

Berklee College of Music
Office of Institutional Advancement

DRAFT

Policy and Procedure on Personal and Corporate/Foundation Address Standards in
Benefactor
Submitted: Stephen Rodriguez
8/9/07

Berklee College of Music
Office of Institutional Advancement

**Policy and Procedure on Personal Address Standards in
Benefactor**

Purpose:

Addresses must be stored in Benefactor with similar address layout in order to facilitate mailing, labels, production of lists, as well as ensure quality of data entry assignments. This policy is formulated after USPS formats and abbreviations. This address standardization will also facilitate the use of addressing machines as well as ease the process of data cleansing and mass mailing as all internal processors and licensees with the USPS adhere to these standards.

General:

Standardized Delivery Address Line and Last Line:

STEPHEN RODRIGUEZ
1761 BEACON STREET
BROOKLINE MA 02445

Recipient Line
Delivery Address Line
Last Line

In Benefactor the screen would appear as such:

The screenshot shows the 'ADR-Address Maintenance' window for Stephen Rodriguez (ID: 0092007). The form is divided into several sections for data entry:

- Header:** Rodriguez, Stephen; ID: 0092007; M: DNR: Y ST
- Address:** Line 1: 1761 Beacon Street; Line 2: (empty); Line 3: (empty)
- Eff. Start:** 02/01/2007; **Eff. End:** (empty); **Status:** Current
- CSZ+4+2+1:** Brookline; **Country:** MA; **02445**
- County:** Norfolk; **Route Code:** (empty); **Time Zone:** EST
- Type:** 1 H Home; **Mail Pref:** Y; **Pref Res:** Y
- Chapter(s):** 1 BOS - Boston; 2 (empty)
- Phone/Type:** 1 617-470-8917 Home Phone; 2 617-747-2439 Work
- E-Mail Address:** 1 WE srodriguez1@berklee.edu
- Person Rules:** 1 (empty); **Address Rules:** 1 NAFF No Annual Fund Phone
- Seasonal Dates:** 1 (empty); **Modifier:** (empty)
- Address Change:** (empty); **Source:** (empty); **Last Src:** SELF
- Date:** 08/02/2007; **By:** SRODRIG
- Controller Address:** (empty); **Value 1/1:** (empty)

Designators:

Secondary address designators, such as *SUITE*, *APARTMENT*, and *FLOOR*, are preferred to be printed at the end of the delivery line as noted above. If the pound (#) sign must be used, there must be a space between the pound sign and the number.

The most common designators are listed below and shall be exclusively used in Benefactor:

APARTMENT	APT
BUILDING	BLDG
FLOOR	FL
SUITE	STE
UNIT	UNIT
ROOM	RM
DEPARTMENT	DEPT

A more complete list of designators will be at the end of this policy.

If the secondary designator does not fit on the original line it must be placed above the delivery line.

STEPHEN RODRIGUEZ
APT 3
1761 BEACON STREET
BROOKLINE MA 02445

In Benefactor the screen would appear as such:

ADR-Address Maintenance

Rodriguez, Stephen ID: 0092007
M: DNR: Y ST

Address 1 Apt 3
2 1761 Beacon Street
3

CSZ+4+2+1 MA 02445

Country
County Norfolk

Type 1 H Home

Mail Pref Y

Pref Res Y

Phone/Type 1 617-470-8917 Home Phone
2 617-747-2439 Work

E-Mail Address 1 WE srodriguez1@berklee.edu

Person Rules 1

Address Rules 1 NAFF No Annual Fund Phone

Seasonal Dates 1

Modifier

Eff. Start 02/01/2007
Eff. End
Status Current

Route Code
Time Zone EST

Chapter(s)
1 BOS - Boston
2

Address Change
Source
Last Src SELF
Date 08/02/2007
By SRODRIG

Controller Address Adding Value 3

Delivery Address Line:

The delivery address line must be formatted much the same way as the last line: one space must be between each element. These components include the primary address number, predirectional, street name, suffix, postdirectional, secondary address identifier, and secondary address.

Directionals (South, West, North, South East, etc...) should be abbreviated to the appropriate one or two character abbreviation.

If the street name happens to be a directional term, it must be fully spelled out.

Last Line of Addresses:

It is preferred that the city name be completely spelled out on the last line. Punctuation should be excluded in city names. If a city must be abbreviated it should follow the approved abbreviations listed at the end of this policy.

W ROXBURY
NEWTON SPGS

Acceptable

WEST ROXBURY
NEWTON SPRINGS

Preferred

Once information is exported from Benefactor, the format of the bottom line must have at least one space between city, state, and zip. Per USPS guidelines, the comma between city and state is not necessary when using labels or when sending computer printed address information.

Military Addresses:

Oversees military address must contain the APO or FPO designation along with a two-character "state" abbreviation of AE, AP, or AA and the zip code.

AE is used for armed forces in Europe, the Middle East, Africa, and Canada.

AP is used for the Pacific.

AA is used for the Americas, excluding Canada.

Post Office Box Addresses:

Post office boxes will have no # listed, the number will simply be listed, with once space between each element: PO BOX 1124.

International Addresses:

Per USPS guidelines, the last line of the address should hold the country name only, written fully out, no abbreviations. Do not place postal codes on this line. See example:

STEPHEN RODRIGUEZ
HARTMANNSTRASSE 7
5300 BONN 1
GERMANY

This information will be stored in Benefactor the following this guideline. In order to do so we will be listing the complete address on field 1, including street, city, state (if applicable) and zip code. The country will be put into field 3 (use ... to look-up the correct country). See example:

ADR-Address Maintenance

Rodriguez, Stephen ID: 0092007
M: DNR: Y ST

Address	1	Hartmannstrasse 7	Eff. Start	02/01/2007
	2	5300 Bonn 1	Eff. End	
	3		Status	Current
CSZ+4+2+1			Route Code	
Country		GERMANY Germany	Time Zone	EST
County				
Type	2		Chapter(s)	
Mail Pref	Y		1	BOS - Boston
Pref Res	Y		2	
Phone/Type	1	617-470-8917	Home Phone	
	2	617-747-2439	Work	
E-Mail Address	1	WE		
		srodriguez1@berklee.edu		
Person	Rules	1		
Address Rules	1	NAFP No Annual Fund Phone		
Seasonal Dates	1			
Modifier				

Address Change
Source
Last Src SELF
Date 08/02/2007
By SRODRIG

Policy and Procedure on Corporate/Foundation Address Standards in Benefactor

Purpose:

Addresses must be stored in Benefactor will similar address layout in order to facilitate mailing, labels, production of lists, as well as ensure quality of data entry assignments. This policy is formulated after USPS formats and abbreviations. This address standardization will also facilitate the use of addressing machines as well as ease the process of data cleansing and mass mailing as all internal processors and licensees with the USPS adhere to these standards.

General:

Taken from the USPS guidelines for business mail these standards are in place to ease the issues when dealing with addressing business mail. Information must first be placed accurately in Benefactor in order to address corporations and foundations.

Possible Elements of a Business Address:

Company/Contact Information:

1. Name Prefix
2. First Name
3. Middle Name or Initial
4. Surname
5. Suffix Title
6. Professional Title
7. Functional Title
8. Division/Department Name
9. Mailstop Code

Distribution and Delivery Address Information:

- | | |
|------------------------------|------------------------|
| 10. Street Number | 18. PO Box Number |
| 11. Predirectional | 19. City |
| 12. Street Name | 20. State |
| 13. Street Suffix | 21. Zip Code |
| 14. Postdirectional | 22. ZIP+4 Code |
| 15. Secondary Unit Indicator | 23. Carrier Route Code |
| 16. Secondary Number | 24. Barcode |
| 17. Company Name | |

It is highly unlikely that all elements will be used when mailing, but elements should be displayed in the chronological order listed above. See example:

STEPHEN RODRIGUEZ
ASST DIR ANNUAL FUND
MS 1140 IA
BERKLEE COLLEGE OF MUSIC
1140 BOYLSTON ST
BOSTON MA 02215

It is preferred that all city, state, and zip information appear on one line, as noted above.

Use standard abbreviations as noted in the personal address standards section.

An example of where specific address information is stored in Benefactor is below:

CFP-Corporation Profile

Fluid	STATUS:	ID: C0504000
CONTACT:	SOURCE: Corporation	

Corp ID	C0504000	Matched Thru	
Source	1 CO Corporat	Employee List	
Origin	CO Corporation	Total Employees	4
Extended Name	Fluid		
Mailing Name	Fluid		
Address	1 532 Broadway, 5th Floor	Tax Id	
	2	Anonymous	
CSZ	New York	NY	10012
Country			
Sort Name	FLUID		
Other Names	1		
E-Mail Address	1		
Website Addr	www.fluidmusic.com		

Phone/Type	1			Public/Private	
SIC Code				Record Entry Date	07/17/07
Industry Cls				Last Changed Date	07/17/07

Appendix:

State and Possession Abbreviations:

Alabama	AL
Alaska	AK
American Samoa	AS
Arkansas	AR
California	CA
Colorado	CO
Connecticut	CT
Delaware	DE
District of Columbia	DC
Florida	FL
Georgia	GA
Guam	GU
Hawaii	HI
Idaho	ID
Illinois	IL
Indiana	IN
Iowa	IA
Kansas	KS
Kentucky	KY
Louisiana	LA
Maine	ME
Maryland	MD
Massachusetts	MA
Michigan	MI
Minnesota	MN
Mississippi	MS
Missouri	MO
Montana	MT
Nebraska	NE

Nevada	NV
New Hampshire	NH
New Jersey	NJ
New Mexico	NM
New York	NY
North Carolina	NC
North Dakota	ND
Northern Mariana Islands	MP
Ohio	OH
Oklahoma	OK
Oregon	OR
Palau	PW
Pennsylvania	PA
Puerto Rico	PR
Rhode Island	RI
South Carolina	SC
South Dakota	SD
Tennessee	TN
Texas	TX
Utah	UT
Vermont	VT
Virgin Islands	VI
Virginia	VA
Washington	WA
West Virginia	WV
Wisconsin	WI
Wyoming	WY

Directional Abbreviations:

North	N
East	E
South	S
West	W
Northeast	NE
Southeast	SE
Northwest	NW
Southwest	SW

Street Suffix Abbreviations:

Alley	ALY	Fall	Fall	Orchard	ORCH
Annex	ANX	Ferry	FRY	Oval	OVAL
Arcade	ARC	Field	FLD	Overpass	OPAS
Avenue	AVE	Flat	FLT	Park	PARK
Bayou	BYU	Ford	FRD	Parkway	PKWY
Beach	BCH	Forge	FRG	Pass	PASS
Bend	BND	Fork	FRK	Passage	PSGE
Bluff	BLF	Fort	FT	Pike	PIKE
Bottom	BTM	Freeway	FWY	Pine	PNE
Boulevard	BLVD	Garden	GDN	Place	PL
Branch	BR	Gateway	GTWY	Plain	PLN
Bridge	BRG	Glen	GLN	Plaza	PLZ
Brook	BRK	Green	GRN	Point	PT
Brooks	BRKS	Grove	GRV	Port	PRT
Burg	BG	Harbor	HBR	Prairie	PR
Bypass	BYP	Haven	HVN	Radial	RADL
Camp	CP	Heights	HTS	Ramp	RAMP
Canyon	CYN	Highway	HWY	Ranch	RNCH
Cape	CPE	Hill	HL	Rapid	RPD
Causeway	CSWY	Hollow	HOLW	Rest	RST
Center	CTR	Inlet	INLT	Ridge	RDG
Circle	CR	Island	IS	River	RIV
Circles	CRS	Isle	ISLE	Road	RD
Cliff	CLF	Junction	JCT	Route	RTE
Club	CLB	Key	KY	Row	ROW
Common	CMN	Knoll	KNL	Rue	RUE
Commons	CMNS	Lake	LK	Run	RUN
Corner	COR	Land	LAND	Shoal	SHL
Course	CRSE	Landing	LNDG	Shore	SHR
Court	CT	Lane	LN	Skyway	SKWY
Courts	CTS	Light	LGT	Spring	SPG
Cove	CV	Loaf	LF	Spur	SPUR
Coves	CVS	Lock	LCK	Square	SQ
Creek	CRK	Lodge	LDG	Station	STA
Crescent	CRES	Loop	LOOP	Stravenue	STRA
Crest	CRST	Mall	MALL	Stream	STRM
Crossing	XING	Manor	MNR	Street	ST
Crossroad	XRD	Meadow	MDW	Summit	SMT
Curve	CURV	Mews	MEWS	Terrace	TER
Dale	DL	Mill	ML	Throughway	TRWY
Divide	DV	Mission	MSN	Trace	TRCE
Drive	DR	Motorway	MTWY	Track	TRAK
Estate	EST	Mount	MT	Trafficway	TRFY
Expressway	EXPY	Mountain	MTN	Trail	TRL
Extension	EXT	Neck	NCK	Trailer	TRLR

Tunnel	TUNL
Turnpike	TPKE
Underpass	UPAS
Union	UN
Valley	VLY

Viaduct	VIA
View	VW
Village	VLG
Ville	VL
Vista	VIS

Walk	WALK
Way	WAY
Well	WL

Secondary Designators:

Apartment	APT
Basement	BSMT
Building	BLDG
Department	DEPT
Floor	FL
Front	FRNT
Hanger	HNGR
Key	KEY
Lobby	LBBY
Lot	LOT
Lower	LOWR

Office	OFC
Penthouse	PH
Pier	PIER
Room	RM
Side	SIDE
Space	SPC
Stop	STOP
Suite	STE
Trailer	TRLR
Unit	UNIT
Upper	UPPR

Spanish Street Suffix Abbreviations:

Avenida	AVE
Calle	CLL
Caminito	CMT
Camino	MAN
Cerrada	CER
Circulo	CIR

Entrada	ENT
Placita	PLA
Rancho	RCH
Vereda	VER
Vista	VIS