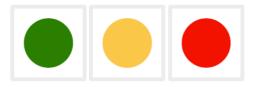# Development Proposal 05
Safeguarding Dashboards

New Features for Diocesan Users

Summary

The aim of the two previous developments was to make the Safeguarding Dashboards easier for parish users. However, the aim of this proposed set of developments is to assist diocesan users by:

- **Helping to keep diocesan mailing lists up to date**
- **Nudging parishes to update their dashboard**
- **Removing inactive users**
- **Generating a dashboard management report**

Further details can be found below.

Helping to keep diocesan mailing lists up to date

All dioceses maintain a mailing list of PSOs, but keeping it up to date can be quite a challenge. The problem is that a parish can sometimes forget to tell their diocese about a new PSO, or about a change of email address.

We will assist your diocese by automatically notifying you of any changes that we become aware of. For example:

- Someone new takes over the account of a dashboard owner
- A dashboard owner changes their email address
- Someone stops being the dashboard owner of a parish
- An email address is no longer valid

In the event of any such changes, we will send an automated email to a nominated person in your diocese.

Nudging parishes to update their dashboard

Most dashboard owners are keeping their dashboards up to date, but some aren't. About 18% of 'live' dashboards have not updated during the past 12 months.

We will try to improve this figure by sending a gentle reminder to any dashboard owner who has not updated their dashboard within the past 6 months. If necessary, a further reminder will also be sent 3 months later. Each diocese will also have the option to customise these reminder emails if they wish.

Removing inactive users

As a final resort, inactive users will be removed from Safeguarding Dashboards. This feature was requested at the Dashboard User Group meeting in 2021.

Inactive users might include:
- Clergy who have moved from the parish
- Safeguarding officers who have stepped down
- People who registered but never started to use their dashboard

We will automatically remove inactive **owners** as follows:
1. **After 12 months of inactivity**, we will notify the owner that their account will be removed if they don't sign in.
2. **Two weeks later**, we will send a reminder email.
3. **Two weeks later**, we will send an email to notify the relevant diocese that an inactive owner will soon be removed. This email will include a '**Don't close this user's account**' button that can be pressed if there is a good reason (e.g. the person is on sick leave).
4. **Two weeks later**, if the above button has not been pressed, we will remove the inactive owner. We will also notify both the owner and the relevant diocese.

If the '**Don't close**' button is pressed, we will wait six months and then go back to Step 1. A similar process will be followed for inactive **viewers**, except that Step 3 will be omitted.

Generating a dashboard management report

The existing dashboard tools already provide helpful information about dashboards and their owners. However, diocesan users will also be able to generate a customised *Dashboard Management Report*.

It will be possible to generate the report at any level (diocese, archdeaconry or deanery), and it will comprise one or more of the following sections:
- **Unused dashboards** – A list of dashboards with no owner and have never been used
- **Level 0 dashboards** – A list of dashboards that do have owners but have never been used
- **Inactive dashboards** – A list of dashboards that have not been updated during the past 12 months and their owners

- **Abandoned dashboards** – A list of dashboards that have been used in the past, but no longer have a current owner
- **Low-progress dashboards** - A list of dashboards whose progress is below a chosen threshold
- **Owners with invalid email addresses** - A list of dashboard owners that no longer have a valid email address

When generating the report, a diocesan user can choose which of the above sections to include.

Another major benefit

Change your email preferences

...or press 'Cancel' to leave them unchanged.

Send me an email about my own parish dashboard:

☑ When it is promoted to Level 2

☑ When it is promoted to Level 3

☐ When there is a new owner or viewer

☐ When a dashboard light turns amber

☐ When a dashboard light turns red

The above preferences only apply to parish dashboards where you are an owner or viewer.

Send me an email about ANY dashboard in my area:

☐ When it is used for the first time

☐ When it is promoted to Level 2

☐ When it is promoted to Level 3

☐ When there is a new owner

☐ When an owner changes their name

☐ When an owner changes their email address

☐ When an owner is removed from a dashboard

☐ When the email address of an owner is no longer valid

You have access to all dashboards within a **diocese, archdeaconry** or **deanery**.

The above preferences apply to **any** dashboards within your area.

Another major benefit is that we will significantly improve email preferences for **everyone** (including parish users).

The screenshot on page 3 illustrates how email preferences will be clearer, simpler and more flexible.

Cost

This is a [medium-size development](#).   If agreed by the User Group, it will be funded by increasing the Annual Fee by **£97**. This will apply to all dioceses from 2023 onwards.