

***Important*: Name and Salutation Changes in Advance, November 2023**

In 2020, the UC system issued a Gender Recognition and Lived Name (GRLN) [Policy](#) that provides guidance on the collection of gender identity and preferred/lived names for our constituencies. It is the UC's intent that this policy be fully implemented by December 31, 2023. As mandated by this policy, and to ensure that we use preferred gender, preferred/lived names over legal names, and to ensure that we are recognizing/addressing donor names and salutations in a bias-free manner, the following changes have been made to entity names and salutations in Advance.

Gender: Per GRLN Policy, while collecting and storing gender information, we should always have at least three equally recognized gender options - woman, man and nonbinary. To adhere with this policy, Advance now has the following four categories under Gender - Female, Male, Nonbinary and Unknown. These are to be selected based on the entity's reported preference. The Unknown category is to be used when there is no data available on the entity's preference.

Prefixes: Prefixes have been removed from all preferred names in Advance, the exceptions being professional, honorary and military titles. Previous versions of the entity names with prefixes (Mr./Mrs./Ms.) are stored as archival data (Formal Names) in Advance.

Preferred Names: Names previously referred to as 'Primary' have been renamed '**Preferred**' in Advance. This field will reflect the preferred/lived names of entities and will be populated in report pulls under **Mail Name** and **Spouse Name** columns. Legal names will be stored as separate name types in Advance.

Legal Names: Beginning January 1, 2024, UC campuses will not be allowed to use/display legal names (names assigned at birth) in any public facing documents or collaterals. This includes all appeals and mailers, and public recognition documents. Legal names will be stored in Advance for information purposes only, and will not be visible in Look-up names (see below).

AKA names: The majority of these were created to look up entities in Advance. These names have been renamed as **Look-up** names and will be used for search functions.

Nicknames: These should only be entered/used if they are the preferred nicknames as confirmed by the entities themselves.

Stacked Names for Appeals and Mailers: For bulk appeals, mailers and envelopes, the donor names should be stacked as follows. These merge fields are included in all ad-hoc as well as OARS reports.

«MAIL_NAME»

«SPOUSE_NAME»

«PREF_STREET1»

«PREF_STREET2»

«PREF_STREET3»

«PREF_CITY», «PREF_STATE_CODE» «PREF_ZIPCODE»

Example:

John Gaucho

Jane Gaucho

111 Hollister Avenue

Santa Barbara, CA 93111

Joint Salutations: These will be the first names of the two entities when the joint mailing indicator is enabled.

«FIRST_NAME» and «SPOUSE_FIRST»

John and Jane

Donor Recognition Names: These names are manually entered for Giving Society donors under '**Salutations**' in Advance. For guidelines and support on creating donor recognition names for donors with lower giving thresholds, please contact **Donor Relations & Stewardship at donor.relations@ia.ucsb.edu**