

Event Mailing List Guidelines

Once the purpose of your event has been determined, the Office of Donor Relations and Stewardship stands ready to work with you and the Office of Foundation Events to determine the appropriate mailing list for your special event. There is no magic formula or super database on campus that can just print out a perfect guest list. A perfect guest list is a result of research, collaboration, and thoughtfulness, all backed up with good data and information. Therefore, it is critical that we all continue to work with Central Records to keep our constituent's records up-to-date.

When to do an IM request vs. Manual Crystal Mailing List Pull

Please note that the Crystal mailing report files do not have the "Salutation" column necessary if your mailing includes a merged letter that requires a proper salutation ("Dear Ms. Bull"). Therefore, if your mailing requires a "salutation", an IM request must be submitted. Please note that names generated through a Banner mailing list conform to our approved standards for Mail Name and Salutation, as well as our donor's direction as to how they would like to be addressed. Please contact Information Management for assistance with entering an IM Request.

Corporate Contact Codes on Your Mailing List

If your Mailing List includes corporations, then you should be aware that each corporate record in AOAORGN may list a variety of types of contacts. The President's Council Contact (PCC) is the automatic representative on all mailing lists. If there is no PCC contact in Banner, your mail list will default to the Gift Contact (GFT). If your event requires a type of corporate contact other than the "President's Council Contact (PCC)", then that must be specified in your IM request.

Sample Corporate Contact Codes:

COR Corporate Contact
CRC Community Relations Contact
PCC President's Council Contact
PCA President's Council Alternate
STW Stewardship Contact

Salutation and Mailing Guidelines

Questions regarding how to address the constituents on your mailing list should be directed to the Office of Donor Relations and Stewardship. Additionally, Mailing List and Salutation Guidelines can be found on Sharepoint.

Scheduling and Inviting the Trustees, Elected Officials or Foundation Board of Directors

- Communication with members of the **University Board of Trustees** is handled through the office of the Chief of Staff. The office of the Chief of Staff handles requests for participation and opportunities to invite trustees.
 - Send event information to the Office of the Chief of Staff.

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- Prepare invitations for members of the Board of Trustees and email them to the Chief of Staff's office. They will distribute them to the Board and make any necessary follow-up contacts.
- If you are sending invitations to **elected officials**, please work through the Office of Government Relations. As the event approaches, please report the names of the officials who have replied to the Office of Government Relations.
- The Office of Foundation Board Relations is tasked with approving use of the **Foundation Board of Directors** mailing list. Because this office has close communication with the Board members, it is crucial that they be kept apprised of events that the Board members are invited to.

Things to remember:

- When pulling a mailing list, always use the “Preferred” address. This is the address that our donors and friends have told us to use for mailings.
- Please note that corporate contacts are not linked with individual Banner records, so you will need to de-dup your list. For example, if Jane Bull is the President’s Council Contact (PCC) for Bulls-R-Us, Inc. and is invited to your event because the company is a donor, but Ms. Bull is also an individual donor, then she may appear on your list twice. In this case, you will need to evaluate if you need to remove an instance of Ms. Bull, or keep both instances on your list, but send one invitation to her at work and one to her at home.
- If the invitation includes individuals and corporate contacts “and guest”, you may request that Information Management pre-populate “and guest” to the mailing list for those 2 populations.
- After your event, please send your RSVP list to Information Management so that they can track attendance in Banner. This information is very important in helping to determine Affinity for our constituents.