FREE CHECKLIST

Post-Award Grant Compliance Checklist (Free PDF)

A fillable checklist for managing a grant after the award, from reading the agreement to closeout, with a key dates table and a record of who is responsible.

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

> This checklist helps you manage a grant after it is awarded: what to do at award, during set-up, through the grant period and at closeout. It is general and does not state any funder's rules. Your award agreement and the funder's own instructions come first, so wherever this list says "as your award agreement requires", look up the exact requirement there.

Award details

Grant or project title:

Funder:

Award or reference number:

Amount awarded:

Grant period (start and end dates):

Funder contact (name, role, email):

Where the signed agreement is filed:

At award

- [ ] Read the whole award agreement, including attachments and any terms it refers to
- [ ] Compare the award with the proposal: amount, period, activities and targets. Note anything that changed
- [ ] List every reporting requirement and due date in the key dates table below
- [ ] Note what the funds may and may not be used for, as your award agreement states
- [ ] Note the rules on changing the budget, activities, staff or timeline
- [ ] Note any requirements on acknowledging the funder, publicity or use of the funder's name
- [ ] Ask the funder about anything that is unclear, in writing, before spending
- [ ] Have the authorized person sign and return the agreement as the funder instructs
- [ ] Hold a start-up meeting with program, finance and leadership

Educational resource. Following this guide does not guarantee an award. Always follow your funder's official instructions. Free to use and share with attribution. (c) Angel Reyes Consulting LLC.

Who is responsible

Responsibility	Person	Backup
Overall grant management		
Program delivery and data		
Financial tracking and financial reports		
Narrative reports		
Contact with the funder		
Approving spending		

Set-up

- [ ] Grant funds are tracked separately in the accounting system so income and spending can be reported for this grant alone
- [ ] The approved budget is entered so spending can be compared with it line by line
- [ ] There is a written approval step for each grant purchase, and staff know who approves
- [ ] Staff time charged to the grant is recorded in the way your award agreement and your own policies require
- [ ] A grant file is set up (paper or electronic) for the agreement, budget, reports, approvals and correspondence
- [ ] Data collection for each objective is ready before activities start
- [ ] Partners and contractors have written agreements that pass on the relevant requirements
- [ ] Report due dates and reminders are in a shared calendar

Educational resource. Following this guide does not guarantee an award. Always follow your funder's official instructions. Free to use and share with attribution. (c) Angel Reyes Consulting LLC.

Key dates

Fill this in from the award agreement. Add a reminder ahead of each date.

What is due	Due date	Who prepares it	Who approves it	Done

During the grant

Spending

- [ ] Compare actual spending with the approved budget on a regular schedule
- [ ] Charge only costs that are allowed under the agreement and that fall within the grant period
- [ ] Keep a record for every cost: what it was, why it was needed and who approved it
- [ ] Keep invoices, receipts, contracts and time records in the grant file
- [ ] Document any required match or cost share as it is contributed

Changes

- [ ] Before changing the budget, activities, key staff or timeline, check what the agreement says about approval
- [ ] Where approval is required, ask the funder in writing and wait for a written answer before making the change
- [ ] File every approval with the grant records
- [ ] Tell the funder early about delays or problems. Do not wait for the report

Reports and results

- [ ] Collect data for each objective as planned, and review it before each report is due
- [ ] Submit each report on time, in the funder's format
- [ ] Check that the numbers in the financial report match the accounting records
- [ ] Have a second person review each report before it is sent
- [ ] Keep a copy of each report and the confirmation that it was received

Educational resource. Following this guide does not guarantee an award. Always follow your funder's official instructions. Free to use and share with attribution. (c) Angel Reyes Consulting LLC.

Closeout

- [ ] Confirm the final date for spending and for the final reports, as your award agreement states
- [ ] Complete all activities and pay all grant costs within the period allowed
- [ ] Reconcile the grant account against the approved budget
- [ ] Submit the final narrative and financial reports in the funder's format
- [ ] Ask the funder what to do with any unspent funds, and follow the agreement
- [ ] Handle any equipment or materials bought with grant funds as the agreement requires
- [ ] Keep all grant records for as long as your award agreement and applicable rules require
- [ ] Record where the files are stored and the date they may be destroyed
- [ ] Thank the funder and share results
- [ ] Hold a short review with the team: what worked, what to change next time

Closeout record

Final report submitted on:

Unspent funds and how they were handled:

Records kept until (date, from the agreement):

Where the records are stored:

Lessons for the next grant:

> **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.

Educational resource. Following this guide does not guarantee an award. Always follow your funder's official instructions. Free to use and share with attribution. (c) Angel Reyes Consulting LLC.