

# Pre Award vs Post Award

Two Paths, One Goal:

Sustainable Funding Without Chaos



## PRE-AWARD PROCESS

## Overall objective

Install a **replicable pre-award system** inside the NGO—**people + templates + process**—to identify, decide on, and develop funding opportunities with greater clarity, control, and compliance, while reducing **information leaks**, rework, and operational chaos.

## Specific objectives

1. Standardize **GO/NO-GO decision-making** using evidence, implementing a flow of **screening → guidelines alignment → Donor Fit Memo** so Leadership can approve opportunities in minutes—with criteria, risks, conditions, owners, and dates clearly defined.
2. Increase the **consistency and “submission-ready” quality** of proposals by installing a production and quality-control engine (**Evergreen Narrative Pack + MEL menu + QA Unit + pre-flight compliance**) to ensure deliverables are complete, traceable, and ready to submit—without avoidable compliance, formatting, annex, or versioning errors.

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

With **IGROW**, we move from a fuzzy problem (**Issue**) to clear targets (**Goal**), remove underlying drivers with controls (**Root Cause**), make evidence-based calls (**Options**), and leave next steps embedded so the system runs **without depending on specific individuals (What’s next)**.

### Issue (the real problem)

#### What we work on

- Identify the core pre-award problem inside the NGO: chaos, reliance on “heroes,” rework, information leaks, slow decisions, and compliance risk.

#### Associated win (by the end of the process)

- The NGO moves from “proposals as crisis mode” to a **visible, controllable process**, because:
  - there is a **single repository** (single source of truth),
  - **naming conventions + version control** are in place,
  - and there’s a clear pipeline (from intake to submission).

#### Evidence you can show

- POS folder structure + rules like: **no “final\_final2.”**
- Completed Week 0 checklist.

### – Goal (measurable targets)

#### What we work on

- Turn “we want better proposals” into clear, operational targets for the pre-award system.

#### Associated win

- The NGO ends with **explicit standards and targets**, typically:
  - Reduced and defensible **decision time** (Intake → Go/No-Go)
  - **Zero avoidable submission errors** (annexes/format/portal/versions)
  - **Zero open POs** by the time you reach pre-flight

#### Evidence you can show

- SLAs defined by stage + gates with clear authority.
- Minimum metrics included in the **30-day Playbook** (Week 8).

## – Root Cause (underlying drivers)

### What we work on

- Identify why chaos keeps repeating. In NGOs, it's usually some combination of:
  - lack of **roles and accountability** (no single "A")
  - no real **gates** (no one can stop a bad GO decision)
  - donor **requirements** not translated into actions (guidelines read like a novel)
  - late or non-existent QA
  - scattered institutional evidence (policies, audits, CVs, etc.)

### Associated win

- The NGO closes the underlying drivers with installed controls—not good intentions:
  - internal SOP (POS) with roles/rituals/SLAs/gates
  - scorecard + knock-outs (so you can say NO with evidence)
  - Alignment Matrix (requirement → evidence → gap → action → owner → due date)

### Evidence you can show

- Internal SOP (2–4 pages) signed off / accepted internally.
- Alignment Matrix v1 applied to a real opportunity.

## – Options (options and decisions)

### What we work on

- Generate real options (**GO / NO-GO / GO with changes**) and make decisions with criteria:
  - conditions
  - mitigations
  - recommended changes (scope/partners/budget/framing)

### Associated win

- The NGO can make **executive decisions in 5 minutes**, without endless meetings:
  - **1-page Decision Guide + 1–2 page Donor Fit Memo** including risks, mitigations, conditions, and next steps.

### Evidence you can show

- Final Donor Fit Memo ready for Leadership.
- GO/NO-GO decision log with traceability.

## – What's next (next steps and execution)

### What we work on

- Close each cycle with a clear, repeatable "next action":
  - QA gate
  - annotated review (MUST/SHOULD/NICE)
  - pre-flight compliance
  - submission log
  - 30-day playbook

### Associated win (the most important one)

**Internal capability is installed to run pre-award end-to-end—under control and without chaos**— because by the end there is an "operating bundle" any team member can follow:

- **Evergreen Narrative Pack + boilerplate + MEL menu** (write faster, backed by evidence)
- **QA Unit (rubric + QA memo)** (quality control in **<48 hours**)
- **Pre-flight checklist + submission log** (traceable submission, no avoidable errors)
- **30-day Playbook** (habits, calendar, owners, metrics)

### Evidence you can show

- Capstone bundle with **OO\_START\_HERE** structure and ready-to-use templates.
- 30-day Playbook with real names, rituals, and metrics.

## Mini “proof of effectiveness” table (what changes thanks to IGROW)

IGROW	Before	After (8 weeks)
Issue	After (8 weeks)	visible pipeline + controlled repository
Goal	“improve proposals”	SLAs, gates, clear metrics and standards
Root Cause	repeated symptoms	SOP + scorecard + alignment matrix (controls)
Options	intuition-based decisions	Donor Fit Memo with evidence, risks, and conditions
What’s next	“we’ll deal with it later”	Donor Fit Memo with evidence, risks, and conditions

## Big picture (what gets installed in an NGO)

- A proposal operating system (POS): roles, rituals, SLAs, and gates to make pre-award repeatable.
- A decision and risk pipeline: screening → alignment → executive memo.
- A production engine: evergreen pack + boilerplate + MEL menu.
- Quality control and the final mile: QA unit → annotated review → pre-flight compliance → submission evidence.
- Adoption: final bundle + 30-day playbook + metrics.

## WEEKLY PLAN

### Week 0 – Onboarding (60–90 min)

**Theme:** Case + repository + execution plan.

**Objectives:**

- Define 1 opportunity/case (ideally real) and a concrete objective.
- Configure the POS repository (structure, naming, versioning).
- Create a personal 1-page plan + minimum calendar.

**Templates / tools:**

- Template A: Intake
- Template B: Case definition
- POS folder structure + naming conventions + version control
- (Optional) Template C: File register
- Template E: Personal plan (1 page)

**Deliverables:**

- Defined case (explainable in 60 seconds)
- Repository ready (single source of truth)
- 1-page plan with owners + minimum rituals + calendar

## Week 1 – Internal system (NGOs): proposal SOP

**Theme:** Install the Proposal Operating System (POS) as an internal operation.

**Objectives:**

- Define roles and responsibilities (RACI).
- Install rituals (triage, go/no-go, QA gate, pre-flight).
- Agree SLAs by stage and gates with authority (who can say NO).
- Define “what we do NOT do” to prevent manufactured urgency.

**Templates / tools:**

- Standard roles table + RACI table
- Rituals table (frequency, duration, output)
- Suggested SLAs by stage
- Minimum official SOP templates:
  - Donor Fit Matrix (1 page)
  - Go/No-Go minutes/record
  - QA Gate checklist
  - Pre-flight checklist

**Deliverable:**

- Internal proposal SOP (2–4 pages) with steps, owners, SLAs, gates, and official templates

## Week 2 – Opportunity Screening (10-Step Toolkit)

**Theme:** Decide which opportunities to pursue—using evidence.

**Objectives:**

- Build a scorecard with weights, thresholds, and knock-outs.
- Produce a 1-page Decision Guide for Leadership (5-minute decision).
- Apply screening to 1 real opportunity (or simulated case).

**Templates / tools:**

- Weighted scorecard (0–5 + weights)
- Knock-out table
- Decision Guide template (1 page)
- Evaluation log (one row per opportunity)

**Deliverables:**

- Scorecard ready (usable by third parties)
- 1-page Decision Guide
- 1 completed evaluation + GO / NO-GO / conditional GO decision

## Week 3 – Donor Guidelines Alignment (actionable matrix)

**Theme:** Turn guidelines/RFP/ToR into actions, controls, and risks.

**Objectives:**

- Extract “atomic” requirements and classify them: Hard / Preferred / Evaluated.
- Map verifiable internal evidence.
- Turn gaps into actions with owner + due date (mini workplan).
- Prepare a decision draft based on risks and fixes.

**Templates / tools:**

- Alignment Matrix v1 (requirement → evidence → gap → action → owner → due date → status)
- (Optional) mini risk log
- Decision draft template (Go/No-Go/Go with changes)

**Deliverables:**

- Alignment Matrix v1 (actionable)
- Top critical gaps + fixes with owners and due dates
- Evidence-backed decision draft

## Week 4 – Donor Fit Memo (1–2 pages)

**Theme:** An executive document for Leadership: “decide without reading 40 pages.”

**Objectives:**

- Convert the Scorecard (W2) + Alignment (W3) into an executive recommendation.
- Make risks + mitigation + conditions and next steps visible, with owners.

**Templates / tools:**

- Donor Fit Memo template (1–2 pages)
- Risk + mitigation + owner + due date table
- Next-steps timeline (aligned to SOP/SLAs)

**Deliverables:**

- Final Donor Fit Memo (1–2 pages)
- Internal links to the Scorecard and Alignment Matrix (traceability)

## Week 5 – Evergreen Proposal Core (Narrative Pack)

**Theme:** A reusable narrative engine (without risky copy/paste).

**Objectives:**

- Build a modular Evergreen Narrative Pack (short + long versions).
- Create evidence-backed institutional boilerplate.
- Build a MEL menu of baseline indicators with usage rules.
- Assign owners per block + review dates (light governance).

**Templates / tools:**

- Master index for the block library
- Per-block spec (purpose, editable variables, evidence, when to use/not use)
- Templates: evidence-based problem statement, ToC, results chain, MEL menu, cross-cutting inserts, boilerplate

**Deliverables:**

- Evergreen Pack (short + long)
- Boilerplate (1–2 pages) + evidence table (where each document lives)
  - MEL menu (indicators with definition/formula, source, and frequency)

## Week 6 – Proposal QA Unit (Rubric + QA Memo)

**Theme:** Repeatable quality control before the final mile.

**Objectives:**

- Install a QA rubric (scores, weights, thresholds).
- Prioritize findings: P0/P1/P2.
- Produce a QA Memo with executable fixes in <48 hours (with owners/dates).

**Templates / tools:**

- QA Rubric template (0–3) (coherence, MEL, budget, compliance, editing)
- PASS / conditional PASS / FAIL thresholds
- QA Memo template (fix list table with priority + owner + due date)

**Deliverables:**

- QA rubric ready for recurring use
- QA Memo applied (to a real/simulated excerpt) + prioritized fix list

## Week 7 – Annotated Review + Pre-Flight Compliance

**Theme:** The last 24 hours—with a method (and without “final\_final2”).

**Objectives:**

- Run layered annotated review with clear tags: MUST/SHOULD/NICE.
- Convert comments into an executable Fix List owned by the Owner.
- Run pre-flight compliance: format, annexes, portal, naming, submission evidence.

**Templates / tools:**

- Comment legend (MUST/SHOULD/NICE + EVAL/LOGIC/BUDGET/COMP/EDIT)
- Fix List table
- Pre-Flight Compliance Checklist
- Final role-based checklist (Owner, Compliance, Finance, MEAL, Editor)
- Submission Log

**Deliverables:**

- Document with annotated review (actionable comments)
- Prioritized Fix List (MUST/SHOULD/NICE)
- Final pre-flight checklist + Submission Log ready for traceability

## Week 8 – Capstone + Playbook (30 days)

**Theme:** Package the system + ensure real adoption.

### Objectives:

- Assemble the capstone bundle (a navigable final folder with everything).
- Define triggers, owners, gates, and order of use.
- Create a 30-day Playbook with rituals, calendar, and minimum metrics.

### Templates / tools:

- Trigger table (when each deliverable is triggered and who approves)
- Capstone bundle folder structure (00\_START\_HERE → Submission)
- 30-day Playbook template
- Minimum metrics table (decision time, % P0, pre-flight errors, hours per proposal, etc.)

### Deliverables:

- Complete capstone bundle (templates + examples + applied samples)
- 30-day Playbook (1-2 pages) with dates, names, and initial targets

### Final deliverables installed in the NGO (short list)

- Internal proposal SOP (POS) + standard repository
- Scorecard + Decision Guide (fast, defensible decisions)
- Alignment Matrix (actionable risk and compliance)
- Donor Fit Memo (executive decision)
- Evergreen Pack + boilerplate + MEL menu (faster production with evidence)
- QA Unit (rubric + QA memo) (quality gate)
- Annotated review + pre-flight + submission log (final mile + traceability)
- Capstone bundle + 30-day playbook + metrics (adoption)

## Investment

- **Regular Price:** 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 – USD 750 at kickoff | USD 750 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**

