

Internal Requests for Promotional Materials

1. Purpose

To establish a standardized internal process for requesting, approving, and distributing promotional materials ("swag"), aligning with Lee College's branding, compliance, and efficiency goals.

2. Scope

Applies to **all Lee College internal departments** requesting:

- Branded "swag" items intended for giveaway (e.g., pens, lanyards, cups, t-shirts)
- General Lee College tablecloths for events (loaned)

Not included:

- Printed and Digital Promotional Items (e.g., flyers, banners, postcards, mailers)
 - Contact: [Marketing & Communications](#)
- Event Display & Set-Up Materials (e.g., retractable banners, tents/canopies with logos, back drops, wagons, pop-up booths/displays)
 - Contact: [Marketing & Communications](#)
- Employee Apparel & Staff-Use Items (e.g., staff polos, jackets, vest, ID badges)
 - Contact: Approved Vendor & use of Department Supply Budget

3. Definitions

- **Promotional Items/ "Swag"**: Branded give-away materials intended to attract students, encourage college pride, and enhance brand visibility.
- **Nonpromotional Items**: Custom or personalized items for departmental use, funded via internal supply budgets (e.g., staff polos, tablecloths).
- **Requesting Department**: The internal office/staff submitting the request.
- **Supervisor Approval**: Required sign-off by the department's supervisor before R&O will process the request.

4. Responsibilities

- **Requesting Department**:
 - Review these guidelines for requesting promotional materials.
 - Review the Recruitment & Outreach *Promotional Items Catalog* via SharePoint or www.lee.edu/outreach and select your items.
 - Complete the [Promotional Items Request Form](#) which can be accessed via the [Recruitment & Outreach webpage, www.lee.edu/outreach](#).
 - Confirm supervisor's approval **before submission**.
 - Coordinate pickup/delivery of items with R&O.
- **Recruitment & Outreach**:
 - Partner with departments to ensure requests are clear, complete, and aligned with college branding.
 - Track and manage inventory of existing promotional items.
 - Coordinate bulk purchasing of new items to maximize quality and cost-effectiveness (reducing per-unit, imprint, and shipping fees).
 - Communicate with departments promptly when items are ready for pickup.
- **Budget Manager (Immediate Department Level)**:
 - Confirm that the request aligns with the department/division budget and approve it before submission to Recruitment & Outreach.
 - Executive Director, Associate Vice President, or higher approval not

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required unless instructed by your AVP. (Follow your departmental protocol)

5. Budget Planning Timeline for Requesting Promotional Item Funds (annually)

February – March (Prior to Fiscal Year)

- February 1 – 15
 - Departments **initiate promotional budget requests** for the upcoming academic year.
 - Each unit wanting a promotional items fund account will work with their supervisor to determine appropriate needs and monetary requests.
 - After receiving approval from the appropriate **Executive Director, Associate Vice President, or Provost**, department leads will submit Monetary Requests for the next academic year via the *Promotional Budget Request Form* via SharePoint to the Director, Recruitment & Outreach for inclusion in the promotional budget fund request.
- March 1
 - The Director, Recruitment & Outreach will:
 - Aggregate all requests for inclusion on promotional budget.
 - Send department requests to supervisors for informational purposes regarding proposed promotional allocations for the next fiscal year.

April

- Budget Request Deadlines:
 - Director, Recruitment & Outreach aggregates all requests to submit a final request for promotional funds approval within the Recruitment & Outreach budget.

August (Prior to Fiscal Year)

- Final budget confirmations provided by the start of the new fiscal year.
- Allocations are set based on requests, available funding, and strategic priorities as decided by the Cabinet. Final numbers are not available until the college budget is approved by the Board.
- Departments may begin submitting individual promotional item requests to Recruitment & Outreach within their approved allocation.
- Requests outside allocation must include approval from chain of command.

Procedure

Step 1: Determine Need & Eligibility

- Begin with the [Promotional Items Request Form](#) and review & catalog via www.lee.edu/outreach or SharePoint.
 - If funds have not yet been secured or were not requested, go to step 8.
- Confirm that you're requesting promotional giveaway items.
 - If requesting non-giveaway items (e.g., staff apparel, personalized tablecloths), use internal departmental supply channels.

Step 2: Supervisor Approval

- Obtain departmental supervisor's written approval, if necessary, before proceeding.

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Step 3: Submit Request

- If ordering from the R&O Catalog, complete the R&O [Promotional Items Request Form](#) via www.lee.edu/outreach.
 - Provide all necessary details:
 - Event name, date, audience, and purpose
 - Desired swag items via Catalog
 - Department funding source and allocation
 - Requested quantity (some items are in bundles)
- If ordering outside of the R&O Catalog, send an e-mail with the complete vendor quote to Navigator@Lee.edu.
 - Vendor Quote should include:
 - Applicable set-up & shipping fees
 - Number of items ordered
 - Cost per item
 - Vendor orders may not be fulfilled within the same timeframe as internal promotional item requests due to processing and shipping timelines (see Lead Time Requirements).

Step 4: Lead Time Requirements

- Requests utilizing the R&O Catalog should be requested **at least 14 business days** before the event.
 - Same-day and expedited requests may not be accommodated due to volume and staffing constraints.
- Requests for items not currently in stock (those requiring special ordering from a vendor) may take an excess of 30-60 days to complete.
- Annual Deadlines:
 - May 15 - Deadline to place orders, requiring vendor, to ensure delivery of products by August.
 - June 15 – Last day to place orders for all promotional funds.

Step 5: R&O Processing

- For orders from the R&O Catalog, the team reviews requests, confirms eligibility, evaluates quantities, and checks stock availability.
 - Departments are notified via email or phone when items are ready for pickup and/or if the items requested cannot be fulfilled.
- When ordering outside of the R&O Catalog, the Recruitment & Outreach team will start the workflow through Lee College Purchasing within 48-72 hours of receipt. The order will be placed with the designated vendor through the purchasing process.
 - Special orders may take up to 30 – 60 days to receive.
 - For special orders: It is the requester's responsibility to maintain communication with the vendor if any issues arise regarding delivery dates and/or payment.

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Step 6: Pickup & Collection

- Assign an individual who will collect the items.
 - Items must be picked up within **48-72 hours** of notification to avoid storage constraints.
- All departments receiving “special order” promotional items from vendors must send R&O a confirmation email confirming that the order they received matches the items requested via their quote from the vendor including quantity, design, sizing, etc.
 - Confirmations must be submitted within 48 to 72 hours of the order being picked up.

Step 7: Special Orders (Non-Stock Items)

- If the requested item is not in R&O inventory and is approved, the requestor will coordinate with Recruitment & Outreach to place the bulk order. Special ordering capabilities often depend on order size and available budget funds.

Step 8: Requesting Funds or Items Not Allocated during Fiscal Year

- Fund Request:
 - If a department, unit, or organization whom does not have allocated funds wishes to request funds they must start with their supervisor.
 - If receives supervisor approval, the requestor will contact Recruitment & Outreach to coordinate budget transfer. They will be included in future annual requests for funding.
- Item Request (one-time, infrequent):
 - If a department, unit, or organization who does not have allocated funds wishes to request items they complete the Promotional Items Request via Step 3.
 - Requester will E-mail Navigator@Lee.edu to communicate a budget transfer request amount.

7. Compliance & Guidelines

- R&O centralizes swag procurement for cost-effectiveness and quality control.
- Special orders: Promotional items must reflect Lee College brand, messaging, and image positively.
- Items are for **external distribution only** (prospective students, families, community).
- Employee use requires purchase via Navigator Nation