Policies and Procedures

Constituent Records

# Head of Household Policy

Constituent couples can exist as two constituent records or as a constituent record and a relationship record, linked using the 'partner' area of the bio 1 tab. When both constituents have separate constituent records, one needs to be marked as head of household. The constituent marked head of household is the record that gifts, notes, and actions are entered on to. It is also the record that mailings get sent to. It is important for data to be contained to one record so we can see all interactions with a household easily.

# The ‘secondary’ household member should only be a non- constituent relationship record when possible

* 1. Secondary household members should only be non- constituent relationship records.

This makes it clear which record all data should be entered on to.

* 1. Exceptions:
     1. **If a spouse is selected to become a committee member/ board member and will be receiving separate mailings to meetings etc., it may be desirable to create a constituent record for the spouse.** Discuss with the Database Administrator. The administrator may do so with the spouse record.
     2. **If a spouse is the recipient of Honor/Memorial gifts**, that person MUST have their own constituent record to be flagged as an Honor/Memorial. Constituent menu, Create Constituent Record. Go to Honor/Memorial tab and indicate “Constituent is an honor/memorial”.
     3. **When both constituents have a record**, only one should be identified as the Head of Household.
  2. The first constituent entered into the database (check date entered under constituent properties), is the default head of household.
  3. The solicitor or primary relationship holder for the household may decide to change the head of household as necessary.
  4. If the Head of Household is changed for a record, put a note on each record noting the date and reason of the change.

# Procedure

* 1. Constituent Records: [Changing Head of Household](PROCEDURE%20-%20Head%20of%20Household.docx)