**BRADLEY PRIZES PROCEDURES**

**PROCESSING NOMINATIONS AND**

**PREPARING SELECTION COMMITTEE BOOKS**

February 20, 2013

1. From the Administrator Module of Gifts, create a new Status code = Prize YEAR.
2. In the Organization tab of Gifts, create a new organization (Bradley Prizes YEAR) and move to the coding tab. Code as follows so these defaults will carry into each request as they are being created: Program Area = None, Fund = Bradley Prize, Population = No, Type of Support = Bradley Prize, Internal Program = Bradley Prize.
3. Email nominations should be saved; open the attachment and save to the current year Prizes directory, using naming convention Nominator-Nominee. Hard copies should be scanned and saved in the same method. Don’t scan attachments unless they are from the form and part of a “see attached” note.
4. As in entering any request, in the Organization tab of Gifts, search for Bradley Prize. Select the current year you created in step 2. Focus on the org, move to requests tab, choose create new request.
5. It is helpful to make a basic entry for each request as it arrives and then go back and prepare the write-up at another time. This allows for Lists and Reports to be produced even though the write-ups are not complete.
6. As you create the new request, enter information from the nomination form into fields as described below:

 A. Type = Bradley Prize; Status = Prize [year])

 B. Subdivision = Area(s) of expertise

 C. Primary contact = name of the nominee (if not found in the database search, create a new contact using the information provided on the form)

 D. Project title = the nominator’s name, title, org, phone, email

 E. Reference number = nominator’s last name, then first

 F. Docket number = list type of attachment that was sent (CV, articles)

 G. Also on page 1, deselect “information complete” until everything is completed, including the write-up, which you may be doing later in the process. This will easily allow you to see which requests have not been completed because they are listed in a different color.

 H. Move to the codes tab and verify or complete as follows:

 Program = None

 Fund = Bradley Prize

 Population = No

 Type of Support = Bradley Prize

 Internal Program = Bradley Prize

1. If an organization instead of a person is nominated, you will need to create a “contact” record using the organization name as a person.
2. Move to the affiliations tab. Open primary contact (nominee) and on page 2, mailing list, assign Bradley Prize Nominee, save and close. Then, choose “new affiliation” to add name of nominator. On page 2, mailing list, deselect Bradley Prize Nominator-invited and select Bradley Prize Nominator-accepted. If “former BP nominator” is not selected, choose that as well. Save and close. Under the affiliation role, choose Bradley Prize Nominator.
3. Back in the page 2 tab of the request record, enter the references in the Project Description Long field. Use only: name, title, org, phone, email.
4. Tab to the Evaluation-Long field. This is where you will copy and paste the
nominator’s write-up, or type it in if it cannot be copied. Note that if you copy it
from an OCR’d document, you will need to proof it carefully, and once again on
the form after it is merged.
5. To copy the write-up, open the nomination from its saved location. Copy and
paste the nomination text into the Evaluation-Long field, or merge the write up
and then paste directly into the Word document where it is easier to edit; from
there copy to page 2 of Gifts.
6. Choose write-up (the scroll icon) and select BP nomination. The form will merge with the entries you just made. You will need to edit the following:
7. Remove titles (Mr. Dr. Ms.) at top.

 B. Select name, bold and change to all caps.

C. Spell out organization abbreviations used in the text.

D. Read through the Statement of Nomination and edit accordingly, changing the “
 to “ as needed and italicizing names of books, newspapers, etc.

E. Place page breaks accordingly.

F. Make sure everything looks good on the page.

G. Print two copies, double-sided, for each request’s write-up (one for the
 nominee’s file folder; one for the alpha list folder which will be used to prepare
 the first Selector Book.)

1. After at least one entry, you can create a search to easily get to the list and easily begin entering again at any time. Search for Type = Bradley Prize, Status = YEAR. As you save the search as 2011 Bradley Prizes Nominees, be sure to select the view Bradley Prizes Nominees before you save. The next time you want to enter or look something up regarding Prizes, right mouse click in the Requests tab of Gifts, choose Get Search, then select the newly created 2011 Bradley Prizes Nominees. Focus on any one of the items in order to select the “organization name” Bradley Prizes 2011 and continue to enter by clicking on the “new” icon.
2. Each time a new person it nominated you need to create a file folder label. Type file folder label in all caps: Last name, first name of nominee. Next line, two spaces in, -- 2011 Bradley Prizes Nominee. These labels will be placed on a blue file folder and the items submitted along with the nomination form as well as the write-up created from Gifts will be kept in the folder, which will be filed alphabetically in the second drawer down in the lateral file cabinet in Yvonne’s office.
3. If a candidate is nominated more than once, prepare entry and write-up as usual, but place nomination papers and write-up in the existing blue file folder. Do not prepare a second folder – one folder per nominee.
4. Add the scanned file to the documents tab so it can be viewed by all from Gifts:

 A. Focus on the applicable request just entered.

*No longer being used; can refer to the BP year for nominations.*

 B. Move to the documents tab.

 C. Click on the new document icon.

 D. Choose “browse for file.”

 E. Locate the nominee’s scanned file in H:\WPDATA\BRADLEY PRIZE\2010 NOMINEES\ directory and choose “save and close.”

1. After the nomination deadline, all of the write-ups will need to be printed/copied and provided to Dianne Sehler and Mike Grebe. This can be accomplished by printing an extra set when the form is first merged and printed for the file folder. Place the extra forms in the expanding alpha sort folder until all entries have been completed. Then, do the detail alphabetizing and make two copies. Three hole punch two sets and place them in three-ring binders using alpha index tabs. Do no double-side the write-ups; books must be comprised of single sided copies. Keep one unbound set for yourself, in case any other copies are needed; other copies will be needed when you prepare the Selector Agenda Books. You will need to run two lists of the nominees from Gifts, one sorted by nominee, the second sorted by nominator; these will serve as index pages for the binders. The views are saved in the view/apply edit views. Change views, columns, sorts to accomplish this task. (See previous years.)
2. Mike G. and Dianne S. will determine which write-ups need to be coded “sent to Selection Committee” for each member to choose their top 10. These write-ups are noted by:
3. Run the search for current year nominations
4. Select each record sent to the Selection Committee by highlighting each with the
 “ctrl” key depressed (windows method of multiple selections)
5. At the top of the screen, go to Gifts Plus, Update, Coding Sheet; choose “add a
 code” then choose “ethnicity” as the field to update, and “sent to selection
 committee” as the code. Okay screens until done.
6. Focus on each highlighted record being sent on (as a group, using ctrl select) and
 move to the contacts tab.
7. Select all Primary Contact names and follow the same process using Gifts Plus to
 add the “sent to selection committee” code to the “ethnicity” field for each of the
 nominees, being careful not to select the nominators as their names will also
 appear on the list of related contacts.
8. Next, these various lists and write-ups will be compiled to form the Selection Committee’s first agenda book, which is sent to their home/office. The agenda book is compiled of the write-ups indicated by Dianne (staff director of the program), and will also contain an Index (on white paper), the Cover Page in color and Mission and Vision Statement, both printed on 2nd sheet letterhead (cream) paper. Prepare a sample book in a 3-ring binder and give to Dianne for review, keeping a clean set of write-ups for future use. With her approval (make any changes requested) give the sample to the VP-Administration. After review (make any changes requested), she will give the material to the Office Assistant, who will spiral bind and mail the books.
9. After each selector sends in their list of Top 10 and Dianne indicates those moving on to the Selector Finalist Book, follow procedure A-E above to add the code “Top 10” in the “ethnicity” field of the request record and again in the contact record by using Gifts Plus. (This code is added once in the contacts record, and once in each of the applicable request records for that nominee, no matter how many times or in what years they were nominated. Therefore, in some cases, the codes may already be in place.)
10. The information from Dianne will also be used to create several grids indicating the votes reach nominee received. Find prior year’s Selector Grids file and save as current year.
11. On the file tab of Selection Committee Members Top 10 Choices, delete the n names and replace with the nominees that were sent to the Selection Committee.
12. Copy this first grid to the “two or more votes” grid and delete those with less than
 two votes.
13. Copy this grid to the “three or more votes” grid and delete those with two votes.
14. Next, type the first and last names of the Top 10 into the columns on the chart
 where the column title indicates the number of votes received.
15. For the last chart, list the first and last names of the nominees who received “Zero
 to 1 Votes” and in the second column “2 or more votes.”
16. Give these grids to Dianne for review, and provide the President and
 VP-Administration each with a copy.
17. Prepare the Selection Committee Tally sheet by opening the prior year’s file and saving as the current year. Change the names in the Finalist column to the current finalists. Print the Round 1 page, then for each round through 12, change the Round number and print the page. Give these to the VP-Administration, along with contact information for the current year’s Top 10, and the nominators of the Top 10. To do this:
18. Search the requests tab of Gifts for status code = BPcurrentYear and Ethnicity
 code contains Top 10.
19. Select all, focus, move to the affiliations tab.
20. Use an affiliations view that sorts by Type of Affiliation for ease in selecting the
 names.
21. Click to highlight the name of the nominator at the top and scroll down to the lasts
 nominator’s name. Hold down the shift key and click on that name. Focus on
 the selected names and move to the contacts tab.
22. Select a view that gives you the columns of Name, Primary Phone and Email.
23. Print all, creating an appropriate title for the report.
24. Go back to the affiliations tab and repeat the same process selecting the Primary
 Contact affiliations this time.
25. To prepare the Selector Finalist Book, you will need the Cover Page printed in color on 2nd sheet letterhead paper, the Mission and Vision Statement also printed on 2nd sheet letterhead, the Index from the first selector agenda book with “Original” added to the title and the tab column removed, the updated Numerical Index followed by the write-ups in the corresponding tabs. Provide this material to the VP-Administration for review. She will pass on to the Office Assistant to be spiral bound and sent to the hotel where the meeting is being held.
26. When the winners are selected, add BP Winner to the ethnicity field in each winner’s contact code table and to their mailing list; also add “*year* winner” in their note’s field. Then, include the Winner code in the ethnicity field of each of the winning nominations in the requests tab.\*
27. After the event, run the list of nominees from the requests tab of Gifts. Select all and then decline, using the declination reason of “program completed.”
28. Go to the Affiliations tab of the appropriate year of the Bradley Prizes Initiative and add each winner as a $250,000 Payee.
29. Discard write-ups and nomination materials at the start of next year’s program, but keep winner information for each year in file cabinet.
30. When next year’s program gets underway, change Page 2 mail list of each of the prior year’s nominators’ contact record from declined or accepted, back to invited so a draft nominators list can be prepared, reviewed, edited and updated.
31. Go to the payment section of the current year of the Bradley Prizes Initiative grant, whether or not it is formally awarded yet or not. If there were four winners:

 A. Split the $1,000,000 payment into four $250,000 installments using the pending date of 06/30/xx. Their exact payment schedule will be determined after the President and winner decide it.

 B. Indicate the winner’s name on the notes line of each payment record (payee = name).

 C. Select payee = (winner’s name) from the pull down menu.

 D. Change the Status to Hold for each payment.

 E. Move to the requirements tab to schedule a requirement of the W-9 Form for each winner, typing their last name in the notes field.

 F. The requirement should be marked as done and the payment status field should be changed to scheduled when the form has been received, which will allow payment to be released. (The W-9 will be requested by President or someone from the Finance Department, who should let you know when it has been received.)

1. When the winners send in their invitation list, keep these names in one spreadsheet, using a tab for each winner, in order to track their RSVP so each winner may be informed of which of their invitees are attending. Do not add these names to e-Tapestry’s BP invitation list; these are temporary unless directed otherwise.
2. Add the winner’s guests, names, directors, and staff to the RSVP list.
3. The RSVP list will be used to create the check-in list by refining the Yes responses in a new document.

When the program is over and you are given the combined check-in list in order to record attendance, use that list to enter the current year attendees in e-Tapestry. The winner’s guests and congressional list should not be included. Search for each name on the list. If it is found in e-Tapestry, go to Defined Fields and move to Events. Choose events attended and select the current year Prizes; then save, and search for the next name. Do not add the names to the Mail List field’s Bradley Prizes invitee code, and do not enter additional persons into the database unless specifically directed to.

\**Note:* In the case of an organization instead of an individual winning (Federalist Society, 2009), the contact record will not contain the “sent to selection committee” or “top 10” code because it was the organization and not a person nominated. However, the “BP Winner” code should be added to each of the individuals’ contact record, in all places as previously indicated.

**PROCESSING BRADLEY PRIZE SELECTOR DESIGNATED GRANTS**

March 21, 2012

The form “Grant Designation by Bradley Prize Selection Committee Member” will be given to each member of the Selection Committee to complete at the off-site meeting. Open the prior year file and save as current year. Change the information according to current year selectors. The President’s Assistant will take these forms along to the Selection Committee Meeting and return the completed forms to the Finance Department, who will use it as documentation to release the $10,000 meeting fee for each Committee member. The Finance department will give you a copy of the form to authorize the grant to the organization(s) they designate.

1. Award a new grant in the database, coding it BP Selector Designated in the Type field.
2. Indicate the selector in the Reference field (last name).
3. Complete the coding fields as usual, using the Program Area = None, Fund = BP Selector Designated, Population = No.
4. When awarding, place “BP Designated/(name)” in the Board Minutes field.
5. Enter the Selector in the Affiliations tab as the Sponsor.
6. Schedule payment for a regularly designated grant payment date. Be sure BP Selector Designated appears in the Fund code of the payment record as well.
7. Remove contract requirement; indicate form required and received.
8. Make file folder as usual, placing the Designation form inside.
9. Print Charity Check report and Yellow Checklist; place in file folder.
10. When payment is made, use appropriate transmittal letter.

**NOMINATOR & SELECTOR DETAILS**

Each nominator or selector is coded as such in their contact record of Gifts. Open the contact record (or create, if record doesn’t exist). Go to page two, assign Bradley Prize Nominator (or Selector) in the mailing list section.

At the end of each year’s program, search for all of the Bradley Prize Nominators using the Mailing List code of Accepted or Declined. Delete all Accepted and Declined; then add Former Prize Nominator (if not already in place) and reinstate BP Nominator Invited again. This allows a draft list of nominators to be prepared for next year by searching for BP Nominator Invited. If anyone is removed from the draft nominator list, the BP Nominator-Invited code is removed from the contact record, but the Former Prize Nominator code will always remain.

**BRADLEY PRIZE WINNER DOCUMENTATION REQUIREMENTS**

A completed and signed W-9 is requested by the President’s assistant (or the Finance Department) and kept by the Controller.

Board authorization for each year’s $1,000,000 is also noted by copying the page from the Board minutes for the authorization file.

If the winner chooses to designate a 501(c)(3) organization to receive the $250,000 award, amend the $1M Bradley Prize Initiative down by $250,000 and award a $250,000 grant to the designated organization.