

**Exhibit B**  
**Att B-1 Task Summary**

**Attachment 7**

Summary Task Budget		Prime Contractor Reimbursable Costs	Major Subcontractor #1 Reimbursable Costs	Major Subcontractor #2 Reimbursable Costs	Major Subcontractor #3 Reimbursable Costs	Totals
		Company Name	Company Name	Company Name	Company Name	
		<input type="checkbox"/> SB <input type="checkbox"/> MB <input type="checkbox"/> DVBE <input type="checkbox"/> None	<input type="checkbox"/> SB <input type="checkbox"/> MB <input type="checkbox"/> DVBE <input type="checkbox"/> None	<input type="checkbox"/> SB <input type="checkbox"/> MB <input type="checkbox"/> DVBE <input type="checkbox"/> None	<input type="checkbox"/> SB <input type="checkbox"/> MB <input type="checkbox"/> DVBE <input type="checkbox"/> None	
<b>1.0</b>	Name of Task 1					\$ -
<b>2.0</b>	Name of Task 2					\$ -
<b>3.0</b>	Name of Task 3					\$ -
<b>4.0</b>	Name of Task 4					\$ -
<b>5.0</b>	Name of Task 5					\$ -
	<b>Grand Totals</b>	\$ -	\$ -	\$ -	\$ -	\$ -

PLEASE SEE THE INSTRUCTIONS SHEET FOR DETAILED INFORMATION ON COMPLETING THIS FORM.

If the budget forms are not filled out completely your bid/proposal may be rejected.

For these boxes, be sure to include all costs: labor (unloaded rates) and non-labor costs (fringe, overhead, general & administrative, & profit and other direct operating costs). The totals are total costs to perform each task.

**Exhibit B**  
**Att B-2 Category Summary**

**Attachment 7**

Summary Category Budget	Prime Contractor Reimbursable Costs	Major Subcontractor #1 Reimbursable Costs	Major Subcontractor #2 Reimbursable Costs	Major Subcontractor #3 Reimbursable Costs	Totals
	Company Name	Company Name	Company Name	Company Name	
Direct Labor					\$ -
Fringe Benefits					\$ -
Travel					\$ -
Equipment					\$ -
Materials/ Misc.					\$ -
Minor Subcontractors*					\$ -
<b>Total Direct</b>	\$ -	\$ -	\$ -	\$ -	\$ -
Indirect Overhead					\$ -
General & Administrative					\$ -
Profit					\$ -
<b>Total Indirect</b>	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Grand Total</b>	\$ -	\$ -	\$ -	\$ -	\$ -

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Direct Labor = unloaded rates X number of hours (Att B-3)

\* A Minor Subcontractor is any subcontractor receiving less than \$100,000 or 25% (whichever is less) of the Commission Funds.

**Exhibit B**  
**Att B-3 Prime Labor Rates**

**Attachment 7**

Company Name						
Time intervals from the start of the project through the Contract Term End Date. (Use your organization's Fiscal Year start / end dates.)		Projected Hourly Unloaded Rates (\$)				Total Hours Worked
		From: <input style="width: 50px;" type="text"/>	To: <input style="width: 50px;" type="text"/>	From: <input style="width: 50px;" type="text"/>	To: <input style="width: 50px;" type="text"/>	
Name	Job Classification/Title	(\$) Unloaded Maximum Rate	(\$) Unloaded Maximum Rate	(\$) Unloaded Maximum Rate	(\$) Unloaded Maximum Rate	

\* Actual billable rates cannot exceed the rates specified in this exhibit.

\* Rates listed must be unloaded rates (that is, before fringe benefits, overhead, G&A or Profit). These rates must reflect the highest salary or wage rate that is actually paid to the employee.

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## Attachment 7

RFP 600-12-602

**Exhibit B**  
**Att B-4 Prime Non-Labor Rates**

**Attachment 7**

Company Name				Percentage Rate			
Time intervals from the start of the project through the Contract Term End Date. (Use your organization's Fiscal Year start / end dates.)				Fringe Benefits (FB)	Indirect Overhead (IOH)	General & Administrative (G&A)	Profit (P)
From:		To:		%	%	%	%
From:		To:		%	%	%	%
From:		To:		%	%	%	%
From:		To:		%	%	%	%
From:		To:		%	%	%	%

Note: Use the categories that you typically use in your standard business practice.

Non-Labor Rate Category	List the budget expense items to which the indirect costs or fees are applied. Use the following abbreviations: DL = Direct Labor, FB = Fringe Benefits, M = Materials/ Miscellaneous, EQ = Equipment, T = Travel, S = Subcontracts, IOH = Indirect Overhead, G&A = General & Administrative
Fringe Benefits	
Indirect Overhead	
General & Administrative	
Profit	

\* Prime Contractor profit not allowed on Subcontractor invoices.

List items you include in each category (e.g., vacation, retirement plan, telephone, secretarial, rent/lease, insurance, etc.).		
Fringe Benefits	Indirect Overhead	General & Administrative

\* Actual billable rates cannot exceed the rates specified in this exhibit.

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**Exhibit B**  
**Att B-4a Sub#1 Non-Labor Rates**

**Attachment 7**

Company Name							
Time intervals from the start of the project through the Contract Term End Date. (Use your organization's Fiscal Year start / end dates.)				Percentage Rate			
				Fringe Benefits (FB)	Indirect Overhead (IOH)	General & Administrative (G&A)	Profit (P)
From:		To:		%	%	%	%
From:		To:		%	%	%	%
From:		To:		%	%	%	%
From:		To:		%	%	%	%
From:		To:		%	%	%	%

Note: Use the categories that you typically use in your standard business practice.

Non-Labor Rate Category	List the budget expense items to which the indirect costs or fees are applied. Use the following abbreviations: DL = Direct Labor, FB = Fringe Benefits, M = Materials/ Miscellaneous, EQ = Equipment, T = Travel, S = Subcontracts, IOH = Indirect Overhead, G&A = General & Administrative
Fringe Benefits	
Indirect Overhead	
General & Administrative	
Profit	

\*Subcontractor profit is not allowed on Sub-subcontractor invoices.

List items you include in each category (e.g., vacation, retirement plan, telephone, secretarial, rent/lease, insurance, etc.).		
Fringe Benefits	Indirect Overhead	General & Administrative

**\* Actual billable rates cannot exceed the rates specified in this exhibit.**

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Unhide additional Subcontractor sheets as necessary.

**Exhibit B**  
**Att B-5 Direct Operating Expenses**

**Attachment 7**

Pre-approved Travel List *						
Task No.	Prime / Sub Name	Trip #	Who	Departure and Destination	Trip Purpose	Amount
						Commission Funds
2	Prime	2-1	Bob Williams & Jane Condor	Los Angeles to Sacramento	Kickoff Meeting	\$100
3	UC Berkeley	3-1 - 3-4	Principal Investigator & Research Assistant	Los Angeles to Mobile, AL	Four trips for PAC Meetings @ \$300 per trip	\$1,200
Total:						\$0

\* Travel is reimbursed at state rates.

Equipment**						
Task No.	Prime / Sub Name	Description	Purpose	# Units	Unit Cost	Amount
						Commission Funds
Total:						\$0

\*\* Equipment is defined as having an acquisition unit cost of at least \$5,000. See instructions for more details.

**Exhibit B**  
**Att B-5 Direct Operating Expenses**

**Attachment 7**

Material(s)/ Miscellaneous Costs						
Task No.	Prime / Sub Name	Description	Purpose	# Units	Unit Cost	Amount
						Commission Funds
Total:						\$0

Minor Subcontractors					
Task No.	Subcontractor Legal Name	Purpose	DVBE? (Yes/No)	Small/ Micro Business (SB/MB)	Amount
					Commission Funds
Total:					\$0

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# Not a Contract Document Att B-6 Loaded Rate Calculation

Job Classification/Title	DL	FB %	FB Base	FB \$	IOH %	IOH Base	IOH \$	G&A %	G&A Base	G&A \$	Profit %	Profit Base	Profit \$	Loaded Hourly Rate
EXAMPLE 1	\$ 40.00	40%	\$ 40.00	\$ 16.00	35%	\$ 40.00	\$ 14.00	15%	\$ 40.00	\$ 6.00	10%	\$ 40.00	\$ 4.00	\$ 80.00
EXAMPLE 2	\$ 40.00	40%	\$ 40.00	\$ 16.00	35%	\$ 40.00	\$ 14.00	15%	\$ 56.00	\$ 8.40	10%	\$ 40.00	\$ 4.00	\$ 82.40
		0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	\$ -
		0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	\$ -
		0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	\$ -
		0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	\$ -
		0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	\$ -
		0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	\$ -
		0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	\$ -
		0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	\$ -
		0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	\$ -
		0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	\$ -
		0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	\$ -
		0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	\$ -
		0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	0%	\$ -	\$ -	\$ -

## Instructions:

The purpose of this form is to illustrate how the previous forms capture the break-out of a company's loaded rates. This is not a contract document. This form may be used in some solicitations for Cost Evaluation purposes but is otherwise just for the Bidder's Use.

The loaded rate is the sum of the unloaded hourly rate/ Direct Labor Rate (DL), plus Fringe Benefits (FB), plus Indirect Overhead (IOH), plus General & Administrative (G&A), plus Profit.

1. Insert all Job Classifications to be charged to this agreement.
2. Insert the DL Rate for each classification. This is the rate that is actually paid to the employee (before FB, IOH, G&A, or Profit).
3. Insert the FB% to be charged to this agreement and copy for each job classification.
4. Insert the Base \$ amount for FB (usually just the DL amount).
5. The FB \$ will automatically calculate based on the FB% and the FB Base.
6. Complete steps 3 and 4 for IOH, G&A, and Profit.

NOTE: This form automatically calculates the base for all indirect rates as the Unloaded Hourly/ Direct Labor rate (FB% x DL = FB \$) (See Example 1). Some companies may charge indirects on other indirects, for example, the G&A % rate may be charged on a base of DL +FB. If this is the case, the G&A Base must be modified to read =B2+E2 instead of just =B2. (See example 2)

7. If your company standard is to charge clients at a Loaded Rate, verify that the Loaded Rate calculated on this sheet is accurate. The Loaded Rate is for verification purposes only. Contractor must invoice with detailed break-out information.

Acronyms:	
Direct Labor (Unloaded Hourly Rate)	DL
Fringe Benefits	FB
Indirect Overhead	IOH
General & Administrative	G&A