

Church Data Spreadsheet Directions

The goal of this spreadsheet and directions is to help Churches be more effective in their efforts, making the most of their time and resources. May God bless your endeavors!

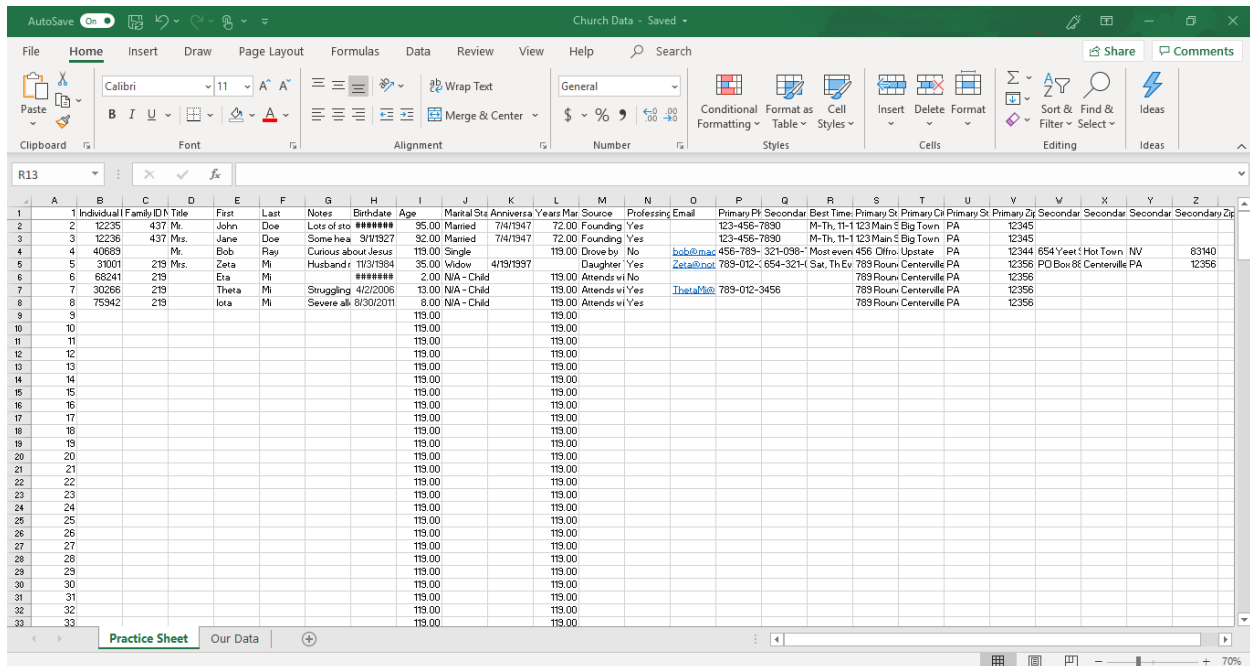
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Part 1: Spreadsheet Overview



The above image is a screen shot of the 'Practice Sheet' worksheet in the MS Excel file. I've included normal looking (but fake) data to aid in this guide. You are encouraged to click around and explore. Once you're ready to record information for your Church, click on the 'Our Data' worksheet. If you're not overly familiar with MS Excel, we suggest keeping the 'Practice Sheet' available so you can experiment without worrying about overwriting your search information.

Let's go through each column:

A. A numbered column

- i. I do this on most spreadsheets so that if ever I need to return to the original layout it's as simple as sorting the column (I'll explain how to do that in a bit).

B. Individual ID

- i. Assigning ID numbers to congregants, as cold and impersonal as it may seem, is a very effective way of keeping track of them on a spreadsheet. Some Churches use the Finance tracking number for consistency.

Regardless, just be sure that no two people or families end up with the same number. I've included a formula that will highlight duplicate numbers. This number should never change.

C. Family ID

- i. A secondary ID number is recommended, as it's a quick way to keep grouped information together in a format like this. That said, if an individual has no family members, then they should not need a Family ID number. Again, be sure to avoid having a number shared by more than one family. To guard against that, I suggest having a 5-6 digit number for individuals, and a 3-4 digit number for families. Outside of a change in marital status, this number should never change.

D. Title

- i. This is the known title of the individual you will be in contact with.

E. First

- i. This is the first name of the individual.

F. Last

- i. This is the last name of the individual.

G. Notes

- i. This is for anything significant that isn't covered elsewhere on the spreadsheet - especially useful for recording information that a visitor might need to know (recent trauma, etc.).

H. Birthdate

- i. The date of birth for the individual. Once you click on a cell and enter the birthdate, the Age in the next column will be calculated (default with no date is 119). Note that this field requires a date - so if the date is not known, please leave the field as it is.

I. Age

- i. Their current age. I configured a formula to update this automatically. 119 is the default - this will update automatically when you enter a birthdate.

J. Marital Status

- i. Their current marital status.

K. Anniversary

- i. The anniversary of their marriage. Once you click on a cell and enter the birthdate, the Years Married in the next column will be calculated (default with no date is 119). Note that this field requires a date - so if the date is not known, please leave the field as it is.

L. Years Married

- i. The length of their marriage. I configured a formula to update this automatically. 119 is the default - this will update automatically when you enter an Anniversary.

M. Source

- i. How they first came to the Church. Word of mouth, advertisement (specify which), random visit, etc.

N. Professing Believer

- i. Do they self-identify as a Christian?

O. Email

- i. This is the email address of the individual.

P. Primary Phone

- i. Their preferred number.

Q. Secondary Phone

- i. An alternate number, if they have one.

R. Best Times to Call

- i. It can be frustrating (and a time suck) to need to make a dozen calls, only to leave a dozen messages. Keeping track of the best times helps to prioritize your calls. Keep this field up to date.

S. Primary Street

- i. Current address.

T. Primary City

- i. Current address.

U. Primary State

i. Current address.

V. Primary Zip

i. Current address.

W. Secondary Street

i. Alternate address.

X. Secondary City

i. Alternate address.

Y. Secondary State

i. Alternate address.

Z. Secondary Zip

i. Alternate address.

Part 2: Modifying the Spreadsheet

Adding Information

The screenshot shows the Microsoft Excel interface with the following elements highlighted:

- 4**: A red circle around the Undo button in the top-left corner of the ribbon.
- 3**: A red circle around the formula bar, which contains the text "= 193.00".
- 2**: A red circle around a selected cell in the spreadsheet grid, specifically cell R13.
- 1**: A red circle around the "Our Data" worksheet tab at the bottom of the screen.

The spreadsheet data includes columns for Individual ID, Family ID, Title, First Name, Last Name, Notes, Birthdate, Age, Marital Status, Anniversaries, Years Married, Source, Profession, Email, Primary PI, Secondary PI, Best Time, Primary St, Primary Ct, Primary St, Primary Zip, Secondary Zip, and Secondary Zip. The data rows show various individuals and their details.

1 - To get to the 'Our Data' sheet provided, click on the 'Our Data' worksheet tab at the bottom of the screen.

2 - A 'cell' is where any column and row intersect (e.g. R13).

3 - When adding information to a cell, simply click on that cell with your cursor and begin typing. You will see the data you enter appear both in the cell as well as the 'Formula Bar' above.

4 - To reverse your several most recent actions, in order, click on the 'Undo Typing' arrow at the top of the screen. If you go back too far, you can re-do your most recent reversed action by clicking on the 'Redo Typing' button at the top of the screen - this will bring back the information you removed.

If you're adding the same data to a number of cells, then a shortcut is to enter that data into one cell, then copy and paste it to other cells.

- Enter the data into one cell, then click out of that cell.
 - Click back on that cell.
 - Simultaneously press 'Ctrl' and 'C' - this copies the information in the cell.
 - Click on a different cell, and then simultaneously press 'Ctrl' and 'V' - this pastes the data. You can paste multiple times.
 - If you want the same data in a long range of cells, then following the steps in 'Sorting Information,' step 6, (renumbering a column) will allow you to do that. Bear in mind that the system should recognize the 'pattern' in that case as unchanging data.

Updating Information

At times you will need to update the information held in a cell - the Notes column is the most frequently updated. If you click on a cell that already contains information and begin typing, then what you type will overwrite (delete and replace) the contents of that cell. The way to update a cell without overwriting the contents is to click on the cell and

then click on the Formula Bar data. Your cursor will appear there, and you can edit freely.

Sorting Information

The screenshot shows the Microsoft Excel interface with the 'Home' ribbon selected. The 'Sort & Filter' group is expanded, and the 'Sort Smallest to Largest' option is highlighted. A 'Sort Warning' dialog box is open, asking 'What do you want to do?' with two options: 'Expand the selection' (selected) and 'Continue with the current selection'. The 'Sort' button is highlighted in the dialog box. Red circles and numbers 1 through 5 indicate the steps: 1. Clicking the column header 'C', 2. Clicking the 'Sort & Filter' icon, 3. Clicking 'Sort Smallest to Largest', 4. Selecting 'Expand the selection', and 5. Clicking the 'Sort' button.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
1	Individual	Family ID	First	Last	Notes	Birthdate	Age	Marital Sta	Anniversa	Years Mar	Source	Professio	Email	Primary P	Seconda	Best Time	Primary St	Primary Cr	Primary Sh	Primary Zi	Primary Zi	Primary Zi
2	2	12235	437	Mr.	John	Doe	Lots of sto	*****	35.00	Married	7/4/1947	72.00	Founding	Yes		123-456-7890	M-Th, 11-1	123 Main S	Big Town	PA	12345	
3	3	12236	437	Mrs.	Jane	Doe	Some hea	3/1/1927	32.00	Married	7/4/1947	72.00	Founding	Yes		123-456-7890	M-Th, 11-1	123 Main S	Big Town	PA	12345	
4	4	40689		Mr.	Bob	Ray	Curious about	Jesus	119.00	Single		119.00	Drove by	No	bob@mac	456-789-321-038-	Most even	456 Dfiro	Upsrate	PA	12344	
5	5	31001	219	Mrs.	Zeta	Mi	Husband	11/3/1984	35.00	Widow	4/19/1997		Daughter	Yes	Zeta@ndt	789-012-654-321-H	Sax. Th Ev	789 Roun	Cenrsville	PA	12356	
6	6	66241	219		Eta	Mi	*****		2.00	N/A - Child		119.00	Attends w	No				789 Roun	Cenrsville	PA	12356	
7	7	30266	219		Thera	Mi	Struggling	4/2/2006	13.00	N/A - Child		119.00	Attends w	Yes	Thera@ub	789-012-3456		789 Roun	Cenrsville	PA	12356	
8	8	75942	219		lota	Mi	Severe all	8/30/2011	8.00	N/A - Child		119.00	Attends w	Yes				789 Roun	Cenrsville	PA	12356	
9	9								119.00			119.00										
10	10								119.00			119.00										
11	11								119.00			119.00										
12	12								119.00			119.00										
13	13								119.00			119.00										
14	14								119.00			119.00										
15	15								119.00			119.00										
16	16								119.00			119.00										
17	17								119.00			119.00										
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26	26								119.00			119.00										
27	27								119.00			119.00										
28	28								119.00			119.00										
29	29								119.00			119.00										
30	30								119.00			119.00										
31	31								119.00			119.00										
32	32								119.00			119.00										
33	33								119.00			119.00										

It will be helpful to sort the information in your spreadsheet, in particular when you want to group people by Family Id, age, town, etc. or even when you want to quickly find blank cells.

1 - To sort a column of information, begin by clicking on the header of that column. Using column 'C' as an example, move your cursor to hover over the letter 'C' at the column header. You'll notice that the cursor

Renumbering a column is a straightforward process.

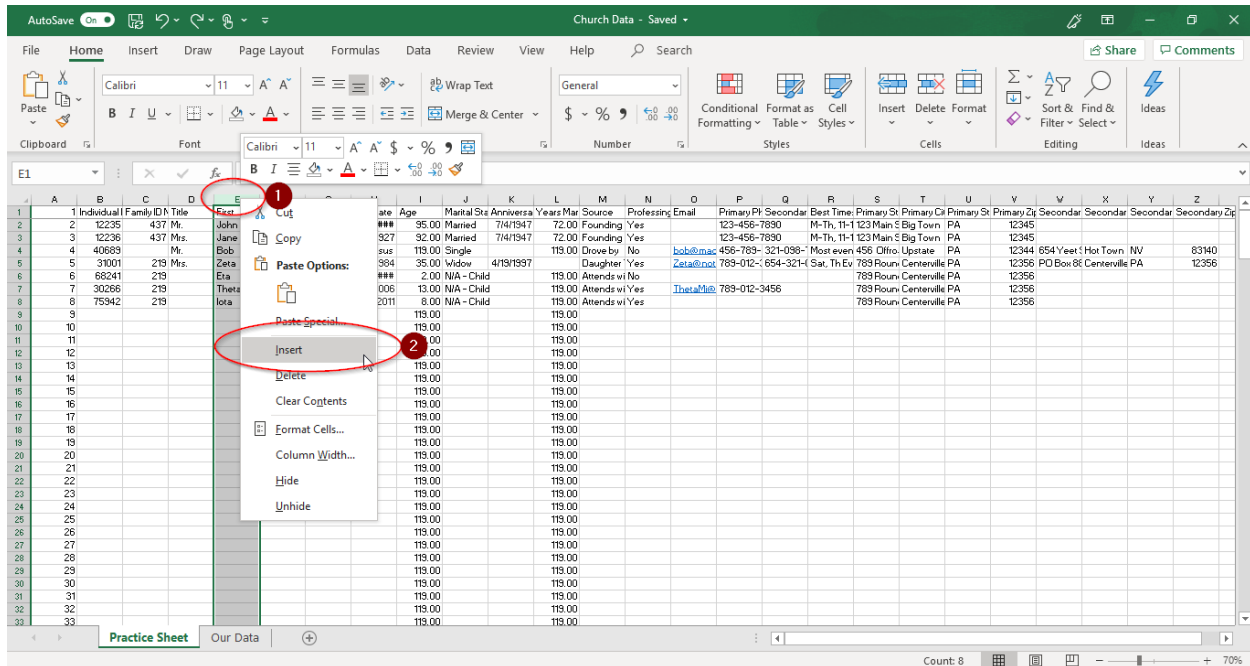
1 - Click on the A1 cell, and overwrite the data with the number '1.' Move to cell A2 and overwrite it with '2.' Overwrite cell A3 with '3.' This is now enough information for the program to recognize the simple pattern (each successive row in column 'A' increases in value by 1).

2 - Now, click and hold on cell A1 (the beginning of the pattern), and drag the cursor down to cell A3 (the end of the pattern). Those three cells should be tinted, with a bold outline. In the bottom right hand corner of that outline you should see a small dark square. Hover your cursor over that square - your cursor should turn into a small dark cross.

3 - Click and hold. Now drag the cursor downward so that the outline extends as far as you desire. Once you've reached your goal cell, release the button. That entire section should now be renumbered.

Adding, Removing, and Reordering Columns

Depending on your needs, you may find it best to customize the layout on the spreadsheet.



Adding or removing a column

1 - To add a column, click on the letter heading that column. This will tint the column.

2 - Now, right-click anywhere on the highlighted section. This will open a menu.

- To insert a new column, select 'Insert.' This will add a blank column and shift everything to the right of that point one column over. Be sure to add a column header (title) right away, as sorting with data not connected across columns will result in only a portion being sorted.
- To delete the column, select 'Delete.' This will remove the column and shift everything to the right of that point one column to the left. If you want to simply delete a columns content without removing the column, then follow step 1 here, and then click the 'Delete' button on your keyboard.

Reordering a column

- To reorder, follow step 1.

- Hover your cursor over the left or right edge of the highlighted column. Click and then drag the column to its new location.
- Release the button, and the column will stay in place.