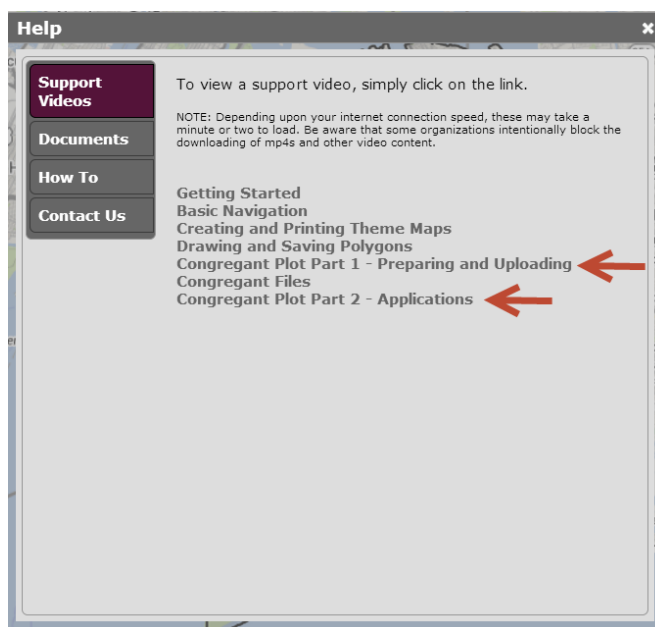


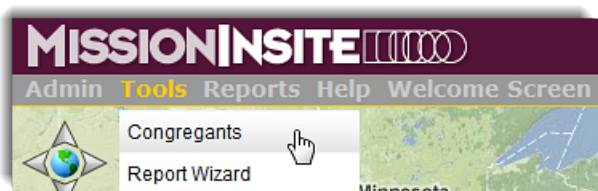
Maximizing the Use of Congregant Plot

July 2013

There are two support videos available on the **Help/Support Videos** menu of the MissionInsite web site map screen. You must be logged in to your study area to access these resources. Mouse over the **Help** tab a drop down menu will appear. Select **Support Videos**. A new screen will open to display all available support videos. Before beginning to use Congregant Plot, it is essential that you view the two videos “**Congregant Plot Part 1 – Preparing and Uploading Congregant Files**” and “**Congregant Plot Part 2 – Applications.**” Note: these files are marked by red arrows in the illustration on the right below.



After viewing the two Congregant Plot support videos, you are ready to begin creating and then uploading your congregant data file. Mouse over the **Tools** tab on the MissionInsite web site and select **Congregants**. A new window will open where you may select **Import Congregants**. See the example below on the right marked with a red arrow.



After selecting Import Congregants, a new “Import Congregants” window will open. See the illustration below.

Import Congregants

[Download sample](#)

Instructions:

1. Download [Sample File](#). You **HAVE** to use it to load your data, it is already set up with the proper field headings.
2. Download [Instructions for Uploading Congregants](#)
3. The fields marked in red are required to plot.
4. All other fields are optional.
5. For Congregant Status and Member by means please use the numeric codes. If you use other codes, you must match your codes to the MissionInsite codes using the Translation Tables. Click the appropriate Translation Tables.
6. Click 'Upload'. **There will be a 15-minute delay after a successful congregant file upload for the ability to plot new congregants on the MI System.**

Church:

Congregant Status: Use Expected Congregant Status Codes OR [Edit Congregant Status Translation Table](#)

Member By Means: Use Expected Member By Means Codes OR [Edit Member By Means Translation Table](#)

Submitted By:

Email:

Select file:

Upload status: Waiting for file

Step 1 – In the Import Congregants window, sentence number 1 contains the essential Excel file template necessary to upload your congregants. Please download the **Sample Excel Template file**, save it to your hard drive and use it as you prepare your congregant data file. This Excel file may be used to capture the data necessary for uploading congregants. See the **Sample Excel Template file** illustrated below.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	LastName	FirstName	Address1	Address2	City	State	Zip	Phone	CongregantStatus	MemberByMeans	FirstAttendDate	BaptismDate	MemberDate	Birthdate	YearEnteredKindergarten
2															
3															
4															
5															
6															
7															
8															

Step 2 – In the Import Congregants window, sentence number 2 contains the Excel file “Instructions for Uploading Congregants.” In order to understand how to best use Congregant Plot, please download this file for complete instructions. The Excel file “Instructions for Uploading Congregants” is illustrated below.

PLEASE READ BEFORE UPLOADING: ALL of the field headers listed below must be included in your file. The RED fields must have data in them and are required to plot.

The rest of the fields may or may not contain data, however, all the field headers must be included in your file. Your file **MUST BE AN EXCEL file**. (.xls) CSV files are no longer accepted.

LastName	FirstName	Address1	Address2	City	State	Zip	Phone	CongregantStatus	MemberByMeans
Brown	Mary	123 Main ST Apt 2		Irvine	CA	92603	949.555.555	1	1
Brown	George	123 Main ST		Irvine	CA	92603	949.555.555	1	3
								Congregant Status Codes	
								Label	Code in data field
								Member	1
								Regular Attender/Non Member	2
								Non-regular Member	3
								Other	4
								Visitor	5
								Member by Means Codes	
								Label	Code in data field
								Profession of Faith	1
								Transfer	2
								Re-affirmation	3
								Other	4

******NOTES ON UPLOADING DATA**

- 1.) The fields marked in red are required to plot.
- 2.) All field (red and white) headers are required. Leave cells empty if there's no data available. See the "template for congregant plot" for required field headers.
- 3.) For Congregant Status and Member by means please use the numeric codes. If you use other codes, you must match your codes to the standard MissionInsite codes using the Translation Tables. Click the appropriate Translation Table.
- 4.) Please use the "template for congregant plot" to load your data. It contains the proper field headers.
- 5.) Phone field must contain 25 characters or less and it can be in any format.
- 6.) Address1 field must not include P.O. Boxes, Apartment numbers, room numbers, etc.
- 7.) Uploading Zip Code + 4 will result in an upload failure. Enter only 5 digit Zip Codes.
- 8.) The State field must contain a two letter abbreviation with no punctuation.

Regional Applications

- **Cluster/District Planning**
 - *Denominational Penetration* - Congregant Plot may be used to plot all congregants related to a regional agency in order to view denominational penetration into the region. (Some clients have more than 100,000 congregants plotted for their churches) Viewing multiple church plots together assists in understanding collaborative potential and new mission opportunities.
 - *Identifying Regional and Neighborhood Churches* - Congregant Plot assists in understanding the reach and ministry focus of churches in a region. Viewing congregants for a specific local church will reveal which churches are regional in their ministry outreach and which churches provide ministry primarily focused on local neighborhoods.
 - *New Church Planting Emphasis* – In considering a new mission, plotting congregants for all existing churches inside the new mission area will assist in understanding the opportunity and/or impact of a new mission start upon existing churches. Plotting the new core group members of a new church plant, along with the congregants of existing congregations may be of value in telling the” story” as well as making the case for a new ministry in the area. In addition, use of the *ComparativeInsite Report* based upon the core group of a new church plant would provide a *Financial Potential Estimate* for the start of the new church plant.
- **Disaster Response**
 - *Disaster Response* - Regional Agencies and their local churches may use congregant plot to quickly respond to their members in geographies affected by a natural disaster. Creating a mailing list for the impacted neighborhoods will provide instant and critical contact information for emergency response teams.

Local Church Applications

- **Comparative Analytics using the ComparativeInsite Report**
 - *Comparing A Congregation to its Community* - Creating a ComparativeInsite Report of a church’s congregants allows for comparison of the Mosaic Household Types in the community vs. those Mosaic Household Types present in the congregation. It helps answer the question “Does our congregation look like the people around us?” In addition, such a comparative analytics may present new opportunities for a church to reach Mosaic Household Types that their ministries have yet to engage.

- *Discover Financial Potential for Stewardship Development* – Creating a Comparative Insite Report of a church's congregants will also generate a Financial Potential Estimate for your congregation based upon the current Mosaic Household Types present in the congregation. The Financial Potential Estimate includes calculated financial potential for a church at several percentage giving levels to 10%.

- **Evangelism Strategies**
 - *Reaching New Movers/New Homeowners* – Reaching New Movers/New Homeowners may be enhanced by plotting new mover households and then viewing them alongside existing church congregants. By viewing the proximity of existing church members to new movers' households, an evangelism strategy for matching "neighbor to neighbor" may be developed. Welcoming a new mover family across the street (or within a smaller neighborhood) will most likely be more effective than asking existing church volunteers to welcome new movers in unfamiliar more distant neighborhoods. Some churches have recruited volunteers whose ministry calls are assigned based upon their geographic proximity to new movers' households.

 - *Small Group Formation* – Congregant Plot assists in the formation of small groups based upon the ability to display congregants on the map and then drawing custom shapes around neighborhoods where most existing members live. By retrieving mailing lists for neighborhoods, leaders may be recruited and members invited to small group participation. In addition, viewing the number of congregants by neighborhood will assist in strategically locating small group meetings.

 - *Opportunity Analysis* – Plotting all congregants in a ministry area will assist in viewing locations where the church is well represented as well as those areas where the church is underrepresented.

 - *Visitor Analysis* – Plotting and viewing the location of church visitors will assist in focusing direct mail and calling campaigns based upon a church's reach into the community. In addition, visitor analysis may suggest parts of a ministry area that have opportunity based upon the number of visitors being drawn from that area.