



New Grant Intake Form

A practical intake form for capturing the key information needed to set up and monitor a new grant.



1. Basic Grant Information

Grant Name _____

Funder _____

Public or Private Grant ☐ Public ☐ Private

Award Number / Contract Number _____

Award Date _____

Period of Performance _____

Award Amount \$ _____



2. Funding & Restrictions

Funding Method ☐ Reimbursement ☐ Advance ☐ Other

Match Required? ☐ Yes ☐ No

Match Amount \$ _____

Restricted Purpose _____

Key Spending Restrictions _____

Related Project / Program / Property _____



3. Ownership & Contacts

Primary Internal Owner _____

Finance Contact _____

Compliance Contact _____

Funder Contact Name _____

Funder Contact Email / Phone _____



4. Key Dates & Requirements

Reporting Deadline(s) _____

Draw / Reimbursement Deadline(s) _____

Compliance Requirements Summary _____

Closeout Deadline _____

Record Retention Notes _____



5. Required Documents

- ☐ Executed award agreement uploaded
- ☐ Approved budget uploaded
- ☐ Reporting template received
- ☐ Funder guidance or special conditions saved
- ☐ Internal approvals documented
- ☐ Grant folder created



6. Setup Notes



Helpful reminder

A complete intake form makes it easier to assign requirements, build the reporting calendar, and keep the grant file audit-ready from day one.



Prepared By _____



Date _____



Reviewed By _____



GrantableHQ helps organizations keep awarded grants organized from award setup through audit support.



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