Dining for Dollars Users Manual

By Mark King, Neighborhood UU Church

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Introduction

The Dining for Dollars fundraiser was an offshoot of the auction fundraisers at Neighborhood Unitarian Universalist Church in Pasadena CA. Members who had no goods to donate, would offer to host a dinner or other event to support the church. So many folks would volunteer these dinners, that eventually they were moved into their own event, and Dining for Dollars was born.

When I took over the event, all the information was handled either manually or by spreadsheets, which made the execution of the event a bit of a challenge. Being a bit of a geek, I had a lot of fun putting the information into a database, then designing database, then redesigning the database over successive iterations. As you might guess, I am not a database professional – I had the cart in front of the horse from the beginning!

Over the past few years, I have provided copies of our materials (bid books, bid sheets, etc.) to other churches that have initiated their own Dining for Dollars events. Up to now, I have not shared the database that I use to administer our fundraiser. However, FileMaker has a solution that allows the database to be compiled into a standalone application that no longer requires FileMaker to run. The "runtime" applications are portable and make the sharing of the database with others feasible, and more importantly in the world of nonprofit organizations like churches, affordable.

So when my close friend, Nancy Rose, volunteered to set up a Dining for Dollars fundraiser for her Rhode Island congregation, I used that as motivation to transition my database into a standalone application that I could share with her and others.

In writing this manual, I'll be describing not just the use of the database, but also the execution of a Dining for Dollars fundraiser. The two are so closely linked; it makes no sense to try to separate them.

Neighborhood Church member Gillian Symonds designed the original Dining for Dollars logo – I merely substituted the current UU logo into the design included in the database.

If you find this software useful, please feel free to make a donation to: Neighborhood Unitarian Universalist Church, 301 N Orange Grove Blvd, Pasadena CA 91103. Be sure to tell them why, otherwise you might be mistaken for a bidder!

What is Dining for Dollars?

Dining for Dollars is a fundraiser for your church (or other organization) where members and friends host dinners, parties, and other food-oriented entertainments, and the church auctions off the seats at the table. Each seat at the table is auctioned individually. This creates a mix of people, and is a great opportunity to meet other folks in the church by either bidding (successfully) on events or hosting one.

The rules governing the event are printed on the inside of the bid booklet cover and are as follows:

1. Church members and friends offer to sponsor dinners, teas, picnics, museum tours and lunch, pool parties, brunches, barbecues, sailing expeditions, and other events for fellow members and their families.

2. Beginning on <<Bid Day 1>> at <<gBidOpenTime>> and through <<gBidCloseTime>> at <<Bid Day 2>>, church members may enter bids in bidding rosters on the patio after services. Feel free to buy places at events for non-church members you love - friends and family.

3. If you want two seats at the event, you need to bid on two lines ! !

4. You'll need to monitor your bids and events because, in the case of some popular events, you might be outbid If you're willing, the "It's yours bid" (maximum bid) guarantees you seats at the event.

5. After bidding closes, we will generate letters to all the bidders indicating what they have won. You will get this letter within 2 weeks after bidding closes. <<You may pay by credit card.>>

6. All proceeds go to the church.

7. You are responsible for payment even if you cannot attend an event. We rely on you to check your calendar. If you are not able to attend an event, you may send someone of your choosing in your place. In this case, any monetary considerations are between you and your replacement.

NOTE: The numbered text above is hard-coded into the database on in the "bid book cover" layout; variables controlled by the database are shown as <<variable>>.

Installing software

The software comes in a D4$ folder containing a number of individual files (see image to the right).

To install the software, drag the D4$ folder wherever you would like on your computer's hard disk, but do not change the location of the items within the folder.

To launch the software, double-click on the icon: D4$.

FileMaker Basics

There are four modes – these are the ways you interact with the program. In **Browse**, data may be entered, and you move from one layout to another as needed. The **Find** mode allows you to search the database for specific subsets data to work with, while **Preview** shows how the layout fits in the current print settings. The **Layout** mode allows the creation and modification of the various layouts, and should not be available in the standalone application. The usual way of moving between the modes is the View menu, where you can select among the three available modes. There are frequently buttons in the toolbar that will allow you to select the mode there by clicking them.

A FileMaker window has main two places where you can control some of the goings-on in the program. There is a small area at the lower left of the window with a

number, three icons and a word – "Browse" in the sample shown to the right. The number is the current zoom level, the smaller "mountain" icon makes things smaller, and the larger "mountain" icon makes things larger. I tend to use the 150% zoom for my eyes on my computer. The third icon shows or hides the status toolbar at the top of the screen. The finally the word tells you what mode you are in – Browse, Find, or Preview – and functions as a pop-up menu to allow you to select which mode you want.

The big area is at the top of the window under the title bar that announces the name of the program. The left most icon (the open book with arrows right and left) allows you to navigate, depending on the mode. In Browse, this takes you from one record to the next / previous, while in Find, it will take you from one Find request to the next / previous, and in Preview it goes from one preview page to the next.
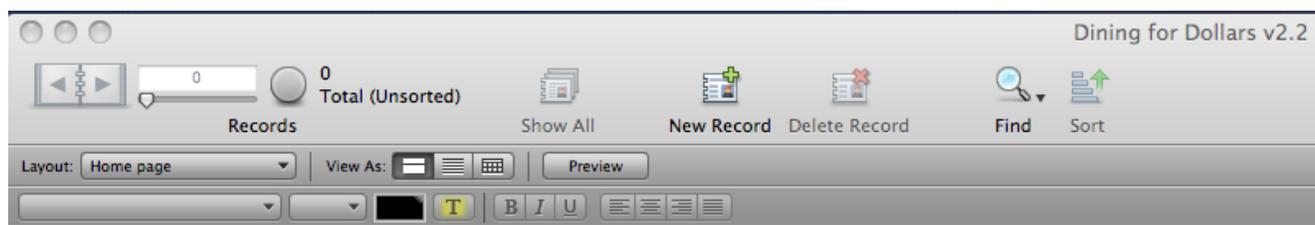
Next to that is a number and a slider. The slider allows you to move more rapidly than clicking on the arrows on the page icon, and the number shows the number of records, find requests, or pages depending on the mode. To the right of the slider are five icons:

1. Show All. If you have executed a Find command, only that subset of records will be shown. Clicking on this button essentially undoes any Find.

2. New Record. Allows you to create a new record, e.g. an event, or a mailing list entry.

3. Delete Record. Allows you to delete a record.

4. Find. Enters the Find mode

5. Sort. Sorts your records depending on the criteria you set.

Below the main toolbar, are two additional toolbars. The middle bar allows for navigation between layouts via the Layout popup menu, change view from forms to lists to tables, and go into Preview mode.

The lower toolbar is a text formatting toolbar the first popup menu is font, and the second is size. The buttons to the right allow for the selections of text color, highlight text, bold | italic | underline, and justification.

Navigation – getting around

This application is composed of many layouts that allow the entry, display, and printing of the data. To move about these layouts there are three main options – (1) by the layout dropdown menu in the toolbar at the top of the window shown by the red box, (2) by using the menu: **View** > **Go To Layout**, or (3) use the navigation buttons shown by the red arrow.

Generally speaking, where you see the pale green, e.g. the navigation buttons, there is usually a control (button,

menu) associated with that object.

The D4$ logo is also set up as a button to take you from various print out layouts (e.g. envelopes and correspondence) where obvious buttons are not "feasible" as part of the design.

Initial set-up: Home page

Once you've decided to run a Dining for Dollars fundraiser, and you've acquired this software, there are a few global items that need to be set up. This is done on the **Home page**.

In the image to the right, you see the organization's information, in this case for Neighborhood Church. The payments are sent to this address and contact should be the person receiving the checks. The contact handles questions about arrival (or not) of payments and is usually the church administrator. There is a field to enter how the payments checks should be made out, e.g. in the example a shortened version of the church name is used.

In the second image, the coordinator's information is entered. The contact information in these fields is used for the correspondence with the hosts of the events as well as with the winners of the bidding. If the coordinator does not want to handle the correspondence from their home address, they can enter the church's address and info here.

Below the coordinator's information, there are two fields to enter the start and end time of the bidding. The dates are not entered here – they are entered when you set up a "semester" described below.

And finally below, the **Accept credit cards** pop-up menu that allows you to indicate whether you accept credit cards or not. Selecting "Yes" causes two phases to be added – one to the rules in the bid book, and the other to the winner letters – that inform the reader that credit cards may be used.

The only other user accessible field is one for making notes.

Set-up Information

Enter organization info here:

Organization	Neighborhood Unitarian Universalist
Contact	Alyssa	Bellew
Street	301 N Orange Grove Blvd
City, ST Zip	Pasadena, CA 91103
Phone	626-449-3470
Email	abellew@uuneighborhood.org
Checks payable to	Neighborhood Church

The organization's address is used for all payments.

Enter coordinator info here:

Name	Mark	King
Street	626 N Michigan Ave
City, ST Zip	Pasadena, CA 91106
Phone	626-395-9758
Email	MarkTKing@mac.com

The coordinator's address is used for correspondence with the hosts and notification of the winners.

Time bidding opens	10:30 AM
Time bidding closes	1:30 PM
Accept credit card?	Yes

Organizing the fundraiser

Setting up Dining for Dollars takes some modest planning. Once the dates for the silent auction bidding are set, the coordinator and her helpers need to publicize the event and to round up the events to be auctioned. My experience is that the publicity and the solicitation of events should start at least 6 weeks prior to the first day of bidding.

I have been most successful soliciting events by making that pitch from the pulpit at service. Then after services I usually approach past hosts as well as trying to identify potential new hosts. For new hosts, checking in with the Welcome or Membership Committee is a good idea.

One of the questions potential hosts ask is: when should I schedule my event? We have found that limiting the events to the six months following the bidding is optimal, as peoples' calendars are too uncertain beyond that.

There is a FAQ list for hosts (and bidders) at the end of this document that was developed by Alyssa Bellew, Neighborhood Church's administrator.

The data you need to obtain from your host for each event is:

1. Title – something catchy or memorable
2. Description – *very important*, this is what really gets folks excited about the event
3. Place – where the event will take place
4. Date and Time
5. Number of Guests
6. Flexibility for squeezing in one extra person - The reason to ask about this flexibility is that, occasionally, a couple bidding for two seats at the table wins only one. If the host has the flexibility to squeeze in one more, the couple can be accommodated. Having that information up-front saves a lot of phone calls later. The event is still advertised for the original number of guests.

One other question that will come up frequently is how many guest should I have to my event? Experience teaches that events of 12 or more aren't necessarily the events that raise the most money. The law of supply and demand governs bidding dynamics – an event of only 6 guests that sells out (i.e. gets six "It's Yours" bids) is more effective raising money than a event of 20 that barely sells out. However, having a couple large events is useful, as they tend to go for lower bids and are more accessible to the budget conscious, who are likely to be outbid for the popular events. There are exceptions to this rule – we had a Blues and BBQ event that included live music, that was going for $70 to $100/person for 16 guests. As mentioned above, it's in the description…

Publicity

As mentioned before, this takes place 6 weeks ahead of the event with two main purposes – (1) to solicit events to auction, and (2) to get the rest of the congregation excited about bidding. To reiterate, I find that making announcements just prior to services is most effective, but also follow that up with information in newsletters, email lists, announcements in the order of service, and other avenues of written communication.

Setting up a semester

I organized D4$ on a semester basis given that we only accept events six months out from the day of bidding, and run the event twice a year in the spring and fall. Despite that, there is nothing in the structure of this database that requires you to keep to that six-month interval. It's just a convenient terminology for me. The steps for entering a new semester are:

1. Navigate to the **SemesterList** layout
2. Make the following menu selection: **Record** > **New Record** (Cmd-N) to create the new semester.
3. Five fields are available for entry: **Semester**, **Bidding Days** (2 fields), and **Events run from …** (2 fields). As shown in the image below, there are two additional fields, however these are calculations are not available for entry.

a. Enter the name of the semester. This text-based field is sorted, so I use some leader characters, e.g. "2010-05 Spring" to assure that it sorts in chronological order.

b. Bidding days are both date-based fields: mm/dd/yy.

c. Events run from … are text-based fields. The text entered here is used in some other places and uses a typical format of "May 2010" or "November 2010", whatever defines the range of time that this edition of D4$ covers.

Entering the events

As you acquire the information for your events, they may be entered using the **Event Entry** layout. A screenshot of that layout is shown below. To create a new event, make the following menu selection: **Record** > **New Record** (Cmd-N).

Most of the fields are self-explanatory, but there are a few with special functions and purposes. These are:

1. ID. This number is automatically assigned by the database and should not be modified. This is one of the keys that link all the information.

2. Host ID. Enter the ID number of the hosts. This number comes from and links to the **Mailing List** portion of the database. Your hosts' information should be entered into the mailing list before you enter a number here (see next section). The blue shaded field adjacent to the ID will display the hosts' name once the ID has been.

3. Limits. This text field allows entry of information, e.g. "must not be allergic to cats" that will show up on the bid sheets.

4. Missing Info and All Done? These check boxes help keep track of what information has been provided.

5. Semester. This is a dropdown menu that lists all the individual semesters that have

been entered into the database. Choose your current semester from the list. If it doesn't appear here, then check the **SemesterList** layout to see if it has been entered yet.

6. <u>Minimum Bid</u> and <u>Bid Increment</u>. These fields are where the price information is entered. I usually start an event at $30, with an increment of $10. Once I have a history with an event, I may alter these numbers on subsequent editions based on how the bidding went.

7. <u>Minimum Income</u> <u>Actual Income</u>, and <u>It's Yours Bid</u>. These fields are calculations and accept no entries.

The button <u>Export for bidbook</u>, is used later to export the necessary information to compose the bid booklet, and is described later.

The box with the lines of alternating color that has <u>Amount Bid</u> and <u>Bidder Number</u> above it are used when entering the winning bids after the event. This process is discussed later in this document.

Viewing of a list of events

A list of events for a given semester can be viewed in the **EventList** layout, the top portion of that

layout is shown below. In this layout all the events for a give semester are displayed. Other semesters may be displayed by either clicking on the forward or back arrows in the toolbar, by moving the slider adjacent to it, or by doing a search by using the menu command **View** > **Find Mode** and using the dropdown menu to select the semester of interest. The pale green text in the layout indicates the location of that dropdown menu.

Individual events may be viewed in the **Event Entry** layout by clicking on the ID number on that line, also highlighted in pale green.

Once all the events have been gathered, a separate "local" event number should be assigned to the event under the "#" symbol. This allows the events to be renumbered from "1" for subsequent Dining for Dollars

done?	ID	#	Title	Hosts	Date	Guests	Min $	Actual $
☐	114	1	Family Story Time by the Fireside (even	Erin Lindsay & Sam Westcott	Sun 17 Jan 2010	5	150	180
☐	106	2	Tour and Tea at the Huntington	Christine & Ken Bender	Sat 23 Jan 2010	6	180	400
☐	118	17	"Tastes of Heaven" Cocktail Party	Sara Willard	Sat 23 Jan 2010	10	250	765
☐	108	3	Chinese Cooking Class with Toni LeBel	Toni LeBel & Roger Patterson	Sun 24 Jan 2010	5	150	370
☐	103	7	Comfort Food Cuisine	Mark King & Jonathan Lubin	Wed 27 Jan 2010	6	240	580
☐	105	4	A Subcontinental Feast!	Andrea Leistra and Jane Rigby	Sat 06 Feb 2010	8	240	660
☐	107	5	Chocolate Lovers' Film Night	Lee Brainerd & Ned Racine	Sat 13 Feb 2010	8	320	440
☐	112	6	A Magical Evening - Dinner and a Show	Laura Fry	Sat 20 Feb 2010	8	240	360
☐	116	8	A Zen Buddhist Experience	Melva Watts	Sat 06 Mar 2010	8	240	440
☐	104	9	TANGERINE TANGO VI	Phoebe Conn	Sat 13 Mar 2010	8	320	680
☐	111	10	Le Concert Champetre	Neighborhood Church Staff	Sun 14 Mar 2010	20	600	1,190
☐	120	11	Sukiyaki, Sake, and Seven Samurai	Lynn Miyamoto & Kevin Kroeker	Sat 20 Mar 2010	6	180	480
☐	109	12	Food for the Body - Food for the Soul	Jim & Kathe Nelson	Sat 27 Mar 2010	8	400	1,050
☐	113	18	Poker Night - Part IV	Melinda & Grady Goddard	Sat 10 Apr 2010	14	420	850
☐	117	13	La Noche en Puerto Rico	Gillian Symonds & Cesareo Perez	Sat 17 Apr 2010	6	180	540
☐	119	14	A Mediterranean Feast	Scott & Clarli Wilson	Sun 25 Apr 2010	6	180	390
☐	110	15	Food and Faith Redux	Michelle Huneven	Fri 14 May 2010	8	480	780
☐	115	16	Un-American Dinner	Janice Partyka & Randy Hall	Sat 15 May 2010	8	240	720
☐							5,010	$10,875

Clicking on the **ID** goes to the individual event.

fundraisers rather than unique ID assigned by the database. Folks seem to get confused if the first event is numbered "42". The local event numbers in the "#" field show on the bid sheet, and are used in the bid booklet.

Mailing list

The mailing list is what one would expect, and a sample is displayed below. To create a new entry, make the following menu selection: **Record** > **New Record** (Cmd-N).

Except for the ID#, which is assigned automatically by the database, all the fields are entered by the user. The structure of the SortName, FirstName and FullName fields is important as they are used in other layouts and correspondence, especially when partners do not share a last name. Also, although I usually alphabetize the last names to create the SortName, if one of the partners is more active in the events (e.g. hosting or bidding) I will sometimes list them first. The check boxes, Host and QuickTag, are useful for flagging specific individuals for later **Find** operations.

For the first time Dining for Dollars, this data entry can be tedious, subsequent Dining for Dollars fundraisers will have access to that information, reducing later work. Although I have not explored this option, it should be possible to import this information from the organization's mailing list.

Executing the silent auction

At this point, you should have all the data for the events in the database, and at a minimum, the hosts mailing list also. The local event number, "#" field, should be assigned also.

The next items needed for the silent auction are the bid booklets to provide to the bidders that describe the events. This information comes from the **Event Entry** layout described above. Also necessary are the bidding sheets.

Also, print a list of bidder numbers (i.e. ID#) assigned by the **Mailing List**. For a first time run of Dining for Dollars, bidder numbers are assigned manually via a sign-up sheet.

Bid booklets

The cover of the bid booklets is embedded as the **bid book cover** layout in database. The cover includes the dates and times of bidding, the rules, and a chronological list of events with the local ID number. I use the **EventList** layout to use assign the "#" field in the same sequence, 1 through N. These are the numbers that show up on the bid sheets, and most folks will use to identify the events.

To print out the bid book cover:

1. Navigate to the **bid book cover** layout. If you do this by using the navigation button on the **Home page**, the proper print settings should be loaded.

2. View layout through preview mode by selecting menu **View > Preview Mode**. The preview should display as two landscape-oriented $8^1/_2$ x 11 pages. If not, use the menu command **File > Page Setup...** to make adjustments to the orientation and/or paper. The desired display of the first page is shown to the right. To show the next page, click on the right pointing triangle in the control at the top-left of the window.

3. Choose menu **File > Print** to execute the printing.
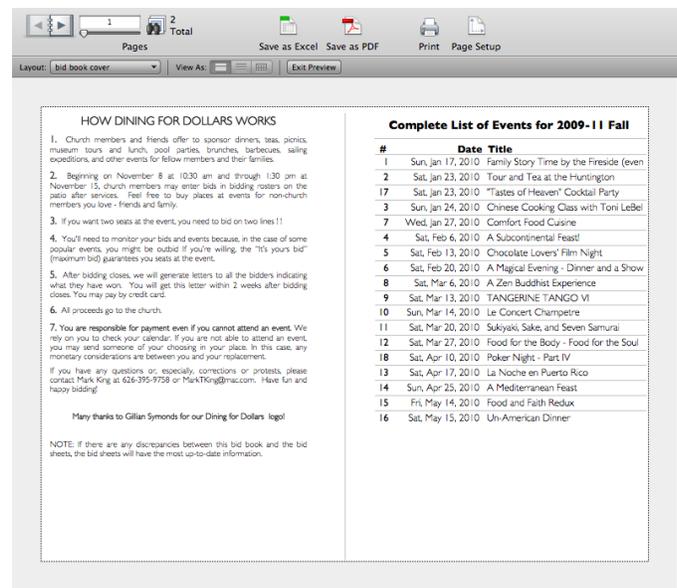
There is currently no way I know to get FileMaker to print the interior of the bid booklets so that they are ready to photocopy. Therefore, I use the export function to move the necessary information to a word processing or page layout program and compose the booklet there.

To export the data (see graphic in the *Entering the events* section above):

1. Go to layout **Event Entry**

2. Choose menu **View > Find Mode**

3. Click on the **semester** field and select the desired entry from the list.

4. Click on the button **Export for bidbook**. A dialog box will appear asking for information where to save the data and under what name. When ready, click **Save**.

5. Open and edit the information in your choice of page layout program to make the bid booklet.

Because the local Kinkos (or FedEx Office as they are now known) takes 48 hours or longer to print the bid booklets, I usually try to have them in by the Wednesday prior to bidding (on Sunday) just in case of a disaster. (There was one – I, and they, were glad of the extra time!) For a congregation of about 700, I print up 175 booklets, and have plenty to spare.

Bid sheets

The specific bid sheet used for an event depends on the number of guests attending. There are five bid sheets – one each for events hosting 6, 8, 12, 20, and 30 guests. If an event hosts an "odd" number of guests, select the bid sheet just greater, e.g. an event of 10 would use the 12-guest bid sheet, with two lines crossed off manually at each bid level.

Because of the interaction between the number of bid levels, the number of guests, it's always useful to examine the bid sheets before printing them, as well as viewing them in the preview mode to make sure the print settings are correct.

I haven't yet figured out a way to assign the appropriate bid sheet to an event where they would then print out in a single print job. The current way I do it is to select the events that share a bid sheet layout and print those together, and repeat until all events have a bid sheet printed.

1. Go to the **Event Entry** layout.

2. Choose menu **View** > **Find Mode**.

3. Click on the **semester** field and select the desired entry from the list. In the number of guests field, enter:

    a. "0..6" for the 6-guest, (yes, those are two periods between the numbers)

    b. "7..8" for the 8-guest,

    c. "9..12" for the 12-guest,

    d. "13..20" for the 20-guest, or

    e. "21..30" for the 30-guest bid sheet.

4. Click on the find icon in the toolbar (or press enter or return on the keyboard).

5. Go to **Bidsheet ##** layout. The "##" represents 06, 08, 12, 20, or 30 depending on what was entered in the find in the previous step.

6. Choose menu **View** > **Preview Mode** to make sure print settings are correct. If not, use **File** > **Page Setup…** to make corrections.

7. Choose **File** > **Print** to execute print job.

8. Repeat steps 1 through 7 until all the bid sheets are printed.

I have used file folders to hold the bid sheets, stapling the sheets to the interior of the folder to hold them in place. It makes it easy to manage the sheets when laying them out for bidding and picking them up afterwards. De-stapling them after the bidding is over is a bit of a nuisance. So I got certificate holders from the office supply store, which hold a single sheet without staples. I purchased "photo corners" from the local photography store and used $8^{1}/_{2}$ x 11 card stock to place them on the facing page to support two-page bid sheets. We'll see how it works in practice…

Bidder number assignment

One of the keys of the database is the assignment of a unique bidder number to each individual, couple, or family. For bidders (and/or hosts) already entered, the bidder number assignment is handled by the Mailing List layout.

Using the layouts **Bidder Numbers** and **Bidder Booklet Labels**, print out the currently assigned numbers for use by those individuals. The first layout is an $8^1/_2$ x 11 sheet, which is useful for those folks who have forgotten their number or left their bid booklet at home. The second layout is a label print out (Avery 5160) that allows the coordinator to place the label on individuals' bid booklet for a rapid assignment (pre-assignment) of the bidder number.

A manual sign-up sheet with a list of available bidder numbers is necessary. This may be composed in a word processing or spreadsheet application, but should capture all the information shown in the layout **Mailing List** – name, address, phone, and email. To determine what is the next open bidder number:

1. Go to layout **Mailing List**.

2. Click on the **Show All** icon on the tool bar (if it is not grayed out).

3. Click on the **Sort** icon on the tool bar. In the dialog box, click on "BidderID" in the left hand list, and click the button **Move**. If "BidderID" is already in the right hand list, this is not necessary.

   a. Make sure "BidderID" is at the top of the right hand list. Move the items by clicking and dragging the two-way arrows

4. Click the "Sort" button. Scroll to the bottom of the mailing list to determine the last assigned number.

Bidding Day

On the day of bidding, what you need is:

1. The bid sheets/folders

2. The bid booklets

3. Sign-up/bid number assignment sheets

4. List of previously assigned bid numbers

5. Bid book labels (the previously assigned numbers)

6. **Pens** – enough for all the events' bid sheets, and some extra for bid number assignments.

7. OPTIONAL: one-page display of the each event description to put by each bid sheet. This was considered a great innovation when I implemented it. Folks didn't have to be constantly digging in their bid booklet to be sure of an event. I bought plastic stands from the office supply superstore to do this – 'twas a bit expensive, but the stands are reusable. I wouldn't invest in these unless you are going to be doing repeated D4$ fundraisers.

Logistically, sufficient table space is needed to lay out the bid sheets with sufficient room around them for people to circulate. Some hosts provide some table decorations to illustrate the theme of their event.

During the bidding, sign up people and hand out the bidding booklets to those who sign up as follows:

- ❖ If a person is already on the list (i.e. has a previously assigned bidder number) – confirm their address/contact information and make any corrections, then take the corresponding label and place it on the cover of the bid booklet.

- ❖ If a person is not on the list, have them fill out a line on the sign up sheet, and write that bidding number on the bid booklet cover

Remind the bidders that if they want two seats at the table they need to bid on two lines!!

Processing the results

Once the bidding is over, the bid sheets are reviewed for the winners. One of the rules in determining the winners is that the first bid at a given level is the last one to lose out to higher bids. The sequence that the winning bidders are determined is shown by the green numbered check marks. In the example to the right, for an event with six guests, the two bids by S. Gaskie (bidder #147) are out bid by the bids of L. Chavez (#186) and S. Miranda (#203). The bids by L. Max are the last $30 bids to be bumped by higher bids should someone bid at a higher level.

Bid $30	
126. L. Max	✔5
126. L. Max	✔6
147. S. Gaskie	✗
147. S. Gaskie	✗

Bid $40	
255. J. Brown	✔1
255. J. Brown	✔2
186. L. Chavez	✔3
203. S. Miranda	✔4

Identify any "split couples" and determine if the event has the flexibility to accommodate an extra guest. If not, contact the couple and offer them the option of dropping their bid.

Split couples (sounds like an ice-dancing event…) are the situation where a couple bids for two seats, but only get one. Most of these folks are not interested in going if only one of them can attend the event. I like to know from my hosts their ability to squeeze in that extra chair at the table ahead of time so I can adjudicate this issue immediately. If the host has room, the extra spot is goes to the couple. If there is no room, I offer the couple the option of taking the one seat anyway, or backing out of the event. If they withdraw, then I go to the next bidder in the list (in the example above, it would be S. Gaskie as the last person out).

With the winners determined, check the manual bidder number assignment sheet for winners whose data is not yet entered into the database, and highlight them for entry. These are the only entries that must be made into the mailing list at this time. I do not enter any of the other entries, as they have not won their bid and there is no need to track them at this time.

The key concept here is that the bidder number assigned in the database is the number that must be used when entering the winning bids in the next section (and semester). There may be other ways to achieve this, what I do is the following:

The last task is to "compress" the newly assigned bidder numbers. This task is designed to avoid having bidder numbers jump around, e.g. "101, 107, 108, 110, 113, 114, 115, 121, etc." because the folks with bidder numbers "102, 103, 104, 105, 106, 109, 111, 112, etc." were outbid. This is important because the **Mailing List** increments the bidder numbers by one (101, 102, 103, etc.). So the goal is to align the numbers being assigned by the database to the bidders being entered. Also note that this does not apply to bidders whose information is already in the database!! They already have their unique number. So working from the winning bidder with the highest bidder number, reassign them to the lowest open bidder number and make a note on the bid sheets of the new number. Repeat until all the bidding numbers are contiguous (no gaps). Once this is done, the next step is to enter the winning bidders into the layout **Mailing List** as described above.

Entering the winning bids

The winning bids are entered in the **Event Entry** layout. In the image below from that layout, the first line has been clicked and now shows the fields (boxes) on the line. The first two, Amount Bid and Bidder Number, are available for entry and are the only fields (on each line) that will be filled manually. Enter the dollar amount of the bid in Amount Bid and the bidder number and press Tab to move to the next available field. The two unlabeled fields will fill in automatically with the bidders' name and the semester.
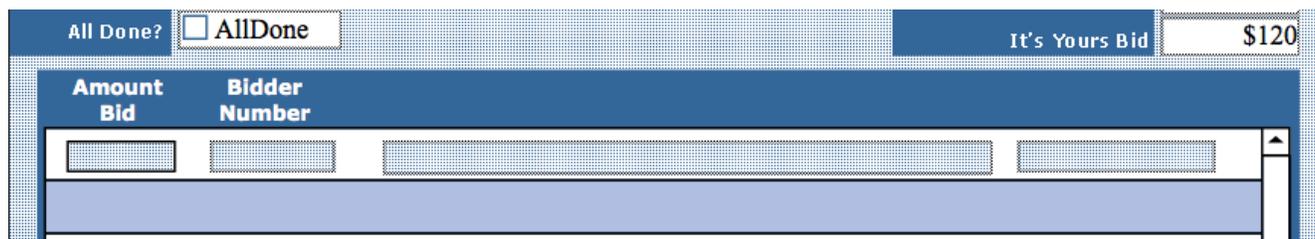
With all the bids entered, you can go to the **EventList** layout to see how much money was raised by you fundraiser in the fields at the bottom of the list.

Notifying hosts of their guest list

Notification of the hosts of their guest lists can be accomplished two ways, either by snail mail or by email. I've gone to email to save a few $, and it seems folks don't lose emails as readily as paper.

1. Go to the **Event Entry** layout.
2. Choose menu **View** > **Find Mode**.
3. Click on the Semester field and select the desired entry from the list. Enter "<16" in the Number of Guests field.
   a. For events with more the 15 guests, enter ">15" in the Number of Guests field.
4. Click on the find icon in the toolbar (or press enter or return on the keyboard).
5. Printing the letters:
   a. Go to the **Host guestlist** layout by clicking on the Guest List navigation button.
      i. If a host has an event with a guest list greater than 15, use the **Host guestlist 15+** layout. This layout will print out on two pages.
   b. Choose menu **View** > **Preview Mode** to make sure print settings are correct. If not, use **File** > **Page Setup…** to make corrections.
   c. Choose **File** > **Print** to execute print job.
      i. If you are emailing PDF copies of the letters to your hosts, you want to print each guest list individually.
6. Printing the envelopes (not necessary if sending by email):
   a. From the Guest list letter, go to the **Host guestlist** layout by clicking on the D4$ logo, then click on the Envelope navigation button.
   b. Choose menu **View** > **Preview Mode** to make sure print settings are correct. If not, use **File** > **Page Setup…** to make corrections.
   c. Choose **File** > **Print** to execute print job.

7. Send the letters to your hosts:

   a. Fold stuff lick and stick – If you want to send hard copies: fold the letters, stuff them in the appropriate envelope, lick the envelope to seal it, and stick a stamp on it. Drop in the mail.

   b. Email option (saving some postage) – when executing the print job, click the **PDF** button. From the dropdown menu select **Save as PDF…** option. Save the PDF document, and then use your email program to send each of the hosts.

Notifying winners and payment

I still use snail mail to notify the winning bidders. That's because the notification includes the payment card and a return envelope. Also, the winners are more numerous than the hosts, which makes the emailing of the letters a bit tedious.

1. To identify the winners and how much they owe:

   a. Starting from the **EventList** layout, use the navigation button with pale green text, Winners, to go to the **Winner DuePerPerson** layout.

   b. If the semester displayed is incorrect, use the dropdown menu (in the pale green lined box) to select the desired semester. This will display in the list all the winners and how much they owe (along with a grand total at the bottom).

2. Printing the letters:

   a. Click on the navigation button Letters. This will take you to the layout **Winner Letter**.

   b. Choose menu **View** > **Preview Mode** to make sure print settings are correct. If not, use **File** > **Page Setup…** to make corrections.

   c. Choose **File** > **Print** to execute print job.

3. Printing the payment cards:

   c. From the Winner letter, go to the **Winner DuePerPerson** layout by clicking on the D4$ logo, then click on either the PayCards or PayByCheck navigation button.

      i. Use the PayCards button if you accept credit cards.

      ii. Use the PayByCheck button if you only accept checks.

   d. Choose menu **View** > **Preview Mode** to make sure print settings are correct. If not, use **File** > **Page Setup…** to make corrections. The cards are designed to print three to an $8^1/_2$ x 11 sheet of cardstock.

   e. Choose **File** > **Print** to execute print job.

   f. Cut the sheets into individual cards. These cards were sized to fit in $6^3/_4$ envelopes.

4. Printing the envelopes:

   g. From the Winner letter, go to the **Winner DuePerPerson** layout by clicking on the D4$ logo, then click on the Envelopes navigation button.

   h. Choose menu **View** > **Preview Mode** to make sure print settings are correct. If not, use **File** > **Page Setup…** to make corrections. The envelopes are designed to print on #10 business sized envelopes.

       i. Choose **File** > **Print** to execute print job.

5. Printing the return envelopes:

    a. The database does not print out these envelopes. I use labels printed from a word procession program to address blank $6^3/_4$ envelopes. Some organizations may already have envelopes of this size printed up that could be used for this purpose.

6. Send the letters to your winners.

7. About 6 to 8 weeks after the event, send reminder letters to those folks who have not paid. If that doesn't work, ask the church administrator to contact the individual. Sometimes the checks are sent, but don't have a D4$ designation on them and so don't get credited (going to general accounts instead).

Philosophically, I suppose the winner letters and payment cards could be sent by email. But I prefer the hardcopy/snail mail approach with the return envelope to facilitate rapid payment by the winners. I'm not sure an email with an attachment will get the same attention with respect to payment that a tangible bill will.

Keeping track of the money

At Neighborhood Church, the winners' checks and payment cards are mailed directly to the church office where they are handled the church staff. To assist the church staff in tracking the incoming moneys, I forward a list of the winners and how much they owe to the administrator and bookkeeper. They in turn keep me informed on the payments so that I can send a follow-up reminder to the tardy folks about 6 to 8 weeks after the bidding.

To export the list of winners and amount due:

1. Perform step 1 from section ***Notifying winners and payment*** (previous section) if you haven't already.

2. Go to the **Winner DuePerPerson** layout.

3. Click on the button Export list for the office and supply the name and location to store the exported list.

4. Email the exported list to the church office.

What documents to keep and other loose ends

Keep the bid sheets.

Once the winner letters go out (and the money comes in), the coordinator's job is mostly complete. The only remaining tasks depend on the hosts and winners. My most frequent job is dealing with the situation where the winner is no longer able to attend an event.

Something inevitably comes up on someone's calendar. At this point, I offer the winners the option of giving their seats to someone else of their choosing (the easiest solution). In this case, the winner usually notifies the host of the change of guest, and that's that, or sometimes they simply opt to not attend, in which case the host can invite replacements as they see fit.

On the other hand, some folks prefer to get their money back (or receive an updated bill if they haven't paid yet). Even though the event rules require the winner to own the responsibility, it is usually more productive (especially from a good will perspective) to let them back out. At this point, I

refer back to the original bid sheets to see who would be next in line. I then contact them and offer them the option of exercising the bid, and work down the list until replacements are found.

Other items I keep include the bid number sign-up sheets, and a copy the bid book. Once all the events for the semester have occurred, the bid sheets and sign-up sheets can be discarded. I tend to keep a few copies of the bid booklets for posterity.

One other task that occurs with some frequency is supplying hosts and winners with new copies of the letters sent to them, usually by printing to a PDF and emailing the file to them.

Other stuff

Organization of the data

For the geeks out there, there are four data tables behind these layouts:

- Dining for Dollars (semester info, global variables)

- Event Table (information on each event)

- Mailing list (the obvious)

- Bid table (information on each winning bid)

The layouts use the tables listed above to filter the information so that you can enter information and print out documents that help administer your D4$ event. The relationships are shown below – there are two instances of the mailing list table, one filtered through the bid tables, and other filtered through the host ID in the event table.
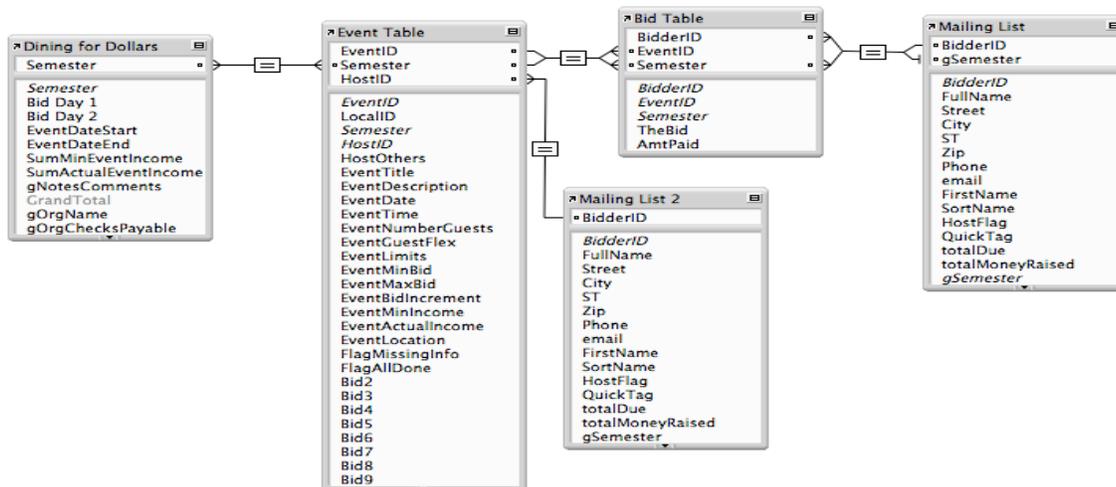
Other ways to start a find

Like most programs, there are frequently more than one way to tell the database to do something. In the case of "performing a find" or searching records for the ones of interest, here are three ways:

1. Use the menu **View** > **Find Mode**

2. Use the keyboard command-F (cmd-F) – press the command and the F key simultaneously.

3. Use the toolbar icon – just click on it.

To execute, once all your criteria have been entered, hit **enter** or **return**, or click on the toolbar icon.

Absentee bidding

I do take bids by phone or by email if someone can't be present during bidding. I will enter their bids when I receive them.

I will take bids after the bidding closes **<u>only</u>** if the event is not fully bid (not a common occurrence).

Dining for Dollars Host Frequently Asked Questions

1. How many people can I expect?

As many as you can comfortably accommodate for your type of event. Please plan for at least 6.

2. What time will they arrive and how late will they stay?

The start and end time of the event is up to you.

3. Are children allowed?

It's your decision. If you host an event where children are welcome, please include it in your event description.

4. Where shall I feed people-inside or out?

Wherever you are most comfortable hosting your friends.

5. Should I pick a theme for the evening?

If that sounds fun to you and makes sense to plan the menu. Themed events tend to be most popular.

6. Do I have to cook it myself or can I order in?

Host as you would for your friends. You can cook or call a restaurant if that better suits your schedule.

7. Who will pay for the food and drinks?

You. Since this is a fundraiser event, you are asked to donate the items and your contribution is tax deductible. You can submit your receipts to the IRS.

8. Do I get to choose who comes to my home?

No. Guests are determined by the highest bids. Encourage your friends to bid on your event.

9. Should I be concerned with dietary restrictions?

Not necessarily. It is helpful to list the complete menu in the event description and if you will offer any meat, wheat, or dairy-free options.

10. I'm willing to host. Now what?

Contact Mark King, the Dining for Dollars event coordinator, as soon as possible at 626-395-9758 or MarkTKing@mac.com. Provide him with a title for your event, the date and time, location, number of guests you can accommodate, and an appealing description.

Dining for Dollars Event Frequently Asked Questions

1. What is Dining for Dollars (D4$)?

It is a popular fundraising and friend-raising event in which members and friends of the church host dinners and other events in their homes or elsewhere and other members and friends bid silent auction-style to attend. All proceeds go to the church.

2. When is Dining for Dollars?

Event bidding happens each fall and spring with various events spread throughout the year. Bid on events that fit your schedule. The exact dates will be publicized in the newsletter and weekly announcements.

3. Where is the bidding?

D4$ bidding takes place on the patio on 2 Sundays.

4. How do I bid?

Provide your name to the D4$ coordinator on the patio to obtain your bid # and bid booklet. After reviewing the wonderful event offerings, bid on events you desire. Monitor your bids as you may get outbid. You may bid again at a higher amount. To guarantee your place at the table, bid the "It's Yours" price.

5. How do I know if I'm the winning bidder?

Within 2 weeks of bidding you'll receive a letter of congratulations for the event(s) you've won. If you do not receive a letter, you did not win. Try again next event!

6. How do I pay?

With the letter of congratulation will be a payment request card. Send payment at your earliest convenience directly to the church. You may pay by credit card.

7. What if I paid but cannot attend?

You are responsible for payment even if you cannot attend. Check your calendar closely before bidding. You may send someone of your choosing in your place. Monetary considerations are between you and your replacement. Notify your hosts of the change.

8. Will I get an event reminder?

While hosts are asked to send reminders to guests a few weeks in advance of the event, you are ultimately responsible to mark your calendar and remember the event date and time.

9. What if I still have questions?

Contact Mark King, the Dining for Dollars event coordinator, at 626-395-9758 or MarkTKing@mac.com.