



Council Dashboard Summary

Source and Calculation Guide

A plain-English guide to where dashboard values come from, how they are refreshed, how major metrics are calculated, and how the in-dashboard help works.

Item	Current source / value
Data current	Aug 3, 2026
Dashboard workbook	2026-08-03_Dashboard - CAC.xlsx
CST workbook	2026-08-03_CST7.xlsx
monday.com workbook	2026-08-03_Membership-Hub-Field-Service-monday-export.xlsx
Guide reviewed	Aug 3, 2026
Published site	https://pbsargent.github.io/council-dashboard-summary/

Reader promise

This guide avoids code-level detail unless a formula matters. The dashboard's ? buttons provide brief panel-level help; this document provides the deeper source and calculation context. For exact implementation and edge cases, use the Markdown data dictionary in the repository.

1. What The Dashboard Is

The Council Dashboard Summary is a static web dashboard for Capitol Area Council operating review. It brings together membership, unit health, training, safeguarding, commissioner coverage, Service Area context, CST comparison, and monday.com operating context.

The website itself is static. It does not connect directly to Google Drive or monday.com when someone opens it. Instead, a daily local refresh process creates compact JSON data files, commits those files to GitHub, and GitHub Pages publishes the updated dashboard.

Most major panels include a circular ? help control. Hovering, focusing, or clicking that control opens a short explanation of the panel's source and meaning. Those panel notes are intentionally brief; this guide remains the fuller reference.

At-a-glance data currently published

Area	Current value
Youth membership	7,925
Units	295
At-risk units	131 (44.4%)
Healthy units	77 (26.1%)
Commissioners	95
Unit commissioners	66
Service Areas	3
Training rows	5,454
Hot prospects	201
Renewal rows	311
School rows	738
Popcorn units	291
Popcorn committed	87 (29.9%)

2. Where The Data Comes From

The dashboard has four main source lanes.

Source lane	Used for	Published as
Council dashboard workbook	Membership, unit health, district training rates, commissioner objectives, person-level training, and commissioner roster.	`data/latest.json`

Source lane	Used for	Published as
CST comparison workbook	Service Territory comparison metrics and Capitol Area Council comparison fields.	`data/latest.json`
monday.com daily workbook	Hot prospects, 2026 renewal status, schools, Total Available Youth, and Popcorn commitments/readiness.	`data/monday-latest.json`
Service Area mapping	District-to-Service-Area assignments and Field Director ownership from Bill Kohl's authoritative Districts and Service Area email.	`data/latest.json`

The monday.com daily workbook is preferred because it contains richer detail rows. If that workbook is not available, the automation can fall back to the monday.com API, but the API fallback is less detailed than the workbook export. The Council Dashboard Reports drive also contains Unit Level Metrics captures; those are used only for Unit Level detail and must not be selected as the main Dashboard - CAC workbook.

3. How The Daily Refresh Works

The scheduled macOS LaunchAgents refresh the source workbooks first, then publish the two dashboard sites from their active working copies. The Council Summary site runs `/Users/petersargent/CouncilDashboardSummaryUpdate.zsh` and uses `/Users/petersargent/CouncilDashboardSummaryRepo` as its active GitHub Pages repo. The Commissioner Dashboard is a separate GitHub Pages portal that reads the same canonical Council Summary JSON, so it is updated without replacing or merging into the Council Summary site.

1. Find the newest `\_Dashboard - CAC.xlsx` Council dashboard workbook in the Council Dashboard Reports shared drive.
2. Ignore `\_CAC - Unit Metric Scorecard.xlsx` for the CAC dashboard source selection, even if that Unit Level Metrics workbook is the newest workbook in the same shared drive.
3. Find the newest CST7 workbook in the Council Metric Reports shared drive.
4. Build `data/latest.json`, including Service Area rollups and a dated archive JSON file.
5. Find the newest monday.com export workbook in the Council monday.com Reports shared drive.
6. Build `data/monday-latest.json`, falling back to the monday.com API only if needed.
7. Copy the refreshed JSON files to the local preview site.
8. Publish the Council Summary site tree to GitHub Pages using historyless publishing.
9. Publish the Commissioner Dashboard site tree to its separate GitHub Pages repository using historyless publishing.
10. Let GitHub Pages publish the updated dashboard.

What changes daily

The daily automation updates data files. It does not rewrite dashboard code or formulas. A formula or page layout changes only when the website code is edited and committed.

Historyless publishing

Each GitHub Pages repository is replaced with a fresh single root commit for each publish using force-with-lease protection. That keeps the public Pages repositories compact while still publishing the current static site trees.

How freshness times display

The lower-left dashboard timestamp is shown in the viewer's local timezone. Council dashboard timestamps that do not include a timezone are interpreted as America/Chicago source time first; monday.com timestamps that include UTC or another offset are treated as exact instants and then displayed locally for the viewer.

Automation paths

The active Council Summary repo is /Users/petersargent/CouncilDashboardSummaryRepo. The Council Summary LaunchAgent is /Users/petersargent/Library/LaunchAgents/com.pbsargent.council-dashboard-summary.daily.plist. The scheduled wrapper script is /Users/petersargent/CouncilDashboardSummaryUpdate.zsh. The active Commissioner Dashboard worktree is /Users/petersargent/CACDashboardAutomation/outputs/council-commissioner-dashboard-github, and its scheduled publisher is /Users/petersargent/CACDashboardAutomation/work/commissioner_site/update_and_publish_github.zsh.

4. Build And Data Acquisition Requirements

A technical maintainer can rebuild a similar dashboard if they have the source workbooks, a Python environment with the workbook/document libraries, a GitHub Pages repository, and a daily automation path that can read the local Google Drive files and push JSON outputs.

Requirement	What must be available
Runtime	Python with openpyxl for Excel parsing and python-docx for guide generation.

Requirement	What must be available
Google Drive access	Shared drives named Council Dashboard Reports, Council Metric Reports, and Council monday.com Reports. Council Dashboard Reports contains both the Dashboard - CAC workbook and the Unit Level Metrics workbook.
Workbook patterns	Use ``*_Dashboard - CAC.xlsx`` only for the council dashboard source, ``*_CAC - Unit Metric Scorecard.xlsx`` only for Unit Level detail, ``*_CST7.xlsx`` for CST metrics, and ``*_monday-export.xlsx`` for monday.com detail.
monday.com access	Daily export workbook preferred; API token fallback requires read access to the configured boards.
Publishing	GitHub Pages repository on main branch with static HTML, CSS, JavaScript, assets, and JSON data.
Automation	LaunchAgent or equivalent scheduler that refreshes source workbooks, builds changed JSON, and historylessly publishes the current site trees to GitHub.
Service Area mapping	Authoritative district-to-Service-Area mapping source and a maintained mapping table in the builder.
Panel help	Shared ``panel-help.js`` and dashboard CSS provide active hover, focus, and click/tap help popovers for the ? controls.

Technical runbook

The repository file IMPLEMENTATION_RUNBOOK.md documents setup paths, source acquisition, manual refresh commands, schedule/log checks, validation steps, common failure modes, and guidance for rebuilding a similar dashboard.

5. How The Main Page Metrics Are Calculated

Displayed metric	Plain-English calculation
Youth	Sum of district youth membership from the Membership tab.
Units	Sum of district unit counts from the Membership tab.
Average Metric	District average metrics weighted by the number of units in each district.
Assigned	Assigned units divided by total units. Assigned units come from the Assigned tab.
Training	District all-scouter training rates weighted by units.
Youth / TAY	Council youth membership divided by the raw sum of Total Available Youth from monday.com school rows.
Popcorn Participation	Units marked Committed divided by every unit row in the published Popcorn snapshot.

District status

Each district is labeled Needs Attention, Monitor, or On Track using threshold rules.

Status	Rule
Needs Attention	YoY membership is below -10%, or SYT is below 80%, or at-risk unit rate is 55% or higher.
Monitor	Training is below 65%, or at-risk unit rate is 40% or higher, or SYT is below 85%.
On Track	None of the Needs Attention or Monitor rules apply.

6. What Each Detail Page Adds

Page	What it answers
Training	Which people are trained, which leaders are direct-contact, and where direct-contact training gaps exist.
SYT	Whether direct-contact leaders have current SYT, Hazardous Weather, BALOO, and IOLS-related requirements.
monday.com	Where prospect, renewal, and school operating follow-up is concentrated.
Popcorn	How unit commitments, goals, prior sales, onboarding, and training roll up from Service Area to District to Unit.
Unit Metrics	How districts and unit sections compare across unit health, training, outdoor, advancement, and the current workbook retention metric.
Membership Intelligence	Where membership opportunity, TAY penetration, unit health risk, prospects, and renewals combine into priority signals.

Detail pages that compare district records also expose Service Area filters. District filters remain available inside the selected Service Area, and official district views exclude operational labels that are not part of the 12-district Council dashboard structure.

Retention metric

Question	Current dashboard definition
What is the formula?	(Current members - members new in the prior 12 months) divided by same-month prior-year members.
What does it measure?	The share of the prior-year membership base represented by current members after removing people who joined within the prior 12 months.
Can retention exceed 100%?	Yes. Values above 100% are valid under this source-workbook formula and must not be capped.
How is it published?	The dashboard preserves the workbook's decimal ratio for calculations and sorting, then rounds displayed retention to the nearest whole percent. For example, 117.5% displays as 118%.

7. Service Area And District Filtering

Service Area is not inferred from workbook formulas. It is a maintained mapping based on the authoritative Districts and Service Area email. The builder attaches Service Area and Field Director values to district rows, priority units, training people, commissioner records, Unit Metric Compare rows, and monday.com district contexts where an official district can be identified.

Service Area	Field Director	Official districts
Northern	Justin Brundin	Bee Cave; Chisholm Trail; Hill Country; North Shore
Central	Vicki Rosengarten	Armadillo; Colorado River; Exploring; San Gabriel; Thunderbird
Southern	Ed Grune	Live Oak; Sacred Springs; Waterloo

How monday.com rows are assigned

monday.com rows can contain multiple district labels. A row is attached to a Service Area when any listed official district belongs to that Service Area. Rows with only non-official or blank district labels remain outside official district and Service Area rollups.

Popcorn commitments hierarchy

The Popcorn page uses one drill-down hierarchy: Service Area > District > Unit. Service Areas and Districts start collapsed. Expanding a Service Area reveals its District rollups; expanding a District reveals the corresponding unit follow-up rows inline.

Popcorn measure	How it is calculated or displayed
Participation	Committed unit rows divided by all unit rows in the selected population.
Committed goal	Sum of 2026 goal values for committed units only.
Prior sales	Sum of 2025 sales values for committed units only.
Goal vs 2025	Committed goal compared with prior sales for committed units.
Onboarded	Committed units whose onboarding progress is 11/11.
Unit trained	Committed units marked trained in the Popcorn source.
Unit follow-up	Commitment, goal, sales, onboarding, training, kernel, kickoff, and last-update context shown beneath the District.

Public-data privacy

The published Popcorn rows intentionally exclude primary contact names, email addresses, and phone numbers. The normal scheduled source is the Popcorn Commitments sheet in the daily monday.com workbook; the monday.com API is retained as a fallback.

8. TAY And Membership Opportunity

TAY means Total Available Youth. It comes from the monday.com Schools export, not from the base Council dashboard workbook.

- Council Youth / TAY uses raw school-row TAY once per school row.
- District Youth / TAY attributes a school's full TAY to each official Scouting District listed for that school.
- This means district TAY context is useful for district comparison, but district TAY values should not be summed and treated as the council total.
- Official district views exclude non-official labels such as Unassigned when comparing districts.

9. Training And Safeguarding Logic

Question	How the dashboard answers it
Who is direct-contact?	The source workbook's Direct Contact column is converted from YES/NO to a boolean.
Who is trained?	The Training tab's Trained column is converted from YES/NO to a boolean.
Is SYT current?	SYT applies to all leaders. Missing or expired SYT is flagged for all leader rows, not only direct-contact rows.
Is Hazardous Weather current?	For direct-contact leaders, missing or expired Hazardous Weather is flagged.
Is BALOO needed?	Direct-contact Pack leaders require BALOO; missing or expired BALOO is flagged.
Is IOLS missing?	Direct-contact Troop leaders are flagged when mandatory code S11 remains present.
What about all-leader views?	Existing safety dates are shown for all rows. SYT issues apply to all leaders; Hazardous Weather, BALOO, and IOLS issues are evaluated where role and unit type make them applicable.

Training code names are looked up from the Training Codes tab so the SYT page can translate course codes into readable course names where possible.

10. Membership Intelligence Signals

Membership Intelligence is a dashboard-created prioritization view. It combines source workbook membership and unit-health metrics with monday.com school, prospect, and renewal context.

Signal input	How it is counted
Schools	School rows whose Scouting District includes the district.
TAY	Sum of TAY for those attributed school rows.
Schools without unit	Attributed school rows with a blank Unit Associated field.
Hot prospects	Prospect rows whose District includes the district.
Stuck prospects	Prospect rows where Step 1 status is Stuck.
Renewal follow-up	Renewal rows where Posted is not Completed.

Important interpretation

The Membership Intelligence priority score is not an official workbook metric. It is a dashboard sorting aid that highlights districts where low TAY penetration, membership decline, unit health risk, stuck prospects, and renewal follow-up overlap.

11. Commissioner Coverage

Commissioner coverage comes from the Commissioners tab and assignment-related tabs in the Council dashboard workbook.

Coverage value	Calculation
Registered commissioners	Unique commissioner names from the Commissioners tab after whitespace and case normalization.
Workbook commissioner records	Raw rows in the Commissioners tab before deduplication.
Duplicate commissioner records	Workbook commissioner records minus unique commissioner names.
Unit commissioners	Unique people with at least one Unit Commissioner role, counted once even if the person appears multiple times.
Commissioners trained	Unique commissioners marked trained divided by unique commissioners where training status is known.
With assignments	Unique commissioners with assigned units divided by unique commissioners.
Assigned units	Rows in the Assigned tab where Assigned is yes.

12. Practical Caveats

- The published dashboard is only as current as the most recent successful local refresh and GitHub Pages deployment.
- The ? buttons provide quick panel context in the website. They are not a replacement for this guide or the Markdown data dictionary.
- Workbook labels and sheet names matter. If a source workbook changes structure, the refresh may need a code update.
- The July 1 Council dashboard workbook is broadly usable, but a small number of real Excel error cells exist, concentrated in Renewal Prep and some Objectives - Commissioners fields. Those fields should be treated cautiously until the workbook formulas are repaired.
- Expiration checks on the Training and SYT pages use the viewer browser's current date.
- Freshness timestamps are displayed in the viewer browser's local timezone, so the same data snapshot can show different clock times to viewers in different timezones.
- The SYT detail page flags SYT for all leaders. It flags Hazardous Weather, BALOO, and IOLS only when they are required by the leader's role and unit type.
- monday.com district labels can include operational labels that are not official dashboard districts; official district charts filter those out.
- Service Area filters are based on the maintained district mapping, not on source workbook columns.

- Popcorn participation counts every published unit row in the denominator and only rows marked Committed in the numerator.
- Popcorn contact names, email addresses, and phone numbers are excluded from the public JSON and dashboard.
- The Markdown data dictionary remains the best place for exact formulas and implementation details.

Appendix: Quick Formula Reference

Metric	Formula
YoY %	YoY delta divided by same-month-last-year membership.
At-risk rate	Units with Unit Metric 0-2 divided by total units.
Healthy rate	Units with Unit Metric 4-5 divided by total units.
Assigned %	Assigned units divided by total units.
Council training %	District training rates weighted by district units.
Council SYT %	District SYT rates weighted by district members.
Council Youth / TAY	Council youth divided by raw school-row TAY total.
District Youth / TAY	District youth divided by school TAY attributed to that district.
Retention	(Current members - members new in the prior 12 months) divided by same-month prior-year members; results above 100% are valid and displays round to the nearest whole percent.
Popcorn Participation	Committed Popcorn unit rows divided by all Popcorn unit rows.
Registered commissioners	Unique normalized commissioner names.
Unit commissioners	Unique normalized people with at least one Unit Commissioner role.
Service Area	Maintained district-to-Service-Area mapping applied after official district normalization.

Where to look for exact source details

- ``DASHBOARD_DATA_DICTIONARY.md`` documents the full data dictionary and formulas.
- ``IMPLEMENTATION_RUNBOOK.md`` documents technical setup, source acquisition, automation, validation, and rebuild requirements.
- ``update_daily.zsh`` documents the automation order.
- ``panel-help.js`` documents the website's active ? help popover behavior.
- ``refresh_monday_data.py`` documents the monday.com workbook/API extraction.
- ``work/commissioner_site/build_site.py`` documents the source workbook parsing and ``latest.json`` formulas.