

NAVE · HOW IT WORKS

Groups

Councils, commissions and committees — their members, their meetings, and what the parish chooses to make public.

For pastors, parish office staff and the chairs of parish bodies

The idea in one page

A group is one of the bodies that govern or advise the parish: the Pastoral Council, the Finance Council, the Liturgy Commission, the Building Committee. Nave keeps each one's members, its running agenda and its meetings in one place — private to the parish unless the office decides otherwise.

Where it lives

Open **Governance** → **Groups**. The page lists every body the parish has recorded with its member count and open items. Press **Add new** to create one:

- **Name** — the parish's own name for it, for example "Finance Council".
- **Type** — Council, Commission or Committee. On the public page councils are listed before commissions, and commissions before committees.
- **Goal** — what the body is for. Shown at the top of the group's own page and, once published, on the parish website.
- **Sort order** — Nave keeps the order you set rather than alphabetising, so a parish that lists Pastoral, Consejo Hispano, Finance keeps that order in public.

Each body then expands into a card holding its details, its **Members** and its **Agenda & projects**; **Open meeting workspace** leads to the body's own page, where its meetings live.

Internal by default

Nothing here is on the website unless the office publishes the body (see "Putting a group on the parish website"). Meetings, agendas, minutes and documents never appear on a public page, the public calendar or the calendar feed — only in the back office, the admin calendar, and the parishioner portal for the group's own members.

Members and the chair

A seat on a body is a name, a title, and — where it helps — a link to the person's Nave account or parish record. Most of a council never logs in, and that is fine.

Adding a member

Who: the parish office, or the body's chair.

1. Expand the body on the Groups page and press **+ Add member**.
2. If the person has a Nave account, pick it under **Link a Nave account**. Their name and email fill in from the account, and the seat shows on their profile.
3. Otherwise type a **Name**; an **Email** is optional.
4. Give the seat a **Role** in the body's own words — Chair, Secretary, Treasurer, Member, Presidenta. This is what the public page prints beside the name.

Result: the seat appears in the list, badged *account* when linked to a login. Where the email or account matches a parishioner record, Nave links the seat to it; when the evidence is ambiguous it leaves the seat unlinked rather than guess.

Who leads the body is the office's decision

The word "Chair" in a seat's title is just a word. What makes someone the leader is **Make leader** (or **Co-leader**) under **Leaders & members** on the group's own page, and only the parish office can press it. A chair who adds a "Co-Chair" to their own body gets a plain seat carrying that word; the office promotes it. Nave enforces this in the database, not just on screen.

When the office adds a seat whose title reads like leadership — chair, president, head, coordinator, director, lead — Nave marks it as a leader from the start. **Clear** removes the title and the leader mark together.

What a chair can do that other members cannot

A leader whose seat is linked to their Nave account gets **My Group** in the back-office menu — even with no other access — showing only the body they lead. There they can:

- add and remove members;
- keep the Agenda & projects list;
- schedule, edit and cancel meetings; write agendas and minutes; upload documents.

They cannot create, rename or delete a group, change its type or goal, set its cadence or group email, appoint a leader, link a seat to a parishioner record, or publish the body. Those stay with the office. The same reach can also be given in **People & Team** → **Access** by setting Groups to *Write* on that one body, or by inviting someone as a **Group chair** and answering "Which group will they chair?"

One person, spelled two ways

Until a seat is linked to a parishioner record, the spelling *is* the identity. "Fernando López" on one council and "Fernando Lopez" on another read as two people — here and, once published, on the website. The Groups page warns you when it sees this, listing the spellings and the bodies, and never corrects a name on its own. The fix is **Link to a parishioner...** under the seat, which makes the parish record the one source of the name on every body. Linking is office-only, because chairs cannot see the parishioner list.

Agenda & projects

Separate from any single meeting, each body carries a running list of what it is working on — "Approve 2026 budget" — each with an optional detail and due date and a status of **Open**, **In progress** or **Done**. The open count is what the Groups page shows beside the body's name.

The meeting workspace

A body's page is where its meetings live: schedule them, run them from an agenda, record the minutes, keep the documents, and find any of it later.

Schedule



Agenda



Mark held



Minutes



Documents



Archive

Cadence and group email

Who: the parish office.

At the top of the group's page: **Meeting cadence** ("2nd Tuesday, 7:00 PM PT") and **Group email**. The email is meant for a shared mailbox — `council@yourparish.org` — never a member's personal address copied in. Both print on the public page once the body is published. The field displays an address; Nave does not send mail to a group from this screen.

Schedule a meeting

Who: the office, or the body's chair.

1. Open **Schedule a meeting** on the group's page.
2. Give it a title ("Monthly meeting"), a date, and optionally a location and start and end times in the parish's time zone.
3. Press **Add meeting**.

Result: the meeting appears under **Upcoming** with a *Scheduled* badge, and on the admin calendar, with times shown as "7:00 PM PT".

Agenda, minutes and documents

Open a meeting to reach its page.

- **Agenda** — add items with an optional presenter and notes; move each through Open, In progress and Done; remove what was withdrawn.
- **Minutes & takeaways** — one free-text box for what was discussed and decided. **Save minutes** keeps it.
- **Documents** — upload a PDF, Word file or image up to 10 MB, filed as Agenda, Minutes or Document. Files are private to this body; download links are minted fresh on each visit rather than being permanent addresses.
- **Mark held** or **Mark cancelled** when the day has passed. **Edit meeting details** changes the title, date, time or place; **Delete this meeting** removes it and its documents.

The archive

Meetings on or after today that are not cancelled are **Upcoming**, soonest first. Past and cancelled meetings are the **Archive**, most recent first. **Search past meetings** looks through titles, minutes and locations, so "budget" finds the meeting where the budget was discussed even if it was titled "Monthly meeting".

What members see

A member whose seat is linked to their Nave account finds **My councils & groups** in the parishioner portal: each body they serve on, its meetings, and each meeting's agenda, minutes and documents — read-only. A seat entered as a name alone gives no portal access.

The trail. Seat changes, meeting and document changes, and every publish or unpublish are recorded in the **Activity Log** under Governance, with who did it and when.

Putting a group on the parish website

Renaming a committee and printing twenty-four parishioners' names on a public page are not the same decision. Nave keeps them apart.

Two switches, both required — and the second is per group

The public **Leadership** page shows the parish's staff from the org chart. Whether it also shows a governance body is decided *one body at a time*:

1. The **Leadership** feature is on under Features. Without it, the publish control does not appear on the Groups page at all.
2. The body's card reads **Not on the parish site**. Press **Publish**; Nave asks you to confirm and says how many members' names will become visible to anyone.

Result: the card reads **Published on the parish site · 12 names visible** and the body appears under Governance on the Leadership page. **Remove from site** reverses it at once.

Every body starts unpublished. Switching the Leadership feature on never publishes a council as a side effect; neither does creating one.

Who may publish

Publishing is its own level in **People & Team** → **Access**: the Groups row offers *Read*, *Write* and, above *Write*, *Publish*. Write lets someone run every body; only Publish puts one on the website. A chair never can. The Pastor, Parish office and Site admin starting points include it.

What the public page shows

- The body's name and type, goal, meeting cadence and group email — where entered. Empty fields are left out.
- The members' **names** with the title each seat carries, leaders first and highlighted, then in the order you set.
- **Never a member's email or phone**. The parish office's contact details print underneath as the way to reach a body with no mailbox of its own.

A body with no members recorded still publishes — "the parish has a Finance Council, here is what it does" is an answer a visitor came for. On the org chart under People & Team, a node can also *be* a body, so its name and chair follow the group.

Questions the office asks

Our chair signed in and cannot find the group

Two things must be true: their seat is linked to their Nave account, and the office has pressed **Make leader** on it. A seat that merely says "Chair" in its title is a member with a title. Once both are set, **My Group** appears in their menu on the next page load. Inviting them as a **Group chair** and naming the group does the same job from the other direction.

A council member wants to read the minutes online

Their seat needs an account behind it: remove the typed seat and add it again choosing **Link a Nave account** (invite them first if they have none). They will then see the body under **My councils & groups** in the portal, read-only. There is no way to share minutes with someone who is not on the body.

I published the Pastoral Council and one name is on there twice

Almost always the same person entered twice — two spellings, or a typed name and an account. The "One person, spelled two ways" notice on the Groups page lists what it found. Remove the duplicate seat, or link the seat to the parishioner record so the spelling comes from one place.

Someone can see the Groups page but every save does nothing

Look at their Access row. *Read* on Groups opens every body and its meetings but refuses each change — the row says so: "Cannot add a member, edit a body or publish one to the website." Inside *Write*, the Add / Modify / Delete switches can also be off individually. Set what they need.

Can I delete a committee that has wound up?

You can — **Delete commission** at the bottom of its card removes the body with its seats, agenda items and meetings — but consider leaving it. A deleted body takes its minutes with it, and "who sat on the Building Committee in 2027?" gets asked late. Removing it from the website costs nothing and keeps the record.