

## PROPOSAL PREPARATION CHECKLIST

The following proposal checklist is provided to assist with proposal preparation. For further information, please refer to Sponsored Program's [Proposal website](#).

**PLEASE FORWARD THE FOLLOWING DOCUMENTS VIA CAYUSE AT LEAST FIVE (5) BUSINESS DAYS PRIOR TO THE SPONSOR DEADLINE FOR REVIEW AND APPROVAL:**

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- PROPOSAL COVER PAGE**  
If required by sponsor, provide completed form (agency or SPO template).
- PROPOSAL GUIDELINES FROM SPONSORING AGENCY (e.g., RFP, RFA, BAA etc.)**  
Provide sponsor guidelines or website link to guidelines.
- PROPOSAL SCOPE OF WORK**  
Provide the scope of work for the proposed project. *Draft copies are accepted initially.*
- BUDGET SPREADSHEET**  
Provide detailed estimate of expenses for each budget category. Refer to the [Proposal Budget Development](#) and [OR Budget Templates](#) for assistance. Include cost share/match only if specifically required by funding agency.
- BUDGET JUSTIFICATION**  
Provide a detailed justification for all items listed in the budget. Refer to the [Preparing a Proposal Budget Toolkit](#) for guidance.
- COST SHARE APPROVAL (if applicable)**  
Provide documentation with approval signatures or other written approval.
- PI ELIGIBILITY (if applicable)**  
Provide completed PI Exception form ([Form 105A](#)) with approval signatures. Refer to UC Davis' [PI eligibility policy](#) for assistance.
- ELECTRONIC APPLICATION PACKAGE**  
Provide access to the completed electronic application with Cayuse SP submittal. Technical components may be in draft form at time of Cayuse SP submission. *Final copies are required 2 business days prior to submission to sponsor agency.*
- ADDITIONAL SPONSORED-SPECIFIC ITEMS (if applicable)**  
Provide additional items required by sponsor agency, (i.e. agency forms and certifications, etc.).
- SUBAWARDS (if applicable)**  
Provide scope of work, budget, budget justification, F&A Rate Agreement and Subrecipient Monitoring Form or Multiple Campus (MCA) Commitment Form for all subawards.
- COMPLIANCE DOCUMENTS (if applicable)**  
Provide completed and signed conflict of interest [Form 800](#) and/or other required compliance documents.