

COLLEGE OF ARCHITECTURE AND ENVIRONMENTAL DESIGN SOLICITATION/MARKETING PROCESS

PLEASE NOTE - ALL Marketing Materials, Newsletters and Mass Mailings to Alumni need to be approved by the Advancement Office prior to mailing to ensure the materials are in compliance with university policy. If there is no solicitation or "ask for funding", then please use the Polylink Email Process.

1. Department develops a plan for solicitation such as:
 - a. A solicitation letter or document,
 - b. A newsletter with an "ask" included,
 - c. An email.
2. The document is drafted by the department and an output request is entered for the alumni/donor group address data? (If you have not completed advancement training, you will need to contact the advancement department at 805-756-5138 for their assistance with this step.)
3. A solicitation coordination form is completed and either delivered to the advancement office at Bldg. 5, Room 210, or placed in the advancement folder in the Dean's office.
4. <http://advancement.calpoly.edu/forms/solicit.pdf>
5. The form should also include a copy of the document to be mailed, emailed or distributed attached. (If the department has their own mailing list of individuals or corporations who are not alumni or current donors then that list needs to be attached as well.)
6. The advancement office reviews the document.
7. The advancement office retrieves the document and makes a copy of the solicitation form for your department's file.
8. If the solicitation is in the form of an email, a (Word Document) of the email text needs to be emailed to John Rau at jrau@calpoly.edu.
9. Once Advancement Services has the solicitation they will route it through various departments for approval. It will also be forwarded to the University Public Affairs Office who will make corrections they deem necessary. These corrections must be completed before the document is mailed, emailed or distributed.
10. If you have requested a solicitation code to track the funds from the solicitation effort, you will receive one to add to your document.
11. A confirming email should be sent to John Rau at jrau@calpoly.edu once the corrections/additions are completed.
12. Once this final step is complete, departments are free to distribute their document.