

# **SAMPLE DESK REVIEW**

## **Checklist for Desk Audit of Grant Contracts**

***This is a sample desk audit form that you may choose to use and adapt for your own purposes. This form may be used when you cannot perform an on-site visit of your grantee(s). If you cannot perform regular site visits, it is good practice to periodically review how your grantee(s) are performing. You might use this form as a stand-alone tool, or you might combine it with a phone call to your grantee to discuss their program progress, and any unanticipated indicators or deficiencies.***

**REVIEW PERIOD:** *This might be annual, semi-annual or as needed (e.g., weather, geography or staff limits might prevent you from performing a site visit on a regular basis).*

**GRANT OR CONTRACT NUMBER:** \_\_\_\_\_

**GRANT AMOUNT:** \_\_\_\_\_

**ORGANIZATION NAME:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

**CONTACT PERSON:** \_\_\_\_\_

**PHONE:** \_\_\_\_\_

**E-MAIL:** \_\_\_\_\_

**COUNTY (and/or other information you might want):** \_\_\_\_\_

**Place a checkmark in the space provided to signify that you have reviewed the following information on this grant: (if you have comments, use the numbers below and state the comments on separate paper).**

- \_\_\_\_\_ **1. Progress Reports**
- \_\_\_\_\_ **2. Contract Amendments**
- \_\_\_\_\_ **3. Contract Administrative Obligations**
- \_\_\_\_\_ **4. Project Start/End Dates**
- \_\_\_\_\_ **5. Fiscal Spreadsheet**
- \_\_\_\_\_ **6. Unresolved Program Issues**
- \_\_\_\_\_ **7. Staff Time Records**
- \_\_\_\_\_ **8. Equipment Inventory Reports**
- \_\_\_\_\_ **9. Other (anything your agency deems important)**

**Deficiencies (if needed, use separate paper):**

**If deficiencies are noted, should a stop payment be placed on this contract?** \_\_\_\_\_

**Completed by:** \_\_\_\_\_

**Date:** \_\_\_\_\_