



Project Zip Code

GUIDE

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Cloud instructions

1. Go to this [link](#) and select “Run PZC” on the top navigation bar after logging in. After that, please select “Run Online” and then you will see the page below.

GETTING STARTED WITH PROJECT ZIP CODE:

- To proceed, you will need to upload a CSV file containing your member data. At a minimum, this file must include the street address, city, and state of each credit union member.

CSV FILE REQUIREMENTS:

- The file must be in a comma-separated values (CSV) format.
- Each column must have a header in the first row describing its content (e.g., "Street Address" for all street address values).
- The data should be structured so that each piece of information (street address, city, state, etc.) is in its own column.

SECURITY & DATA MATCHING:

- Your data is secure and will not be accessed or viewed by anyone outside your organization.
- Uploaded data will be matched against the most accurate legislative district information available.
- Once processed, you will gain insights into which members live or work in specific state and federal legislative districts.

DATA USAGE:

- Only the aggregated number of matched credit union members per district is shared with the master census. No personal information is stored.
- The resulting census demonstrates the strength and reach of credit union membership across the country.

Upload CSV Data

2. Select the desired credit union to associate the pending uploaded data with. Credit unions may be configured via the “Edit” button on this upload step or through the “Credit Unions” link within the navbar.

The screenshot shows a web interface for selecting a credit union. At the top, there is a horizontal list of credit unions: ARISTOTLE CU, EXAMPLE FCU, INTEGRITY FCU, and ABYSSAL CU. ARISTOTLE CU is selected and underlined. To the right of this list are navigation arrows (left and right) and a plus sign. Below the list, the form is divided into two columns. The left column contains fields for Credit Union ID, Street Address, City, Zip Code, and Web Page. The right column contains fields for League Name (with a dropdown menu showing 'No league assigned'), Street Address 2, State (with a dropdown menu), and Phone. At the bottom of the form, there are two buttons: 'Upload' and 'Edit'.

3. Select the file to be uploaded via the “Upload CSV File” button. This will open the connected client’s file explorer for selection.

The screenshot shows a web interface for uploading a CSV file. At the top, there is a button labeled 'Upload CSV File' with a cloud upload icon. Below this button, there is a paragraph of text: 'Your data is safe and secure with Project Zip Code. No personally identifiable data or individual information leaves your computer. The Project Zip Code database receives only the counts of records successfully matched by the program. All of your data remains confidential and secure with Project Zip Code.' At the bottom of the form, there are two buttons: 'Upload Data' and 'Reset'.

4. Upon selecting a file, the window will update to the view below. Provide the desired email for notifications to be sent as the data is processed. The corresponding address columns will need to be specified as well to match against the selected csv. The “Auto Find Fields” may automatically select these columns based off known/common names.

Upload CSV File

Notification Email

example@email.com

required

Auto Find Fields

Street Address

required

Street Address 2

City

required

State

required

Zip

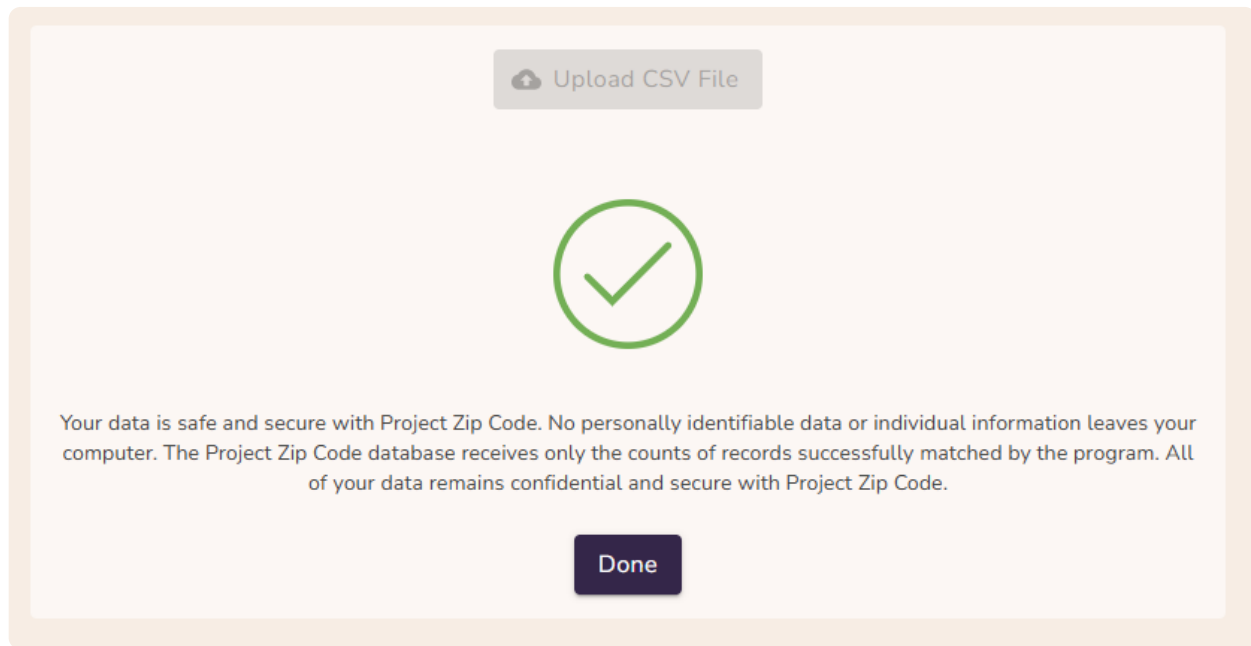
required

Your data is safe and secure with Project Zip Code. No personally identifiable data or individual information leaves your computer. The Project Zip Code database receives only the counts of records successfully matched by the program. All of your data remains confidential and secure with Project Zip Code.

Upload Data

Reset

5. After uploading the data, the file will begin processing. Once the connected client has completed the upload transaction into Aristotle's system, the user may complete the session. The provided data will then continue processing through Aristotle's system. Upon completion, an email will be sent to the provided email address in the previous step as well as brief instructions of how to access the totals.



General PZC questions

Q. What is Project Zip Code?

A. Project Zip Code (PZC) is a secure program created by America's Credit Unions and the Leagues to compile a national census of credit union members. Aiding both federal and state advocacy efforts, PZC shows legislators the presence of credit unions across the country. Credit unions provide the most essential piece to this tool: the data necessary to build it.

Q. How does it work?

A. To participate in PZC, all you need is your members' street address, city, state and zip code. On a secure, encrypted server, PZC will sort the addresses by Congressional district, state legislative district, and county, then transmit **only** these totals to the national database to be combined with the data from other credit unions across the country.

Q. Is my members' data secure?

A. Absolutely! Because individual information is never stored in the national database, you can be sure that no one outside of your organization will be able to view specific member data.

Q. How will my members' information be used?

A. Member data will not be used any further than being counted and stored on the secure server. Once PZC calculates your credit union's totals, they will be added to the existing database.

Q. How does PZC help the credit union movement?

A. PZC allows us to show legislators, in real numbers, how many of their constituents are credit union members. Additionally, many credit union members reside in states other than the state in which their credit union is domiciled, which is why it's so important that all credit unions participate.

Troubleshooting/ miscellaneous questions

Q. Where do I find my database or membership file?

A. You should be able to get this information from your data processor (if applicable) or do a simple export from your system of a file that contains the required information (street address, city, state, zip).

Q. What format does my membership file need to be in?

A. PZC works best with comma delimited text (CSV) files but you should be able to use SQL Server, Excel and Access.

Q. What information needs to be included in the membership file?

A. You must include the address, city, state, and zip in separate fields (or columns).

Q. What do I do if the member database has active and non-active members?

A. You should export your member table as a .CSV or excel file with only the active members selected. Then you can use that file to match your member database.

Q. I have received the preliminary dataset, but the number of records is much higher than what I know to be our membership to be.

A. Make sure when exporting your member table, you are only exporting MEMBERS, not ACCOUNTS, as members can have multiple accounts.

Q. What if our credit union changes names or if there is a merger?

A. Email America's Credit Unions' Grassroots team at grassroots@americascreditunions.org with any name changes or mergers.

Q. When I am in the Data Mapping field there is nothing to select in the required fields, what should I do?

A. This means your database does not have the columns properly labeled. Go into your database and make sure that the first row lists the column names, i.e. address, state, city, zip, etc. If it doesn't list the column labels, please add the labels in the first row, save your document, and go back to Select Your Database Type within the PZC program.

Q. How often should member data be uploaded?

A. America's Credit Unions recommends you upload data at least twice a year (around GAC and Congressional Caucus) to maintain up-to-date membership counts when meeting with lawmakers.

Q. How do you view the national database information?

A. Please visit www.pzconline.com

If you don't see what you are looking for or require any additional assistance, please contact America's Credit Unions' Grassroots team at grassroots@americascreditunions.org.

THANK YOU for your participation in Project Zip Code!