

# Gathering the Names and Contact Information

## Output Request Process

**Note:** Please *read* and *save* this document for future reference.


### ***Introduction***

University Advancement has set up the Output Request process to supply you with data on Cal Poly's alumni, parents, and friends. The department of Advancement Services takes great care to maintain the most up-to-date information on our alums, parent and friends. We regularly update address, phone, email, deceased status, and giving information. The data is screened by outside vendors from time to time to insure that we have the latest and most accurate zip codes and area codes.

Rules to remember:

- 1) The Output Request usually takes 2 weeks to process.
- 2) The lists are confidential.


### **A. Step One:**

Submit an output request online and track it electronically at the Cal Poly Advancement Network ([advancement.calpoly.edu](http://advancement.calpoly.edu)). Once at this web address, click  on the left side of the screen. Please read the page because it contains general information and policy on output processing. Users are **required** to have an authorized username and password for the Cal Poly Advancement Network. Please contact John Rau at 6-7331 or [jrau@calpoly.edu](mailto:jrau@calpoly.edu) if you do not have a username and password for the Advance system.

## B. Step Two

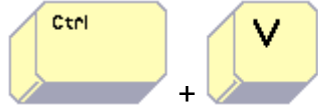
Click on [Submit a NEW output request](#) link. Complete the web form.

**Note:** It is a good idea to copy the criteria section into your clipboard just in case an

error occurs. Do this by highlighting the data and pressing  +



. If an error occurs, it clears the web form. This happens rarely but if you have copied the criteria section, you can re-enter the request quickly. Use



to paste the text into the criteria section.

There are various types of output you can request:

- 1) **Mailings** – With or without a count. A **count** is a request to see how many your criteria produces. It is helpful if you are trying to figure out your printing and postage budget for a particular project.
  - a) **General** – These can be invitations or notifications.
  - b) **Solicitation** – These requires a *Solicitation Coordination Form* with your Dean or Advancement Officer's signature and submission of your mailing material. The form is available at [www.advancement.calpoly.edu](http://www.advancement.calpoly.edu). Click on the FORM button on the left side. Or there is also a hyper link WITHIN the online output request form as well.
- 2) **Hard Copy Reports** – Summary or detailed report containing biographic and gift information. There are a variety of standard reports available. You can view samples of these reports from the hyperlinks *within* the output request form page.
- 3) **Data** –
  - a) **E-mail Communication.**
    - i) Submit your proposed email text as a word document attachment and email to Ida Dutra. (Note: include the text that you would like to appear in the "Subject" line of the outgoing email AND the contact person/phone number you would like listed for questions/comments from your audience in the form of reply emails. The text will be reviewed in the central review process (see below for details).
    - ii) Advancement Systems will actually be sending the message out for you to your criteria population.
  - b) **Honor Roll** (includes name, fiscal year total, and giving level if appropriate)
  - c) **Other** (data for word merges)

**The standard turn around time is two weeks.** *Please plan ahead on your projects.* If you need it sooner, please enter that in the **Date Needed** field and we will make every reasonable effort to help you meet your deadline.

**If you will be using a mailing service, please enter that information in the General Information Section near the top.** Under the section “How do you want to receive this request, please change the default from my e-mail to other location. Type in the box the name of your mail house. We can electronically send your label file directly to the mailing service.

### **C. Step Three:**

Please submit a complete copy of your mailing material (including inserts and envelopes) within two days of submitting your online request.

Send to John Rau, Advancement Services, Building 117, Room 103. Once sent, let me know if the material has changed. Please do not print material prior to approval by Advancement Services.

#### **All materials go through a central review.**

- ✓ The Cal Poly Fund Director and Interim Advancement Services Director (Craig Nelson) will review it for solicitation coordination with all colleges and departments, and for IRS regulation compliance.
- ✓ Public Affairs (Teresa Hendrix, JoAnn Lloyd, Susan McDonald, or Stacia Momburg) will review it for spelling, grammar, and accuracy (current logos and statistics).
- ✓ Corporate & Foundation Relations will review it for compliance with IRS regulations if the general/solicitation mailing concerns either corporations or foundations.
- ✓ Advancement Services, the Advancement Services Special Projects Coordinator (Jonelle Thomson) will review it for security compliance if it is a general mailing.
- ✓ Advancement Services, the Advancement Records Coordinator (Cathy Rathbone) will assign a Solicitation Code if it is solicitation mailing.

You may be requested to make changes to your material prior to approval.

Programming is being performed simultaneously to the central review process.

You will receive electronic communication from Advancement Systems acknowledging your output request, and requesting your response verifying the count (if you requested a pre-count),

In order to release your output data to you, both programming and central review of your mailing material needs to be complete.

***D. Step Four:***

Please pass along to us any address updates, deceased notifications, phone number changes, etc. With your help, we can keep our database accurate and up to date. Send all updates to Cathy Rathbone, Advancement Services (crathbon@calpoly.edu).

**Note: *Data Expiration*** – Information received is valid for only 30 days and must not be used beyond that time period. Please request new data using the output request form if your information has expired.

## ***Conclusion***

This hopefully answers questions you may have. Your questions, suggestions, and/or comments are most welcome.

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