

NAVE · HOW IT WORKS

Reports & Parish Pulse

Two read-only pages under Governance: the parish at a glance, and who may be drifting away.

For pastors, the parish office and council members

The idea in one page

Nothing on either page is typed in. Every number is counted from the records the parish already keeps — families, sacrament cases, intentions, gifts, service hours, clearances — at the moment you open the page. There is no separate spreadsheet to maintain, and no way for the report to disagree with the record behind it.

Two pages, two questions

Both live under **Governance** in the back-office menu, and both are read-only by design — there is nothing on them to add, edit or delete.

- **Reports & Analytics** answers *"how big is everything right now?"* — a wall of counts grouped into Community, Sacrament pipeline, Prayer & devotion, Engagement & service, and Compliance, with a Finances corner for those who may see money.
- **Parish Pulse** answers *"who have we not heard from?"* — every current household sorted into Active, Cooling or Dormant by the last sign of life Nave can detect, a thirty-day trend strip, and a Reach out list with Email and Call buttons.

Live, not scheduled

Neither page keeps a history. Each time it is opened, the counts are recomputed from today's data in the parish's own time zone. Nothing is emailed on a schedule: Parish Pulse is called the weekly read because that is how often a pastor tends to want it, not because anything sends it weekly. Open it when you want it.

Every tile is a door

On Reports & Analytics, most tiles open the page they were counted from — Members opens People & Team, each Compliance tile opens Safe Environment, and so on. The number is the summary; the page behind it is the work.

Reports & Analytics, tile by tile

Where each number comes from, so you can trust it — or know why it looks odd.

Community

- **Members** — everyone who has a parish account, whether they signed up themselves or were invited. This counts sign-ins, not families; the census is the Parishioners page.
- **Registrations** — the registration requests on file, with how many are still marked new. The tile opens the Parishioners page at its Needs attention tab, which is where new families are followed up today.
- **Ministries & groups** — every ministry on the Ministries page.
- **Upcoming events** — events starting today or later.

Sacrament pipeline

Total cases is every sacrament case the parish holds, and the four tiles beside it split them by stage: **Submitted**, **In review**, **Scheduled**, **Completed**. Declined cases are inside the total but have no tile of their own. **Certificates pending** is a different queue — requests for a copy of a record, counted while they are new or being verified — because a certificate request is not a sacrament case and is never mixed into the stages.

Prayer & devotion, Engagement & service

- **Prayer requests** and **Candles lit** — everything ever posted, not just what is currently shown on the Prayer Board.
- **Mass intentions** — every intention booked, with how many still await the office.
- **Volunteer roles** and **Sign-ups** — the opportunities posted and the people who put their name down.
- **Service hours** — the total hours logged across every entry, verified or not, with "verified / entries" underneath so you can see how much of it the office has confirmed.
- **Announcements** — every announcement on file. **Bulletins** — only the issues that have been published.

Compliance

Six tiles over the Safe Environment records, each opening that page: **Certified**, **Expiring soon** (lapses within sixty days), **Expired**, **Awaiting review** (reported, not yet verified by the office), **In progress** (requested or under way), and **Incomplete**. These are the statuses Safe Environment itself shows, computed the same way from the dates on each record.

Finances

Who sees it: only people with Read on Finance. Everyone else sees a one-line note that giving and finance reporting appears once online giving is enabled.

This corner does not show figures of its own; it holds two buttons. **Offertory report — by Mass & collection** opens the online-offertory report: pick a date range (the last ninety days by default), see totals for first and second collections and the gifts behind them, broken down by Mass, and **Export CSV** for the bookkeeper. Every time that report is opened is written to the Activity Log. **Giving & funds** opens Online Giving.

The one export. The offertory CSV is the only download here. Reports & Analytics and Parish Pulse have no export or print button; they are screens to read, and each tile leads to the page where the full list lives.

Parish Pulse — how "at risk" is decided

Pulse is built from signals the parish already collects. It stores nothing new, and it makes no judgment; it points at a phone call worth making.

What counts as being "seen"

For each household, Nave takes the most recent of these dates and calls it the day the household was last seen:

- the day the household registered, or the day its record was created;
- its last **annual check-in** — submitted through the household's own check-in link, or stamped by the office when it marks a family registered or adds one to the census;
- its latest **event RSVP**;
- its latest **gift** that went through online giving;
- its latest **Mass intention** request;
- the latest **service hours** entry logged by anyone in the household.

Activity is read back about thirteen months. Something older than that does not count toward "seen" — which is fine, because it would be Dormant either way.

Three tiers, fixed thresholds

- **Active** — seen in the last 30 days.
- **Cooling** — last seen between one and three months ago.
- **Dormant** — over three months, or no activity on record at all.

The Engagement strip shows **Current households** and the three tiers with their share of the whole. "Current" means households marked active or pending. A family that has moved or been marked inactive is not at risk — it has left — and is not counted anywhere on this page.

How activity is matched to a household

RSVPs, gifts and intentions are matched to a household by its **contact email**; service hours by the **accounts linked** to the household (the contact person and anyone on its roster). This is a signal, not a proof of identity, and it has one practical consequence: **a household with a missing or outdated contact email gets no credit for what it does**. A family that gives every Sunday under an address the census does not hold will show as Dormant. When Pulse surprises you, check the household's email on the Parishioners page before you check on the family.

Last 30 days

Four tiles compare the last thirty days with the thirty before them: **New households**, **Event RSVPs**, **Gifts** and **Service entries**, each with an up or down figure "vs prior 30d", or "no change". Gifts counts successful online gifts; Service entries counts entries logged, not hours.

Reach out

The list holds every current household that is not Active — at most thirty, longest silence first, with households that have never shown any activity at the top. Each row carries its tier, when it was last seen ("Seen 6 weeks ago", "No activity on record") and the signals Nave did find: checked in, gifts, RSVPs, service. **Email** opens your own mail program addressed to the household; **Call** dials the number on a phone. Nothing is sent from Nave and nothing is recorded when you press either button. When every household has been active in the last month, the list is replaced by a line saying so; **All households** opens the Parishioners page.

What Pulse does not see. Attendance at Mass (Nave keeps no headcount), cash or cheques in the basket, sacrament cases, ministry membership, broadcasts opened or read, sign-ins to the website, and anything that happened under a different email. A household can be deeply involved and still read as Dormant here; the page says so itself — a gentle prompt for a phone call, not a judgment.

Who can see each page

The two pages are separate features with separate switches, because they carry different weight.

Two rows in Access

On **People & Team** → **Access, Reports** and **Parish Pulse** are their own rows, and each offers only *No view* or *Read* — there is nothing to write, so no higher level exists. The two were split apart on purpose: the reports are aggregate counts, while Pulse names households and says who is drifting, and a parish may want to keep that closer.

Starting from a job, five of them include both pages at Read: **Pastor**, **Site admin**, **Parish office**, **Council** and **Viewer**. Any other job, and anyone granted access row by row, sees neither until you tick it. The Finances corner of Reports additionally needs Read on Finance.

The feature switches

On the **Features** page, both appear under Governance — "Reports & Analytics" and "Parish Pulse". Switching one off removes it from the menu and, should someone open the address directly, shows a "feature off" panel rather than the page. Neither feature has a public side: parishioners never see these numbers, and nothing from either page appears on the website or in the member portal.

What the Activity Log records

Opening Reports & Analytics or Parish Pulse is not written to the Activity Log; they are counts, and the people who may open them have already been granted the right to look. Opening the **Offertory report** is recorded, with the date range viewed, because it is money.

Questions the office asks

The pastor says a family is very involved, but Pulse shows them Dormant

Almost always the contact email. Pulse credits RSVPs, gifts and intentions to the household whose contact email matches; if the family gives or signs up under a different address, nothing lands. Open them on the Parishioners page and set the email they actually use. Involvement Pulse cannot see — serving at Mass, attending a ministry, sitting in the pew — never moves the tier, so Dormant is a reason to check, not a finding.

Can I get last month's numbers?

Not from these pages. They show the parish as it is when opened and keep no snapshots. The Last 30 days strip on Pulse compares the current month with the previous one, which is the only backward look either page offers. If a figure matters for a council meeting, note it when you see it.

Can I print or export a report?

The offertory report exports to CSV. Nothing else on these two pages downloads or prints in a dedicated way. For a full list rather than a count, open the tile — the page behind it has the rows.

Why does Reach out stop at thirty households?

Because it is an outreach list, not a census. It shows the thirty that have gone quietest; the Engagement strip above says how many Cooling and Dormant households there are in all. When those have been called, come back — the list is recomputed each time.

Does Parish Pulse count Mass attendance or the Sunday basket?

No. Nave keeps no attendance headcount, and gifts count only when they come through online giving. Contributions in the contribution ledger, cash, cheques and envelopes are not signals here. Pulse reads the touchpoints the website sees, and only those.

Someone can open Reports but the Finances corner is missing for them

Finance is its own row. The Council starting point includes it at Read alongside Reports, Parish Pulse and the Activity Log; the Viewer starting point does not, and neither does anyone granted row by row until you tick it. Everything is on the person's Access panel; nothing here is decided anywhere else.