

Sample Grant Audit Package Outline

A lightweight outline of the documents, summaries, and requirement history commonly requested during grant monitoring or audits.

i 1. Grant Summary

- Grant name, funder, award number, and period of performance
- Award amount, match requirement, and funding method
- Primary internal owner and funder contact
- Short description of funded purpose and restrictions

F 2. Award & Source Documents

- Executed agreement or award letter
- Approved budget and amendments
- Funder guidance, terms, and special conditions
- Board approvals or internal authorizations, if applicable

M 3. Requirement Matrix

- Reporting, compliance, and closeout requirements
- Owner, due date, status, and completion date
- Source reference for each requirement
- Evidence location or linked support file

R 4. Reporting History

- Submitted reports and reporting periods covered
- Proof of submission or portal confirmation
- Funder acceptance, comments, or follow-up requests
- Open items or unresolved questions

\$ 5. Financial & Reimbursement Support

- Approved grant budget and budget-to-actual summary
- Draw or reimbursement request schedule
- GL detail, transaction support, and coding references
- Cash receipts and reconciliation to amounts received

C 6. Compliance Evidence

- ☐ Procurement support is retained, if applicable
- ☐ Eligibility or beneficiary documentation is retained
- ☐ Inspection or monitoring records are included
- ☐ Contractor certifications are included, if required
- ☐ Record retention requirements are documented

D Recommended audit package folders

- 01 Grant Summary
- 02 Award Documents
- 03 Requirement Matrix
- 04 Reports & Submissions
- 05 Financial Support
- 06 Compliance Evidence
- 07 Correspondence & Review Notes

A 7. Audit Trail & Review Notes

- Requirement status history
- Key correspondence and decisions
- Internal review notes and approval history
- List of missing or pending documents



Helpful principle

An audit package should tell the grant story: what was required, what was done, when it was done, and where the proof is stored.

Grant Name: _____ Prepared By: _____ Review Date: _____



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



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