

## PROPOSAL PREPARATION CHECKLIST (REVISED 02/14/2024)

### GENERAL CONSIDERATIONS

	Is there a concern regarding <a href="#">Gift, Grant, or Sales &amp; Service</a> ?
	Are you applying to the correct Funding Opportunity Announcement (FOA)?
	Did you read and understand the sponsor guidelines, FOA and the application instructions?
	Do UGARF (non-profit) or UGA (Institute of higher education) meet the sponsor's eligibility criteria?
	Does the Principal Investigator (PI) meet the sponsor's eligibility criteria?
	Do all PIs/Co-PIs/Co-Is meet <a href="#">UGA's PI/Co-PI/Co-I Eligibility Policy</a> ?
	Do all PIs/Co-PIs/Co-Is have up-to-date sponsor credentials (Commons, NSF IDs, etc.), if required?
	Is this a <a href="#">Limited Submission</a> ? If so, has the PI been selected to submit? If not, please instruct PI/unit to work with the <a href="#">UGA Internal Competition</a> group to ensure PI is authorized to submit.
	Does the proposal conform to the <a href="#">Proposal Submission Policy</a> ?

### BUDGET CONSIDERATIONS

	Does the proposal budget contain all necessary <a href="#">Direct Costs</a> to perform the work? While we recognize each sponsor may require their budget forms, we also encourage PIs to utilize the <a href="#">UGA Budget Templates</a> which align with UGA Financial Management System's account codes and facilitate timely project setup.
	Does the budget conform to any limitations imposed by the sponsor or the Uniform Guidance (salary caps, prohibition of certain cost types, etc.)?
	Are all personnel anticipated to perform the scope of work incorporated pursuant to the <a href="#">Institutional Base Salary, Compensation &amp; Payroll Certification</a> and <a href="#">Application of Staff Benefits</a> policies?
	Are <a href="#">Compensation of Research Subjects, Participant Support, Scholarships &amp; Student Aid</a> Costs incorporated appropriately, if applicable?
	If the project budget exceeds the sponsor's limitation (e.g., NIH \$500K direct cost cap per year, refer to FOA), did you obtain the sponsor's approval?
	If cost share is incorporated, does it comply with the <a href="#">Cost Share Policy</a> ?
	Is the Indirect Cost incorporated appropriately and pursuant to the <a href="#">Indirect Cost Policy</a> ?
	Does the budget mathematically add up correctly?
	Does the budget justification align with the budget?
	If there are any "normally unallowable" costs (administrative/clerical supplies, office supplies, computers, phones, etc.), are they justified sufficiently to demonstrate necessity and benefit to project?

### EXTERNAL COLLABORATOR CONSIDERATIONS

	Have you looked at the scope of each anticipated collaborator to determine if they are appropriately reflected as a <a href="#">Subrecipient vs. Contractor/Consultant</a> ?
	Is the role (subrecipient versus contractor) of each individual/institution clearly stated in the proposal to avoid misunderstandings or potential disputes?
	<i>For Subrecipients:</i> Have you provided contact information for each Subrecipient's sponsored projects office? Have you obtained <a href="#">Subrecipient Commitment Form</a> , scope, budget, justification, and other required documentation for each anticipated subrecipient?
	<i>For Consultants:</i> Have you obtained a consulting letter detailing (1) scope, (2) compensation rate, (3) dates of services, (4) deliverables, and (5) deliverable due dates?

### ADDITIONAL GRANTS PORTAL CONSIDERATIONS

	Have you (1) initiated the proposal in the Grants Portal, (2) uploaded the FOA/sponsored guidelines, basic proposal directions, and (3) uploaded all required proposal components (e.g. scope of work, budget, justification, biographical sketches, other support or current and pending, facilities statements, etc.)?
	Have you ensured all Grants Portal fields and PI/Co-PI certifications are completed correctly?
	Have you submitted the proposal in the Grants Portal for University Review?