CONTENT CHECKLIST FOR SERVICE CENTER RATE PROPOSALS

- ☐ General, specific, and contact information are provided for the service center:
  - ☐ *General:* center name, school/dept, fiscal/calendar year, center effective date
  - ☐ *Specific:* building name, room #, room type, usage %
  - ☐ *Contact:* email addresses and phone numbers for the Center, Tech, and Admin Directors, as well as other relevant contacts
- ☐ An accurate smartkey is provided.
- ☐ Faculty/staff salaries and fringe costs, core personnel salary costs per service, and other direct costs are distinguished from one another:
  - ☐ *Faculty/staff salaries and fringe costs:* faculty/staff salaries and fringe costs for the rate change's desired fiscal year
  - ☐ *Core personnel salary costs per service:* personnel salary based on the effort spent on each service
  - ☐ *Other direct costs:* costs directly tied to the production of goods/services such as IT, lab supplies, maintenance and repair, etc.
- ☐ Unit of measurement is specified (i.e., hours, tests, scans, etc.).
- ☐ Prior year actual revenue and expenses are depicted to ensure the validity of the proposed rate (if not a new activity).
- ☐ Logical mathematical steps for rate calculations are provided (including links and formulas vs. direct entry).
- ☐ Detailed volume forecast is provided for each service.
- ☐ All internal and external rates included in the rate list align with the rates reflected in the projected budget.
- ☐ If your proposal is for an existing activity, the prior year actuals are up-to-date.
- ☐ If your proposal is for an existing activity, the prior year's revenue and expenses are aligned with the proposed rates (based on past performance, rates aren't too low/high).
- ☐ Uniform Guidance unallowable expenditures are not included.
- ☐ Your activity's fund balance (service center fund 2501) is 1/6 or less of your total annual operating expenses.
- ☐ If applicable, prior year surpluses or deficits are included as carryforward in the rate calculation.
- ☐ If subsidized, factor the subsidy into the rate calculation.
- ☐ The annual plan breaks even.