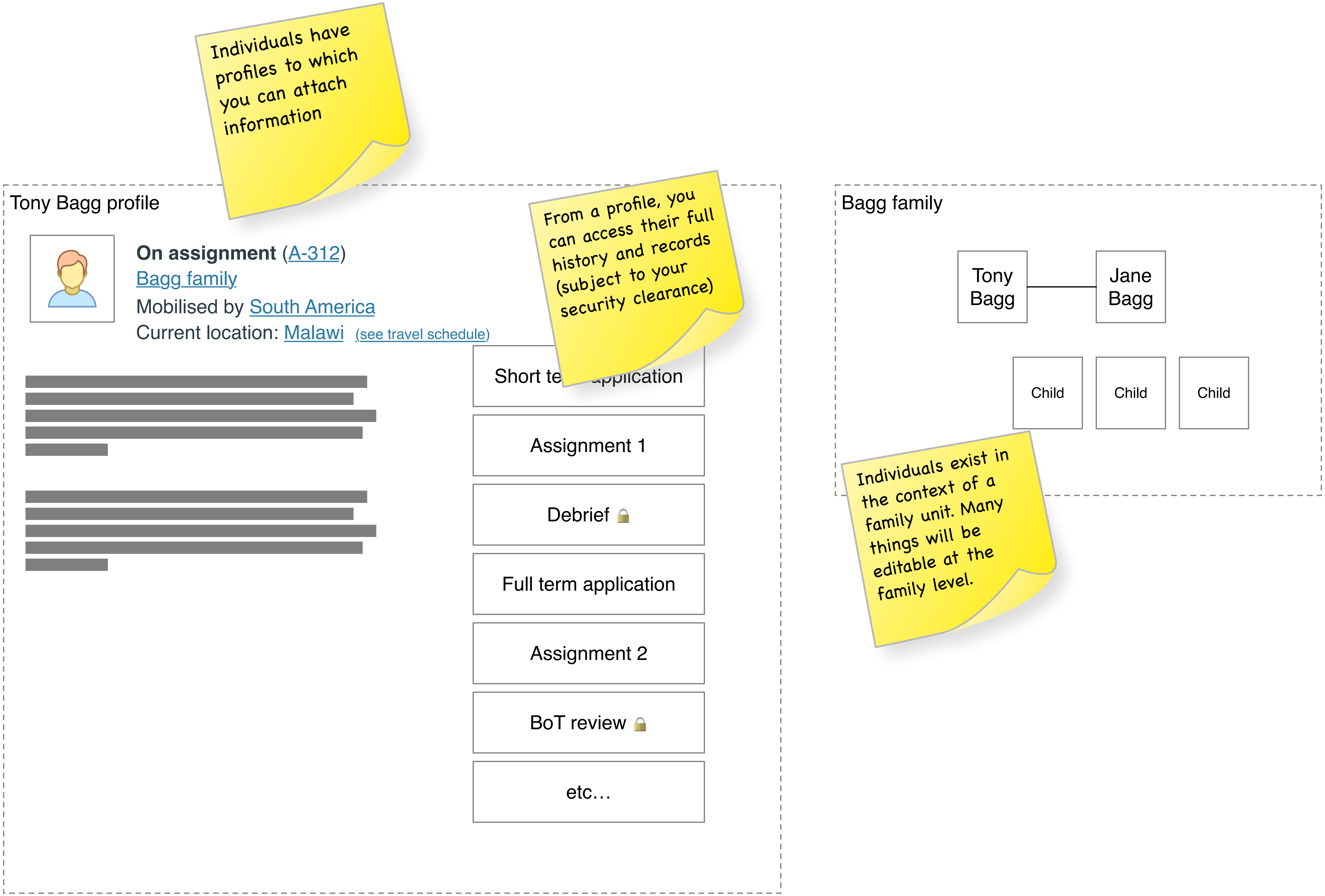
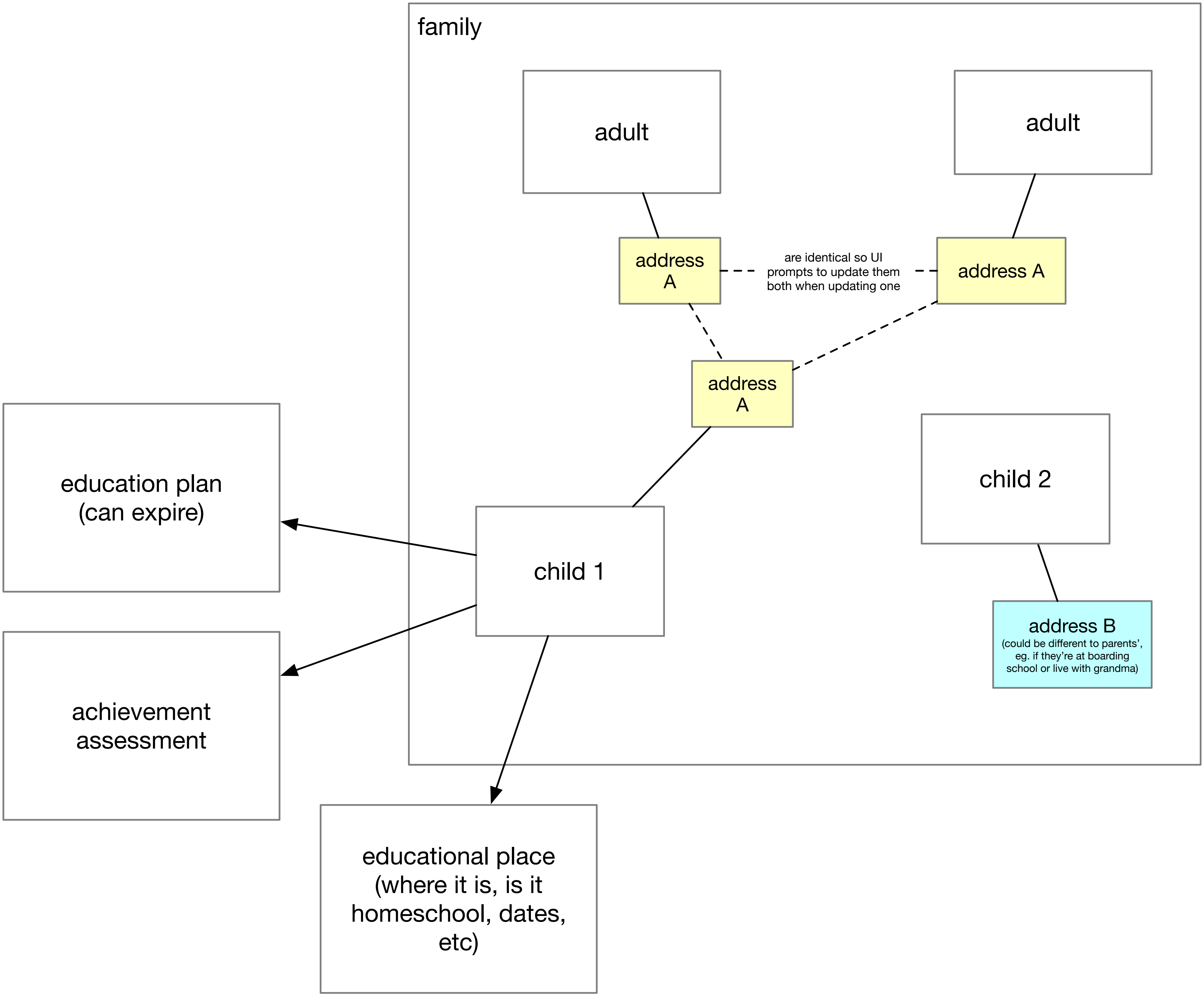
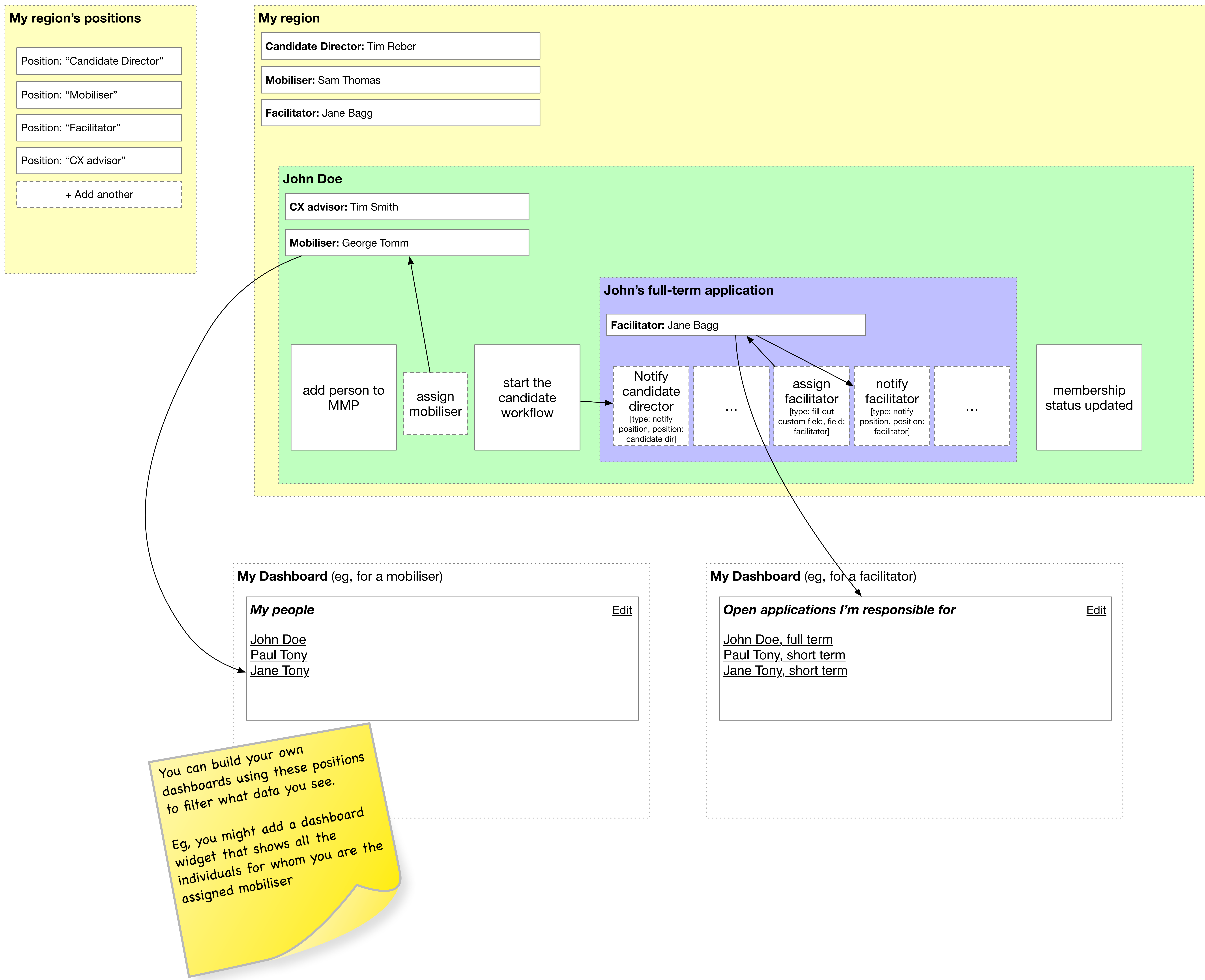
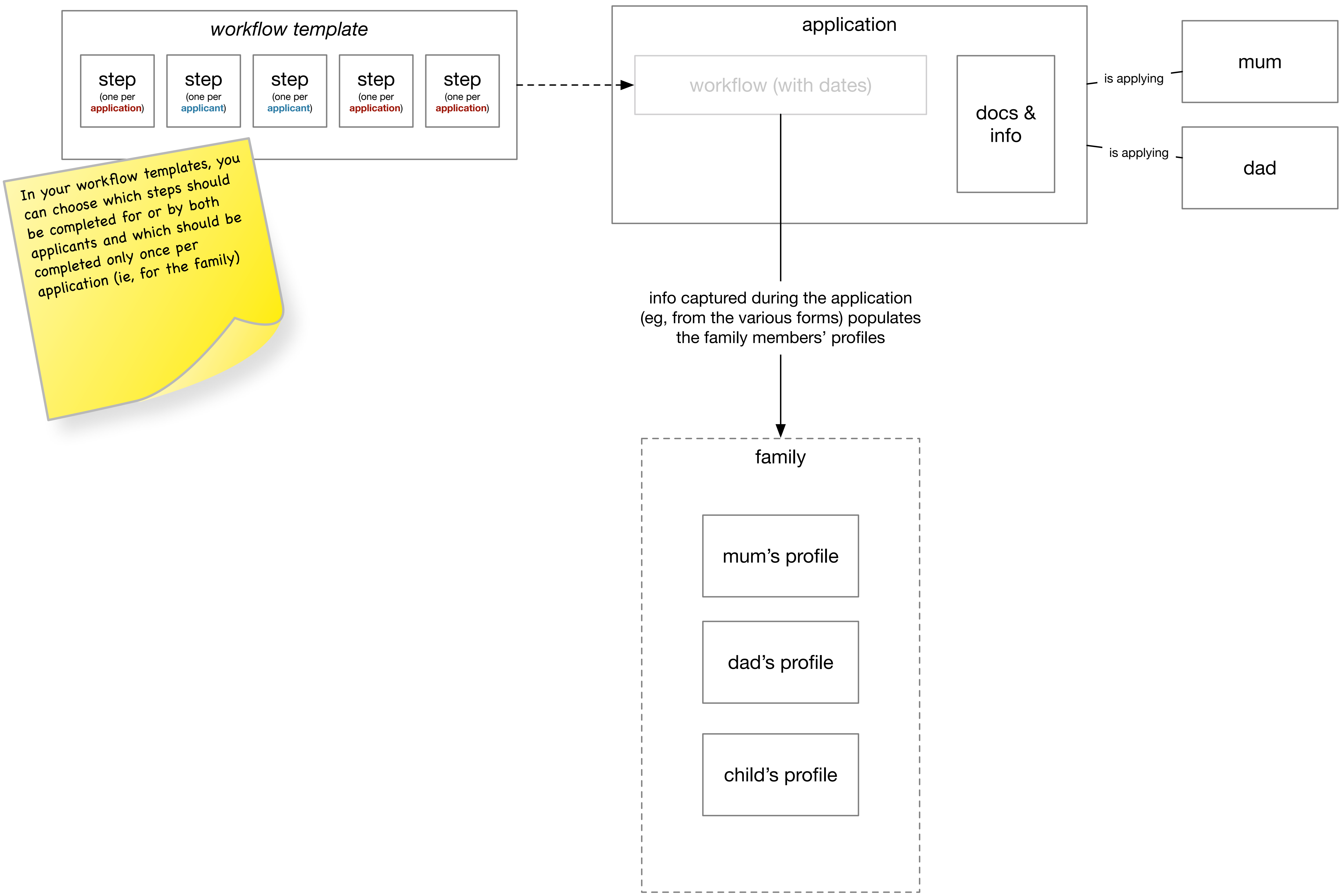


Individuals have profiles to which you can attach information
Tony Bagg profile
On assignment (A-312)
Bagg family
Mobilised by South America
Current location: Malawi (see travel schedule)
From a profile, you can access their full history and records (subject to your security clearance)
Short te
application
Assignment 1
Debrief
Full term application
Assignment 2
BoT review
etc…
Bagg family
Tony Bagg
Jane Bagg
Child
Child
Child
Individuals exist in the context of a family unit. Many things will be editable at the family level.

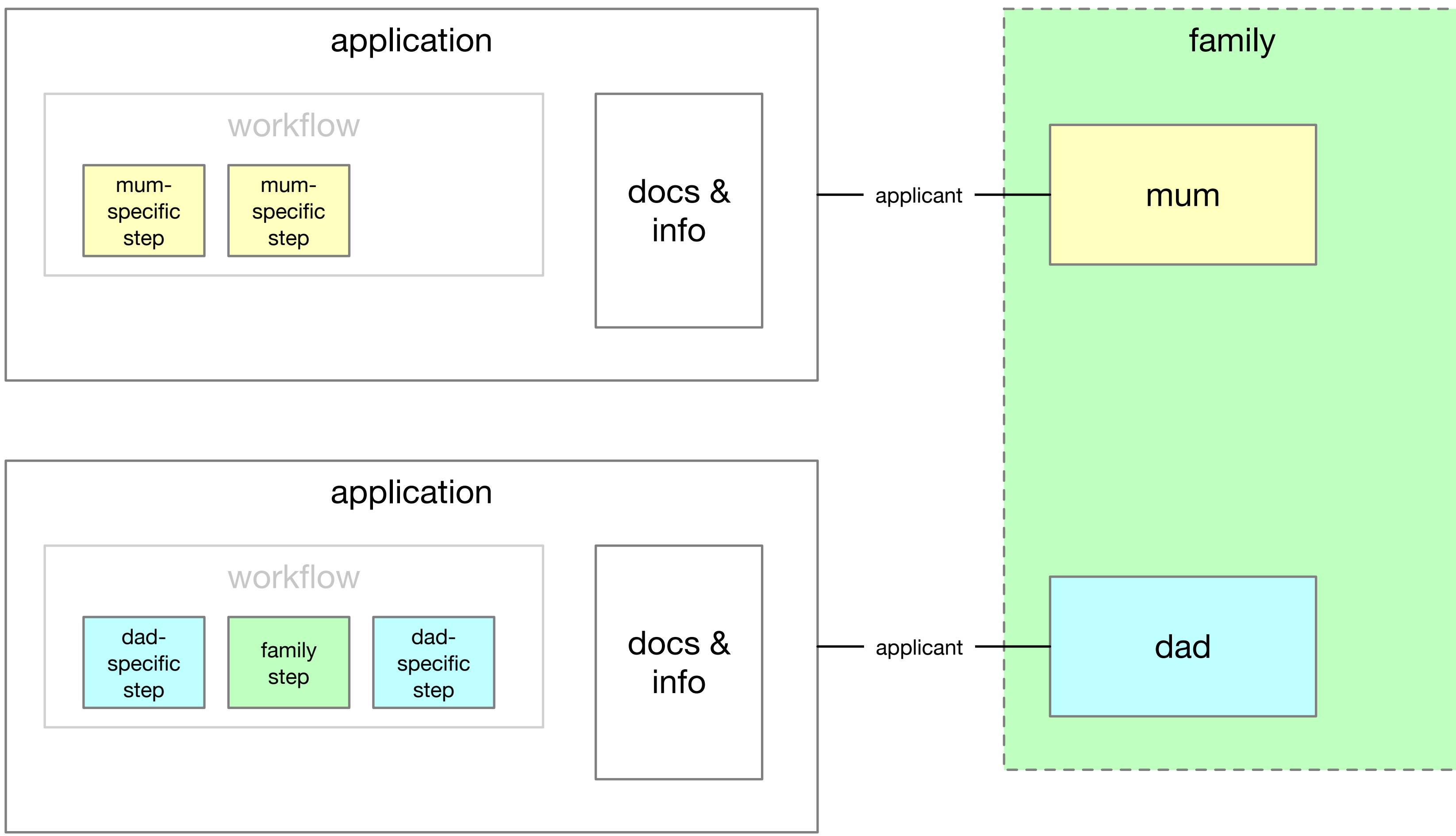

family
adult
adult
address A
are identical so UI prompts to update them both when updating one
address A
address A
education plan (can expire)
child 1
child 2
address B
(could be different to parents', eg. if they're at boarding school or live with grandma)
achievement assessment
educational place (where it is, is it homeschool, dates, etc)

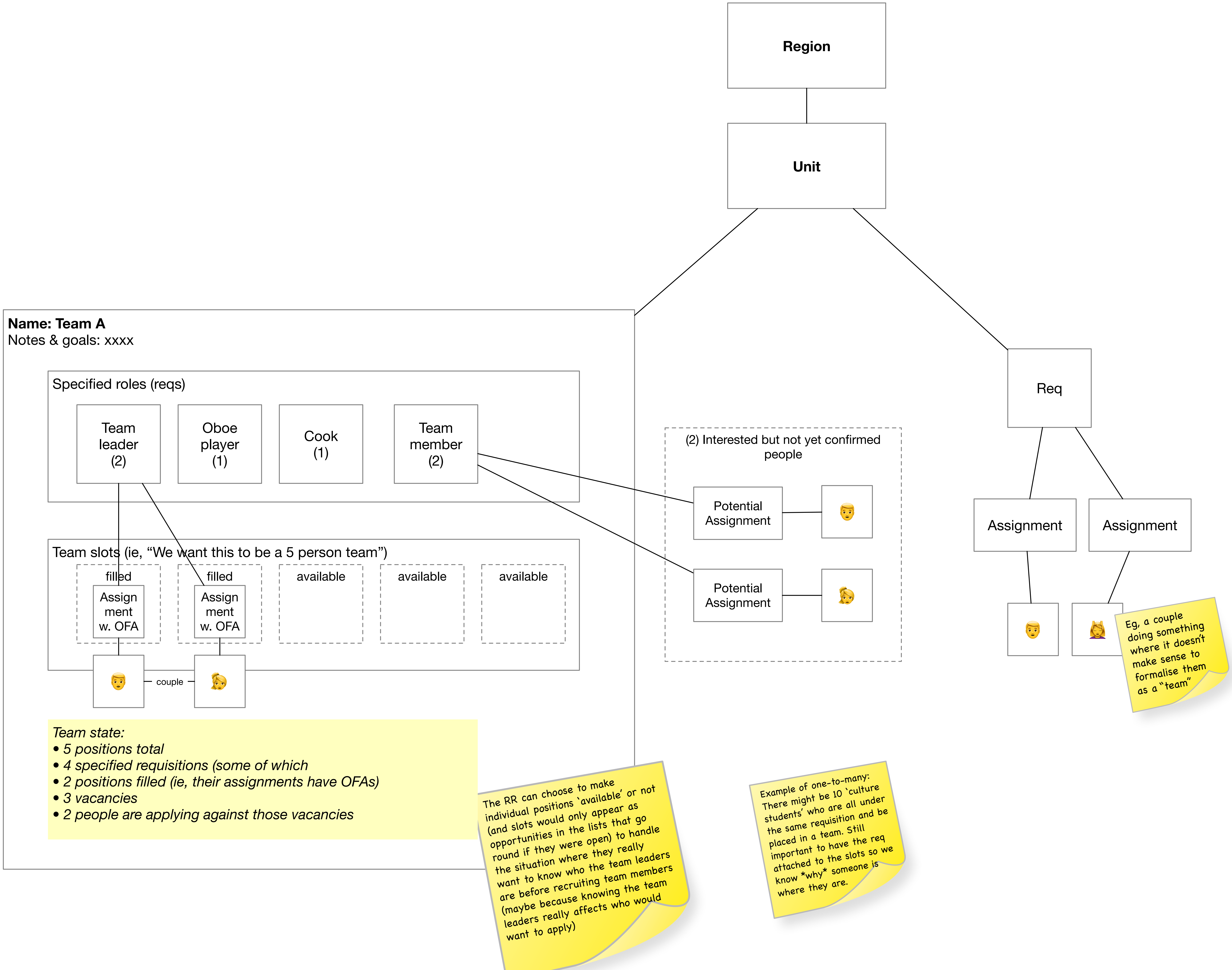

My region's positions
Position: "Candidate Director"
Position: "Mobiliser"
Position: "Facilitator"
Position: "CX advisor"
+ Add another
My region
Candidate Director: Tim Reber
Mobiliser: Sam Thomas
Facilitator: Jane Bagg
John Doe
CX advisor: Tim Smith
Mobiliser: George Tomm
add person to MMP
assign mobiliser
start the candidate workflow
John's full-term application
Facilitator: Jane Bagg
Notify candidate director [type: notify position, position: candidate dir]
...
assign facilitator [type: fill out custom field, field: facilitator]
notify facilitator [type: notify position, position: facilitator]
...
membership status updated
My Dashboard (eg, for a mobiliser)
My people
Edit
John Doe
Paul Tony
Jane Tony
My Dashboard (eg, for a facilitator)
Open applications I'm responsible for
Edit
John Doe, full term
Paul Tony, short term
Jane Tony, short term
You can build your own dashboards using these positions to filter what data you see.
Eg, you might add a dashboard widget that shows all the individuals for whom you are the assigned mobiliser

Taking a family through an application process



The alternative (which we think is not appropriate)





Region
Unit
Req
Assignment
Assignment
Name: Team A
Notes & goals: xxxx
Specified roles (reqs)
Team leader (2)
Oboe player (1)
Cook (1)
Team member (2)
Team slots (ie, "We want this to be a 5 person team")
filled
filled
available
available
available
Assign ment w. OFA
Assign ment w. OFA
couple
Team state:
• 5 positions total
• 4 specified requisitions (some of which
• 2 positions filled (ie, their assignments have OFAs)
• 3 vacancies
• 2 people are applying against those vacancies
(2) Interested but not yet confirmed people
Potential Assignment
Potential Assignment
Eg, a couple doing something where it doesn't make sense to formalise them as a "team"
The RR can choose to make individual positions 'available' or not (and slots would only appear as opportunities in the lists that go round if they were open) to handle the situation where they really want to know who the team leaders are before recruiting team members (maybe because knowing the team leaders really affects who would want to apply)
Example of one-to-many: There might be 10 'culture students' who are all under the same requisition and be placed in a team. Still important to have the req attached to the slots so we know *why* someone is where they are.

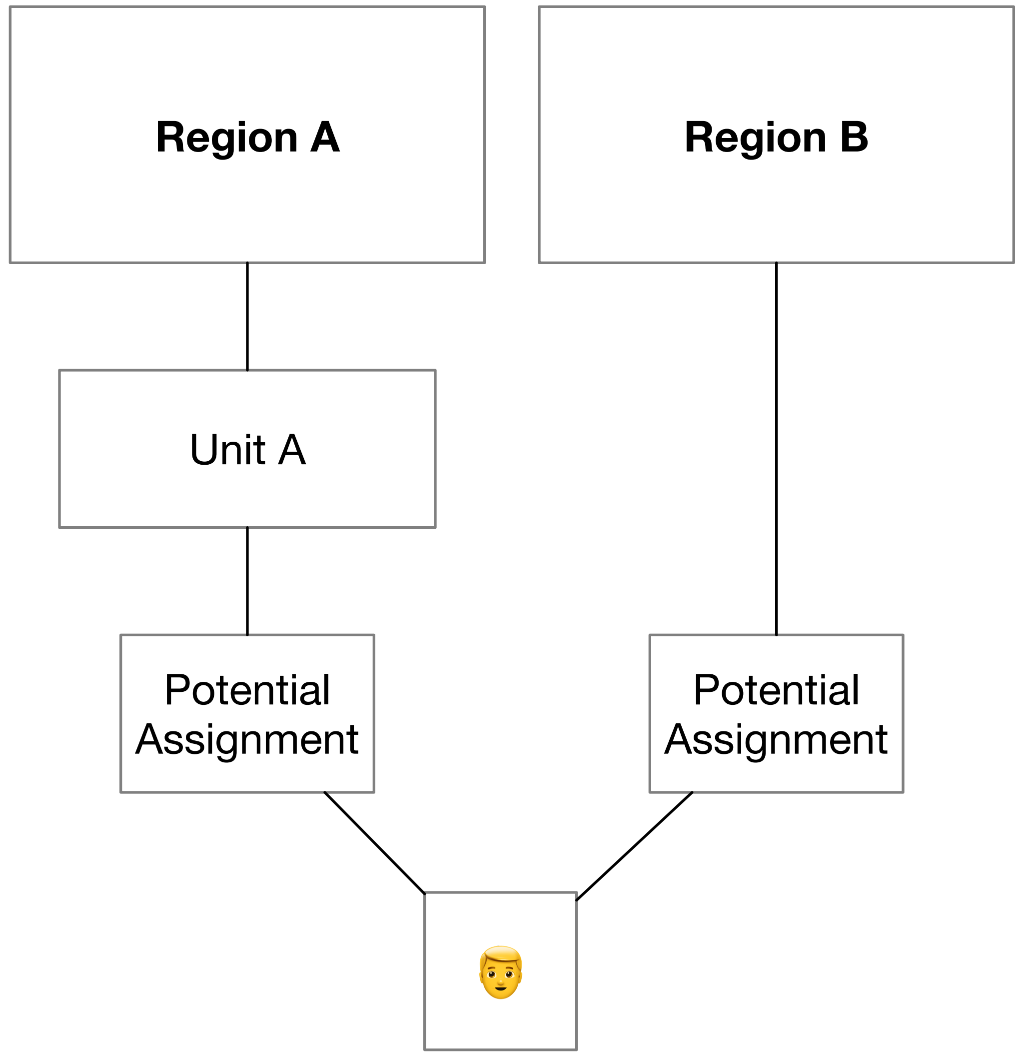
An example — placing someone into a team

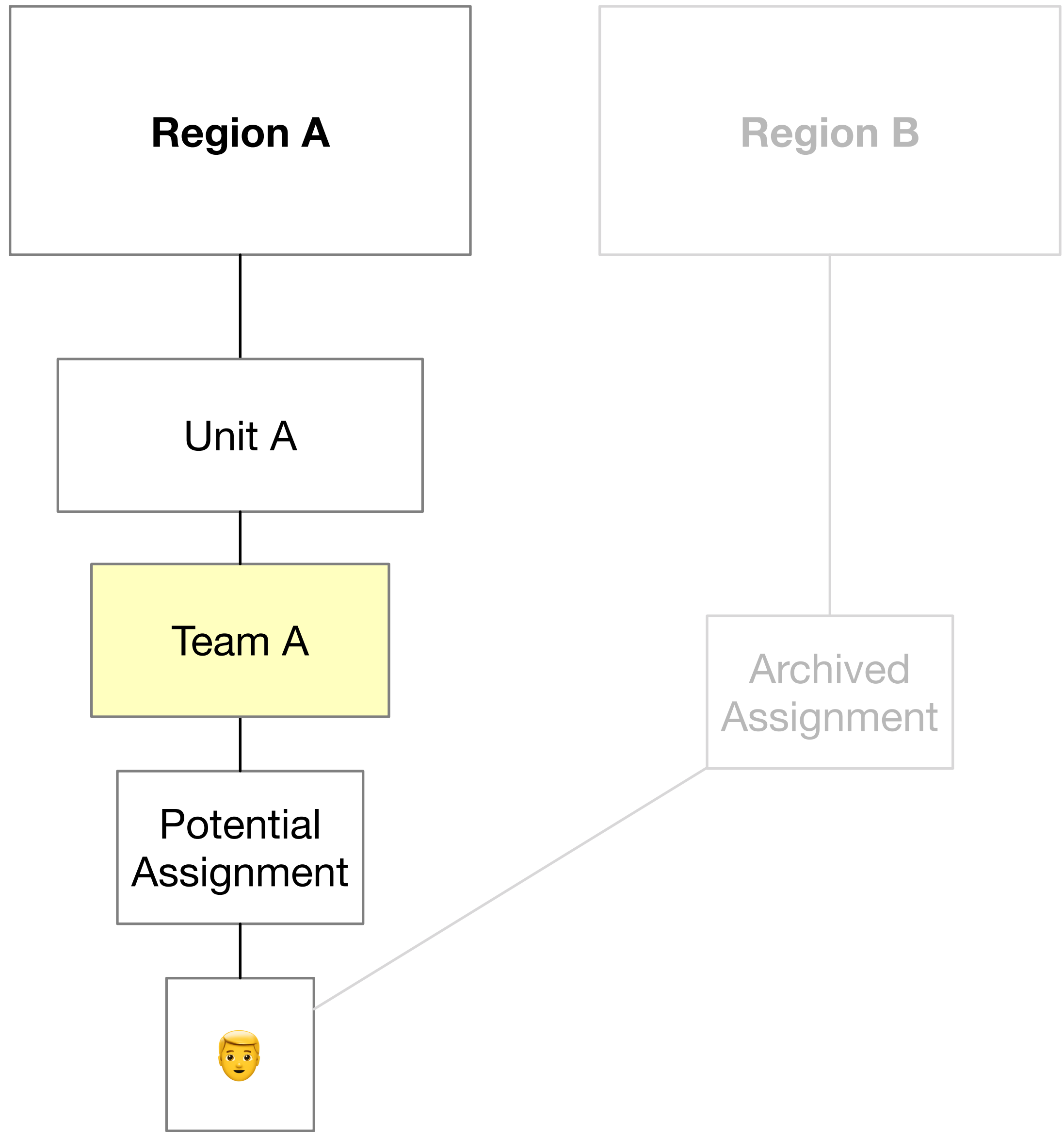
First, a person might have a potential assignment attached simply to a region or unit (eg, if this candidate has a heart for a particular country). They can has multiple assignments if you're exploring a number of possibilities. At this early stage, the assignment(s) needn't have much detail — they're really a placeholder for "We're exploring this region/unit/team/req for this particular person".

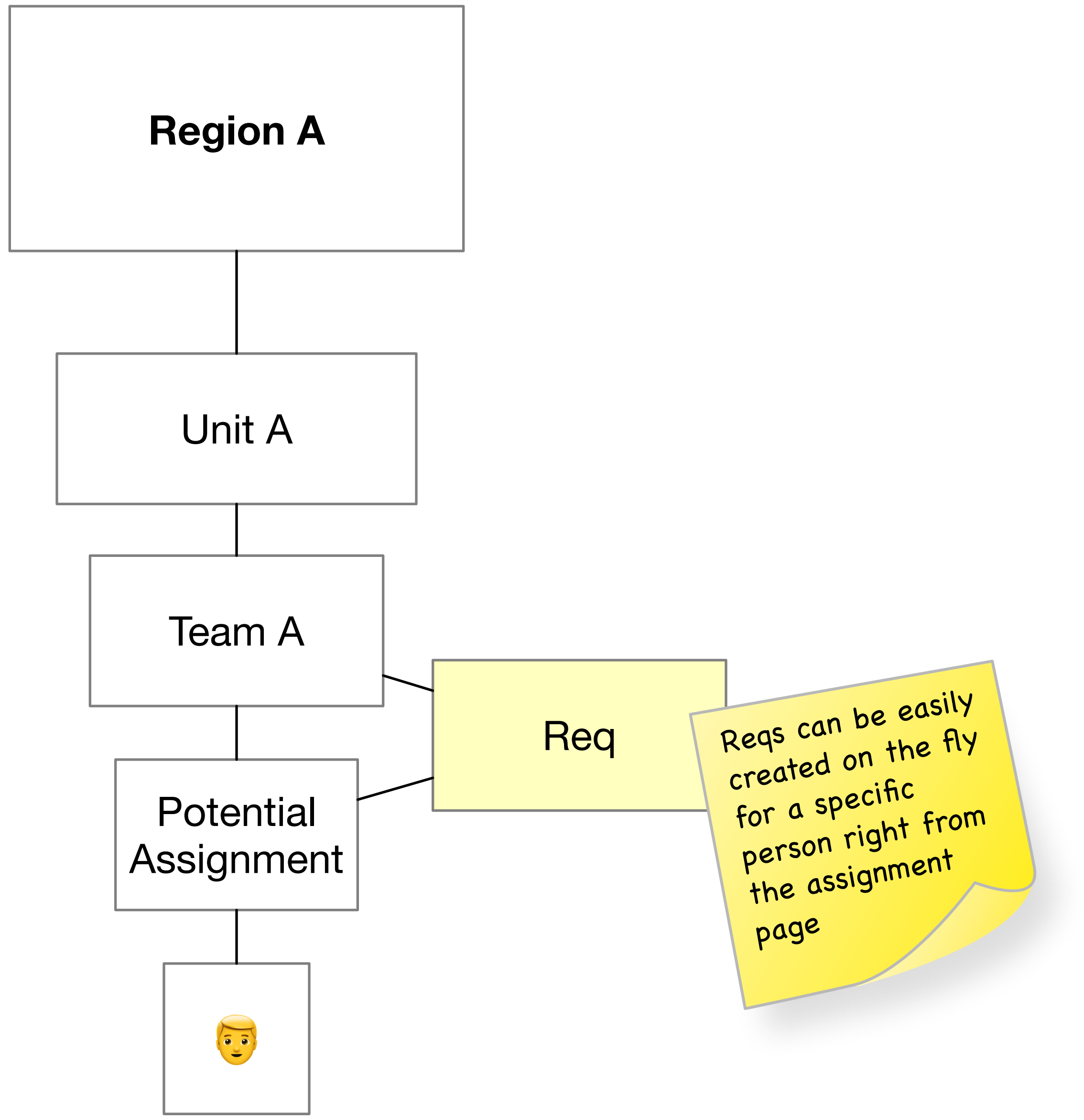
If, after conversations, the unit leader highlights a team that would be a great fit, the assignment is attached to that team. Other assignments might be ruled out along the way as you hone in on the right assignment for this person

Eventually, when this assignment is ready to be solidified, a req has to be attached to the assignment to formalise what the 'job description' is.

The req can be created on the fly specifically for this person (which will be simple to do right from the assignment page), or can be attached from the existing bank of available reqs.







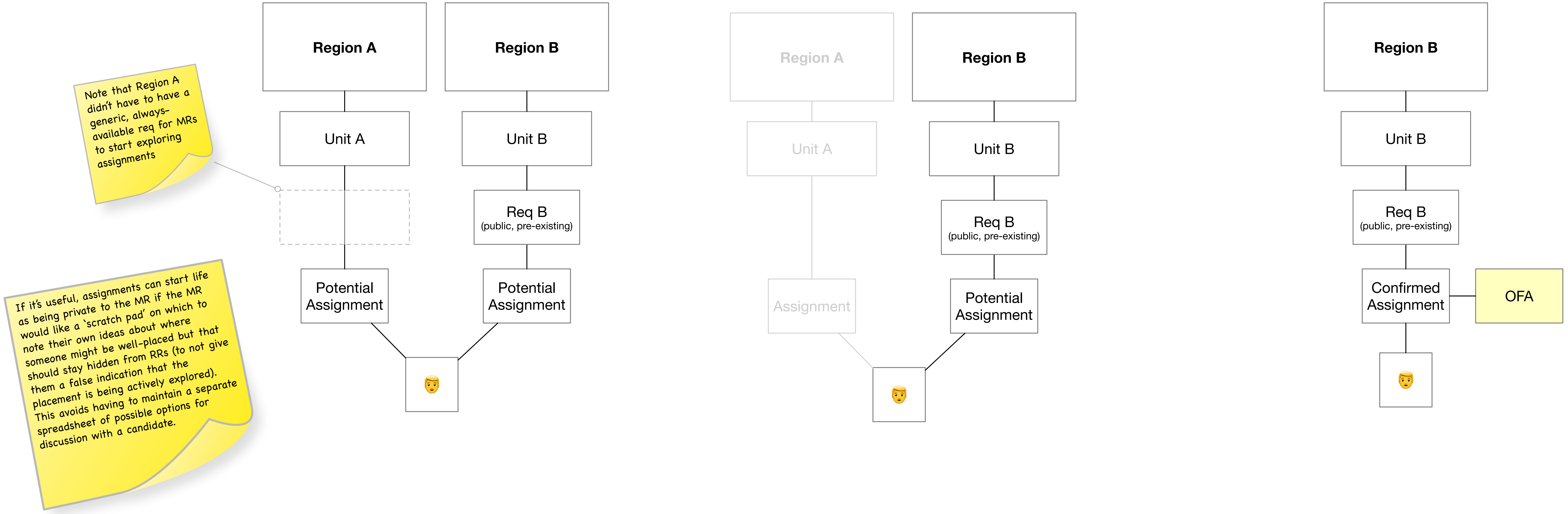
An example — placing someone against a pre-existing req

First, a person might have a potential assignment attached simply to a region or unit (eg, if this candidate has a heart for a particular country), or they might have found an existing req that's of interest. They can has multiple assignments if you're exploring a number of possibilities. At this early stage, the assignment(s) needn't have much detail — they're really a placeholder for "We're exploring this region/unit/team/req for this particular person".

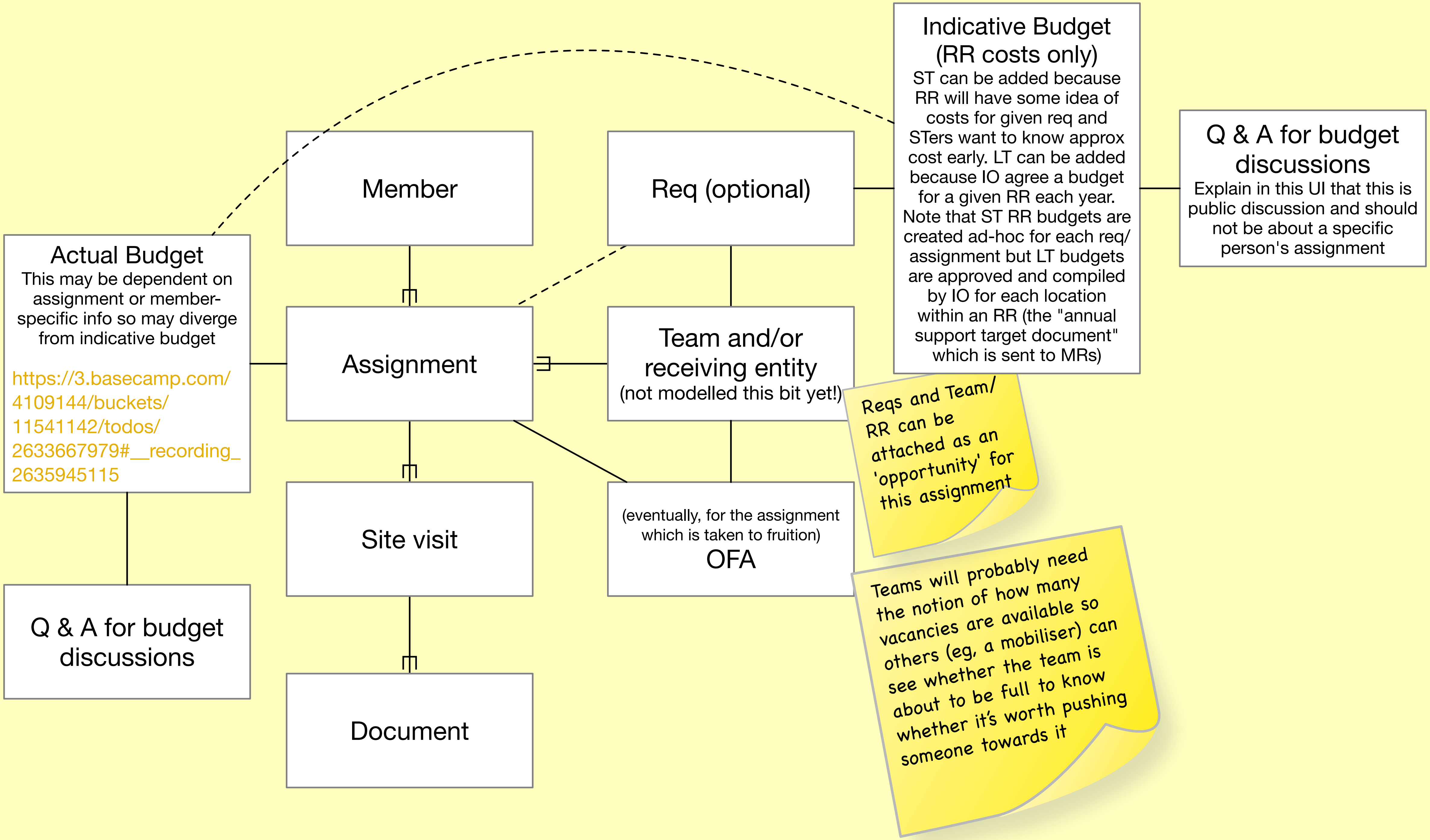
Other assignments might be ruled out along the way as you hone in on the right assignment for this person

Eventually, when this assignment is ready to be solidified, a req has to be attached to the assignment to formalise what the 'job description' is.

The req can be created on the fly specifically for this person (which will be simple to do right from the assignment page), or can be attached from the existing bank of available reqs.



Given that a site visit takes a candidate/member to a region, it makes sense to attach a site visit to a *Assignment* (which really just represents the link between an individual and a receiving region). That then also means the site visit can form part of the history of how this person got to be placed in a region (along with all the other discussions about that person's suitability, budgets, flight schedules, etc)



(only if we do integration with regional finance systems)

Regional finance system-specific mappings between fundraising pot and this budget pot

Budgets

Organisational entity responsible for Budget Planning: **United States**

“Support target – outbound”
$8,000
65% required for clearance
PROGRESS 62%

“Support target – recurring”
$450/month
100% required for clearance
PROGRESS 43%

+ Add another budget pot

[View IO support target document]

Indicative budgets from attached **[Requisition #35212]**
“Outbound”: $2,000
“Recurring”: $500/month

[Copy these values to this budget]
(only shown if there are no defined budget pots yet; there’s probably a better empty state UI to be had here)

Comments & Activity

Attachments (2)

- REF.xslx
- Sara Cola’s notes.xslx

Notes (only editable by budget owner, but visible to all)

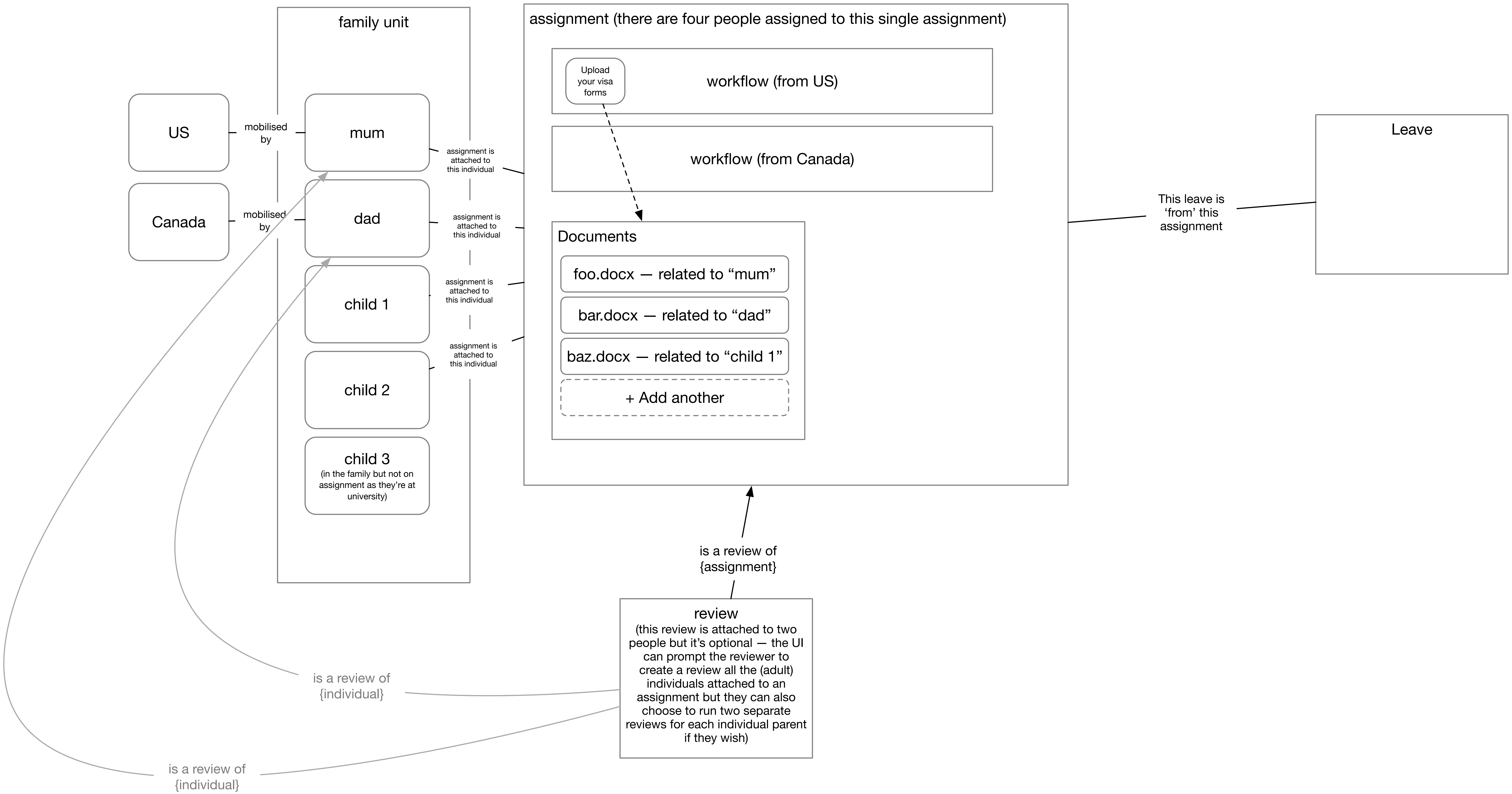
e.g. Personal Deposit amount: $800

Whichever org entity is response for budget planning is allowed to create budget pots. Other collaborators (eg, the RR who provide the RR-side budget) simply operate in comments and uploaded documents.

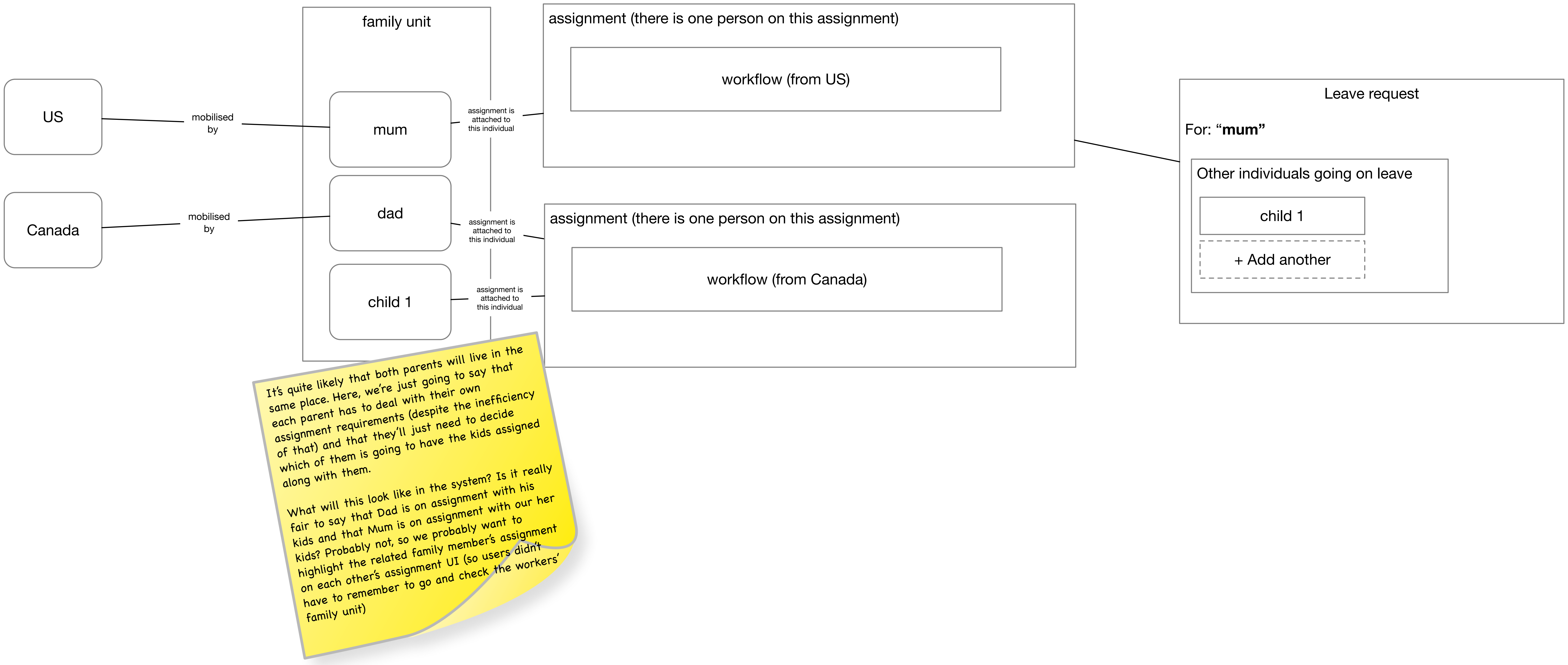
The separate pots are defined and could then be, if we do the integration with regional finance systems, be linked up to income streams (by providing an external identifier onto the MMP budget pots) to automatically track progress towards a budget pot.

[Show me all workflows of type "***Stage 1 Application Process"*** where ***APPLICATION*** "***Start Date***" = 2020, and "***financial clearance***" step is "***complete***"]
Joe Blogs
John Doe
Can report on workflow state
"Full Term First Assignment" workflow **template**
Member workflow (like Outbound)
✔ EQUIP online training
Language learning *(public)*
Office workflow
✔ Assign facilitator *(internal)*
✔ Get budget from RR *(internal)*
✔ Offer OFA *(public)*
Await OFA acceptance
Book ABO *(internal)*
Financial clearance *(public)*
Confirm start date *(public)*
Language learning added just for this workflow instance
Assignment, **as viewed by anyone other than MR**
OFA
OFA — offered, not yet accepted (separate entity with lifecycle, etc)
Budget
RR budget: $xxx
MR budget: $yyy
Financial clearance (not yet given)
Medical clearance (not yet given)
My own region-specific workflow summary (detailed view, editing)
Workflows' progress summary-
[ ] OFA accepted
✔ EQUIP training
[ ] Financial clearance
[ ] Medical Clearance
[ ] Language learning
A summary list of items drawn from the combined list of all public workflow items from all parties (MR, R, IO, etc.) attached to this assignment
Outbound schedule/itinerary
Site visit — Dec2020 (travel details within)
CONFIRMED
ABO — Mar2020 (travel details within)
CONFIRMED
Language learning, USA — Apr2020 (deatils within)
CONFIRMED
Start Date — May2020 (details within)
PROVISIONAL
Travel to field, {RR, location} — arrival on field: Dec2020 (details within)
✉️ Notifications and 📈 'incoming dashboard' when the itinerary is changed or when a date is coming up

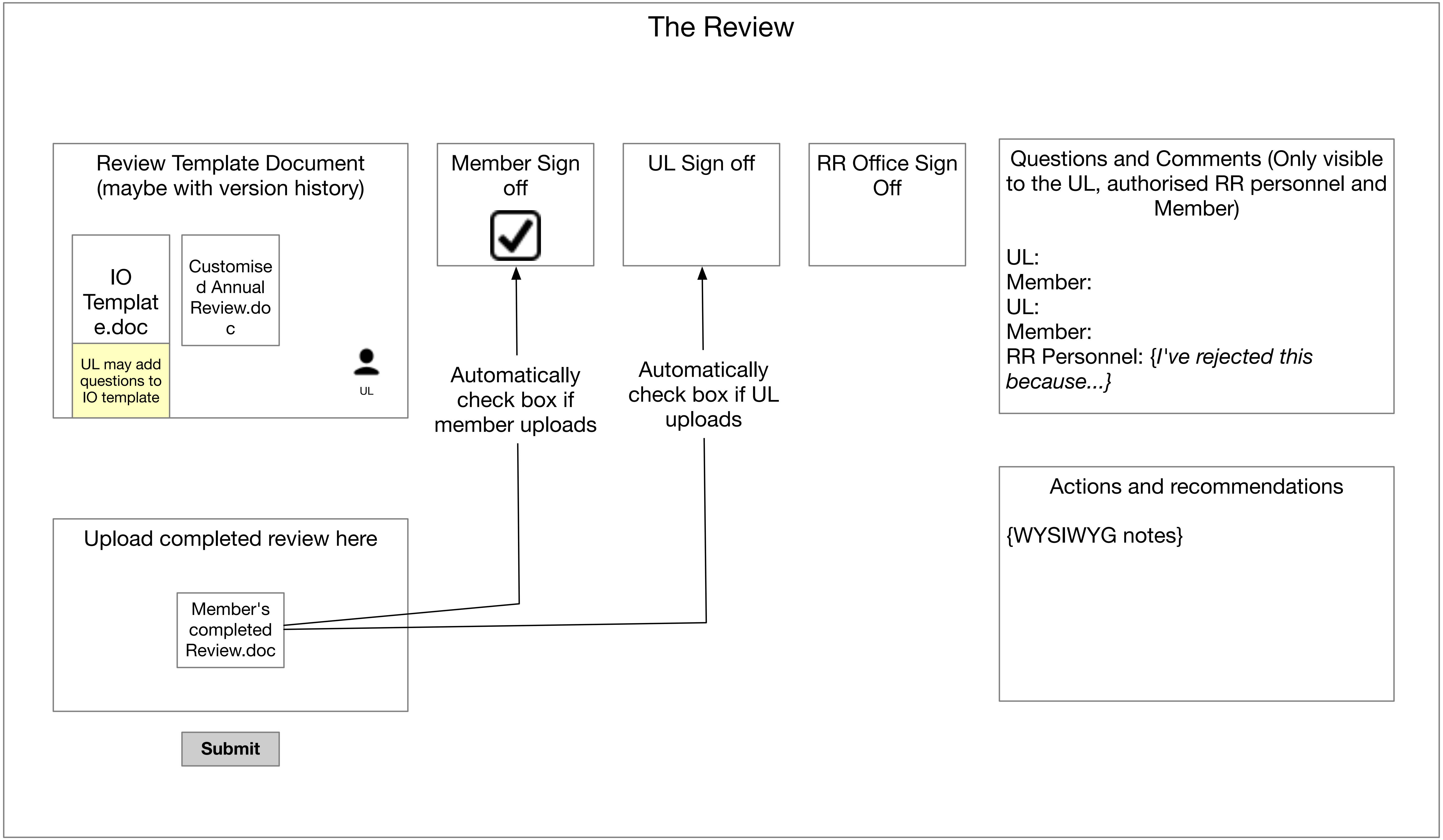
If a family are on the same assignment



If a family are on two separate assignments




Assignment Object
Assignment A
...
Medical Clearance
Financial Clearance
Flights Booked
...
Home Assignment
Debrief
Talk to Mobiliser
Update MPS
...
Assignment Object
Assignment B
...
Medical Clearance
Financial Clearance
Flights Booked
...
Time
Assignment Object
Assignment A
...
Medical Clearance
Jan 1989
Financial Clearance
Jan 1989
Flights Booked
Feb 1989
...
...
Medical Re-Clearance
Jan 2020
Financial Re-Clearance
Jan 2020
Flights Booked
Jan 2020
...
Home Assignment
This will use the itinerary list on the assignment object
At the start of HA, financial and medical clearance will be un-approved on the assignment object so that they can be re-approved before departure
Debrief
Talk to Mobiliser
Update MPS
Record provisional return date
...


The Review
Review Template Document (maybe with version history)
IO Template.doc
UL may add questions to IO template
Customised Annual Review.doc
UL
Member Sign off
UL Sign off
RR Office Sign Off
Questions and Comments (Only visible to the UL, authorised RR personnel and Member)
UL:
Member:
UL:
Member:
RR Personnel: {*I've rejected this because...*}
Automatically check box if member uploads
Automatically check box if UL uploads
Actions and recommendations
{WYSIWYG notes}
Upload completed review here
Member's completed Review.doc
Submit

Org Management
Leave Configuration
First Approval
Priority 1: "Team Leader" position for member's team
Priority 2: "Unit Leader" position for member's unit
Priority 3: "RAO" position
+ Add Another
Second Approval
Priority 1: "RAO" position
Priority 2: "REO" position
+ Add Another
+ Add Another
The idea of this is that the leave module works through the priority list until it finds a position, e.g. if someone is not placed within a team they would not have a team leader it would fall to UL, if they don't have a UL it would fall back to RAO
Positions (in heirarchy)
"REO"
"RAO"
"Unit Leader"
"Team Leader"
John Doe
Tim Fu
We'll need to handle having 2 team leaders who may share administrative responsibility
Di Alock holds "Unit Leader" position for Unit A
Ruth Raver holds "Team Leader" position for Team A
Requisitons, Teams and VSPs (not sure if this is a single or multiple contexts yet)
Unit A
Team A
Assignment
Is on assignment with
Member
Leave
Leave Request
Awaiting Approval from
Ruth Raver and Tim Fu
Tim can give leave permission on behalf of Ruth if she is not available (based on heirarchy)