

Product Requirements Document (PRD): Brosens Family Foundation App

1. Executive Summary

What is this app?

The **Brosens Family Foundation App** is a dedicated platform designed to digitalize and streamline the management of the foundation's charitable giving. It replaces the current manual Google Sheets workflow with a mobile-first, secure application where family members can vet opportunities, vote on proposals, and track real-time budget allocations.

Who is the primary user?

The four family members (Peter, Charlie, Tom, and John) who manage the foundation's grants .

- **Individual Users:** Responsible for proposing grants and voting on others' proposals.
- **Process Oversight (Tom):** Manages the process and documentation.
- **Foundation Manager (Dad):** Sets the annual budget and fund size.
- **Administrator (Brynn):** Executes the actual donations once approved in the app.

2. Technical Architecture

Layer	Technology
Frontend	Next.js (App Router), React, Tailwind CSS (Mobile-first)
Backend/Data	Supabase (PostgreSQL), Edge Functions
Auth	Supabase Auth (Email & Password as per user requirement)

State Management	React Query / SWR for real-time budget updates
Deployment	Vercel

3. Data Model & Schema

Core Tables

Table	Purpose
user_profiles	User roles (Admin, Member), assigned Individual Approval IDs .
grants_master	Central repository for all grant ideas, causes, and descriptions.
grant_proposals	Specific proposals seeking approval, linked to a budget year.
votes	Individual votes (Yes/No) and specific dollar allocations per user.
budgets	Annual definitions for Joint (75%) and Discretionary (25%) pools.
organizations	Directory of charities with Charity Navigator scores and links.

4. Core Feature Specifications

4.1 Authentication & Profile

- **Email/Password Login:** Secure entry for the four family members and the administrator.

- **Role-Based Access:** Standard members see voting/budgets; Admin (Brynn) sees execution cues; Oversight (Tom) can edit master settings.

4.2 Shared View: Foundation Dashboard

- **Reporting & Status:** A high-level view of the current "Master List".
- **Budget Tracking:** Real-time visualization of the Total, Joint, and Discretionary pools.
- **Grant Tracker:** List of all proposals categorized by status (To Review, Approved, Sent, or Declined).
- **Historical Impact:** Charts showing amount given to organizations by year.

4.3 Individual View: "My Workspace"

- **Personal Budget Tracker:** Individual remaining Joint and Discretionary balances.
- **Action Items:** A "To-Do" list of proposals requiring a vote or an allocation amount.
- **Personal History:** List of all gifts submitted by the user and their specific voting history.

4.4 Proposal & Blind Voting Engine

- **Submission Flow:** Form to add new giving ideas to the "Full Grant List" with organization details.
- **Blind Joint Voting:** * To ensure unbiased decisions, users cannot see other members' votes or allocations for a proposal until they have submitted their own.
 - UI triggers a "Vote Required" state in the Action Items; results remain masked (e.g., "3 of 4 votes in") until the final meeting.
 - Final amount is the average (or sum, per preference) of the four individual blind allocations.
- **Discretionary Voting:** * Proceeds unless there is a unanimous "No" from all other members.
 - Proposer is an automatic "Yes".

- Theoretical cap of **\$5M** per person per year.

5. Business Logic & Workflows

5.1 The Annual Cycle

- **January:** Review period for areas of improvement.
- **February:** Process oversight (Tom) proposes changes; budget resets on **Feb 1st**.
- **Year-End (Dec 31):** Deadline to allocate funds or they are considered "Unused" and revert to Dad & Mom.

5.2 Allocation Rules

- **The 75/25 Split:** 75% Joint, 25% Discretionary.
- **Flexibility:** Individuals can contribute more (but not less) to the joint pool.
- **Roll-over:** Support for tracking remaining budget from the previous year into the current year.

5.3 The "Reveal" & Meeting Stage

- **Meeting Sync:** A view specifically for the group meeting where blind votes are unmasked.
- **Decision Logging:** Once the live meeting confirms a decision, the status is updated to "Approved," which then notifies Brynn for execution.

6. Styling Conventions

- Tailwind CSS with custom tokens in ``app/globals.css``
- Theme support via ``next-themes`` (``system`/`light`/`dark``)
- Mobile-first responsive layout
- Shared chart styles in ``lib/chart-styles.ts``