

Workflow System - Design Philosophy

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Why Three Workflows? Why These Differences?

Design Principles

1. Same Engine, Different Routes

All workflows use the **same underlying system**:

- Same ticket structure
- Same status progression
- Same email notifications
- Same closure approval process

But routed to different people based on:

- Expertise (who can best answer)
- Authority (who should handle)
- Governance (who must be involved)

Benefit: Consistency for users, maintainability for developers.

2. Differentiation Where It Matters

Each workflow differs in **meaningful ways**:

Financial Access Request:

- **Checklist:** Because financial documents are standardized
- **Login Required:** Because it's member-right, not public service
- **President CC'd:** Because governance oversight required

- **14 days:** Because gathering records takes time

Membership Inquiry:

- **7-day deadline:** Because first impressions matter
- **No checklist:** Because questions are unpredictable
- **Public access:** Because we want to encourage inquiries
- **System Admin:** Because they know membership systems

Volunteer Interest:

- **Goes to President:** Because volunteers deserve leadership attention
- **Open-ended:** Because matching is personal, not formulaic
- **14 days:** Because thoughtful matching takes time
- **Public access:** Because anyone can volunteer

Why Not More Workflows?

We Could Have Had:

- Board inquiries
- Event questions
- Handbook clarifications
- Technical support
- Complaint handling
- District coordination
- Festival information
- Teacher resources

Why We Have Three

1. Cover the Critical Bases:

- **Financial** = Governance requirement (must have)
- **Membership** = Growth driver (must have)
- **Volunteer** = Engagement engine (must have)

2. Avoid Complexity:

- Too many options confuse users
- "Which workflow do I use?"
- Maintenance burden increases
- More workflows \neq better service

3. Catch-All Design:

- Membership inquiry can handle most questions
- Volunteer interest can handle committee work
- Financial is specific and required

4. Can Expand Later:

- Easy to add new workflows
- Same configuration pattern
- Proven system foundation

Why Financial Access Has a Checkbox

The Uniqueness of Financial Requests

Financial records are standardized:

- Ledgers exist in all organizations
- CPA reports are formal documents
- Budgets have standard formats
- Monthly statements are consistent

Unlike:

- Membership questions (infinite variety)
- Volunteer interests (personal and unique)

Benefits of the Checklist

For the Member (Requester):

- See what's available
- Know what to ask for
- Don't miss important documents
- Set clear expectations

For Secretary-Treasurer (Recipient):

- Immediate clarity on what to gather
- Can prioritize if busy
- Nothing forgotten
- Efficient preparation

For Governance:

- Clear audit trail
- Documented exactly what was requested
- Proof of transparency
- Defensible if questioned

For the Organization:

- Standardized process
- Consistent quality
- Meets handbook requirements
- Professional handling

Why Different Response Deadlines?

7 Days (Membership)

Rationale:

- Prospective members are shopping around
- Competitors respond faster
- Momentum matters for joining
- Simple information questions

- No complex preparation needed

Psychology:

- Quick response = we care
- Shows organization is active
- Builds trust immediately
- Encourages conversion

14 Days (Financial, Volunteer)

Financial - 14 days:

- Gathering records takes time
- May need to locate old documents
- CPA reports might be quarterly
- Secretary-Treasurer has day job
- Quality over speed

Volunteer - 14 days:

- President evaluating best fit
- May consult committee chairs
- Thoughtful matching important
- Relationship building, not transactional
- Quality placement over quick response

Why Different Recipients?

Secretary-Treasurer (Financial)

Only they can:

- Access financial records
- Understand accounting systems
- Know where records are stored
- Handle sensitive information

- Ensure proper procedures

Why not delegate:

- Fiduciary responsibility
- Handbook requires officer handling
- Control of sensitive data
- Expertise needed

System Administrator (Membership)

Best positioned because:

- Knows membership database
- Handles member accounts
- Understands fee structures
- Can look up member status
- Technical access to systems

Why not President:

- President shouldn't handle routine inquiries
- Admin can answer 90% of questions
- Frees President for leadership
- More efficient use of time

President (Volunteer)

Must be President because:

- Knows all committee needs
- Can identify leadership potential
- Personal touch matters for engagement
- Authority to create opportunities
- Relationship starts at top

Why not delegate:

- Volunteers are organization's future

- President's judgment for placement
 - Shows volunteers are valued
 - Personal connection is strategic
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CC List Philosophy

Why President CC'd on Financial

Oversight responsibility:

- Board governance
- Financial accountability
- Member relations
- Potential issues

Not on membership/volunteer:

- Informational nature
- Routine handling
- President trusts admins
- Reduces email volume

Why Everyone Gets Workflow Manager

System monitoring:

- Tracks all workflows
- Ensures nothing lost
- Can step in if needed
- Provides closure approval
- System health monitoring

Consistent across all workflows:

- Single point of oversight
- Complete visibility
- Quality control

- Backup if primary unresponsive
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Same Closure Approval - Why?

All workflows require workflow manager approval for closure.

Why same approver for all three?

1. Consistency:

- Same person, same standards
- Learns patterns
- Efficient review

2. Fairness:

- Equal treatment
- No favoritism
- Consistent quality bar

3. Practicality:

- One person can handle volume
- Doesn't require board member time
- Specialized role

4. Accountability:

- Single point of responsibility
- Clear who to ask
- Defined role

Could it be different?

- Financial → President could approve
- Membership → System Admin could self-approve
- Volunteer → President could approve

But current design is better:

- Workflow Manager is neutral
 - No self-approval issues
 - Separation of duties
 - Professional oversight
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Future Workflow Possibilities

Could Add:

Event Management Workflow:

- Plan festivals, competitions
- Route to: Programs Committee Chair
- Deadline: 30 days (planning takes time)
- Custom: Event type, date range, venue needs

Technical Support:

- Website, login, system issues
- Route to: System Administrator
- Deadline: 3 days (urgent)
- Custom: Issue type checklist

Handbook Questions:

- Interpretation, clarification
- Route to: Bylaws Committee Chair
- Deadline: 10 days
- Custom: Handbook section reference

District Coordination:

- District-level questions
- Route to: District Coordinator
- Deadline: 7 days
- Custom: District selection dropdown

Design Decision Summary

What's the Same (By Design)

☑ **Workflow engine** - Consistency, maintainability

☑ **Email system** - Predictable notifications

☑ **Closure approval** - Quality control

☑ **Audit trail** - Complete history

What's Different (By Purpose)

Routing - Right expertise handles each type

Deadlines - Urgency varies by nature

Form Fields - Financial needs specifics, others need flexibility

Access Control - Financial is member-only, others are public

CC Lists - Oversight varies by sensitivity

The Bottom Line

Your observation is correct: They're similar!

That's intentional:

- Simple is good
- Consistency helps users
- Easy to maintain
- Room to grow

The differences matter:

- Financial checklist serves governance
- Membership speed serves growth
- Volunteer routing serves engagement

It's a "Goldilocks" design:

- Not too many workflows (confusing)
- Not too few (one-size-fits-all)

- Just right for PMTNM's current needs
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Could you add more differentiation? Yes.

Should you? Maybe later, after seeing how these three work in practice.

Is the current design good? Yes! Simple, functional, room to grow.