AnchorPointe
GRAPHICS | PRINT | MARKETING

Direct Mail for Non-Profits

Understanding Data, Postage, & the USPS

Acquisition & appeal mailings can make a huge, positive impact to your non-profits fundraising efforts. But the complexity of USPS regulations can be overwhelming & anxiety-inducing, especially to your already busy schedule.

We know, we've been there.

AnchorPointe Graphics has been guiding non-profits through mailings of all kinds for over 20 years. In this PDF we've compiled our most need-to-know info, to help you figure out how to start any mailing project with confidence.

"...figure out how to start any mailing project with confidence."

Whether it's your first time, or your twentieth - we're sure you'll find a new trick or piece of info within these pages to make your next mailing project go smoother!

WHAT IS 'DIRECT MAIL?'

Direct Mail goes by many names *(pre-sorted mailing, bulk mailing, marketing mail, etc.)* but they all mean the same thing.

If you know the proper USPS guidelines to follow & the correct paperwork to fill out, you can mail at significantly lower postage rates.

There are a few different characteristics for direct mail, **however the biggest common factor is the act of pre-sorting.**

Pre-sorting means to organize the addresses on the mailing list into their different postal routes, & into the order that those routes follow. The mail pieces are then delivered to the USPS in separate mailing trays based on the postal routes.

By pre-sorting a list & delivering the mail pieces separated by route, you cut down on the amount of work the USPS has to do. ***In return, they lower the postage cost on your mailing accordingly.***

There are a few requirements for mailings to qualify for direct mail postage rates - ***read on to learn more!***

DIRECT MAIL REQUIREMENTS

A mailing has to have certain qualities in order to qualify as a “direct mailer” & those lower postage rates.

First, there needs to be a **permit with the USPS**, under which the pieces are mailed. We’ll touch on this, & specifically what it means to you as a non-profit later in this guide.

Next, **the number of pieces mailed has to be at least 200.** That said, if you are outsourcing the work to a mail house, then the extra cost for services can outweigh the postage savings.

In our experience, 500 pieces tends to be the point where pre-sorting & mailing first class break even.

The third requirement is size. There are two types of mailers – letters & flats – that each have their own requirements.

Requirements for Direct Mail Rates

USPS PERMIT

200 PIECE MINIMUM

MEETS SIZE REQUIREMENTS FOR TYPE OF MAIL PIECE

TYPES OF MAIL PIECES

LETTERS

Size Requirements:
Minimum: 3.25” height, 5” length, .0007” thick

Maximum: 6.125” height, 11.5” length, .25” thick

Aspect Ratio between 1.3 & 2.5
(the aspect ratio of a piece is the value of it’s length {side parallel to the address} divided by it’s height {side perpendicular to that})

This includes most standard size mailings, things like **#10 envelopes, standard invite sizes like 5x7” or 4x6”, or a booklet folded to 8.5x5.5”.** However, there is a lot of room if you want to do something different, like a 3.5x8.5” postcard, which is just under a 2.5 aspect ratio.

FLATS

Size Requirements:
Minimum: 6.125” height, 11.5” length, .25” thick

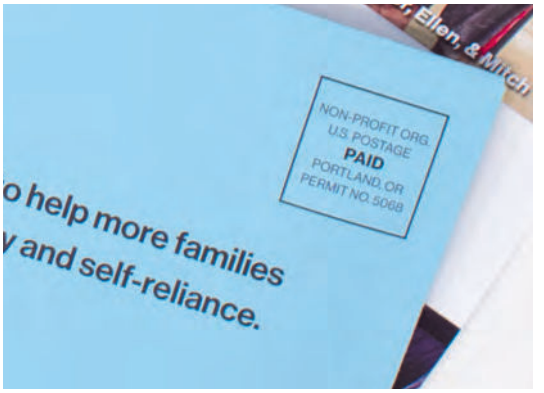
Maximum: 12” height, 15” length, .75” thick

No Aspect Ratio

Flats include essentially everything larger than letter size. It’s important to note that you only have to exceed the maximum letter size in one dimension for it to become a flat mailer.

WHAT IS A MAILING PERMIT?

A mailing permit is essentially permission from USPS to use a certain postage payment method for commercial mailings.



Rather than purchasing & applying first class stamps, **the USPS will charge your postage to a debit account they keep on file.** In place of standard stamp, these pieces typically mail via indicia *(pictured left)*.

There are a number of drawbacks when it comes to getting & maintaining a permit. ***There is a fee to apply for the permit, as well as an annual fee of $370*.***

You also need to do a bulk mailing at least once every two years, or you'll have to pay the application fee again in order to restart your permit.

Having your own mailing permit is only necessary if you want to handle all the work for the mailing yourself or with volunteers. ***If you partner with a mail house, you can use their permit to mail on***, typically with no additional fees.

**rates as of 2/2026, check with the USPS for current rates.*

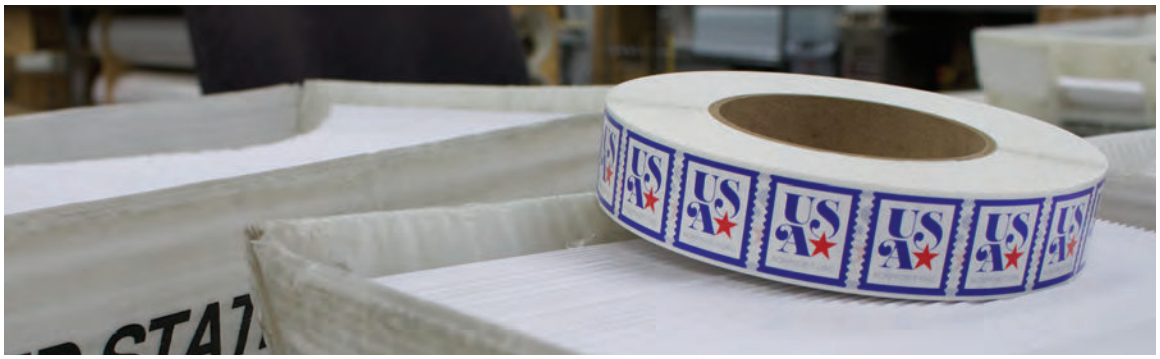
NON-PROFIT AUTHORIZATION

Did you know that the USPS gives special postage rates to non-profit organizations? With one simple application, your organizations can qualify for a Non-Profit Authorization number, also know as an NPA.

Why would you want an NPA?

- Unlike a permit, there is no charge to apply or upkeep
- They don't expire, & there is no minimum usage requirement
- The application is easy to fill out - PS Form 3624
- Significantly lower postage, worst case is ~24.5¢*/each
- You can use it with a mail house permit, which allows you to get the lowest postage possible, without any extra fees

If you don't have an NPA yet, we strongly encourage you to apply for one.
Don't wait until you need it - it can take a few weeks to get approved!



POSTAGE METHODS

BREAKDOWN & DECISION MAKING CHART

	NPA W/ MAIL HOUSE PERMIT	NPA W/ YOUR OWN PERMIT	PRE-SORT STD W/ MAIL HOUSE PERMIT	FIRST CLASS
PER-PIECE PRICE	As low as 17.8¢ ea*	As low as 17.8¢ ea*	As low as 37.2¢ ea*	As low as 78¢ ea*
CAN I USE A STAMP?	Yes, non-profit precanceled stamps	Yes, non-profit precanceled stamps	Yes, marketing mail precanceled stamps	Yes, first class stamps
LOWEST QUANTITY TO QUALIFY	200 (not cost effective until ~500)	200 (not cost effective until ~500)	200 (not cost effective until ~500)	A single piece
ANNUAL FEE	No	Yes - $370*	No	No
USPS APPROVAL NEEDED	Yes	Yes	No	No

**Rates as of 2/2026. Rates displays are lowest available & based on letter-sized mail pieces actual rates may be higher.*

WHAT ARE PRECANCELED STAMPS?
Precanceled Stamps (often referred to as non-profit stamps) are a great option for appeals. They give your mailer a more personal feel, while keeping your postage costs low. To use them, you'll still need to meet the minimum quantity requirement for a pre-sorted mailing, & you'll need an NPA to use the non-profit version.

ADDRESS BLOCK REGULATIONS

The USPS has a variety of standards that allow them to process mail quickly & accurately. Following these standards is necessary for bulk mailing & thus the lower postage rates.

THE RETURN ADDRESS

A return address is needed for mailing with either an indicia or a precanceled stamp. The typical & safest location is in the upper left corner of your mail piece.

If you are using your NPA to mail at non-profit rates, then the return address you use must match the address that is associated with your NPA, on file with the USPS.

THE DELIVERY ADDRESS

The USPS equipment reads mail pieces from the bottom up, so you'll want to **make sure that the delivery address is the first thing it sees.**

Anything below this info *(a tagline, an event address on a postcard, etc.)* can confuse the machine & misdirect your mail.

The address needs to stay within a particular boundary box:

Left: 1/2" from the left edge

Right: 1/2" from the right edge

Top: 2-3/4" from the bottom edge

Bottom: 5/8" from the bottom edge

Adding a barcode to the delivery address is optional. It can save a few cents off postage & ensure the mailing processes quickly. However, studies show that mail pieces with a barcode look more like "junk mail", which decreases their open rates.

THE MAILING LIST & VARIABLE DATA

Variable data is information that changes from piece to piece as we print. In mailing, this mainly focuses on the name & address of the recipients on your mailing list.

Variable data can also encompass a variety of other things, from **tiered ask amounts** to entirely **different paragraphs for different segments** of donors.

It all starts with a spreadsheet. Each row of the spreadsheet is a record, that when combined with your letter layout creates a personalized message for your donors.

Most likely, you'll be extracting your data from some form of CRM system. **The key is to look over your data for accuracy, missing info, & correct formatting.**

Not sure what to look for? ***Let's dive in!***

NCOA & CASS

The first step to knowing why clean & accurate data is important, is understanding how the process works.

Most people are used to printing mailing labels for smaller projects - you type the label exactly how you'd like to see it, print it on Avery Label stock, & adhere it to your envelope. Bulk mailing is different.

Direct mail uses a spreadsheet of data with each of the recipients listed on their own row. In order to run a mailing list through the pre-sorting process, all address information needs to be set into different columns – ***street address, city, state, zip.***

	A	B	C	D	E	F
1	**Name**	**Address**	**Address 2**	**City**	**State**	**Zip**
2	Janey Greenlees	7235 NE Evergreen Pkwy	Ste 100	Hillsboro	OR	97124
3	Audrey Costello	1235 W Main Street		Hillsboro	OR	97123
4	Jim Doe	856 S First Ave	Unit 28	Beaverton	OR	97007
5	Tedd E. Bare	9876 E 27th St		Forest Grove	OR	97116
6	John and Jane Smith	5542 SW Wind Ct		Beaverton	OR	97007
7						

Tip: Information will be printed the same way it is formatted on your spreadsheet. If your names are typed in ALL CAPS, they will print that way, too. Be sure your data is typeset the way you want it to print.

Seperating the information by column is important, as part of the pre-sorting process requires running the list through two different programs - the National Change or Address (NCOA) & the Coding Accuracy Support System (CASS).

The NCOA database includes record updates for people who have moved & reported their new address back to the USPS. It ensures that your mail pieces go to their recipients most up-to-date location.

The CASS process improves the accuracy of a mailing by making sure all addresses are whole & have all their info (for example, a Zip+4). This helps to guarantee that your pieces will be deliverable as addressed.

CLEANING YOUR MAILING LIST

ONLY GIVE THE INFO NEEDED

Only provide the information necessary to complete the variable fields of your appeal/mail piece. If you are not including a variable email address, donor ID, or past giving amounts, then don't include them in your list spreadsheet. Extra information can cause confusion for the team setting up your mail piece.

KEEP COLUMN INFO CONSISTENT

Variable data software works by instructing the program that **the information in one column goes into a corresponding section of text in a layout.** It is important to put only first names in the first name field, last names in the last name field, & so forth.

If your columns are not consistent, some pieces could print with incorrect data, costing time and money to fix. Make sure city/state/zip info is separated the same way on all records. It is important that the formatting is the same, so it flows into the layout of your piece as intended.

CHECK FOR MISSING INFO

Make sure that each record has all the information it needs. We frequently receive lists that have sections of names with no addresses or city/state/zip. Don't forget to expand your window view to see your whole spreadsheet!

Also, double check that all info is correct – if you are pulling your list based on the date of your donor's last gift, make sure that the date is current.

CREATE A DATA MAP

To clearly communicate where each piece of data should be inserted into your appeal *(or any personalized mail piece)*, it's helpful to create a 'data map'.

A 'data map' is a copy of your mail piece with the column names listed as a placeholder & indicator for the personalized information.

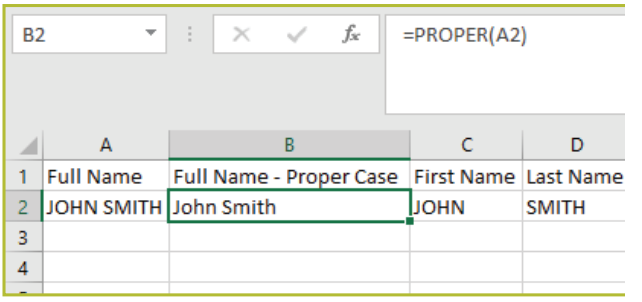
"Dear <<Salutation>>," for example, indicates that the column named Salutation should be used for this variable text. A placeholder example for a variable paragraph might be: "Last year you gave <<ASK1>>, this year would you consider <<ASK2>>".

Calling out which column goes in which spot with placeholders like this helps variable data projects go more smoothly.

LIST FORMATTING

HANDY MICROSOFT EXCEL TIPS

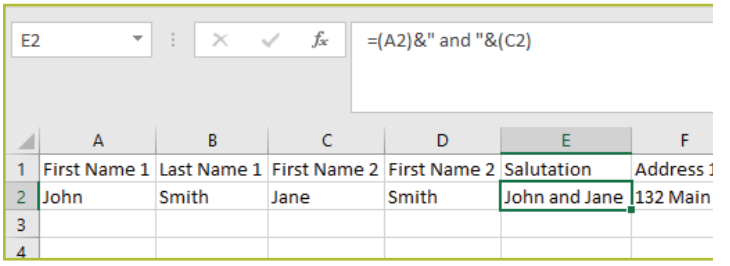
=PROPER(CELL1)



Remember, the way information appears in your excel file is the way it will appear in your letter. Often on a mail list, the recipient's name is set in ALL CAPITALS. In a letter, this is distracting for your reader & throws them out of the narrative.

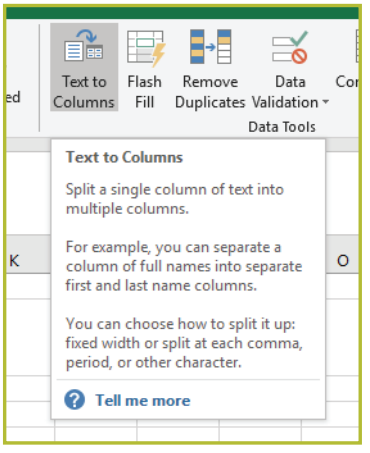
The PROPER formula fixes this, changing the info in a cell to a proper upper- and lower-case format, which looks more natural in the body of an appeal.

=(CELL 1)&" AND "&(CELL 2)



Salutations can be tricky when you are addressing a letter to multiple people in one household. If you use the 'first name 1' field, the other person will be left out. If you combine both first name fields, you'll be using only one person's last name, which may not be the same for both recipients.

This easy formula allows you to combine the info in multiple cells.
Create a separate column for this field to control exactly what your salutations look like & to avoid any potential awkwardness.



TEXT TO COLUMN

Best practice is to have your data in the smallest sections possible, ***to allow the most flexibility in how the data can be used.***

One common issue we run into is with name formatting - the first & last names are together in a "full name" column, but the letter calls for "Dear <<First name>>.

Luckily, excel give us an easy way to separate them - the text to columns feature can be used to separate words into columns based on delimits, like spaces or commas.

HAPPY MAILING!

We hope you feel more confident in tackling your next nonprofit direct mail project & setting up spreadsheets for personalization with variable data. We're always here to answer questions, offer insights & suggestions, & support you through these complex projects.

LOOKING FOR MORE?

Get one-on-one help with all of your direct mail needs. Schedule a consult with us today!

AnchorPointe
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503.619.3000
info@anchorpointegraphics.com
AnchorPointeGraphics.com

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