Build a reviewable award cycle

A fillable planning workbook for five connected lessons and one practical pilot.

Use fictional Horizon applicant A-31 first. Then adapt the plan to a fellowship, award or grant round. Connect intake, rubric review, committee decision and later reporting with appropriate access and ownership.

Download and open this PDF in a PDF reader that supports forms. Type in the shaded boxes and save a copy. You can also print it and write by hand. Some browser viewers handle saving differently: reopen your saved copy to check your answers.

Use fictional or de-identified material for practice. This workbook does not send or store your answers on a website. Completion is a planning exercise, not certification of an implemented system.

Your selection and follow-up question and one workflow to test

Who will help you test the plan? Record the owner and a review date.

1. Plan the intake

An intake specification that separates eligibility, scored evidence and later follow-up.

Practice context: A-31 supplies a proposal, budget and reference in round R-2.

Map eligibility, scored evidence, formats, languages and required documents.

What is the first collection after selection?

Self-check: Could an applicant understand what to submit and a reviewer understand why each item is there?

2. Review the evidence

A rubric review record showing evidence, gaps, judgment and any override.

Practice context: The proposal names delivery roles but two milestones have no review dates.

Write a criterion, anchors and source-based assessment.

Define a clarification and record who can override the suggested assessment.

Self-check: Can someone reconstruct why the application received its assessment?

3. Connect the lifecycle

A relationship map from applicant and round to award, revisions and follow-up.

Practice context: A later budget revision should not erase the version assessed by the committee.

Map applicant, round, submission, award and update records.

Show a revised budget and changed contact without losing the history.

Self-check: Can the next program owner locate the current terms without losing the decision history?

4. Define the rules

Versioned criteria and reporting definitions with explicit comparison limits.

Practice context: Unique people, attendance and financial expenditure have different definitions.

Define one criterion and two reporting fields with versions.

What changes would prevent comparison across rounds?

Self-check: Would two reviewers interpret the same field in the same way, or know when to ask?

5. Govern the cycle

A tested review-to-follow-up workflow with roles, conflict handling and accountable decisions.

Practice context: Applicants, assigned reviewers, committee and program staff need different views.

Assign submit, review, decide, approve and follow-up roles.

Define conflict handling and allowed/denied access tests.

Self-check: Can your team operate the next step without guessing who owns it?

Test the complete workflow

Use fictional records first, then agree a small authorized pilot with the responsible people.

- [ ] A contributor can submit the intended information.
- [ ] An applicant cannot access another application.
- [ ] A correction preserves the original and its reason.
- [ ] A reviewer can trace a finding to its source and definition.
- [ ] The committee and program owner receive appropriate evidence.

Expected vs actual behavior: record gaps and the person responsible.

What will change before the next cycle? Include the next review point.