**BRADLEY PRIZES MAILING LIST**

**(NOMINATORS, INVITEES, WINNER GUESTS, RSVP, CHECK-IN)**

**October 16, 2013**

INVITATION TO NOMINATE LIST

Early in September, prepare the draft nominator invitation list using e-Tapestry and compare it with what is coded BP nominator in Gifts; these reports should be the same. If not, ask questions of Dianne Sehler or Mike Grebe as to who should or should not be included. Format the report using the Foundation’s standard merge column headings, and include report name in the header, file and path in the left footer, page number in the right footer.

Check with Mike Grebe to be sure he wants staff input in editing the list. If he does, print the updated e-Tapestry list and circulate with a memo for the program staff to review and make changes. When returned, provide a copy of the list to Mike Grebe to approve before making the requested changes. Update the list and both databases with address changes, additions and deletions by coding accordingly in Gifs and e-Tapestry. Keep the first tab in the Excel document as the original list. Create a copy as the second tab and edit that with the requested changes. This list will be merged with the letter template inviting nominations.

INVITATION LIST

The first list is for the “Save-the-Date” mailing, which then becomes the invitation list, which becomes the RSVP list and then the Check-in list. Here’s how it works:

Run the standard e-Tapestry report using the “BP invitee” query. Format the report using the Foundation’s standard merge column headings, and include report name in the header, file and path in the left footer, page number in the right footer. [Exhibit A] Print and circulate with a memo to the program staff asking for address updates, additions and deletions. Provide the reviewed list to Mr. Grebe to approve before making any changes. Create a copy as the second tab in the Excel document and edit with the requested changes; also update Gifts and e-Tapestry with the changes. Foreign addresses should be pulled out and placed in a separate tab labeled “foreign." (The mailing permit used for the group mailing cannot contain foreign addresses.) The Office Assistant will ask for the number of invitations needed before requesting that you email the list to her, who will forward it to the printer, who prepares the invitations and mails them for us. Foreign addresses will be mailed from the office. As guests of the winners are added to the mail list, re-sort the list alphabetically and manually review in case the same people are added with slightly different addresses.

GUESTS OF THE WINNERS

Mr. Grebe will ask each of the winners chosen to provide a list of family and friends they would like invited to the ceremony. Terri will forward these lists to you as they become available. These additions will not be added to the e-Tapestry database because they are for the current year only (unless directed otherwise). These additions will be used in two places: the invitation mailing list that will be sent to the printer (above) and the Excel spreadsheet that tracks the winner’s guests. (If the list has already been sent to the printer, mail them from the office.)

When creating the winner guest lists (all winners in one Excel file, each with separate tab by name) keep the column headers consistent to enable proper copying to the mail list. Assign each winner a color-coded tab. Apply the winner’s background color to the name of each invitee listed on their tab. As the winners’ guest lists are prepared, copy and paste them into the invitation mailing list, keeping the colored background for now. [Exhibit B] The background color will be removed before sending to the printer.

RSVP LIST

Using the “save as” feature, save the mailing list as RSVP list. Because the RSVP list is created from the invitation list, the color-code feature will be used to track guests of the winners as RSVPs are received. Add the foreign guests (previously removed from the mailing) to the RSVP list. Delete the address columns and format the RSVP list by reviewing the prior year’s Excel file for style. [Exhibit C] You will need a column for the last name, first name; a column for the number of people included on the invitation (Mr. & Mrs., family…); two RSVP columns (for yes and no) which will include the number responding; a column for guests/cross reference; and notes. The color coded legend should be placed at the bottom of the document. As RSVPs are received, the receptionist (who takes the responses) will inform you, on a daily or weekly basis, of which winner guests have replied so you can update each of the winners’ guest lists. (This information will be important to Terri when planning the VIP reception, seating, tickets, transportation, etc.) [Exhibit B]

When the receptionist takes an RSVP, she also inquires as to the first name of a spouse or other guest, placing it in the “Guest/Spouse” column. Everyone needs to be approved by President Grebe before being added to the check-in list.

CHECK-IN LIST

Open the RSVP list and save as Check-in List. If not already in place, add a small blank column left of the guest name. This column is used to indicate persons invited to the VIP reception. Their admission ticket will not be at the check-in tables; they will receive their seating ticket at the VIP reception, which is prior to the ceremony. Terri will inform you of those invited to the VIP reception.

To prepare the check-in list, copy the tab and place as the next tab in the document. Sort by RSVP-yes, which is what you will keep, and delete all other names from the end of “yes” through the bottom of the document.

The “Guests/Cross Reference” column contains the name of any person attending with the invitee. Update the column of invited guests to contain both first names of any couples or invitees bring a guest (Mr. & Mrs. John Doe will be changed to Doe, John and Mary), and in the event last names differ, you will need to insert a line to list the names both ways. For example, invited guest Lukianoff, Greg and Shibley, Robert will also be listed alphabetically as Shibley, Robert and Lukianoff, Greg, making it easier to check-in no matter whose name is presented or listed first because both can be checked off at once. Remove the notes column and rename the “guests/cross reference” column “Notes.” [Exhibit D]

ATTENDANCE LIST

After the event, save the Check-in list file as Attendance List and update according to the list of attendees provided you by Terri. The attendees are then entered into the e-Tapestry database as having attended the event. You will need to add a code for each year of the event.

The process continues to evolve and change each year.