

# \*Small Business Subcontracting Plan Checklist

*Include this checklist each time you send a final budget to Purchasing Services.*

## 1. Reference Information

Solicitation Number

(Example: BAA-NIAID-DMID-NIHAI2009058): \_\_\_\_\_

Subcontracting Plan Title: \_\_\_\_\_

Requestor's Name: \_\_\_\_\_

Requestor's Title: \_\_\_\_\_

Requestor's Responsibility Center: \_\_\_\_\_

Requestor's Department: \_\_\_\_\_

Has the budget been finalized by the Office of Research?      YES      NO

If you answered NO, the budget must be finalized by the Office of Research **before** you submit it to Purchasing Services.

If you answered YES, provide the name of the person who finalized the budget: \_\_\_\_\_

## 2. Timeline

As indicated in the [Guide to the Preparation of \\*Small/Disadvantaged Business Subcontracting Plans](#), the timeframe will vary based on the level of complexity in drafting the subcontracting plan. However, a minimum of **ten (10) business days** is recommended.

Enter the date on which you submitted your final budget to the Purchasing Services department: \_\_\_\_\_

Enter the date by which you need a subcontracting plan from Purchasing Services: \_\_\_\_\_

➡ Does the submission meet the recommended **10-day minimum** review?      YES      NO

*If you need a subcontracting plan in fewer than 10 days from the date you submitted a final budget to the Purchasing Services department, please explain your circumstances:*

\_\_\_\_\_  
\_\_\_\_\_

## 3. Documents

Forward the following two documents to Purchasing services, via this email address [subcontractingplans@cfo.pitt.edu](mailto:subcontractingplans@cfo.pitt.edu), for the development of a federal subcontracting plan:

A final detailed budget in excel format ([see sample budget](#)) including a "summary of materials" worksheet

*Note: Your final budget must include a "summary of materials" worksheet that identifies anything that must be sole-sourced ([see sample](#))*

A completed version of this checklist

### To be completed by Purchasing Services:

Procurement Specialist: \_\_\_\_\_

Notes on any additional DBE supplier sourcing efforts that were required to complete the federal subcontracting plan:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_