Mailing Lists Webinar Presented by Mail Services and Human Resources
Overview

• General Information about mailing lists
• Ordering and using outside mailing lists
• Ordering and using internal mailing lists
• List Processing
• Working in Excel
• What Mail Services can (and can’t) do with your mailing lists
Definitions

• **Database** -- *da·ta·base* [dey-tuh-beys] *noun*
  a comprehensive collection of related *data* organized for convenient access, generally in a computer.

• **Mailing List** -- a list of addresses to which mail, especially advertisements, can be sent.

*Dictionary.com Unabridged*
What’s needed by the Post Office

Remember, the USPS reads the address from the bottom right up.

Address Format: There are five lines in a standard address.

Non-Address Data → FELO 1225-66H
Information/Attention → KAREN MAGAZINO
Name of Recipient → NATIONAL POSTAL FORUM
Delivery Address → 801 MOUNT VERNON PLACE NW
City, State, ZIP+4 → WASHINGTON DC 20001-3614

Dual Delivery Addresses:
Mail will be delivered to:
GRAND PRODUCTS INC
100 MAJOR ST
PO BOX 200
NEW YORK NY 10001-0200
Purchasing Lists

• Determine the goal/outcome of your mailing
• Determine your total budget for your mailing
• Determine your timeline (will usually need 4-8 weeks for this process)
• Consider all costs in your project budget including:
  – Name purchase costs
  – Printing costs
  – List prep costs (NCOA, CASS, labeling)
  – Postage
• SRDS – (Standard Rates and Data) through KSU library
Purchasing Lists, cont.

• Contact your list vendor for a quote
• Pricing: usually a cost per name
• Know your parameters (zip codes, age group, demographics, etc.)
• Determine if this is a one-time use list or multiple-use list (will affect price)
• Allow enough time for printing, mail prep and delivery
De-Duping

• Check your lists for duplicates prior to using for mailing
• Saves money, resources and embarrassment
• Use unique identifier (Kent State ID, email address, etc.)
• In Excel, click on the Data tab and then click on Remove Duplicates
• Click on Unselect All and then select unique identifier and click OK
• You will receive a notification regarding how many records were deleted and how many unique records remain
Current Student Mailing Lists

- Student information is protected by FERPA. Directory information may be disclosed for mailing lists where appropriate

- Lists of currently enrolled students may be requested from the Office of the University Registrar
What is FERPA

• FERPA is a federal law designed to protect the privacy of education records

• The Essence of FERPA
  – College students must be permitted to inspect their own education records
  – School officials may not disclose personally identifiable information about students nor permit inspection of their records without written permission unless such action is covered by certain exceptions permitted by the act.
FERPA Guidelines

• Keep only those individual student records necessary for the fulfillment of your teaching and advising responsibilities.
• Student information must not be displayed publicly. If lists of grades or scores are to be displayed, use a code known only to the student and you. Always post lists in random order to prevent possible identification.
• Student record information that you receive is not to be shared with others unless their official responsibilities identify their legitimate educational interest in that information for that student. Always be mindful that a student may have restricted disclosure of information.
• Refer requests for information from the educational record to the Office of the University Registrar.
Request Student Data

- Complete the Data Request Form ([http://www.kent.edu/registrar/forms/index.cfm](http://www.kent.edu/registrar/forms/index.cfm)) on the Registrar’s Internet Forms Page
Ordering and Using Employee Lists

• Role of Human Resources Records
• Faculty & Staff Data
• Ordering & Using Employee Mailing Lists

Records Mailing Data Available

• Departmental and Home Mailings
• Employee Email address lists
• Targeted Employee Groups
• Targeted Management/Supervisor Groups
• Targeted Department, College, Division & Campus Groups
How to Request Employee Mailing Data
How to Request Employee Mailing Data

• Complete the Mailing Request Form located in the HR Forms Library
  • https://www.kent.edu/hr/forms/mailing-request.cfm
• All mailing requests are processed in Excel format
• All requests are subject to approval
• Departments can work directly with Mail Services for processing or create their own labels from the information provided
Information Needed by HR Records

- Does this request involve human subjects?
- Will this information be provided to an off-campus source?
- Reason for the request
- Targeted employee groups
- Address type
- Where to send the file
Alumni/Advancement Lists

Types of Data Available

| Alumni | Retired / Emeriti | Parents * | Friends (Donors) |

* Parents are not currently removed when students leave the university

How to make a Request

**Multiple Requests per Year**
Enter your request at [ODIE.kent.edu](http://ODIE.kent.edu)
Request access from Advancement Security Admin ([ksacket1@kent.edu](mailto:ksacket1@kent.edu))

**Occasional Requests**
Email your request to the Advancement Data Quality Assurance Analyst ([fpurkey@kent.edu](mailto:fpurkey@kent.edu))
Alumni/Advancement Lists

Information We Need from You

• Criteria for selecting individuals for your List
• What will the list be used for? (Events/ Solicitation/ Letter/ Published)
• Do you want Individuals or Combined Spouses?
• When do you need the list? (Allow 2 Weeks if possible)
• Other than Names, Salutations & Addresses, what other data fields do you need?
Alumni/Advancement Lists

Data will be delivered as an Excel file

**DO NOT** use address lists more than 2 weeks after receipt

*we can re-run them*

Send list removal requests, deceased, and Address Updates

**ODIE.kent.edu**  (or contact  **ksacket1@kent.edu**)  

Forward Returned Mail to **Advancement Services**

**Do Not** try to maintain “shadow” lists outside of Banner!

Quarterly NCOA, Lost Address Searches, Deceased coding, New Grads, New Parents, New Donors, and Self-reported moves means our database is constantly changing.
List Processing - Automation

• CASS and NCOA

Update

NCOA

Validate

CASS Certification

Standardize

[Image of a triangle with the steps listed inside]
List Processing - Hygiene

• **Merge/purge** = bringing together multiple lists and dropping duplicate records

• **De-duping** = The most common categories for de-duping are:
  1. **Name and Address** searches for records with matching Names, Addresses and ZIP Codes.
  2. **Address Only** searches for records with matching Addresses and ZIP Codes. All "Name" fields will be ignored.
  3. **Name and Phone Number** searches for records with matching names and phone numbers.
  4. **Phone Number Only** searches for records with matching phone numbers.

• **List Cleaning** Whenever possible, use capitalized letters, eliminate punctuation, follow preferred postal abbreviations.
Lists on your computer

The Postal Service defines a complete address as one that has all the address elements necessary to allow an exact match with the current Postal Service ZIP+4 files to obtain the finest level of ZIP+4 and delivery point codes for the delivery address. Whenever possible, use capitalized letters, eliminate punctuation, follow preferred postal abbreviations.

Preferred Address Abbreviations

<table>
<thead>
<tr>
<th>AVENUE</th>
<th>AVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>BOULEVARD</td>
<td>BLVD</td>
</tr>
<tr>
<td>CENTER</td>
<td>CTR</td>
</tr>
<tr>
<td>CIRCLECIR</td>
<td>CIR</td>
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<td>CT</td>
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<td>JCT</td>
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<td>PARKWAY</td>
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<td>PLACE</td>
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<td>ROUTE</td>
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<td>VIADUCT</td>
<td>VIA</td>
</tr>
<tr>
<td>WAY</td>
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</table>

Preferred Directional Abbreviations

N, S, E, W, NE, NW, SE, SW

Common Unit Designators

<table>
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<tr>
<th>APARTMENT</th>
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<tr>
<td>BUILDING</td>
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<tr>
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<td>ROOM</td>
<td>RM</td>
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<tr>
<td>DEPARTMENT</td>
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</table>

For more information, please visit the USPS Website regarding Address Standardization: http://pe.usps.gov/text/pub28/welcome.htm
Formatting Mailing Lists in Excel
**Typical Unformatted Excel File**

<table>
<thead>
<tr>
<th>Name</th>
<th>Department</th>
<th>Company Name</th>
<th>Address 1</th>
<th>Address 2</th>
<th>City</th>
<th>State</th>
<th>Zip</th>
<th>Plus 4</th>
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<tbody>
<tr>
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<td>Mail Services</td>
<td>Boston University</td>
<td>1 Oyster Drive</td>
<td>POBox 0004</td>
<td>Boston</td>
<td>MA</td>
<td>123</td>
<td>4</td>
</tr>
<tr>
<td>Brett Edwards</td>
<td>Mail Services</td>
<td>Boston University</td>
<td>1 Oyster Drive</td>
<td>POBox 0004</td>
<td>Boston</td>
<td>MA</td>
<td>123</td>
<td>4</td>
</tr>
<tr>
<td>Steve Finley</td>
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<td>427 Design</td>
<td>1780 Enterprise Pky</td>
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<tr>
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<td>Stow</td>
<td>OH</td>
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<td>1234</td>
</tr>
<tr>
<td>Steve Finley</td>
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<td>Buckeye State Cr Un</td>
<td>47 N Cleve-Mass Rd</td>
<td></td>
<td>Fairlawn</td>
<td>OH</td>
<td>44333</td>
<td>1234</td>
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<td>Tallmidge</td>
<td>OH</td>
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<td>1200 Southeast Ave.</td>
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<td>529 Grant St</td>
<td>F B</td>
<td>Akron</td>
<td>OH</td>
<td>44311</td>
<td>1234</td>
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<tr>
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<td>9601</td>
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<tr>
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<td>Hitchcock Fleming &amp; Ass.</td>
<td>875 Wolves Ledges Pkwy</td>
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<td>Akron</td>
<td>OH</td>
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<td>9601</td>
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<td>OH</td>
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</table>

**Unformatted Zip Code Field**

Note the 0’s are missing in the top 2 zips
To Reformat Zip Code Field

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
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<tbody>
<tr>
<td>1</td>
<td>Name</td>
<td>Department</td>
<td>Company Name</td>
<td>Address 1</td>
<td>Address 2</td>
<td>City</td>
<td>State</td>
<td>Zip</td>
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<td>1 Oyster Drive</td>
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</tr>
</tbody>
</table>

Plus 4 column, if separate, Format as Text

Format Cells: Zip Code, Special Formats are useful for tracking list and database values.
Formatting Your Database/Mailing List

• Field Layout suggestions

  ID * FULL NAME * FN * LN * TITLE * EMPLOYER * ADD1 * ADD2 * CITY * STATE * ZIP

<table>
<thead>
<tr>
<th>FName</th>
<th>LName</th>
<th>Add1</th>
<th>Add2</th>
<th>City</th>
<th>State</th>
<th>Zip</th>
<th>email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steve</td>
<td>Finley</td>
<td>POB</td>
<td>101 ASB, 1500 Horning Rd</td>
<td>Kent</td>
<td>OH</td>
<td>44242</td>
<td><a href="mailto:sfinley7@kent.edu">sfinley7@kent.edu</a></td>
</tr>
</tbody>
</table>

• Sorting your data

A Word Of Caution:
Be sure to click the upper left cell on a database before doing any sorting which will select ALL cells. Then go up to “Data”, pull down and select “Sort.”
What Mail Services Can (and can’t) do with your lists

• Mail Services will gladly CASS and NCOA your mailing lists free of charge.

• Mail Services has limited capabilities in Merging/purging multiple lists from separate sources, but have outside sources who will help us (with reasonable costs)

• If you have multiple lists on the same Excel worksheet, we can select multiple tabs, as long as they are similarly formatted.
Feel Free to contact any of us if you have further questions:
Mark Ledoux – 28858  mledoux@kent.edu
Tia McKee – 28374   tlmckee@kent.edu
Franchesca Purkey – 20436  fpurkey@kent.edu
Steve Finley – 28703  sfinley@kent.edu