



Grant Requirements Setup Worksheet

A worksheet for turning an award agreement into a clear, trackable list of reporting, compliance, and closeout requirements.



1. Grant Overview

Grant Name	
Funder	
Award Number	
Grant Period	
Primary Owner	



Requirement Categories (examples)

- Reporting
- Financial
- Compliance
- Reimbursement
- Monitoring
- Closeout



2. Requirement Identification

Requirement	Category	Source Reference	Owner	Due Date	Evidence Needed



3. Reporting Requirements

- ☐ Narrative reports identified
- ☐ Financial reports identified
- ☐ Reporting frequency confirmed
- ☐ Submission method documented
- ☐ Funder review / acceptance process noted



4. Compliance Requirements

- ☐ Procurement requirements identified
- ☐ Match requirements identified
- ☐ Eligibility documentation needs identified
- ☐ Record retention needs identified
- ☐ Special conditions summarized



5. Closeout Planning

- ☐ Final report required
- ☐ Final reimbursement required
- ☐ Final reconciliation required
- ☐ Closeout deadline _____
- ☐ Remaining follow-up items (see notes)



6. Review Notes



Helpful reminder

Every grant requirement should have an owner, a due date, a source reference, and a clear place where supporting evidence will be stored.

Completed By: _____

Date: _____

Reviewed By: _____

