

Weekly Leadership Snapshot: Power BI rebuild guide

This guide covers what you need to rebuild the Weekly Leadership Snapshot as a one-page Power BI report: the tables, the Power Query steps, the relationships, the key DAX measures, and the visuals. The HTML dashboard in this kit shows the finished layout.

Data files

File (in the data folder)	What it holds
Headcounts.csv	Worship room headcounts by event time (attendance_type, total).
Check-Ins.csv and Check-In Event Times.csv	Children checked in to kids rooms, by location and kind (Regular, Guest, Volunteer).
Guest Pathway.csv	One row per first-time adult guest with the first visit date.
Donations.csv, Designations.csv, Funds.csv, General Fund Budget.csv	Giving by received date and the monthly budget.
Group Events.csv and Group Attendances.csv	Group meetings and who attended.
Plan People.csv and Needed Positions.csv	Serving schedules and the positions each Sunday needs.

Prepare the model

1. Load the CSV files with Get Data, Text/CSV, and set every column ending in _id to Text.
2. In Check-Ins, merge Check-In Event Times on event_time_id to bring in starts_at, then add a service_date column with Date.From([starts_at]).
3. In Headcounts, add service_date the same way, and add a Service column that joins campus and the start time (for example, Main Campus 9:00 AM).
4. In Group Attendances, merge Group Events on event_id to bring in starts_at and attendance_submitted, then add week_ending = Date.EndOfWeek(Date.From([starts_at]), Day.Monday), which returns the Sunday that ends each week.
5. Add the same week_ending column to Group Events.
6. Create the Date table below, mark it as the date table, and relate Date[Date] to Headcounts[service_date], Check-Ins[service_date], Guest Pathway[first_visit_date], Donations[received_at], Group Events[week_ending], Group Attendances[week_ending], Plan People[sort_date], and Needed Positions[sort_date]. Relate the General Fund Budget table to Date on month_start, and follow the Giving Analytics guide for the giving relationships.

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  
    )
```

```
Selected Sunday = MAX ( 'Date'[Date] )
```

```
Worship Headcount =  
CALCULATE (   
    SUM ( Headcounts[total] ),  
    Headcounts[event_name] IN { "Sunday Services", "North Fork Sunday" }  
)
```

```
Kids Checked In =  
CALCULATE (   
    COUNTROWS ( 'Check-Ins' ),  
    'Check-Ins'[kind] IN { "Regular", "Guest" },  
    'Check-Ins'[event_name] IN { "Sunday Services", "North Fork Sunday" }  
)
```

```
Attendance = [Worship Headcount] + [Kids Checked In]
```

```
Attendance Same Sunday Last Year =  
CALCULATE ( [Attendance], DATEADD ( 'Date'[Date], -364, DAY ) )
```

```
Attendance Change % =  
DIVIDE ( [Attendance] - [Attendance Same Sunday Last Year], [Attendance Same Sunday Last Year] )
```

```
Attendance 4-Week Average =  
VAR d = [Selected Sunday]  
RETURN  
    AVERAGEX (   
        FILTER ( ALL ( 'Date'[Date] ), 'Date'[Date] > d - 28 && 'Date'[Date] <= d && WEEKDAY (   
            'Date'[Date], 1 ) = 1 ),  
        CALCULATE ( [Attendance] )  
    )
```

```
Attendance 12-Month Average =  
VAR d = [Selected Sunday]  
RETURN  
    AVERAGEX (   
        FILTER ( ALL ( 'Date'[Date] ), 'Date'[Date] > d - 364 && 'Date'[Date] <= d && WEEKDAY (   
            'Date'[Date], 1 ) = 1 ),  
        CALCULATE ( [Attendance] )  
    )
```

```
First-Time Guests =
COUNTROWS ( 'Guest Pathway' )
+ CALCULATE ( [Kids Checked In], 'Check-Ins'[kind] = "Guest" )
```

```
Group Attendance =
CALCULATE ( COUNTROWS ( 'Group Attendances' ), 'Group Attendances'[attended] = TRUE () )
```

```
Groups Met =
CALCULATE ( DISTINCTCOUNT ( 'Group Events'[group_id] ), 'Group Events'[canceled] = FALSE () )
```

```
Groups Missing Attendance =
[Groups Met]
- CALCULATE ( [Groups Met], 'Group Events'[attendance_submitted] = TRUE () )
```

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

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

```
Waiting on Reply =
CALCULATE ( COUNTROWS ( 'Plan People' ), 'Plan People'[status] = "Unconfirmed" )
```

```
Serving Coverage % =
DIVIDE ( MIN ( [Positions Confirmed], [Positions Needed] ), [Positions Needed] )
```

General Fund YTD and Budget YTD use the same measures as the Giving Analytics guide:
 General Fund YTD = CALCULATE ([General Fund Given], DATESYTD ('Date'[Date]))
 Budget YTD = CALCULATE ([Budget], DATESYTD ('Date'[Date]))

Visuals

Visual	Fields and notes
Slicer	Date[Date] as a dropdown, filtered to Is Sunday = TRUE, single select.
Hero card and line chart	Card: Attendance with Attendance Change % below it. Line chart: X Date[Date] (last 26 Sundays), lines Attendance and Attendance Same Sunday Last Year. Apply a visual-level filter that keeps the 26 Sundays before the selected one.
Two small cards	Attendance 4-Week Average and Attendance 12-Month Average, each with the same measure shifted back 364 days for comparison.
Bar chart by service	Y: Headcounts[Service]. X: Attendance, with Attendance Same Sunday Last Year as a target line or error bar.
Kids rooms bar chart	Y: Check-Ins[location], grouped by campus. X: Kids Checked In and the same measure for last year.
Guests card and column chart	First-Time Guests for the selected Sunday and a 13-week column chart.
Giving cards	General Fund YTD, Budget YTD, and the percent of budget, plus Giving Units for the year.

Visual	Fields and notes
Groups and serving	Group Attendance with Groups Missing Attendance, and a stacked bar by Plan People[team] with Positions Confirmed, Waiting on Reply, and the open remainder.

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.