

Pre Award vs Post Award



Two Paths, One Goal:

Sustainable Funding Without Chaos

Pre Award

(Winning without Burning Out)

- Go/No Go
- Donor Fit Memo + Alignment
- Evergreen Core
- QA Before Sending

Sustainable Funding

Post Award

(Complying without Chaos)

- IGROW Sprints for Reporting/Compliance
- RACI + Tracker + Evidence
- Contract → Action → Evidence

No Chaos!

POST-AWARD PROCESS

Overall objective

Install a **replicable, audit-ready post-award system** within the NGO to execute the grant with control, ensure **traceable evidence**, produce consistent reporting (narrative + financial + MEL), manage changes without improvisation, and close the project without chaos—leaving an internal, team-operated capability in place.

Specific objectives

1. Turn post-award problems into measurable execution (sprints) using **IGROW** to define **Issue / Goal / Root Cause / Options / What's next**, with verifiable outputs, owners, dates, evidence, and a clear **Definition of Done**.
2. Standardize ownership and coordination by installing **RACI + handoffs + rules (SLAs/escalation)**, plus an operational tracker and minimum rituals (**Weekly Ops, Reporting Checkpoint, Evidence Hour**) so progress and blockers are visible—and solvable.
3. Ensure traceability, consistency, and compliance through a **minimum viable Data Room + Evidence Map, a Reporting Pack** (template + cross-consistency checklist), and a **change control + 30-day CAP** system—closing with a **closure checklist + audit-ready final archive + evidence index**.

What gets installed in 8 weeks (macro view)

A post-award operating system that makes **execution, evidence, reporting, changes, and closeout** predictable, traceable, and audit-ready—without relying on constant firefighting.

- **Macro theme:** Operations + evidence + reporting + change control + audit-ready closeout (with 30/60/90 adoption)
- **Macro goal:** turn recurring problems into sprints with verifiable outputs, owners, dates, and evidence (**IGROW + RACI + tracker + data room + reporting pack + CAP + closure**)

End-of-program outcomes (8 weeks) aligned to the IGROW method

IGROW works because it turns post-award into a repeatable cycle: real problem → measurable goal → root cause → operational decisions → evidence-based execution → audit-ready closeout.

– Issue (a real problem)

What we work on

- Define the post-award issue using **facts and evidence**, not perceptions:
 - late reports or reports that require multiple correction rounds
 - scattered evidence (not audit-ready)
 - budget vs. actuals that “don’t reconcile”
 - weak indicators / weak MoV (Means of Verification)
 - procurement files that are incomplete
 - partners/subgrantees who don’t report on time

Ground the problem in a real case (one grant) with deadlines, risks, and baseline documents ready (Week 0).

Associated win (by the end of the process)

- The NGO moves from “post-award = firefighting” to a visible operating system because:
 - there is a single, navigable data room,
 - there is a clear diagnosis (top 3 pain points) and a focused improvement priority,
 - the work is anchored in a real grant with traceability.

Evidence you can show

- **Template B (Week 0):** Top 3 pain points diagnosis + evidence (completed)
- **Template C (Week 0):** Baseline documents list with links and owners
- **Repository structure (Week 0):** naming conventions and versioning rules applied

– Goal (a measurable goal)

What we work on

- Turn “improve reporting/compliance” into a **measurable, time-bound goal**:
 - a **30-day objective** (e.g., reduce time to v1.0, reduce rework, increase % of linked evidence),
 - plus **2-week sprint goals** (Week 1): metrics + targets + expected evidence
- Define what “done” means with a **verifiable Definition of Done** (links or artifacts).

Associated win (by the end of the process)

- The NGO stops measuring progress by “effort” and starts measuring it by **verifiable outputs**, because:
 - every sprint has a goal with metrics and evidence,
 - the team knows when something is truly finished (Done).

Evidence you can show

- **Template E/F (Week 0)**: 30-day objective + 1-page plan with minimum habits
- **Template B (Week 1)**: 2-week Sprint Plan with goals, outputs, owners, dates, and evidence
- **Template C (Week 1)**: “Done” library used in the tracker/reporting workflow

– Root Cause (Underlying cause)

What we work on

- Identify why problems repeat (not just the symptoms), typically:
 - lack of ownership (no single “A”)
 - informal handoffs (“I thought you were doing it...”)
 - evidence with no owner and no standard
 - missing response/decision rules (SLAs and escalation)
 - unlogged changes → inconsistencies in reporting
- Install the structural “cure”: **RACI + handoffs + rules of engagement** (Week 2).

Associated win (by the end of the process)

- The NGO eliminates the “everyone weighs in, no one decides” pattern because:
 - every critical deliverable has **exactly one A**,
 - handoffs and deadlines are defined,
 - SLAs and escalation rules exist to unblock work fast.

Evidence you can show

- **Template A (Week 2)**: Post-award RACI (complete; 1 A per row)
- **Template B (Week 2)**: Handoffs (what/format/when/where)
- **Template C (Week 2)**: SLA + escalation rules + Done per deliverable

– Options (real options and operational decisions)

What we work on

- Design and choose practical options that make the system executable, for example:
 - install an operational tracker (Week 3) and minimum rituals
 - create an Evidence Map and evidence tickets (Week 4)
 - implement a Reporting Pack (Week 5) for cross-consistency
 - define how deviations will be handled: change control + CAP (Week 6)
- Prioritize what moves the needle first (not 50 improvements at once).

Associated win (by the end of the process)

- The NGO moves from “chat-based coordination” to board + rituals + evidence because:
 - the tracker shows what’s in progress, blocked, and due next,
 - reporting advances by sections (not “everything at the end”),
 - evidence is requested and closed through tickets and links.

Evidence you can show

- **Template A (Week 3)**: Operational tracker v1 with owner/date/status/evidence/blockers
- **Agendas (Week 3)**: Weekly Ops + Blockers Triage + Reporting Checkpoint
- **Template A (Week 4)**: Evidence Map v1 with real links (or “Missing” with owner/date)
- **Templates A/B (Week 5)**: Reporting template + cross-consistency checklist

– What's next (sustained execution + closeout)

What we work on

- Turn decisions into sustained, traceable execution:
 - run sprints with lightweight follow-up (**Weekly Ops + Evidence Hour + Reporting Checkpoint**)
 - formalize deviations: **issue log / risk register / change log / decision log**
 - execute a **30-day CAP** (corrective actions with closure evidence)
 - prepare closure/audit readiness (**closure checklist + final archive + evidence index**)
 - package everything into a **Capstone + 30/60/90 Playbook** (adoption)

Associated win (by the end of the process)

- The NGO is left with internal capability to:
 - report consistently (narrative ↔ MEL ↔ finance ↔ evidence),
 - manage changes without improvisation (everything logged),
 - close grants audit-ready (answer requests in minutes),
 - operate the system without depending on a single person.

Evidence you can show

- **Templates (Week 6):** 30-day CAP + CAP tracker + change log + decision log + mini risk register
- **Week 7:** Closure checklist, final archive structure, evidence index, 1-page lessons learned
- **Week 8:** Navigable capstone bundle + 30/60/90 playbook with rituals, owners, and metrics

WEEKLY PLAN

Week 0 – Onboarding (60–90 min)

Theme: Real case + minimum setup to operate (no improvisation starting Week 1)

Objectives:

- Select **one real grant/project** (or simulated) with useful deadlines/risks
- Ensure baseline docs are accessible (agreement, budget, reporting, compliance)
- Set up a **minimum viable data room** (structure + naming + versions)
- Run the diagnosis: **top 3 pain points + measurable 30-day goal**
- Put 3 minimum habits on the calendar (**Weekly Ops, Reporting Checkpoint, Evidence Hour**)

Templates / tools:

- **Template A:** Case selection
- **Template B:** Top 3 pain points diagnosis + evidence
- **Template C:** Baseline docs checklist
- **Template D:** Repository structure (Post-Award)
- **Template E/F:** 30-day objective + 1-page plan
- **Tool:** Drive/SharePoint/Dropbox as the **single source of truth**

Deliverables:

- Defined case + risk/deadline context
- Diagnosis + 30-day goal
- Operational repository created
- Missing docs list with owners
- 1-page plan + real calendar

Week 1 – IGROW as the sprint engine (2-week sprint)

Theme: Turn one post-award issue into an executable sprint with evidence and a verifiable Done

Objectives:

- Install IGROW as a repeatable method (Issue → Goal → Root Cause → Options → What's next)
- Design **Sprint Plan v1** (2 weeks) with 2–4 outputs, owners, and evidence
- Define a minimum follow-up cadence (short meetings, decisions logged)

Templates / tools:

- **Template A:** IGROW (1 page)
- **Template B:** Sprint Plan (2 weeks) v1 (**main deliverable**)
- **Template C:** “Done” library
- **Tool:** board/backlog (Sheets/Notion/Trello)

Week 1 – IGROW as the Sprint Engine (2-week sprint) – Continued

Deliverables

- IGROW Sprint Plan v1 ready to run on Monday
- Tight backlog (10–15 tasks) + blockers log
- Minimum rituals defined (Weekly Ops + close)

Week 2 – RACI for execution and reporting

Theme: Real ownership: “1 A per critical task”

Objectives:

- Build a **post-award RACI** (execution + MEL/evidence + finance + ops/compliance + reporting + changes)
- Define **handoffs** (who hands what to whom, when, and where)
- Install anti-chaos rules: response SLAs, escalation, Definition of Done per deliverable

Templates / tools:

- **Template A:** RACI Matrix
- **Template B:** Handoffs
- **Template C:** Rules of engagement (SLA + escalation + Done)

Deliverables:

- Complete RACI usable by third parties
- Documented handoffs
 - Agreed SLA/escalation rules

Week 3 – Tracker + coordination rituals (weekly board)

Theme: A living operation: “what’s happening this week” (with evidence)

Objectives:

- Install an **operational tracker v1** with owner, due date, status, evidence (link), and blockers
- Define a **minimum cadence:** Weekly Ops + Blockers Triage + Reporting Checkpoint
- Establish “Done = evidence” for critical tasks

Templates / tools:

- **Template A:** Operational tracker v1
- **Template B:** Definition of Done (minimum viable)
- **Template C:** Weekly Ops agenda
- **Template D:** Blockers log
- **Template E:** Reporting checkpoint (by sections)
- **Tool:** Google Sheets/Excel/Notion/Trello (same logic)

Deliverables:

- Tracker v1 populated (≥ 15 rows)
- Rituals with copy-paste agendas
 - Standard Done definition pinned at the top of the tracker

Week 4 – Evidence + minimum viable Data Room + Evidence Map

Theme: Traceability: “we did X” only counts if evidence is findable

Objectives:

- Validate/adjust the data room (structure + naming + versions)
- Create Evidence Map v1: output/claim → evidence → link → report section
- Define a minimum evidence checklist by area (MEL, finance, procurement, partners)
- Assign owners per folder/evidence (basic governance)

Templates / tools:

- Template A: Evidence Map v1 (main deliverable)
- Template B: Minimum evidence checklist
- Template C: Data room owners
- Template D: Evidence request (quick ticket)
- Tool: repository with naming + version control (v0.x / v1.0 / vFinal)

Deliverables:

- Operational data room (find key evidence in < 5 minutes)
- Evidence Map v1 (≥ 10 rows with links or “Missing” with owner/date)
 - Checklist completed + evidence tickets created

Week 5 – Reporting Pack (consistency + traceability)

Theme: Report without rework: narrative ↔ MEL ↔ finance ↔ evidence consistency

Objectives:

- Build a reusable **Reporting Template**
- Install a **cross-consistency checklist** (before v1.0/vFinal)
- Produce **one real report section v1** with linked evidence (the most critical one)

Templates / tools:

- **Template A:** Reporting Template
- **Template B:** Consistency checklist (Yes/No + mandatory fixes)
- **Template C:** Done per section
- **Tool:** Docs/Word + links to the data room + versioning

Deliverables:

- Reusable reporting template
- Consistency checklist
- One report section **v1** with evidence (links)

Week 6 – Troubleshooting + Change Management (30-day CAP)

Theme: Handle deviations without panic: issues/risks/changes with traceability

Objectives:

- Distinguish **issue vs. risk vs. change** and define formal change triggers
- Install **minimum viable change control** (logs + decisions)
- Design and execute a **30-day Corrective Action Plan (CAP)** with closure evidence
- Run weekly follow-up using a board (**CAP tracker**)

Templates / tools:

- **Template A:** Issue/Blockers log (formalized with severity)
- **Template B:** Mini risk register (Top 5)
- **Template C:** Change log
- **Template D:** Decision log
- **Template E:** 30-day CAP (main deliverable)
- **Template F:** Weekly CAP tracker
- (Optional) **Template G:** 1-page Change Request (if required by the donor)

Deliverables:

- 30-day CAP (5–10 actions, each with closure evidence)
- CAP tracker (4 weeks)
- Change log + decision log (minimum 3 entries)
- Updated mini risk register

Week 7 – Closure / Audit-Ready Mini System

Theme: A navigable, audit-ready closeout (not “saving PDFs”)

Objectives:

- Install an area-based closure checklist (program/MEL/finance/ops/compliance/subgrants)
- Create an audit-ready final archive structure with a single vFinal and standard naming
- Build an Evidence Index (linked table) to respond quickly to auditors/donors
- Capture Lessons Learned (1 page) with v2 actions

Templates / tools:

- Template A: Closure checklist (main deliverable)
- Template B: Final archive structure
- Template C: Closeout Evidence Index
- Template D: Lessons learned (1 page)
- Template E: Audit-Ready pack (typical questions → link)

Deliverables:

- Closure checklist with links (Yes/No; if No → owner/CAP)
- Audit-ready final archive assembled
- Evidence Index v1 (≥ 10 items)
- 1-page lessons learned + v2 actions

Week 8 – Capstone + Playbook (30/60/90)

Theme: Integration + adoption: make the system run on a calendar and a tracker

Objectives:

- Package everything into a Capstone bundle (navigable folder with 00_START_HERE)
- Define order of operations, triggers, owners, approvals, and non-negotiable rules
- Create a 30/60/90 Playbook with 3 minimum rituals + metrics + a v2 roadmap

Templates / tools:

- Capstone folder structure (00_START_HERE → 07_CLOSURE...)
- Triggers + approvals table
- 1-page QuickStart template
- 30/60/90 Playbook template (1–2 pages) (main deliverable)
- Bundle assembly checklist

Deliverables:

- Complete Capstone bundle (with templates and examples)
- 30/60/90 Playbook with real dates, real owners, metrics, and rules

Final deliverables (what remains installed in the NGO)

- **IGROW Sprint Plan** (continuous improvement engine through sprints)
- **RACI + handoffs + rules** (ownership and escalation)
- **Operational tracker + rituals + Done** (weekly execution)
- **Data room + naming/versioning + Evidence Map + tickets** (traceability)
- **Reporting Pack** (template + checklist + v1 sections)
- **CAP + change/decision logs + mini risk register** (deviation control)
- **Closure & Audit-Ready system** (checklist + archive + evidence index + lessons learned)
- **Capstone bundle + 30/60/90 Playbook** (sustained adoption)

Investment

- **Investment:** USD 5,000
- **Promotional price (April 25 to May 5):** USD 1,500 (one phase: pre-award or post-award)
- **For small & mid-sized NGOs:** 2 payments of USD 750 – 50% at kickoff | 50% in Week 5
- **Exceptional price (April 25 to May 5):** Pre-Award + Post-Award = USD 2,500

All prices include Practitioner training.

LIMITED SEATS

- **Start date:** By agreement with the organization
- **Duration:** 8 weeks (extendable to 10 in exceptional cases)
- **Schedule:** 2-hour sessions (scheduled with the organization)
- **Facilitator:** Martha Videa | Certified Coach | Grants Specialist
- **Languages:** English | Spanish | Portuguese
- **Payment methods:** Credit card | Debit card | Bank deposit

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Bonus (purchases April 20–30): 1:1 Compliance Coaching

