


## Appendix J: Instructions for Budget Form

This contract will be a deliverables-based contract. It will be reimbursed on a fixed price basis according to task completed. See the sample budget form spreadsheet. Please note there are multiple tabs in the spreadsheet document.

### Labor

In this section, the applicant should detail each broad labor type that will be employed in the course of the project, including any contracted labor as one or more separate labor categories. Labor dollars for each task should include all overhead costs. Additional rows may be added in the case that there are more labor categories to be broken out. Please ensure that all formulas are updated to reflect this change. Labor categories are intended to be broad, with some degree of hourly rate variation within each category. First 5 LA may request additional detail regarding labor categories upon review of the submitted budget.

**Figure 1: Sample Deliverables Based Budget Form**

		Deliverables Based Budget Summary Exhibit B								Contract # <u>XXXX</u>							
										Fiscal Year <u>2010</u>							
		Agency: <u>XXXXXXXX</u>															
		Project Name: <u>Family Survey</u>															
<b>Task/ Deliverable</b>																	
Labor/Cost Type	1. Review F5LA strategic plan	2. Literature review	3. RAC meeting	4. Study design plan	5. IRB approval	6. Data entry system	7. Training	8. Study preparation	9. Data collection	TOTAL HOURS	TOTAL DOLLARS						
<b>Administrative labor</b>																	
Subtotal- Hours	20.0	30.0	10.0	20.0	40.0	20.0	10.0	20.0	200.0	410.0							
Subtotal- Labor Dollars	\$1,100	\$1,800	\$350	\$1,100	\$2,200	\$1,100	\$2,750	\$1,100	\$11,000		\$ 22,550.00						
<b>Survey support</b>																	
Subtotal- Hours	0.0	0.0	0.0	0.0	0.0	0.0	600.0	0.0	15,000.0	15,600.0							
Subtotal- Labor Dollars	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$24,000.00	\$ -	\$ 600,000.00		\$ 624,000.00						
<b>Core research labor</b>																	
Subtotal- Hours	60.0	100.0	40.0	250.0	40.0	150.0	60.0	60.0	300.0	1,060.0							
Subtotal- Labor Dollars	\$9,000	\$15,000	\$7,200	\$37,500	\$6,000	\$22,500	\$9,000	\$9,000	\$45,000		\$ 160,200.00						
<b>Senior research staff labor</b>																	
Subtotal- Hours	30.0	40.0	24.0	30.0	16.0	20.0	30.0	30.0	150.0	370.0							
Subtotal- Labor Dollars	\$7,500	\$10,400	\$6,240	\$7,500	\$4,160	\$9,200	\$7,500	\$7,500	\$39,000		\$ 96,200.00						
<b>DIRECT COSTS</b>																	
Equipment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 20,000.00	\$ -		\$ 20,000.00						
Incentives	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 60,000.00						
Shipping/postage	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,350.00	\$ -		\$ 2,350.00						
Travel	\$ 3,000.00	\$ -	\$ 3,000.00	\$ -	\$ -	\$ -	\$ -	\$ 10,000.00	\$ -		\$ 16,000.00						
Facilities	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,000.00	\$ -		\$ 2,000.00						
IRB fee	\$ -	\$ -	\$ -	\$ -	\$ 2,000.00	\$ -	\$ -	\$ -	\$ -		\$ 2,000.00						
<b>TASK TOTAL</b>	<b>20,900.0</b>	<b>27,030.0</b>	<b>16,990.0</b>	<b>46,400.0</b>	<b>14,360.0</b>	<b>28,800.0</b>	<b>19,550.0</b>	<b>112,250.0</b>	<b>95,000.0</b>	<b>17,448.0</b>	<b>\$ 1,005,300.00</b>						
Fiscal Contact Person _____		Date _____		First 5 Authorized Staff				<table border="1" style="margin: auto;"> <tr> <td><b>Total Cost:</b></td> <td style="text-align: right;"><b>1,005,300</b></td> </tr> <tr> <td><b>Total Hours:</b></td> <td style="text-align: right;"><b>17,448</b></td> </tr> <tr> <td><b>Composite Rate:</b></td> <td style="text-align: right;"><b>58</b></td> </tr> </table>				<b>Total Cost:</b>	<b>1,005,300</b>	<b>Total Hours:</b>	<b>17,448</b>	<b>Composite Rate:</b>	<b>58</b>
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<b>Composite Rate:</b>	<b>58</b>																
Agency Authorized Signature _____		Date _____		Program Officer													
Phone # _____		Finance															

The “Composite Rate” calculates the hourly rate for the project, including all costs, both direct and indirect, divided by the total number of staff hours on the project. All equipment and other purchases are included in this composite rate. The composite rate for any contract may not exceed \$150/hour.

### **Direct Costs**

This section includes all costs not included under the “Labor” section. Categories can be customized based on the applicants’ needs. The applicant should ensure that formulas update appropriately when information is added.

### **Tasks**

The tasks included across the top of the budget form should be based upon those tasks as outlined in the RFQ. If a given task has more than one deliverable, then it may be broken out into sub-tasks by deliverable. The selected contractor will invoice First 5 LA according to deliverable.

### **Other**

Contract number will be assigned upon contract award, applicants should leave that category blank. The budget may be significantly longer than one page, and that is fine.

An original signed budget signed by the agency fiscal contract person and the agency authorized signatory will be required once a contractor is selected. Electronic copies will not be sufficient.

If a deliverable is not achieved in full (for example, a sample size of 400 was included in the budget assumptions and the scope of work but the final sample was only 200), First 5 LA reserves the right to prorate the payment accordingly.

### **Budget Narrative**

In addition to the attached budget form, a budget narrative is required. This narrative will justify, task by task, the costs associated with the project. The narrative should include a justification for the use of different labor categories, as well as a justification for any line of direct costs. The format of the budget narrative may be determined by the applicant.