

Volunteer Health: Power BI rebuild guide

This guide covers what you need to rebuild the Volunteer Health Report in Power BI from Planning Center Services data: response rates by team, people who may need a break, coverage for coming Sundays, and new volunteers.

Data files

File (in the data folder)	What it holds
Plan People.csv	Each scheduling request: plan date, team, position, person, status (Confirmed, Unconfirmed, Declined), and decline reason.
Needed Positions.csv	How many people each plan needs for each team and position.
Service Plans.csv	Plan dates and service types for each campus.

Prepare the model

1. Load the three CSV files, set ID columns to Text, and set sort_date to Date.
2. Create the Date table and relate it to Plan People[sort_date] and Needed Positions[sort_date].
3. Add a Quarter column to the Date table ("Q" & QUARTER([Date]) & " " & YEAR([Date])) for the quarter slicer.
4. Set the report date measure to the last Sunday with confirmed serving, or to TODAY () in a live report.

Key DAX

```
Date =
VAR firstDay = DATE ( 2023, 1, 1 )
VAR lastDay = DATE ( 2026, 12, 31 )
RETURN
    ADDCOLUMNS (
        CALENDAR ( firstDay, lastDay ),
        "Year", YEAR ( [Date] ),
        "Month Start", DATE ( YEAR ( [Date] ), MONTH ( [Date] ), 1 ),
        "Is Sunday", WEEKDAY ( [Date], 1 ) = 1
    )
```

```
Report Sunday = DATE ( 2026, 10, 11 )    // use the most recent Sunday in a live report
```

```
Requests = COUNTROWS ( 'Plan People' )
```

```
Accepted % =
DIVIDE ( CALCULATE ( [Requests], 'Plan People'[status] = "Confirmed" ), [Requests] )
```

```
Declined % =
DIVIDE ( CALCULATE ( [Requests], 'Plan People'[status] = "Declined" ), [Requests] )
```

```
No Reply % =  
DIVIDE ( CALCULATE ( [Requests], 'Plan People'[status] = "Unconfirmed" ), [Requests] )
```

```
Accepted % Last Year =  
CALCULATE ( [Accepted %], SAMEPERIODLASTYEAR ( 'Date'[Date] ) )
```

```
Volunteers Serving =  
CALCULATE ( DISTINCTCOUNT ( 'Plan People'[person_id] ), 'Plan People'[status] = "Confirmed" )
```

```
Positions Needed = SUM ( 'Needed Positions'[quantity] )
```

```
Positions Confirmed =  
CALCULATE ( [Requests], 'Plan People'[status] = "Confirmed" )
```

```
Open Positions =  
MAX (   
    0,   
    [Positions Needed] - [Positions Confirmed]   
    - CALCULATE ( [Requests], 'Plan People'[status] = "Unconfirmed" )   
 )
```

```
Sundays Served Last 13 =  
VAR d = [Report Sunday]  
RETURN  
    CALCULATE (   
        DISTINCTCOUNT ( 'Plan People'[sort_date] ),   
        'Plan People'[status] = "Confirmed",   
        REMOVEFILTERS ( 'Date' ),   
        'Date'[Date] > d - 91,   
        'Date'[Date] <= d   
    )
```

```
Current Streak =  
VAR d = [Report Sunday]  
VAR sundays =  
    FILTER ( ALL ( 'Date'[Date] ), WEEKDAY ( 'Date'[Date], 1 ) = 1 && 'Date'[Date] <= d &&   
    'Date'[Date] > d - 7 * 60 )  
VAR served =  
    CALCULATETABLE (   
        VALUES ( 'Plan People'[sort_date] ),   
        'Plan People'[status] = "Confirmed",   
        REMOVEFILTERS ( 'Date' )   
    )  
VAR missed = EXCEPT ( sundays, served )  
VAR lastMissed = MAXX ( missed, 'Date'[Date] )  
RETURN IF ( ISBLANK ( lastMissed ), 60, INT ( ( d - lastMissed ) / 7 ) )
```

```
Needs a Break =  
IF ( [Sundays Served Last 13] >= 10 || [Current Streak] >= 6, 1 )
```

```

New Volunteers =
VAR periodStart = MIN ( 'Date'[Date] )
VAR periodEnd = MAX ( 'Date'[Date] )
VAR people =
    CALCULATETABLE ( VALUES ( 'Plan People'[person_id] ), 'Plan People'[status] = "Confirmed" )
RETURN
    COUNTROWS (
        FILTER (
            people,
            VAR firstServed =
                CALCULATE (
                    MIN ( 'Plan People'[sort_date] ),
                    'Plan People'[status] = "Confirmed",
                    REMOVEFILTERS ( 'Date' )
                )
            RETURN firstServed >= periodStart && firstServed <= periodEnd
        )
    )

```

Visuals

Visual	Fields and notes
Slicer	Date[Quarter], single select. The coverage visuals use their own filter for the next four Sundays after Report Sunday.
Cards	Volunteers Serving, Accepted %, Declined %, people with Needs a Break, Open Positions for the next four Sundays, and New Volunteers.
Response by team	100% stacked bar: Y Plan People[team], values Accepted %, Declined %, No Reply %. Add Accepted % Last Year as a tooltip or reference marker.
Needs a break table	Table: person name, team, Sundays Served Last 13, Current Streak, filtered to Needs a Break = 1 and sorted by Current Streak.
Coverage for coming Sundays	Stacked bar: Y Date[Date] for the next four Sundays, values Positions Confirmed, Unconfirmed requests, and Open Positions. A table below lists the positions with the most open spots.
New volunteers	Table of people where New Volunteers = 1 for the quarter, and a column chart of New Volunteers by Date[Quarter].
Decline reasons	Bar chart: Plan People[decline_reason] with Requests, filtered to Declined.

Apply the theme file from the Giving Analytics kit (Wren Hollow Giving Theme.json) or a church's own colors. Check the finished numbers against the HTML dashboard before sharing the report.

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