

The University of Texas at Dallas
Office of Development and Alumni Relations
Communication Mailing Checklist

This form will help you plan and manage your mailing project from list generation to production to mailing. Use it to track your project and to ensure a successful mailing. **Start this process at least 12 weeks prior to your mail date.**

Date: _____ Name of Project: _____

Purpose: _____

Quantity: _____ Budgeted Amount: _____

Expected Mail Date: _____ Account Number: _____

Initial Meeting

Development Officer: _____ Admin. Assistant: _____

- Dir. of Gift and Data Services (re: lists) Dir. of Alumni Relations
 Dir. of Prospect Research (re: events only) Others _____




Mail List

Date Needed By: _____ Data Request Form _____

Who will review? _____ Initial Approval Date: _____

Who will approve? _____ Final Approval Date: _____

Printing/Production

- Layout meeting with Comm. Coordinator Insert(s)? _____
Letter Signed By: _____ Size/Type of Envelope: _____
 Personalized Signature Stamp First Class
 Electronic Signature Meter Bulk
Invitation Review _____
Invitation Final Approval _____ **Fold:** Letter  Accordion/"Z"  Center 

Raiser's Edge

Appeal Code: _____

Enter Event/Action: _____

RSVP Query/Report: _____

Notes: _____

Final Steps

- AA enter event on office calendar
 Comm. Coord. enter event on Comet Calendar
Date list sent to mail house _____
Date piece mailed _____
 Send mailing name and # of pieces to Sr. Director of Operations (ODAR account only)