

Giving Analytics: Power BI rebuild guide

This guide lists everything needed to rebuild the Giving Analytics Dashboard in Power BI Desktop: the data files, the relationships, the calculated columns, every measure in DAX, and the visuals on each page. The interactive HTML version in this kit shows what the finished report should look like.

Files in this kit

File	What it is
data/Giving Analytics - Data Tables.xlsx	One Excel table per sheet: Donations, Designations, Funds, Batches, Pledges, Pledge Campaigns, General Fund Budget, People, Households. ID columns are stored as text.
data/*.csv	The same tables as CSV files, plus the Check-Ins, Groups, Services, and Workflows tables used by the other reports in the suite.
rebuild/Wren Hollow Giving Theme.json	Power BI report theme (colors, fonts, card style). Import it under View, Themes, Browse for themes.
dashboard/Giving Analytics Dashboard.html	The finished layout to match.

The tables are shaped like Planning Center Giving and People data, and the column names follow Planning Center's API field names (for example `amount_cents`, `received_at`, `payment_method`, and `membership`). In a live setup these files are replaced by the church's own exports or by a scheduled pull from the Planning Center API, and the model below stays the same.

Step 1. Load and type the data

1. Get Data, Excel workbook, and select all nine tables from the workbook.
2. In Power Query, set every column ending in `_id` (and `People[id]`) to Text so IDs are never summed.
3. Set `Donations[received_at]` and the other date columns to Date (or Date/Time for `created_at` fields), amounts in cents to Whole Number, and `Donations[refunded]` and `Donations[fee_covered]` to True/False.
4. Set 'General Fund Budget'[`month_start`] to Date and [`budget_amount`] to Fixed Decimal.

Step 2. Relationships

From (many side)	To (one side)	Notes
Designations[donation_id]	Donations[donation_id]	A gift can be split across funds, so amounts live on Designations.
Designations[fund_id]	Funds[fund_id]	
Donations[person_id]	People[id]	Anonymous plate cash has no person.
People[household_id]	Households[household_id]	
Donations[received_at]	'Date'[Date]	Mark 'Date' as the date table.
'General Fund Budget'[month_start]	'Date'[Date]	Budget is monthly, keyed to the first day of each month.
Pledges[person_id]	People[id]	
Pledges[pledge_campaign_id]	'Pledge Campaigns'[pledge_campaign_id]	

Keep every relationship single direction. Measures that count giving units use the Designations table as a filter argument, which lets a fund filter reach the Donations table without turning on two-way filtering.

Step 3. Calculated columns, tables, and measures

Create a blank table named _Measures to hold the measures. Formatting: currency with no decimals for dollar measures, whole numbers for counts, and percentage with one decimal for shares.

Calculated columns

```
Designations[Amount] =  
Designations[amount_cents] / 100
```

```
Donations[Is Recurring] =  
LEN ( Donations[recurring_donation_id] ) > 0
```

```
Donations[Giving Unit] =  
VAR hh = RELATED ( People[household_id] )  
RETURN  
    IF (  
        LEN ( Donations[person_id] ) = 0,  
        BLANK (),  
        IF ( LEN ( hh ) = 0, "P" & Donations[person_id], "H" & hh )  
    )
```

```
Pledges[Giving Unit] =  
VAR hh = RELATED ( People[household_id] )
```

```
RETURN IF ( LEN ( hh ) = 0, "P" & Pledges[person_id], "H" & hh )
```

```
Pledges[Received] =  
VAR u = Pledges[Giving Unit]  
RETURN  
    CALCULATE (  
        SUM ( Designations[Amount] ),  
        REMOVEFILTERS (),  
        Funds[name] = "Room to Grow",  
        Donations[refunded] = FALSE (),  
        Donations[Giving Unit] = u  
    )
```

```
Pledges[Expected to Date] =  
VAR asOf = CALCULATE ( MAX ( Donations[received_at] ), REMOVEFILTERS () )  
VAR monthsIn = DATEDIFF ( DATE ( 2025, 10, 1 ), asOf, DAY ) / 30.4375  
RETURN Pledges[amount_cents] / 100 * MIN ( 1, monthsIn / 36 )
```

```
Pledges[Pace Status] =  
VAR r = DIVIDE ( Pledges[Received], Pledges[Expected to Date] )  
RETURN  
    SWITCH (  
        TRUE (),  
        Pledges[Received] <= 0, "Not started",  
        r >= 1.1, "Ahead of pace",  
        r >= 0.85, "On pace",  
        "Behind pace"  
    )
```

Calculated tables

```
Date =  
VAR firstDay = DATE ( YEAR ( MIN ( Donations[received_at] ) ), 1, 1 )  
VAR lastDay = DATE ( YEAR ( MAX ( Donations[received_at] ) ), 12, 31 )  
RETURN  
    ADDCOLUMNS (  
        CALENDAR ( firstDay, lastDay ),  
        "Year", YEAR ( [Date] ),  
        "Month Number", MONTH ( [Date] ),  
        "Month", FORMAT ( [Date], "mmm yyyy" ),  
        "Month Start", DATE ( YEAR ( [Date] ), MONTH ( [Date] ), 1 )  
    )
```

```
Giving Bands =  
DATATABLE (  
    "Band", STRING, "Min", CURRENCY, "Max", CURRENCY, "Sort", INTEGER,  
    {  
        { "Under $250", 0, 250, 1 },  
        { "$250 to $999", 250, 1000, 2 },  
        { "$1,000 to $2,499", 1000, 2500, 3 },  
        { "$2,500 to $4,999", 2500, 5000, 4 },  
    }
```

```

        { "$5,000 to $9,999", 5000, 10000, 5 },
        { "$10,000 to $24,999", 10000, 25000, 6 },
        { "$25,000 and up", 25000, 999999999, 7 }
    }
)

```

Measures (store them in a table named _Measures)

```

Report Date =
CALCULATE ( MAX ( Donations[received_at] ), REMOVEFILTERS ( ) )

```

```

Total Given =
CALCULATE ( SUM ( Designations[Amount] ), Donations[refunded] = FALSE ( ) )

```

```

General Fund Given =
CALCULATE ( [Total Given], Funds[name] = "General Fund" )

```

```

Giving Units =
CALCULATE (
    DISTINCTCOUNT ( Donations[Giving Unit] ),
    Designations,
    Donations[refunded] = FALSE ( ),
    NOT ISBLANK ( Donations[Giving Unit] )
)

```

```

Given Last 12 Months =
VAR asOf = [Report Date]
RETURN
    CALCULATE (
        [Total Given],
        REMOVEFILTERS ( 'Date' ),
        DATESBETWEEN ( 'Date'[Date], EDATE ( asOf, -12 ) + 1, asOf )
    )

```

```

Given Prior 12 Months =
VAR asOf = [Report Date]
RETURN
    CALCULATE (
        [Total Given],
        REMOVEFILTERS ( 'Date' ),
        DATESBETWEEN ( 'Date'[Date], EDATE ( asOf, -24 ) + 1, EDATE ( asOf, -12 ) )
    )

```

```

Giving Units Last 12 Months =
VAR asOf = [Report Date]
RETURN
    CALCULATE (

```

```

    [Giving Units],
    REMOVEFILTERS ( 'Date' ),
    DATESBETWEEN ( 'Date'[Date], EDATE ( asOf, -12 ) + 1, asOf )
)

```

```

Giving Units Prior 12 Months =
VAR asOf = [Report Date]
RETURN
    CALCULATE (
        [Giving Units],
        REMOVEFILTERS ( 'Date' ),
        DATESBETWEEN ( 'Date'[Date], EDATE ( asOf, -24 ) + 1, EDATE ( asOf, -12 ) )
    )

```

```

Average per Giving Unit =
DIVIDE ( [Given Last 12 Months], [Giving Units Last 12 Months] )

```

```

Recurring Share General Fund =
DIVIDE (
    CALCULATE ( [General Fund Given], Donations[Is Recurring] = TRUE () ),
    [General Fund Given]
)

```

```

First-Time Givers =
VAR periodStart = MIN ( 'Date'[Date] )
VAR periodEnd = MAX ( 'Date'[Date] )
VAR unitsInPeriod =
    CALCULATETABLE (
        VALUES ( Donations[Giving Unit] ),
        Donations[refunded] = FALSE (),
        NOT ISBLANK ( Donations[Giving Unit] )
    )
RETURN
    COUNTROWS (
        FILTER (
            unitsInPeriod,
            VAR firstGift =
                CALCULATE (
                    MIN ( Donations[received_at] ),
                    REMOVEFILTERS ( 'Date' ),
                    Donations[refunded] = FALSE ()
                )
            RETURN firstGift >= periodStart && firstGift <= periodEnd
        )
    )

```

```

First-Time Givers Last 12 Months =
VAR asOf = [Report Date]
RETURN
    CALCULATE (

```

```

    [First-Time Givers],
    REMOVEFILTERS ( 'Date' ),
    DATESBETWEEN ( 'Date'[Date], EDATE ( asOf, -12 ) + 1, asOf )
)

```

```

Lapsed Givers =
VAR asOf = [Report Date]
VAR lastYear = YEAR ( asOf ) - 1
VAR gaveLastYear =
    CALCULATETABLE (
        VALUES ( Donations[Giving Unit] ),
        REMOVEFILTERS ( 'Date' ),
        'Date'[Year] = lastYear,
        Donations[refunded] = FALSE (),
        NOT ISBLANK ( Donations[Giving Unit] )
    )
RETURN
    COUNTROWS (
        FILTER (
            gaveLastYear,
            CALCULATE (
                MAX ( Donations[received_at] ),
                REMOVEFILTERS ( 'Date' ),
                Donations[refunded] = FALSE ()
            ) < asOf - 90
        )
    )
)

```

```

Lapsed Givers Last Year Giving =
VAR asOf = [Report Date]
VAR lastYear = YEAR ( asOf ) - 1
VAR gaveLastYear =
    CALCULATETABLE (
        VALUES ( Donations[Giving Unit] ),
        REMOVEFILTERS ( 'Date' ),
        'Date'[Year] = lastYear,
        Donations[refunded] = FALSE (),
        NOT ISBLANK ( Donations[Giving Unit] )
    )
VAR lapsed =
    FILTER (
        gaveLastYear,
        CALCULATE ( MAX ( Donations[received_at] ), REMOVEFILTERS ( 'Date' ) ) < asOf - 90
    )
RETURN
    SUMX (
        lapsed,
        CALCULATE ( [Total Given], REMOVEFILTERS ( 'Date' ), 'Date'[Year] = lastYear )
    )
)

```

```

Units in Band =
VAR lo = SELECTEDVALUE ( 'Giving Bands'[Min] )
VAR hi = SELECTEDVALUE ( 'Giving Bands'[Max] )
VAR units =
    CALCULATETABLE (
        VALUES ( Donations[Giving Unit] ),
        Designations,
        Donations[refunded] = FALSE (),
        NOT ISBLANK ( Donations[Giving Unit] )
    )
RETURN
    COUNTROWS ( FILTER ( units, VAR t = [Total Given] RETURN t >= lo && t < hi ) )

```

```

Dollars in Band =
VAR lo = SELECTEDVALUE ( 'Giving Bands'[Min] )
VAR hi = SELECTEDVALUE ( 'Giving Bands'[Max] )
VAR units =
    CALCULATETABLE (
        VALUES ( Donations[Giving Unit] ),
        Designations,
        Donations[refunded] = FALSE (),
        NOT ISBLANK ( Donations[Giving Unit] )
    )
RETURN
    SUMX ( FILTER ( units, VAR t = [Total Given] RETURN t >= lo && t < hi ), [Total Given] )

```

```

Share of Units =
DIVIDE ( [Units in Band], [Giving Units] )

```

```

Share of Dollars =
DIVIDE ( [Dollars in Band], [Total Given] )

```

```

Budget =
SUM ( 'General Fund Budget'[budget_amount] )

```

```

Budget Difference =
[General Fund Given] - [Budget]

```

```

General Fund YTD =
CALCULATE ( [General Fund Given], DATESYTD ( 'Date'[Date] ) )

```

```

Budget YTD =
CALCULATE ( [Budget], DATESYTD ( 'Date'[Date] ) )

```

```

General Fund YTD Last Year =
CALCULATE ( [General Fund YTD], SAMEPERIODYLASTYEAR ( 'Date'[Date] ) )

```

```

Budget Through Last Full Month =
VAR endM = EOMONTH ( [Report Date], -1 )
RETURN
    CALCULATE (
        [Budget],
        REMOVEFILTERS ( 'Date' ),
        DATESBETWEEN ( 'Date'[Date], DATE ( YEAR ( endM ), 1, 1 ), endM )
    )

```

```

General Fund Through Last Full Month =
VAR endM = EOMONTH ( [Report Date], -1 )
RETURN
    CALCULATE (
        [General Fund Given],
        REMOVEFILTERS ( 'Date' ),
        DATESBETWEEN ( 'Date'[Date], DATE ( YEAR ( endM ), 1, 1 ), endM )
    )

```

```

Percent of Budget to Date =
DIVIDE ( [General Fund Through Last Full Month], [Budget Through Last Full Month] )

```

```

Campaign Goal =
SUM ( 'Pledge Campaigns'[goal_cents] ) / 100

```

```

Pledged =
SUM ( Pledges[amount_cents] ) / 100

```

```

Pledge Count =
COUNTROWS ( Pledges )

```

```

Pledged Percent of Goal =
DIVIDE ( [Pledged], [Campaign Goal] )

```

```

Campaign Received =
CALCULATE ( [Total Given], Funds[name] = "Room to Grow" )

```

```

Campaign Received to Date =
VAR d = MAX ( 'Date'[Date] )
RETURN
    CALCULATE (
        [Total Given],
        Funds[name] = "Room to Grow",
        REMOVEFILTERS ( 'Date' ),
        'Date'[Date] <= d
    )

```

```
Pledge Pace =
VAR d = MAX ( 'Date'[Date] )
VAR monthsIn = DATEDIFF ( DATE ( 2025, 10, 1 ), d, MONTH ) + 1
RETURN
    CALCULATE ( [Pledged], REMOVEFILTERS ( 'Date' ) ) * MIN ( 1, MAX ( 0, monthsIn ) / 36 )
```

```
Expected to Date (all pledges) =
SUM ( Pledges[Expected to Date] )
```

The HTML dashboard spreads the current month's budget using last year's daily giving pattern, because recurring gifts arrive on the 1st and 15th. The two "Through Last Full Month" measures are the simpler Power BI version: they compare complete months only, which avoids a misleading partial month.

Step 4. Pages and visuals

Page size 16:9. Apply the theme first, then add a campus slicer on every page and sync it across pages (View, Sync slicers).

Page: Overview

Visual	Fields and measures	Notes
Slicer	Donations[campus]	Vertical list on the left, single select with an All option.
Five cards (or one multi-row card)	Given Last 12 Months, Giving Units Last 12 Months, Recurring Share General Fund, First-Time Givers Last 12 Months, Lapsed Givers	Put the prior-period measures in the card's subtitle or a small text box underneath.
Clustered column chart with a line	X: Date[Month Start] (last 24 months). Columns: General Fund Given. Line: Budget	Use a line and clustered column chart. Both measures share one axis, so there is no second scale.
Table	Funds[name], Given Last 12 Months, Given Prior 12 Months	Add data bars to the first amount column.
Clustered bar chart	Y: Giving Bands[Band] (sorted by Sort). Values: Share of Units, Share of Dollars	Apply a page filter for the last 12 months on Date[Date].
Bar chart	Y: Donations[payment_method]. X: Total Given, shown as percent of grand total	Sort descending.

Page: Givers

Visual	Fields and measures	Notes
Column chart	X: Date[Month Start]. Y: First-Time Givers	Last 24 months.
Line chart	X: Date[Month Start]. Y: Recurring Share General Fund	Format the axis as a percentage from 0 to 100.

Visual	Fields and measures	Notes
Table	Donations[Giving Unit] (or People names), last gift date, Total Given for last year	Filter the table visual with Lapsed Givers > 0 at the unit level, or build it from a calculated table if the church prefers a static list each month.
Matrix	Giving Bands[Band], Units in Band, Share of Units, Dollars in Band, Share of Dollars	Data bars on Share of Dollars.

Page: Funds and budget

Visual	Fields and measures	Notes
Line chart	X: Date[Month Start] for the current year. Lines: General Fund YTD, Budget YTD, General Fund YTD Last Year	Three lines on one axis.
Matrix	Rows: Date[Month]. Values: General Fund Given, Budget, Budget Difference, and last year's amount	Conditional font color on Budget Difference (green above zero, red below).
Column chart	X: Date[Month]. Y: Budget Difference	Conditional fill color by sign.

Page: Room to Grow campaign

Visual	Fields and measures	Notes
Five cards	Campaign Goal, Pledged (with Pledge Count), Campaign Received, Expected to Date (all pledges), gifts from non-pledgers	Gifts from non-pledgers equal Campaign Received minus the sum of Pledges[Received].
Line and clustered column chart	X: Date[Month Start] from September 2025. Columns: Campaign Received. Lines: Campaign Received to Date, Pledge Pace	One shared axis.
Table	Pledges[Pace Status], Pledge Count, Pledged, sum of Pledges[Received]	Sort by a helper column so the order reads Ahead, On pace, Behind, Not started.
Table	Pledge size bands (add a calculated column on Pledges with the same banding approach), Pledge Count, Pledged	Optional.

Step 5. Check the numbers

With all campuses selected, the cards should match the HTML dashboard: giving units over the last 12 months, the General Fund recurring share, first-time and lapsed givers, and the Room to Grow pledged and received totals. If a count is off, the usual cause is an ID column loaded as a number or the refunded column loaded as text.

Sample data. All names, organizations, and figures are fictional.