving by donor type) should they be classified? Most organizations have seemed to feel that “former board members” are a special lot and should be reported separately, not just dumped back into “Friends.” IF that’s the case for you, you SHOULD add a Former Board code, too, (note—ADD that code, not replace the current code which is already closed off with a Date From) with the day after the current board code’s date to. To illustrate as you did:

Description	Date From	Date To
BoT-Former	12/4/2010	
BoT-Current	1/27/2008	12/3/2010

This lets you “have your cake and eat it too”—you keep your former board members coded for when they were current so when the board says, “Can we see a five-year giving history of the board to see how we’re doing?,” you can give them such a report of giving by board members who were board members *during those years* and NOT this year’s board’s giving the past five years. If you don’t keep the codes as I illustrate above, how does RE know who was a board member when to be able to calculate such historical statistics?

In fact, if someone comes back on the board and then leaves again, his/her cons codes should look like:

Description	Date From	Date To
BoT-Former	4/16/2015	
BoT-Current	7/1/2012	4/15/2015
BoT-Former	12/4/2010	6/30/2012
BoT-Current	1/27/2008	12/3/2010

The point of the BoT-Former is to show their CURRENT giving in that category. If you don’t want their current giving in that category, then assign them Friend or some other current category, that’s fine. But you really should keep the Board Current code there and close off its Date To, not change that code. Additionally, despite some others’ recommendations, if you want former board giving to stand out as such, you should additionally add that code as I have said.

The bottom line is it really depends on what you're trying to do as to what you should do, but given that you're an educational institution and given that most organizations do have both Current and Former codes for board and often staff and others, I'd stand by this approach. You might not want to do this for former volunteers, members, and other less important groups—they can just become "Friends" again—but this is a management and perhaps larger institutional reporting issue that you should consider, not just an RE issue per se. For example, is there a feeling that former board members should continue to be more supportive than the average Friend and their giving should stand out, or is it expected and okay that they go back to lower levels of giving and just get blended in with all the other misc. folks? That's a fundraising management question, not an RE tech question. And that's how I'd resolve the conflicting advice folks gave here today between some having "former" codes and some not—they all could be right, each having made the right decision for their institution's needs. Again, just understand that RE reporting isn't going to automatically assign someone to a "former" category based on the presence of a Date To if that's what you want to see.

Finally, if this is an issue with fundraisers looking at the screen and getting confused, you might take "Current" out of the code and just use "BoT" or "Trustee" or something like that. If you add the Former code and list it first (the most currently true code should be listed highest anyway), it will also be more obvious to them that the person is a former board member. Otherwise they need to understand the implications of this decision are bigger than their looking at the screen and learn to understand what they're looking at (and why, if they will).

Caveats: This can make querying a little more complex, but only a little. This doesn't even begin to address the issue of multiple current cons codes and gift cons codes, but I'm probably already pushing folks' patience by having written this much.

Hope this helps. Cheers,

Bill

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From: Fund raising services technical discussion [mailto:FUNDSVCS@LISTSERV.FUNDSVCS.ORG] **On Behalf Of** Anita Fleming
Sent: Wednesday, January 05, 2011 10:05 AM
To: FUNDSVCS@LISTSERV.FUNDSVCS.ORG
Subject: "Former" Constituent Codes

I'd like to get an idea of how people code their board members (and constituencies in general) in The Raiser's Edge. We have four different categories of Board of Trustees members: current, honorary, emeritus, and former. Way back when (in Raiser's for DOS), when a board member stepped down, we changed the constituent code from "BoT-Current" to "BoT-Former." Then a few years ago since we had the capability to add Constituency Date From and Date To, it was decided to track the member's tenure through those fields. For example:

- A board member began his tenure on "1/27/2008." He was coded as "BoT-Current" and "1/27/2008" was added to the
  Constituency Date From field. The Constituency Date To would be left blank.
- Then when he stepped down, we would add a Constituency Date To as "12/3/2010," for example.
- If he was not an alumni, parent, or didn't have any other constituent code, we would then add "Friend" and add the Constituency
  Date From as "12/4/2010." The Constituency Date To would be left blank.
- On the bio screen, you see the history of the individual as:

Description	Date From	Date To
Friend	12/4/2010	
BoT-Current	1/27/2008	12/3/2010

I've been asked to change the coding system so that when an individual steps down we change the "BoT-Current" code to "BoT-Former," but leave the dates as is so that when fund raisers look at the bio screen, it will not say "current." It would say:

Description	Date From	Date To
Friend	12/4/2010	
BoT-Former	1/27/2008	12/3/2010

But, it would mean the person was a current Board member from 1/27/2008 - 12/3/2010.

I'd appreciate it if others would send a sample or advice on how you keep this type of data. The same situation comes up with individuals who are are former faculty/staff. Thanks,

Anita Fleming