

CHAPTER SEVEN
UNIVERSITY ADVANCEMENT

720 ALUMNI OUTREACH AND ANNUAL GIVING

720.1 Alumni Outreach

The Alumni Outreach office is responsible for encouraging alumni participation in University activities and for generating annual financial support of campus priorities from individual constituents.

720.1.1 Cal Poly Alumni Association

The University President recognizes the Cal Poly Alumni Association (CPAA) as the University's exclusive alumni organization and confers upon the Association the right to represent itself as such and to use the University's name in the name of the Association. The CPAA has the prerogative to enter into and manage, with the approval of the University, affinity service and goods arrangements for alumni, parents, and University friends, within regulatory and policy requirements. Administrative coordination may be provided by University employees as outlined by the Operating Agreement.

720.2 Annual Giving

The Annual Giving office is the central annual fundraising resource for the University, soliciting alumni, parents, friends, and individuals for recurring gifts below the Major Gifts threshold.

720.2.1 Mail and Phone Solicitation

The Annual Giving office coordinates and approves mail and phone solicitations of individuals by any Cal Poly department or program. A mail solicitation is defined as any letter, newsletter, form, or card sent to constituents for the explicit purpose of securing a gift or pledge for the University or any of its programs.

720.2.2 Solicitation Calendar

The Annual Giving office is responsible for maintaining the Campuswide solicitation calendar, therefore proposed mail and phone solicitations must be submitted to Annual Giving for inclusion on the solicitation calendar. The proposal shall outline who will conduct the solicitation activity, who or what will benefit from the gifts received, who will be solicited, and the manner of

solicitation. University Advancement must approve literature and materials before any alumni or prospect contact information can be provided.

References for CAP 720:

1. Date approved by the President: May 15, 2013
2. Effective Date: May 15, 2013
3. Responsible Department/Office: University Advancement
4. Revision History: Not applicable.
5. Related University Policies, Procedures, Manuals and/or Documents:
 - a. Alumni Outreach and Annual Giving office websites:
<http://giving.calpoly.edu/index.html> and <http://www.alumni.calpoly.edu/>.
6. Laws, Regulations and/or Codes of practice referred to herein or related to this policy:
 - a. California Code of Regulations, Title 5, Section 42397 et. seq. Alumni Associations.
 - b. <http://www.calstate.edu/bot/resolutions/nov2002.pdf> Subchapter 5, Chapter 1, Division 5, California Code of Regulations, Title 5.
 - c. May, 2004 Memorandum of Agreement between the Alumni Association and Cal Poly.