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:

☐ 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 (if applicable)
   Provide access to the completed electronic application. 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.