

## At Time of Proposal

- ✓ A need for additional expertise is identified by PI
- ✓ Subrecipient selection process is decided
- ✓ Proposal package from subrecipient is collected
- ✓ If the proposal is going to be a PHS agency the Financial Conflict of Interest review must take place
- ✓ PI assesses potential recipients
- ✓ PI documents decision based on evaluation criteria
- ✓ The PI has several evaluation criteria to help in the decision process. Some important criteria used in the decision process include:
  - Past scientific and financial performance
  - Technical/financial resources
  - Strength of the proposed scope of work
  - Reasonableness of proposed costs
- ✓ The proposal package from the subrecipient includes:
  - Statement of work
  - Budget and associated budget justification
  - Signed commitment letter
  - Biosketches, other support, and other associated information as required by the sponsor
  - Other documentation as requested based on sponsor requirements
- ✓ The subrecipient selection process:
  - Subrecipient competitive bidding: A process whereby a potential subrecipient submits a bid to the PI. The PI considers all bids and makes a decision based on the quality of the science, the best price, and the contract terms.
  - Sole source procurement: The PI's documentation of selection criteria is used.