

Project Advance

Dashboard User Guide

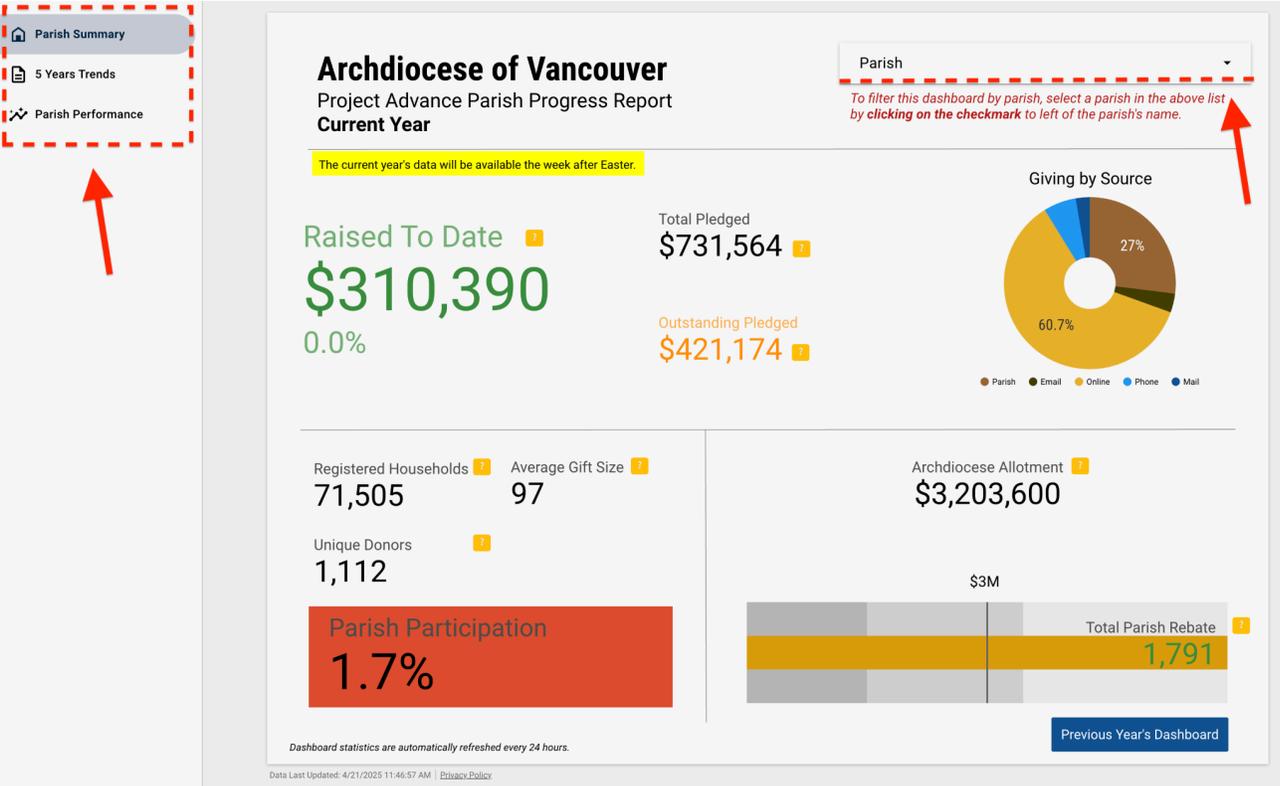
Dashboard Training, Maintenance & Documentation 2025

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Dashboards Overview

When you first open the [Project Advance Dashboard](#), the **Parish Summary** page is displayed by default. You can find it selected on the left-hand vertical menu bar. There are three pages to the Project Advance Dashboard: Parish Summary, 5 Year Trends, and Parish Performance.



Parish Summary Page

The Parish Summary page provides a comprehensive overview of the current year's fundraising progress across all parishes within the Archdiocese of Vancouver. Each data information is called a **Widget**. You can hover over the yellow box (?) for a brief description of the widget. An in-depth description of each widget can be found under the [Widgets](#) section of this User Manual.

Viewing Last Year's Dashboard

To compare the current progress with the previous year's performance, click the **"Last Year's Dashboard"** button located at the bottom right corner.

The timeframe for "This Year" and "Last Year" data is from **January 1 to December 31**.

Viewing Data for a Specific Parish

By default, the data displayed reflects the cumulative performance of all parishes. If you would like to view data for a specific parish:

1. Navigate to the **Parish** dropdown in the top right corner.
2. Select a parish by clicking the checkmark next to its name.

Only **one** parish can be selected and viewed at a time. The selected parish will be displayed with a small checkmark. To deselect, click on the selected parish again to return to the All-Parish view. The '**Amount Raised to Date**' (from January 1 to today's date) of each parish is displayed on the right-hand side of the drop-down menu.

Once a parish is selected, all three pages (Parish Summary, 5 Year Trends, and Parish Performance) will be updated with the selected parish's data.

The screenshot shows a web interface for a 'Cover' report. The main content area displays 'Total Pledged \$731,564' and 'Outstanding Pledged \$421,174'. A dropdown menu is open, showing a list of parishes and their amounts raised to date. The selected parish is 'Canadian Martyrs Parish' with an amount of 11K. A tooltip is visible over the 'Canadian Martyrs Parish' entry in the dropdown.

Parish	Amount
99 Chancery	2K
All Saints Parish	5K
Blessed Sacrament Parish	3K
✓ Canadian Martyrs Parish	11K
Christ the Redeemer Parish	5K
Church of the Assumption - Powell River	850
Corpus Christi Parish	6K
Guardian Angels Parish	2K
Holy Cross Parish	4K
Holy Family Parish - Sechelt	520
Holy Family Parish - Vancouver	2K
Holy Name of Jesus Parish	1K
Archdiocese Allotment	?

Click anywhere outside of the Parish drop-down window to exit the selection menu.

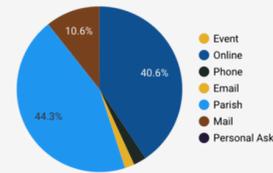
5 Years Trends

Parish ▼

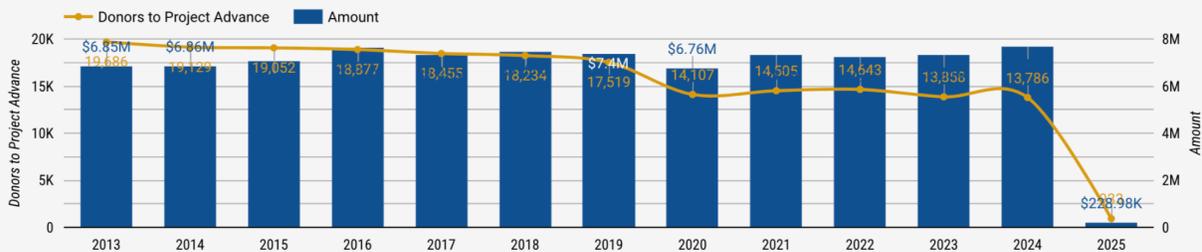
Historical Giving by Month - Last 5 Years

Month	Year / Amount					
	2019	2020	2021	2022	2023	2024
January	\$88,501	\$78,323	\$105,903	\$89,197	\$107,418	\$86,478
February	\$108,860	\$91,330	\$72,139	\$101,611	\$79,706	\$83,532
March	\$81,397	\$73,871	\$127,068	\$100,656	\$110,824	\$93,125
April	\$171,393	\$95,928	\$676,586	\$160,531	\$88,082	\$307,078
May	\$1,361,596	\$69,575	\$1,285,559	\$908,081	\$553,886	\$701,237
June	\$1,223,247	\$1,042,244	\$597,330	\$1,222,139	\$1,042,120	\$1,020,494
July	\$659,259	\$1,137,310	\$371,509	\$638,163	\$564,729	\$738,839
August	\$521,240	\$568,512	\$354,015	\$440,817	\$502,884	\$517,510
September	\$499,951	\$499,623	\$318,729	\$447,671	\$501,047	\$517,128
October	\$573,781	\$780,812	\$713,472	\$623,211	\$859,635	\$785,800
November	\$575,188	\$750,937	\$729,761	\$632,070	\$801,792	\$742,741
December	\$1,535,536	\$1,574,592	\$1,970,144	\$1,880,718	\$2,129,527	\$2,114,349
Grand total	\$7,399,951	\$6,763,058	\$7,322,214	\$7,244,867	\$7,341,650	\$7,708,310

Giving by Source - Last 5 Years



Source	Count	Amount	% of Total
1. Event	1	\$250	+0%
2. Online	62,655	\$14,877,656	40.64%
3. Phone	3,944	\$910,721	2.49%
4. Email	374	\$690,851	1.89%
5. Parish	60,463	\$16,226,003	44.32%
6. Mail	13,851	\$3,893,759	10.64%
Grand total	141,301	\$36,609,080	100%



The **5 Years Trends** page of the Project Advance Dashboard provides a detailed historical analysis of giving patterns over the past five years. It offers insights into monthly donation trends, contributions by source, and donor participation. Every cell in the Bar Chart, every slice of the Pie Chart, and every bar of the Bar and Line Chart can be clicked and interacted with.

Historical Giving by Month - Last 5 Years (Table)

This table shows the donation amounts for each month over the past five years. The values are color-coded, with higher values in darker shades of gold to help identify peak donation months quickly. The Grand Total row at the bottom summarizes the annual donation amounts.

Donors to Project Advance (Bar and Line Chart)

This chart tracks the number of donors and total donation amounts from 2013 to this year. The Gold Line represents the number of donors per year. Blue Bars indicate the total amount raised yearly, with corresponding values labeled for clarity. The right-side y-axis shows the amount in millions, while the left-side y-axis tracks the number of donors.

Giving by Source - Last 5 Years (Pie Chart and Table)

The Pie Chart provides a visual breakdown of contributions by source (e.g., Parish, Online, Phone, Email, Mail, Personal Ask, and Events).

Parish Progress Report

Parish ▼

If only one parish is displayed, uncheck the parish filter above in order to see all parishes displayed in the chart below.

All Parish Comparison Chart

Parish ^	Parish Allotment	Raised This Year	% Allotment Raised	Households	Donor Households	% Participation
1. 99 Chancery	null	\$1,481	null	0	6	null
2. All Saints Parish	\$49,600	\$3,710	7%	730	18	2.47%
3. Blessed Sacrament Parish	\$11,700	\$1,905	16%	275	12	4.36%
4. Canadian Martyrs Parish	\$45,200	\$7,824	17%	1,820	45	2.47%
5. Christ the Redeemer Parish	\$68,200	\$3,645	5%	657	15	2.28%
6. Church of the Assumption - Powell River	\$24,100	\$850	4%	439	2	0.46%
7. Corpus Christi Parish	\$59,500	\$3,910	7%	1,750	23	1.31%
8. Holy Cross Parish	\$58,200	\$2,615	4%	931	14	1.5%
9. Holy Family Parish - Sechelt	\$10,500	\$390	4%	257	3	1.17%
10. Holy Family Parish - Vancouver	\$24,800	\$1,460	6%	365	7	1.92%
11. Holy Name of Jesus Parish	\$32,200	\$1,065	3%	522	6	1.15%
12. Holy Rosary Cathedral	\$72,500	\$7,496	10%	1,221	31	2.54%
13. Holy Spirit Parish	\$16,700	\$2,681	15%	237	11	4.64%
14. Holy Trinity Parish	\$49,600	\$3,675	7%	601	12	2%
15. Immaculate Conception Parish - Delta	\$79,900	\$3,970	5%	2,028	37	1.82%
16. Immaculate Conception Parish - Vancouver	\$34,700	\$590	2%	546	4	0.73%
17. Our Lady of Fatima Parish - Coquitlam	\$49,600	\$8,694	18%	787	20	2.54%
18. Our Lady of Fatima Parish - Vancouver	\$18,600	\$420	2%	478	2	0.42%
19. Our Lady of Good Counsel Parish	\$101,600	\$3,210	3%	5,679	27	0.48%
20. Our Lady of Good Hope Parish	\$5,500	\$252	5%	75	1	1.33%
21. Our Lady of Hungary Parish	\$10,500	\$500	5%	104	1	0.96%
22. Our Lady of Lourdes Parish	\$16,100	\$260	2%	248	3	1.21%
23. Our Lady of Mercy Parish	\$41,500	\$4,770	11%	830	22	2.65%

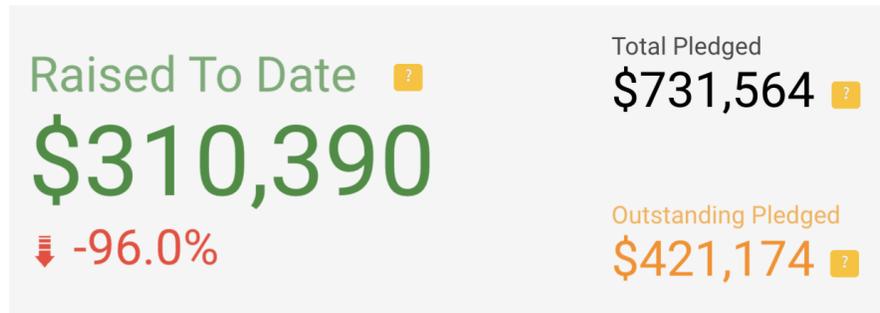
The **Parish Progress Report** page of the **Project Advance Dashboard** provides a comprehensive comparison of all parishes' fundraising progress. It allows users to monitor donation performance, participation rates, and progress toward fundraising goals.

Columns Overview

- **Parish:** Name of the parish.
- **Parish Allotment:** The fundraising goal assigned to each parish.
- **Raised This Year:** The Amount collected so far in the current year.
- **% Allotment Raised:** Percentage of the fundraising goal achieved.
- **Households:** Total number of households in the parish.
- **Donor Households:** Number of households that have donated.
- **% Participation:** Percentage of households that have participated in fundraising.

Widgets

A description of the purpose of each widget and what each number represents.



Raised To Date — The total amount of funds collected from donors. Anything that has been pledged or has already been posted.

Calculation: The sum of all “Amounts” filtered by what the office has received

Setup:

- Source: [Allocations with Funds v5 i](#)
- Primary field: SUM(Amount) from the Funds Allocation objects
- Filter: Exclude 39; Is Won

⚡ -97.1% — The change comparison field indicates the value difference today compared to the value a year ago.

Total Pledged — The total \$CAD amount pledged.

Calculation: The sum of “Raised to Date” and “Outstanding Pledged”

Setup:

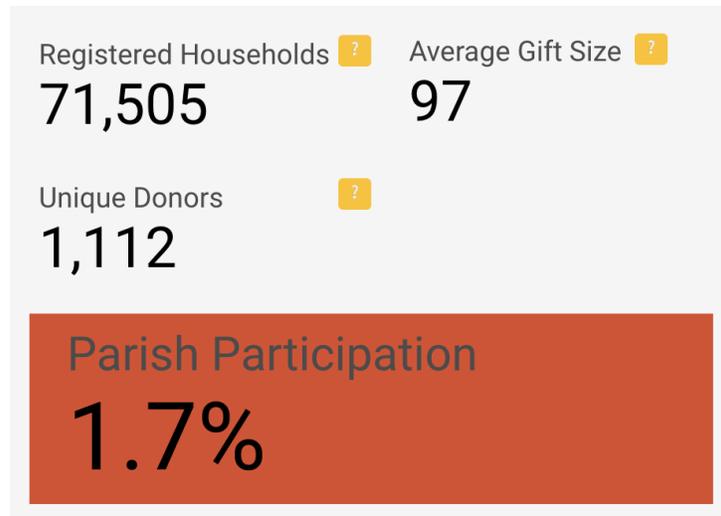
- Source: [Allocations with Funds v5 i](#)
- Filter On This Chart: Pledged & Posted Only; 2024 Only

Outstanding Pledged — This is the amount that donors have promised but has not yet been paid. It represents the pending contributions that are expected in the future.

Calculation: The sum of all “Amounts” filtered by “pledged and not paid”

Setup:

- Source: [Allocations with Funds v5 i](#)
- Primary field: SUM(Amount)
- Filter On This Chart: Pledged not Paid



Registered Households — The total number of households registered under the Archdiocese. It provides a sense of the potential donor base.

Calculation: The sum of registered households from the Fund Allocation objects

Setup:

- Source: [GAU unique households i](#)
- Primary field: SUM(Registered_Households_2023)

Participating Households — The number of households actively donating to the campaign.

Calculation: The sum of unique donors from the Fund Allocation objects

Setup:

- Source: [GAU unique households i](#)
- Primary field: SUM(Unique_Donors_2023)

Average Payment Size — Average amount per donation received so far, and the difference compared to a prior period

Calculation: “Raised to date” divided by non-unique “Donors” gives the average \$CAD amount of all “Amount” from the Fund Allocation objects

Setup:

- Source: [Allocations with Funds v5 i](#)
- Primary field: AVG(Amount)
- Date range: This year; Jan 1, 2023 - Mar 23, 2024 (Look up [Maintenance](#))

Average Pledge Size — The average amount pledged per donor

Calculation:

Setup:

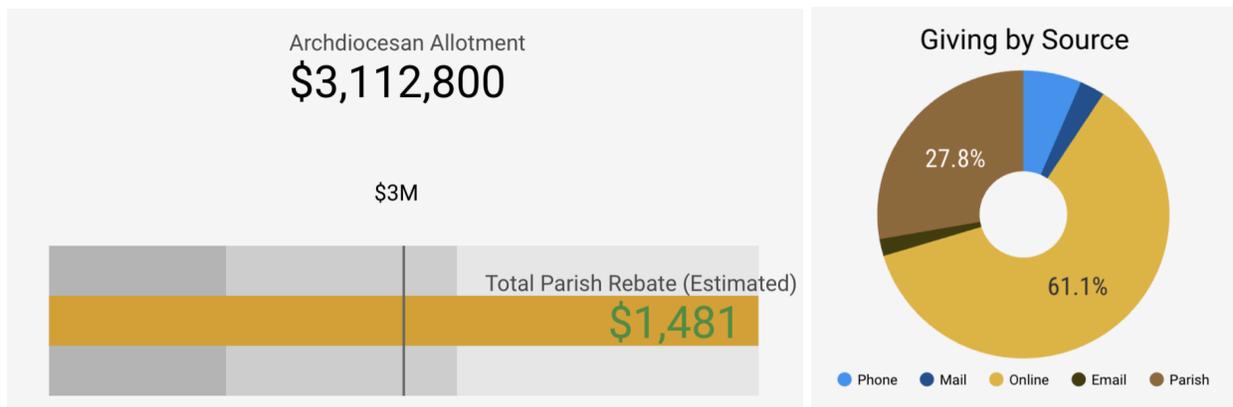
- Source: Blended Data (1)
- Primary field: AUT(Average Pledge Size)
- Formula: SUM(Total Pledged) / SUM(Unique Donors)

Parish Participation — Percentage of registered households that have contributed to the campaign. A higher percentage indicates strong parish engagement.

Calculation: The average of (all) parish participation rate from the Fund Allocation objects.

Setup:

- Source: [GAU_unique_households i](#)
- Primary field: $\text{AVG}(\text{Unique_Donors_2023} / \text{Registered_Households_2023})$;
Data Type: Percent
(Look up [Adding a Custom Field for Widgets i](#))



Archdiocesan Allotment — The total amount that the **Archdiocese has allocated** for various parish and community projects under the Project Advance initiative

Calculation: The sum of this year’s parish allotment from the Funds objects

Setup:

- Source: [GAUs for PA Dashboard i](#)
- Primary field: $\text{SUM}(\text{Allotment} - \text{This Year})$

Total Parish Rebate — Estimated amount of how much is expected to be returned to the parish.

Calculation: The sum of this year’s parish rebate from the Funds objects

Setup:

- Source: [GAUs for PA Dashboard i](#)
- Primary field: $\text{SUM}(\text{Parish Rebate} - \text{This Year})$

Giving by Source — A visualization of the “Total Pledged” by categories

Filters Setup

2024 Only

Include Close_Date Greater than or equal to (<=) 01/01/2024

AND

Include Close_Date Less than or equal to (<=) 12/31/2024

Exclude 39

Exclude Beneficiary Contains "39"

Is Won

Include Won True

Won filter

Include Won True

Pledged not Paid

Include Stage Equal to (=) Pledged

Online Donations Only

Include Source Contains "Online"

Pledged & Posted Only

Include Stage Equal to (=) Pledged

OR

Include Stage Equal to (=) Posted

2025 Only

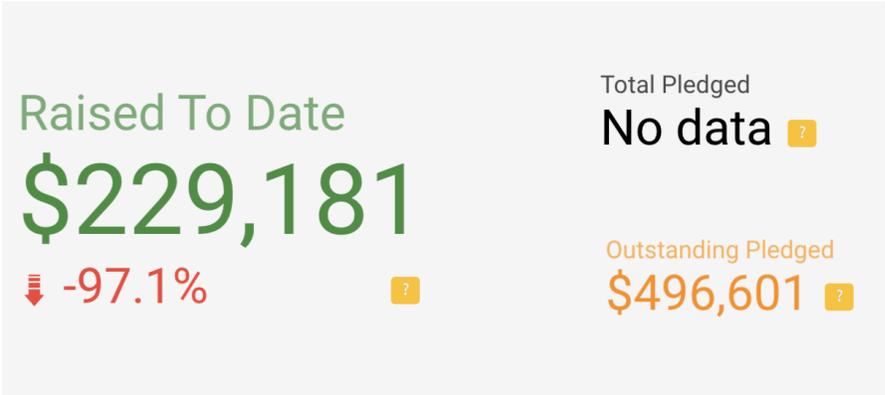
Include Close_Date Greater than or equal to (<=) 01/01/2025

AND

Include Close_Date Less than or equal to (<=) 12/31/2025

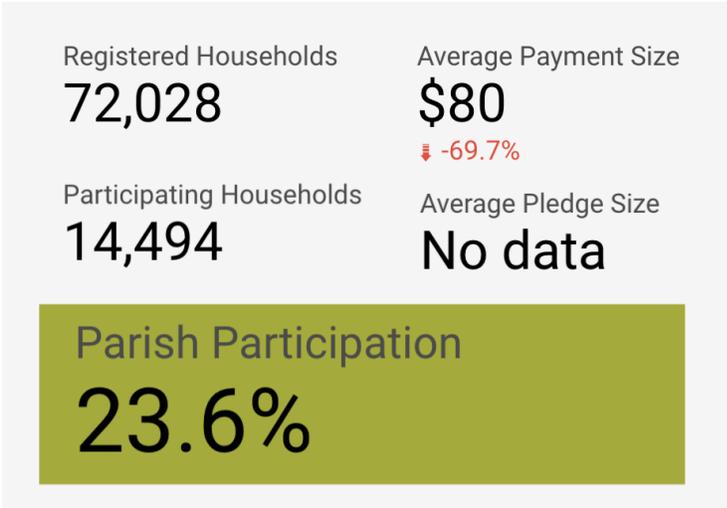
Maintenance

Here are all the steps that need to be taken for the annual maintenance of the Project Advance Dashboard's data. The outlined widgets will need to be updated manually.



Raised To Date; Total Pledged; Outstanding Pledged

The dates of the above widgets' data get rolled over automatically on the Salesforce end (therefore it's not filtered through SQL script). No manual change is needed for these fields.



Manual Configurations (to be done annually)

Previous Year Dashboard:

Outstanding Pledged — The date will have to be manually updated to last year's date range

Default date range filter: Custom

→ Jan 1, 20XX - Dec 31, 20XX

Average Gift Size — The date will have to be manually updated to last year's date range

Default date range filter: Custom

→ Jan 1, 20XX - Dec 31, 20XX

Salesforce & Big Query Data Structure Visualization

Salesforce Data

Donation

- **Fund Allocation(s)**
- **Account Name**
- **Primary Contact**
- Close Date
- Source

Fund Allocation

- Fund Allocation Name
- **Fund**
- **Donation**

Fund

- Fund Name
- Receipt-Friendly Name
- Diff Last_Yr/Current_Yr
- **Fund Allocation(s)**

Account

- Account Name
- Account Record Type
- **Contact(s)**
- Household Registered Parish

Contact

- Constituent ID
- Name
- **Account**
- **Donation(s)**

Big Query Data

RCAV-Development / rcav_01...

PA Allocations with GAU data

- Amount: FLOAT, NULLABLE
- Opportunity: STRING, NULLABLE
- Donor: STRING, NULLABLE
- Donor_Account: STRING, NULLABLE
- Type: STRING, NULLABLE
- Beneficiary: STRING, NULLABLE
- Stage: STRING, NULLABLE
- Close_Date: DATE, NULLABLE
- Won: BOOLEAN, NULLABLE
- Source: STRING, NULLABLE
- Allotment_2021: FLOAT, NULLABLE
- Rebate_2021: FLOAT, NULLABLE
- Allotment_2022: FLOAT, NULLABLE
- Rebate_2022: FLOAT, NULLABLE
- Households: FLOAT, NULLABLE
- Percent_of_Allotment_Raised__c: FLOAT, NULLABLE

GAUs for PA Dashboard

- Id
- Name
- Beneficiary_ID
- Beneficiary_Name
- Parish_Registered_Households__c
- parish_allotment_cy__c
- parish_allotment_py__c
- npsp__Number_of_Allocations_This_Year__c
- npsp__Number_of_Allocations_Last_Year__c
- npsp__Number_of_Allocations_Two_Years_Ago__c
- npsp__Total_Allocations_This_Year__c
- npsp__Total_Allocations_Last_Year__c
- npsp__Total_Allocations_Two_Years_Ago__c
- X2022_Parish_Rebate__c
- X2021_Parish_Rebate__c

GAU-Unique_Households

- Fund_Beneficiary_Account_Name__c
- Registered_Households_2023
- Unique_Donors_2023

Looker Dashboard

Allocations with Funds v5 — Additional field:

- % of Archdiocesan Allotment Raised
 - calc_39uw4f2txc
 - Percent_of_Allotment_Raised__c/100
- Parish Beneficiary
 - calc_x91mp3u1xc
 - CONCAT(Beneficiary,")
- Parish Rebate 2022 (only positive)
 - calc_eqqz0j4txc
 - If(Rebate_2022 > 0, Rebate_2022, 0)
- Parish's Portion of Expenses (2022)
 - calc_yhqari1txc
 - Allotment_2022 / 3019200 * 452880
- participation
 - calc_1nhcad4txc
 - COUNT(DISTINCT Donor_Account)/AVG(Households)

GAUs for PA Dashboard — Additional field:

- Allotment - Last Year
- Allotment - This Year
- Parish Rebate - Last Year
- Parish Rebate - This Year
- % Allotment Raised This Year

Fields are available in **PAST - Rebate and Allotment** but not in **GAUs for PA Dashboard**:

- parish_rebate_py__c
- parish_rebate_cy__c
- parish_allotment_py__c
- parish_allotment_cy__c

Technical Documentation i

The technical documentation guide is for the developers...

Data Pipeline: Salesforce → Big Query Studio → Google Looker Dashboard

Dashboard Data Sources

Name	Data Connector (Looker Dash)	Raw Data Sources (Big Query Tables)
Allocations with Funds v5	RCAV-Development / rcav_01 / PA Allocations with GAU data	...rcav_01 / > npsp__Allocation__c > npsp__General_Accounting_Unit__c
GAUs for PA Dashboard	RCAV-Development / rcav_01 / GAUs for PA Dashboard	...rcav_01 / > npsp__General_Accounting_Unit__c
GAU_unique_households	RCAV-Development / rcav_01 / GAU-Unique Households	...rcav_01 / > npsp__Allocation__c

Salesforce Objects

- npsp__Allocation__c → **Fund Allocation (GAU Allocation)**
- npsp__General_Accounting_Unit__c → **Funds (General Accounting Unit)**

Unused data sources in the Big Query rcav_01 dataset

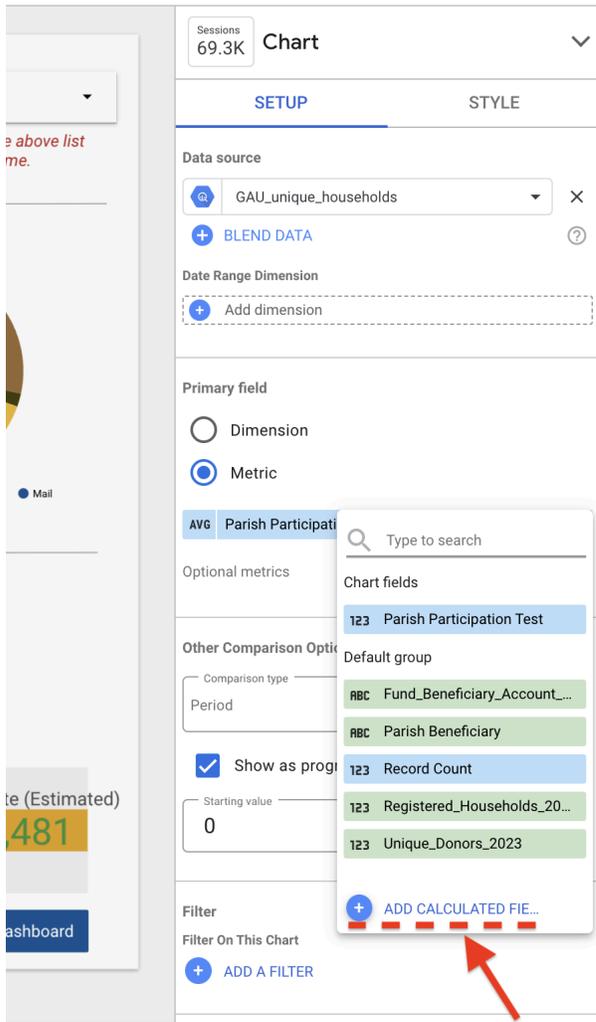
- SF_npsp__Allocation__c
- SF_npsp__General_Accounting_Unit__c

Unused data view in the Big Query rcav_01 dataset

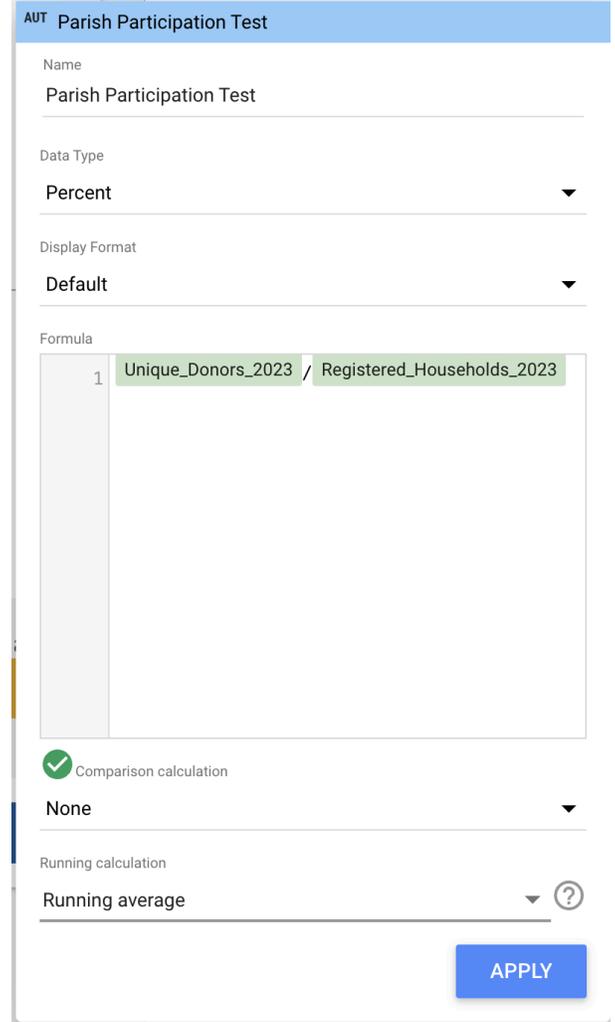
- Parish_Households_UniqueDonorAccounts

Adding a Custom Field for Widgets

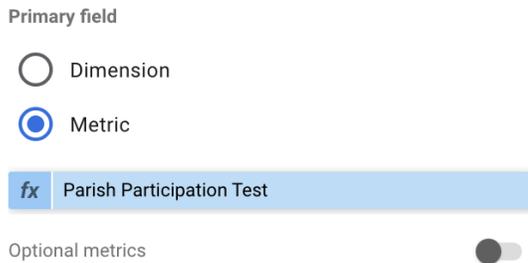
1. Select a widget > Right vertical menu “Properties” > Click “Setup” tab
2. Click “ADD CALCULATED FIELD”



This window will pop up: (Example)



3. Select Apply. Make sure to select the appropriate function “fx” (e.g. SUM, AVG, etc.)



Change Suggestions

1. The file naming conventions can be improved for better readability in Big Query and Salesforce. The naming change request is highlighted in yellow.

Looker Dashboard > Resource > “Manage added data sources”

Request: Have the Data Source names (PA Dashboard data connector) match the Data Views (Big Query) to avoid confusion and improve clarity.

Big Query Location: rcav-development / rcav_01 / GAU-Unique_Households > Details
Query:

```
SELECT npsp__Amount__c AS Amount,  
npsp__Opportunity__c AS Opportunity,  
Donor_ID__c AS Donor,  
Donor_Account_ID__c AS Donor_Account,  
GAU_Type__c as Type,  
`rcav-development.rcav_01.npsp__General_Accounting_Unit__c`.Fund_Beneficiary_Ac  
count_Name__c AS Beneficiary,  
Opportunity_Stage__c AS Stage,  
DATE(Close_Date__c) AS Close_Date,  
Is_Won__c AS Won,  
Source__c AS Source,  
parish_allotment_py__c AS Allotment_last_year,  
parish_rebate_py__c AS Rebate_last_year,  
parish_allotment_cy__c AS Allotment_this_year,  
parish_rebate_cy__c AS Rebate_this_year,  
Parish_Registered_Households__c AS Households,  
Percent_of_Allotment_Raised__c  
FROM `rcav-development.rcav_01.npsp__Allocation__c`  
JOIN `rcav-development.rcav_01.npsp__General_Accounting_Unit__c`  
ON npsp__General_Accounting_Unit__c =  
`rcav-development.rcav_01.npsp__General_Accounting_Unit__c`.Id  
WHERE Type__c='Project Advance';
```

Big Query Location: rcav-development / rcav_01 / GAU for PA Dashboard > Details
Query:

```
SELECT Id
  ,Name
  ,Fund_Beneficiary__c as Beneficiary_ID
  ,Fund_Beneficiary_Account_Name__c as Beneficiary_Name
  ,Parish_Registered_Households__c
  ,parish_allotment_cy__c
  ,parish_allotment_py__c
  ,npsp__Number_of_Allocations_This_Year__c
  ,npsp__Number_of_Allocations_Last_Year__c
  ,npsp__Number_of_Allocations_Two_Years_Ago__c
  ,npsp__Total_Allocations_This_Year__c
  ,npsp__Total_Allocations_Last_Year__c
  ,npsp__Total_Allocations_Two_Years_Ago__c
  ,parish_rebate_cy__c
  ,parish_rebate_py__c
FROM `rcav-development.rcav_01.npsp__General_Accounting_Unit__c` AS gau
WHERE Type__c = 'Project Advance'
```

- To eliminate the need for manual date changes each year. Use functions like EXTRACT() or DATE_TRUNC() to dynamically set the dates for the current/last year. Change requests are highlighted in yellow. Change suggestions are highlighted in green.

Reversion to **Location**: rcav-development / rcav_01 / GAU-Unique_Households

Query (Current Year):

```
SELECT Fund_Beneficiary_Account_Name__c,
AVG(Households__c) AS Registered_Households_Current_Year,
COUNT(DISTINCT Donor_Account_ID__c) AS Unique_Donors_Current_Year
FROM `rcav-development.rcav_01.npsp__Allocation__c`
WHERE
EXTRACT(YEAR FROM DATE(Close_Date__c)) = EXTRACT(YEAR FROM CURRENT_DATE())
AND GAU_Type__c = "Project Advance"
GROUP BY npsp__General_Accounting_Unit__c, Fund_Beneficiary_Account_Name__c
ORDER BY Fund_Beneficiary_Account_Name__c;
```

Last Year Query (Last Year)

```
SELECT Fund_Beneficiary_Account_Name__c,
AVG(Households__c) AS Registered_Households_Last_Year,
COUNT(DISTINCT Donor_Account_ID__c) AS Unique_Donors_Last_Year
FROM `rcav-development.rcav_01.npsp__Allocation__c`
WHERE DATE(Close_Date__c) BETWEEN DATE(EXTRACT(YEAR FROM CURRENT_DATE()) - 1,
1, 1) AND DATE(EXTRACT(YEAR FROM CURRENT_DATE()) - 1, 12, 31)
AND GAU_Type__c = "Project Advance"
GROUP BY npsp__General_Accounting_Unit__c, Fund_Beneficiary_Account_Name__c
ORDER BY Fund_Beneficiary_Account_Name__c;
```

Old Query method:

```
SELECT Fund_Beneficiary_Account_Name__c,
AVG(Households__c) as Registered_Households_2023,
COUNT(DISTINCT Donor_Account_ID__c) as Unique_Donors_2023
FROM `rcav-development.rcav_01.npsp__Allocation__c`
WHERE
(DATE(Close_Date__c) >= '2023-01-01') AND (DATE(Close_Date__c) <= '2023-12-31')
AND (GAU_Type__c = "Project Advance")
GROUP BY npsp__General_Accounting_Unit__c, Fund_Beneficiary_Account_Name__c
ORDER BY Fund_Beneficiary_Account_Name__c
```

