

FREE TEMPLATE KIT

The grant reporting & conditions kit.

Six ready-to-use templates for the two sides of a grant — so the same facts are captured once, in a shape both sides can use.

For funders

Grant conditions, a monitoring schedule, and an evidence checklist.

For grantees

A progress report, an evidence log, and a pre-submission checklist.

How to use it

Copy the templates you need into your own documents, or print them. They are deliberately plain: field names on the left, room to complete on the right. Fill them the same way every time and the same grant reads consistently from application to final report — which is exactly what removes the re-keying the companion guide measures.

One record, entered once. These templates use the same field names on both sides on purpose. When a funder's condition and a grantee's evidence share a name, nobody has to translate between two spreadsheets.

FOR FUNDERS

Grant conditions

The terms of one grant, in one place. Complete once at award and share the same record with the grantee.

GRANTEE ORGANISATION

GRANT REFERENCE

AMOUNT AWARDED

FUNDING PERIOD

PURPOSE OF THE GRANT

Conditions

#	Condition	Evidence required
1		
2		
3		
4		

Payment schedule

Tranche	Trigger	Amount	Expected date
1			
2			
3			

Before you send it. Are the conditions clear enough that the grantee can see exactly what evidence proves each one? Vague conditions are the single biggest cause of repeated back-and-forth later.

FOR FUNDERS

Monitoring & reporting schedule

What you expect, when — agreed with the grantee at the start so no report is a surprise.

Milestone or report	Type	Due	Owner

What each report should cover

- Progress against each condition and milestone, in the words used in the conditions above.
- Spend against budget, with the categories agreed at award.
- Outcomes with numbers where you asked for them.
- Anything that has changed, and any support the grantee needs.

Keep it proportionate. Ask only for what you will act on. Every field you add is a field the grantee completes for every report, every year.

FOR FUNDERS

Evidence checklist

The documents that make up a complete, auditable record for one grant. Tick as each is held and dated.

Held	Document	Date	Where it lives
☐	Signed grant agreement / offer letter		
☐	Confirmed conditions and payment schedule		
☐	Charity / company registration checked		
☐	Bank details verified		
☐	Each progress report received		
☐	Evidence for each condition		
☐	Spend records / receipts as required		
☐	Final report and sign-off		

The audit test. Could someone outside your team reconstruct this grant from the record alone — what was agreed, what was paid, and what was delivered — without asking you? If not, note what is missing above.

FOR GRANTEES

Progress report

One structure you can reuse for every funder. Where a funder asks for something extra, add it — but keep this spine.

ORGANISATION

GRANT REFERENCE

REPORTING PERIOD

DATE SUBMITTED

SUMMARY OF THE PERIOD

Activity against plan

Planned	What happened	On track?

Outcomes

Measure	Target	This period	To date

Spend against budget

Category	Budget	Spent	Remaining

FOR GRANTEES

Evidence log

Record evidence once, as you go, and link it to the condition it proves. Then every report is assembled, not rebuilt.

Evidence	Date	Proves which condition	Where it's stored

The habit that saves the most time. Log evidence when it happens — a photo, a register, a receipt — with the condition it belongs to. Reporting then becomes copying, not remembering.

FOR GRANTEES

Pre-submission checklist

What your funder will almost always ask for. Run through it before you send, so nothing bounces back.

Done	Check
☐	Every condition in the agreement is addressed in the report
☐	Figures reconcile — spend matches your accounts, outcomes match your records
☐	Evidence is attached or clearly located for each claim
☐	Changes and delays are explained, not hidden
☐	The reporting period and dates are correct
☐	Named contact and date of submission are on it
☐	A copy is saved with your own records

One version, everywhere. Keep the submitted report and its evidence together. If the funder asks a question in six months, you answer from the same record you sent — not from memory.

ONE GRANT. ONE RECORD. BOTH SIDES.

These templates work on paper. They work better connected.

Every field in this kit is a field Grantary already holds as live data — entered once, shared between the funder and the grantee, and assembled into reports without re-keying. The templates give you the structure today; Grantary keeps the structure filled in for you.

See it working

Open the live demo at grantary.co.uk

Measure your own admin first

The companion guide: the hidden cost of grant administration

Grantary keeps the record of the money. It does not hold or move it. These templates are provided as a free starting point and are not legal advice; check any grant agreement against your own policies. Grantary is operated by PRODRO GROUP LIMITED, registered in England and Wales, company no. 17268651.