FREE TRACKER

Grant Tracker Template (Free Fillable PDF)

A fillable grant pipeline tracker with a status key, a reports-due table for awarded grants and a monthly review checklist.

Angel Reyes, DrPH(c), MPH, MCHES, PMP, PMI-ACP | grantwritingconsultant.com | Updated November 18, 2026

> A grant tracker is one place that shows every grant you are considering, writing, waiting on or reporting on, with a date and an owner for each. This is a simple layout to print, fill in or copy into a spreadsheet. Deadlines and reporting dates must always be copied from the funder's own instructions or award documents, which come first.

Tracker details

Organization:

Fiscal year or period covered:

Tracker kept by:

Last reviewed on:

Status key

Use the same words every time so the tracker can be read at a glance.

Status	Meaning
Researching	Checking fit and eligibility. No decision to apply yet
Planned	Decision made to apply. Writing has not started
In progress	Application is being written
Submitted	Sent to the funder. Waiting for a decision
Awarded	Funded. Move reporting dates to the reports-due table
Declined	Not funded. Note any feedback and whether to reapply
Not pursuing	Decided not to apply. Note the reason in one line

Grant pipeline

One row for each opportunity. Write the deadline exactly as the funder states it, including the time and time zone if one is given.

Funder	Program	Amount	Deadline	Status	Owner	Next step

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Funder	Program	Amount	Deadline	Status	Owner	Next step

What goes in each column

Column	What to write
Funder	The organization that makes the award
Program	The name of the grant program or funding opportunity
Amount	The amount you plan to request, or the amount awarded
Deadline	The next hard date: letter of inquiry, full proposal or decision date
Status	One word from the status key
Owner	One named person who is responsible for the next step
Next step	One concrete action with a date, such as "Request letters of support by the 10th"

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Reports due for awarded grants

One row for each report or other requirement. Copy every date from the award documents, not from memory.

Funder	Grant and period	Report or requirement	Due date	Owner	Sent on

Monthly review checklist

Set a fixed day each month and run this list with everyone who owns a row.

- [ ] Every deadline in the next 90 days has an owner and a next step
- [ ] Every status is current
- [ ] Each deadline has been checked against the funder's current instructions
- [ ] Every report due in the next 60 days has been started
- [ ] Decisions received this month are recorded, with any feedback
- [ ] Declined applications have a note on whether to reapply
- [ ] New opportunities found this month have been added as Researching
- [ ] Opportunities that are a poor fit have been marked Not pursuing
- [ ] Leadership or the board has seen the current pipeline

Notes from this review

Decisions made:

Risks or deadlines that need attention:

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Date of next review:

> **Want help with this?** The Complete Grant Architect is a free 16-week grant writing course, and you can hire a grant writer for your next proposal. Both are at subthesis.com.

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