



Grant Management Case Management Checklist Template 2026

Pre-Award Planning & Strategy

Initial identification of funding opportunities, alignment with organizational goals, and feasibility assessment.

Grant Opportunity Name

Strategic Alignment Description

Internal Submission Deadline

Funding Source Type

- ☐ Federal
- ☐ State/Local Government
- ☐ Private Foundation
- ☐ Corporate Grant

Required Stakeholders

- ☐ Program Manager
- ☐ Finance Department
- ☐ Legal Counsel
- ☐ Executive Leadership

Initial Research Notes/RFP Document

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Grant Application & Proposal Development

Detailed steps for drafting the proposal, gathering required documentation, and ensuring all submission requirements are met.

Project Title

Write something...

Executive Summary

Write something...

Proposal Submission Deadline

Enter date...

Total Requested Funding Amount

Enter a number...

Required Supporting Documents

- ☐ Budget Narrative
- ☐ Letters of Support
- ☐ Organizational Certifications
- ☐ Project Timeline

Finalized Grant Proposal Draft

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Lead Investigator Approval

Built-in Compliance & Regulatory Review

Verification of adherence to federal, state, and private donor regulations, including legal and policy compliance checks.

Compliance Review Deadline

Enter date...

Regulatory Frameworks Applicable

- ☐ Federal Regulations (e.g., Uniform Guidance)
- ☐ State/Local Mandates
- ☐ Donor-Specific Terms & Conditions
- ☐ Internal Organizational Policy

Compliance Status

- ☐ Compliant
- ☐ Pending Review
- ☐ Non-Compliant/Action Required

Regulatory Compliance Certificate/Proof

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Identified Compliance Risks & Mitigation Plan

Write something...

Compliance Officer Approval

Award Acceptance & Documentation

Procedures for reviewing the grant agreement, formalizing acceptance, and setting up the internal tracking system.

Grant Award Date

Enter date...

Grant Agreement Reference Number

Write something...

Funding Source Type

- ☐ Federal
- ☐ State/Local Government
- ☐ Private Foundation
- ☐ Corporate Sponsor

Executed Grant Agreement PDF

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Summary of Key Terms and Conditions

Write something...

Authorized Official Approval

Fund Disbursement & Budget Management

Monitoring fund allocation, tracking drawdowns, and ensuring expenditures align with the approved budget lines.

Budget Line Item Name

Write something...

Allocated Fund Amount

Enter a number...

Total Amount Disbursed to Date

Enter a number...

Last Disbursement Date

Enter date...

Disbursement Status

- ☐ Pending
- ☐ Approved
- ☐ Disbursed
- ☐ Completed

Proof of Transaction/Receipt

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Budget Variance Explanation

Write something...

Financial Officer Approval

Compliance & Reporting Milestones

Scheduling and executing periodic progress reports, financial statements, and performance metric updates.

Next Reporting Deadline

Enter date...

Report Type

- ☐ Quarterly Progress Report
- ☐ Annual Performance Report
- ☐ Financial Statement
- ☐ Final Closeout Report

Compliance Requirements Met

- ☐ Financial Audit Completed
- ☐ Programmatic Milestones Achieved
- ☐ Regulatory Documentation Filed
- ☐ Sub-recipient Monitoring Performed

Summary of Compliance Progress

Write something...

Supporting Compliance Documentation

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Compliance Officer Verification

Monitoring & Performance Evaluation

Tracking key performance indicators (KPIs) and assessing the impact of the funded program against original objectives.

Evaluation Period Start Date

Evaluation Period End Date

Percentage of Program Milestones Achieved

Performance Rating

- ☐ Exceeding Expectations
- ☐ Meeting Expectations
- ☐ Below Expectations
- ☐ Critical Failure

Key Achievements & Impact Summary

Write something...

Identified Risk Factors

- ☐ Budget Overrun
- ☐ Timeline Delay
- ☐ Resource Shortage
- ☐ Compliance Issue
- ☐ None

Supporting Performance Evidence (Reports/Photos)

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Program Manager Verification

Audit Readiness & Record Keeping

Maintaining organized, accessible documentation and receipts for internal or external financial audits.

Last Audit Review Date

Enter date...

Financial Receipts and Invoices Archive

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Compliance Documents Verified

- ☐ Grant Agreement
- ☐ Budget Amendments
- ☐ Payroll Records
- ☐ Vendor Contracts
- ☐ Meeting Minutes

Audit Findings and Remediation Notes

Write something...

Compliance Officer Verification

Grant Closeout & Post-Award Assessment

Finalizing all obligations, submitting terminal reports, and conducting a post-mortem evaluation for future improvements.

Final Report Submission Date

Enter date...

Grant Status

- ☐ Completed
- ☐ Closed - Pending Final Audit
- ☐ Closed - Fully Reconciled

Post-Award Lessons Learned

Write something...

Final Deliverables Verified

- ☐ Financial Report
- ☐ Impact Statement
- ☐ Asset Inventory List
- ☐ Final Performance Metrics

Final Grant Report Document

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Program Manager Approval

< Previous

> Next

✓ Finish

 Generate Sample Report