

## PROPOSAL PREPARATION CHECKLIST

The following proposal checklist is provided to assist with proposal preparation. For further information, please refer to the Sponsored Program Office (SPO) [Proposal Preparation and Submission](#) page.

**PLEASE FORWARD THE FOLLOWING DOCUMENTS VIA CAYUSE SP AS FAR AHEAD OF THE SPONSOR DEADLINE AS POSSIBLE, SO THAT THEY ARRIVE TO SPO FOR REVIEW AND APPROVAL AT LEAST FIVE (5) TO SEVEN (7) BUSINESS DAYS PRIOR TO THE SPONSOR DEADLINE:**

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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 [Proposal Budgeting](#) 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**  
Along with Cayuse SP submittal, provide access to the completed electronic application in the external submission system. 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 SPONSOR-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. See [Outgoing Subawards](#) page for document links.
- COMPLIANCE DOCUMENTS (if applicable)**  
Provide completed and signed conflict of interest [Form 800](#) and/or other required compliance documents.