

Custom reporting for churches that use Planning Center

Planning Center already holds the records a church leadership team cares about: who attended, who gave, who is in a group, who served, and who is new. Each Planning Center app has its own reports, and they are built around that app. Leaders usually want one weekly picture that puts those numbers side by side and compares them with last year and with the budget. That is what this service builds.

What the reports show

Weekly Leadership Snapshot

Shows how Sunday compared with the same Sunday last year by service and campus, and whether giving, groups, and serving are on track.

Guest to Member Pathway

Follows first-time guests through the follow-up call, groups, serving, and membership, and shows where people stop.

Monthly Elder Board Packet

Explains what moved this month in attendance, giving, budget, the campaign, and ministry in a few plain sentences.

Giving Analytics

Counts giving households, the share who give on a schedule, first-time and lapsed givers, and building campaign gifts against pledges.

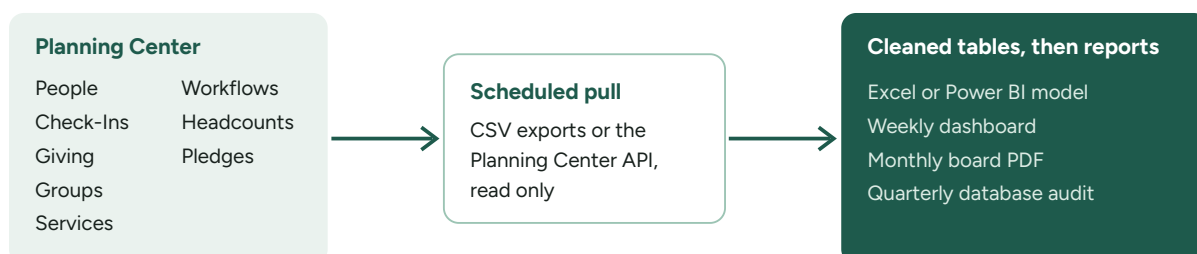
Volunteer Health

Lists teams that are short for the coming Sundays, people who have served too many weeks in a row, and new volunteers this quarter.

Database Health Audit

Counts duplicate profiles, unlinked children, missing contact details, and stale records in People, with a cleanup plan.

How it works



The data comes out of Planning Center in one of two ways. The simplest is the exports Planning Center already offers: People lists can be exported to CSV with the columns you choose,¹ donations can be exported from the Giving dashboard or the donations tab,² Check-Ins reports download as CSV or PDF,³ and pledge information can be exported from a pledge campaign.⁵ A staff member runs the exports on a set day each week, and the reports refresh from those files.

The second way is the Planning Center API, which gives programmatic access to most of the information in an account across its apps. A church can create a personal access token for its own data, and the data comes back in a standard format called JSON API.⁸ A scheduled job pulls the latest records each week, so nobody has to remember to export anything. Either way, the reports read the data and never write changes back to Planning Center.

What to expect

- Every figure ties back to a Planning Center record or an export, and each report states its definitions, such as what counts as attendance or as a giving unit.
- Each report compares this week with the same week last year, giving with the board-approved budget, and pledges with an even pace.
- Monthly reports include a few plain sentences on what moved and why, so board members do not have to interpret charts on their own.
- Reports can be delivered as a PDF, an interactive dashboard, an Excel workbook, or a Power BI report the church owns.

Limits worth knowing

- Reports can only show what is recorded. Adults who attend but are not checked in appear in headcounts, not as individuals, so the guest pathway depends on connect cards and workflow cards being used.^{4,6}
- Headcounts and check-ins need a clear rule so the same people are not counted twice. Planning Center's own guidance warns about double counting when a custom headcount covers people who also check in.⁴
- Budgets and expenses usually live in the accounting system, so the finance pages combine Planning Center giving with a monthly file from the bookkeeper.
- Cleanup is done by church staff inside Planning Center. The database audit lists every record and the steps, such as using Planning Center's duplicate detector and merge tool,⁷ but it does not change data itself.

Sources

1. Planning Center, "Export data" (People CSV exports, list columns, and export permissions). help.planningcenter.com/en/export-data.html
2. Planning Center, "Importing and exporting giving information" (donation exports and donor reports). help.planningcenter.com/en/importing-and-exporting-giving-information.html
3. Planning Center, "Check-Ins data" (reports downloaded as CSV or PDF, event chart export). help.planningcenter.com/en/check-ins-data.html
4. Planning Center, "Track attendance with Headcounts" (headcount types and double counting). help.planningcenter.com/en/track-attendance-with-headcounts.html
5. Planning Center, "Pledge campaigns" (pledge progress and CSV export of pledges). help.planningcenter.com/en/pledge-campaigns.html
6. Planning Center, "Follow a card through a workflow" (workflow steps and assignees). help.planningcenter.com/en/follow-a-card-through-a-workflow.html
7. Planning Center, "Merge duplicate profiles" (duplicate detector and merging). help.planningcenter.com/en/merge-duplicate-profiles.html
8. Planning Center developer support on GitHub (API access, personal access tokens, JSON API format). github.com/planningcenter/developers

Getting started

1. **Choose the questions.** A short call to pick the two or three reports that would help most, and to agree on definitions such as which services count toward attendance.
2. **Set up read-only access.** Either a staff member with permission to export from People and Giving runs a few exports,^{1,2} or the church creates an API token for a dedicated account with the access the reports need.⁸
3. **Start with a database health check.** Duplicates, unlinked children, and nonstandard membership values change the counts, so it helps to know about them before the first report.
4. **Review the first version together.** The first report comes with a walkthrough, and the definitions and layout are adjusted before it goes to the board or staff.
5. **Set the rhythm.** Weekly snapshot on Monday, board packet before each meeting, and a quarterly audit to keep the data clean.

Who builds it

Brad Leake led a full Planning Center migration as chief of staff at a large church and now implements Planning Center for churches as a consultant. He builds the reports in Excel, Power BI, and Tableau.