CASE STUDY

YPO OC Admissions

An independent Airtable membership-admissions case study modeled on a 20-step nonprofit workflow.

Operational spine

Applicants carry status, owner, decision gates, event qualification, Board visibility, verification and sequential onboarding.

Safety boundary

All records are fictional. The interface is public and read-only; forms remain unpublished; automations are disabled; notification sends are mocked.

5	2	4	7
business tables	technical tables	unpublished forms	disabled automation shells

Case-study boundary

This independent prototype was created from the supplied technical specification. It is not YPO Orange County's live system. Airtable-native forms stand in for production Fillout forms, and all applicants, emails and decisions are fictional.

Live read-only portal

Open Dashboard | Open Applicant Profile

Prepared 22 August 2026 · Airtable portfolio case study

1. From specification to prototype

The prototype preserves the five business tables defined for the MVP and demonstrates the workflow's highest-risk controls while replacing live Fillout, email and applicant data with staged records and explicit audit evidence.

Specification requirement	Prototype response	Boundary
Twenty-step applicant progression	Statuses, owner changes, Next Step, Gate Result and audit examples	Representative disabled shells, not production triggers
Five Airtable business tables	Applicants, Events, Members, Event Feedback and Site Visit Feedback	All seeded records are fictional
Four Fillout forms	Four unpublished Airtable-native substitute forms	Production Fillout would update records through unique links
Dashboard + Applicant Profile	Public read-only Admissions Operations interface	Custom role interfaces remain a Phase 2 option
No orphaned or duplicated feedback	Applicant/Event/Member links, normalized keys and duplicate outcomes	No external form submission occurs

MVP implementation focus

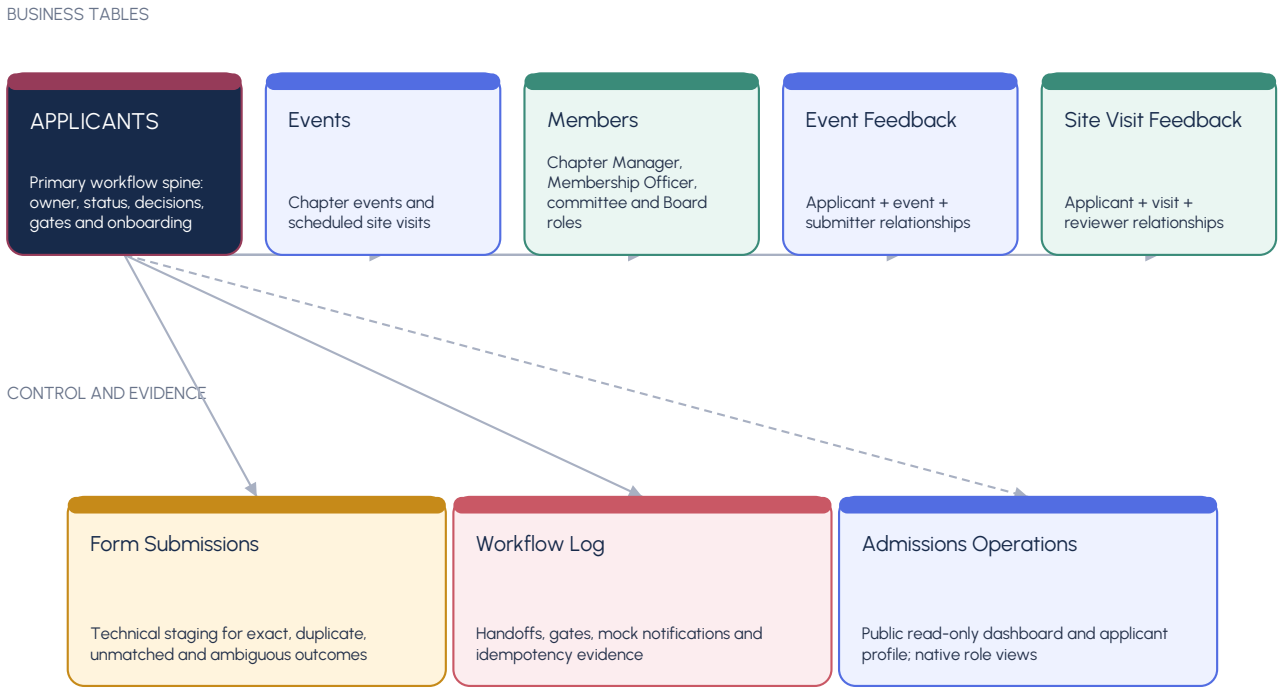
- Stable IDs, normalized email keys, explicit linked records and traceable ownership handoffs.
- Green, Orange and Red paths; three-event completion; Board and Site Visit gates; final vote and onboarding sequence checks.
- Manual-reminder and exception queues where the source specification deliberately defers timed reminders.

Deferred enhancements

- Automatic reminder schedules and timed non-responder alerts.
- Auto-generated consolidated PDF output.
- Additional fully custom role-specific interfaces beyond Dashboard and Applicant Profile.

2. Relational architecture

Applicants are the primary workflow spine. Events, Members and both feedback tables are linked business records; Form Submissions and Workflow Log are clearly labeled technical tables for staged matching, handoffs, deduplication and evidence.



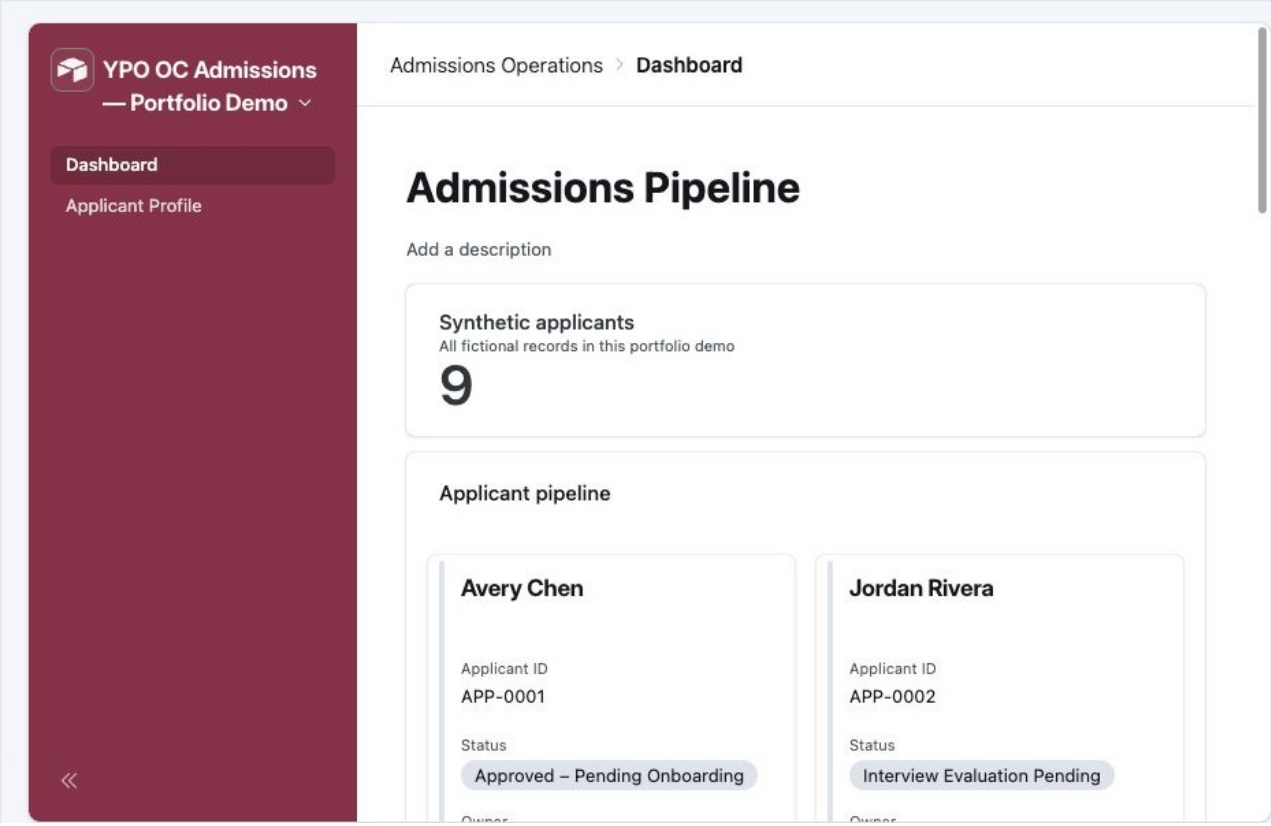
Control fields

- Applicant ID and Applicant Key create durable prefill targets; normalized email acts as a secondary match check.
- Next Step, Gate Result, Active / Closed, Three Event Gate and Exception Flags turn workflow state into visible operations.
- Feedback always links to the applicant, event or site visit, and named submitter where attribution is available.
- Workflow Log holds event keys and outcomes so replay, duplicate suppression and mocked notifications remain auditable.

> Production recommendation
>
> Fillout should use one unique prefilled link per applicant or reviewer and update the intended Airtable record directly. The staging table exists only to make match, duplicate and exception behavior demonstrable in this portfolio base.

3. Admissions Operations dashboard

The public read-only dashboard begins with a nine-applicant pipeline, then exposes current status, owner, Next Step, Gate Result and exception queues. It is designed for a Chapter Manager or Membership Officer to orient quickly before opening a record.



Admissions Operations - open the public Dashboard. Synthetic applicant cards show live source-table values; no client data is present.

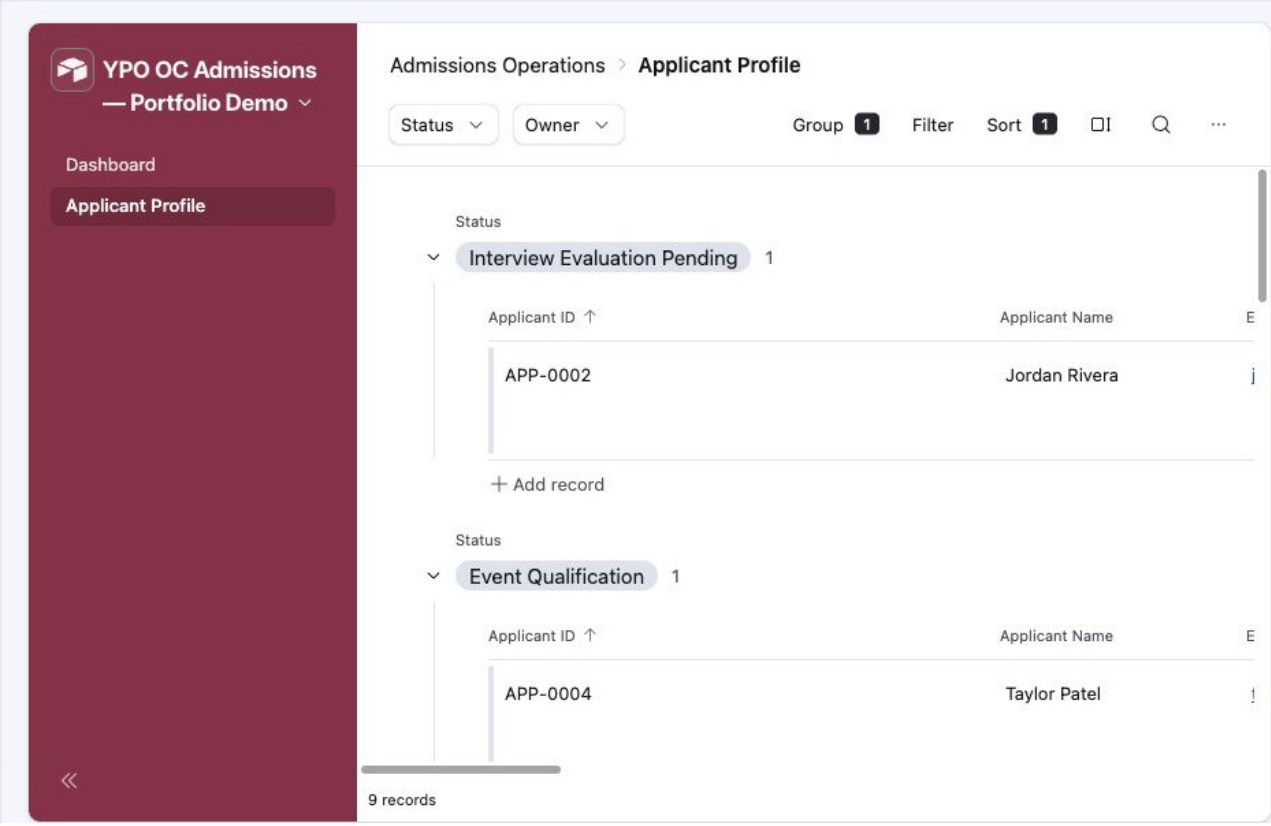
Pipeline
Nine fictional applicants span interview, event, Site Visit, Board, decline and onboarding states.

Ownership
Membership Officer and Chapter Manager queues make responsibility visible at handoff points.

Exceptions
Incomplete attendance, missing Board evidence and invalid onboarding sequence examples are intentionally seeded.

4. Applicant profile and role views

The Applicant Profile page groups the list by status and exposes Status and Owner filters. The source record carries the detailed application, interview, event, Board, Site Visit, verification, final review and onboarding fields.

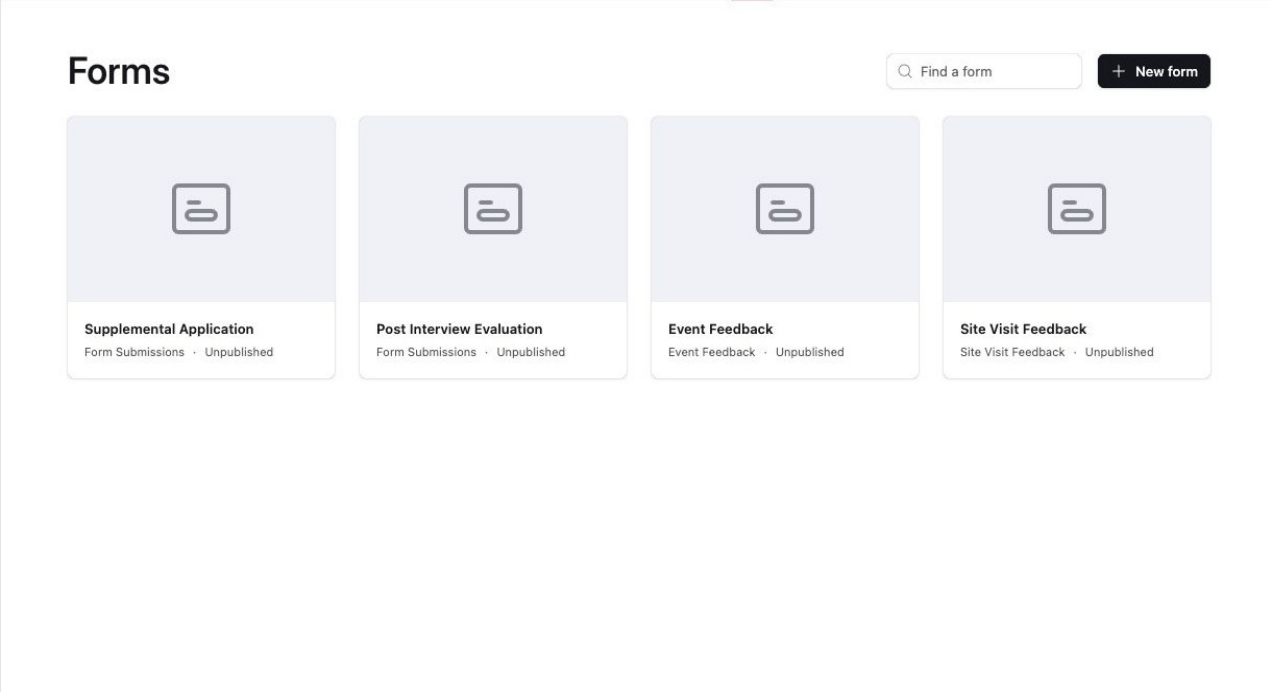


Applicant Profile - open the public read-only page. The grouped view exposes the pipeline by status while retaining a drill-down path to source records.

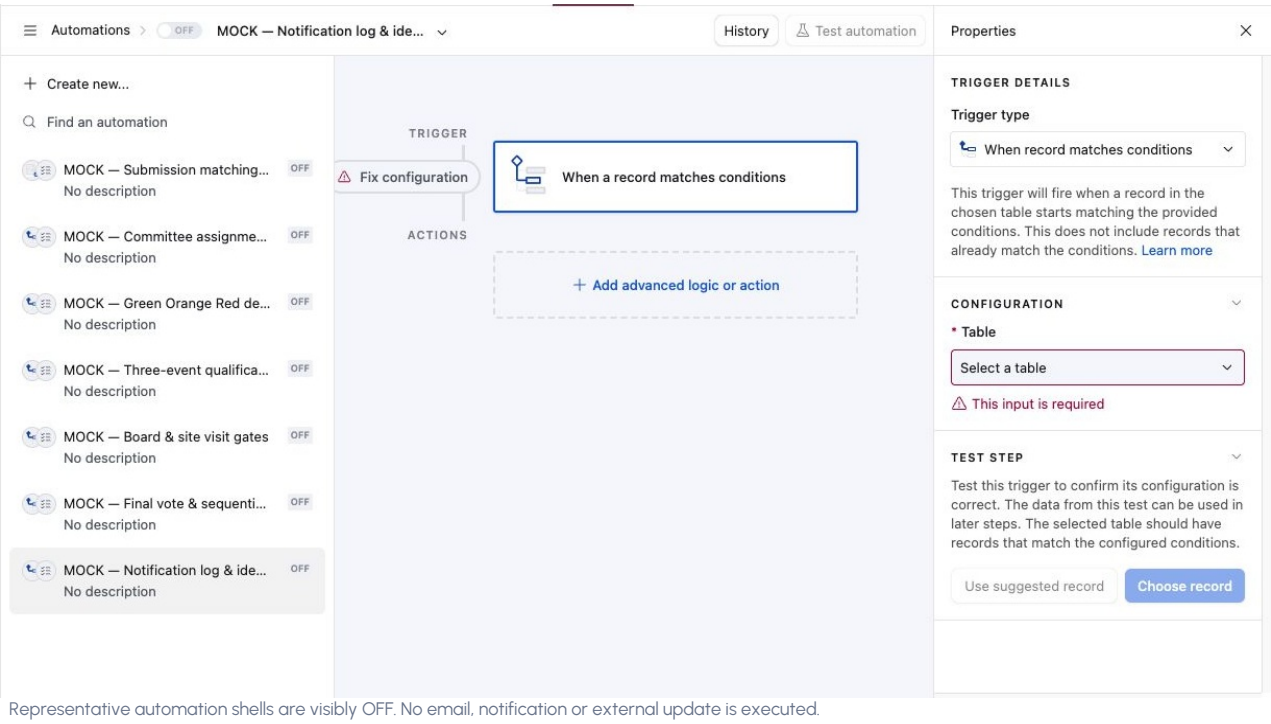
Native view	Operational purpose
Membership Officer Queue	Decision and final-review responsibility
Chapter Manager Queue	Coordination, events, Site Visit and onboarding work
Committee Assignments	Interview-evaluation workload and linked member attribution
Active / Closed / Manual Reminders	Lifecycle separation and Phase 1 manual follow-up
QA Exceptions	Exception Flags is not empty

5. Forms and automation controls

Four Airtable-native forms are preserved as unpublished portfolio substitutes. Seven representative automation workflows remain OFF by design; the Workflow Log demonstrates expected handoff and notification outcomes without sending anything.



All four form substitutes are unpublished.



Representative automation shells are visibly OFF. No email, notification or external update is executed.

6. QA evidence

Result	Test	Evidence
PASS	Data volume	9 applicants · 7 events · 9 members · 5 event feedback · 3 site feedback · 6 staged submissions · 10 logs
PASS	Relationships	Applicant↔committee, three events, Site Visit, both feedback tables and Workflow Log links are populated
PASS	Green path	APP-0001 reaches Approved – Pending Onboarding with all three events and completed Site Visit evidence
PASS	Orange hold	APP-0002 remains active with HELD – Orange decision unresolved
PASS	Red closure	APP-0003 is Closed Declined and removed from active lifecycle logic
PASS	Three-event gate	APP-0004 exposes EVENT ATTENDANCE INCOMPLETE
PASS	Board gate	APP-0005 is blocked until Prospect Presented to Board is true
PASS	Site Visit linkage	APP-0006 links to its scheduled Site Visit and feedback evidence
PASS	Sequential onboarding	APP-0007 blocks payment-before-start; APP-0008 blocks activation-before-confirmation
PASS	Matching outcomes	Exact, processed, duplicate replay, unmatched and ambiguous staged submissions exist
PASS	Safety state	Public interface is read-only; 4 forms unpublished; 7 automation shells OFF

Scope boundary

The prototype demonstrates the proposed data architecture, workflow controls and QA approach. Production Fillout configuration, email deliverability testing, stakeholder UAT and deployment into YPO-owned accounts remain implementation activities.