

Main Contact: Karen Smith
Firm Name: ABC
Firm Address: 123 Main St
Procurement Title: Organizational Assessment for
the San Mateo County Express Lane
Joint Powers Authority (SMCEL-JPA)

Appendix A
Summary
TOTAL PROJECT COST

TOTAL PROJECT COST (without Optional Tasks)	\$ -
Subtotal of Optional Tasks	\$ -
TOTAL PROJECT COST (with Optional Tasks)	\$ -

* Please refer to Section II. Proposal Requirements, Cost Proposal in the RFP for instructions.

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TASK/ DELIVERABLE	DIRECT LABOR					DIRECT EXPENSES (See itemized description at the bottom of this form)	TOTAL COST
	Firm Name ABC	Sub, Inc.	Add extra columns as necessary	TOTAL HOURS	SUBTOTAL DIRECT LABOR		
	Classification Principal	Assistant I					
	Key Personnel Karen Smith	Jane Doe					
	Hourly Rate (\$/Hr) \$210.00	\$50.00					
[THIS TASK IS PROVIDED FOR EXAMPLE PURPOSES ONLY]							
Task 1 - Project Management & Approach							
1.1 - Draft Project Plan Memorandum (Costs per deliverable - \$1,930.00). Values in the table indicate calculated cost based on <u>1</u> Quantity of deliverables)	8	5	0	13	\$ 1,930.00	\$ -	\$ 1,930.00
1.2 - Kick-off Meeting Agenda, Materials, and Minutes	4	2	0	6	\$ 940.00	\$ 100.00	\$ 1,040.00
1.3 - Final Project Plan Memorandum (Costs per deliverable - \$2,520.00). Values in the table indicate calculated cost based on <u>1</u> Quantity of deliverables)	12	0	0	12	\$ 2,520.00	\$ -	\$ 2,520.00
1.4 - Ongoing Project Team meetings (Cost per deliverable - \$255.83). Values in the table indicate calculated cost based on <u>24</u> Quantity of deliverables)	24	12	0	36	\$ 5,640.00	\$ 500.00	\$ 6,140.00
1.5 - [OPTIONAL] [Deliverable name]	0	0	0	0	\$ -	\$ -	\$ -
Task Subtotal	48	19	0	67	\$ 11,030.00	\$ 600.00	\$ 11,630.00
Task 1 - Project Management & Approach							
1.1 - Draft Project Plan Memorandum							
1.2 - Kick-off Meeting Agenda, Materials, and Minutes							
1.3 - Final Project Plan Memorandum							
1.4 - Ongoing Project Team meetings							
Task Subtotal							
Task 2 - Define Organizational Goals							
2.1 - Summary and Notes from Board engagement							
2.2 - Summary of the Working Session with SMCEL-JPA staff							

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2.3 - Meeting summary with the subcommittee and Board (up to four meetings)							
2.4 - Draft Organizational Goals							
2.5 - Final Organizational Goals							
Task Subtotal							
Task 3 - Existing Condition Review & Gaps/Needs Assessment							
3.1 - Meeting Summary from program staff engagement							
3.2 - Findings of Organizational Models							
3.3 - Draft Gap/Needs Assessment							
3.4 - Final Gap/Needs Assessment							
Task Subtotal							
Task 4 - Preliminary Findings Report							
4.1 - Draft Preliminary Findings Report							
4.2 - Final Preliminary Findings Report							
4.3 - Meetings with JPA subcommittee and Board (up to four meetings)							
Task Subtotal							
Task 5 - Alternative Analysis							
5.1 - Draft Alternatives Analysis							
5.2 - Final Alternatives Analysis							
5.3 - Summary Notes from the Working Session documenting input and key decisions							
5.4 - Meetings with JPA subcommittee and Board (up to four meetings)							
Task Subtotal							
Task 6 - Organizational Assessment Report							
6.1 - Summary Notes from the Working Session documenting input and key decisions							
6.2 - Draft Organizational Assessment Report							
6.3 - Final Organizational Assessment Report							
6.4 - Meetings with JPA subcommittee and Board (up to four meetings)							
Task Subtotal							
TOTAL PROJECT COST (without Optional Tasks)							\$ -
Subtotal of Optional Tasks							\$ -
TOTAL PROJECT COST (with Optional Tasks)							\$ -

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ITEMIZATION OF DIRECT EXPENSES
Task 1.1 - Air travel, lodging, printing

OPTIONAL TASKS							
Task 7 - As-needed Tasks (Optional)							
To be determined							
Task Subtotal							