

Request for Proposals

Budget and Budget Narrative Guidance

Thank you for your interest in WorkRise’s Request for Proposals (RFP). This document is intended to provide guidance to applicants on how to prepare the budget proposal for a letter of inquiry or full proposal submission.

Please upload your budget and budget narrative as a single PDF document to the [WorkRise grants portal](#) using this file name format:

WR 2023-A-XXX_PRIMARY ORG NAME_BUDGET.pdf
For example: WR-2023-A-000_Urban Institute_BUDGET.pdf

“WR 2023-A-XXX” is the unique identification number automatically assigned to an LOI when a new application is created in the grants portal.

Multiyear Proposals

The budget must cover the proposed project’s requested period of performance. For proposals that request funding for more than one year, the budget should provide costs details for each 12-month period.

Projects with Multiple Funding Sources

The budget must total the amount requested from WorkRise. If the project is or will be supported by more than one funder, please identify additional sources of support and the total amount of funding committed or received in the budget narrative.

No Profit or Fee

Budget proposals submitted to this RFP cannot include a profit or a fee. Applicants invited to submit full proposals should affirm in the budget narrative that no profit or fee was included in their budget estimate.

Indirect Costs Policy

WorkRise does not require a fixed maximum rate for indirect costs. We assess indirect costs on a case-by-case basis to make it possible for a wide variety of organizations to apply to our RFP. Budget proposals submitted to this RFP should reflect the true costs of the work proposed. At its discretion, WorkRise may propose that an organization limit indirect costs. We can accept an indirect rate of 15 percent of the total amount requested by universities.

Review Process

WorkRise will review all completed LOI applications when the application period closes. Finalists are selected in consultation with our Leadership Board, and project teams invited to submit full proposals will refine their projects and proposal documents for a final review and funding decision.

Letters of Inquiry (LOI) – All Applicants

Applicants submitting letters of inquiry should upload a budget summary and brief budget narrative that describes the project's funding needs. The budget summary and budget narrative should not exceed one page in length. The budget summary should be prepared by the primary applicant organization and uploaded to the grants portal according to the instructions included in this RFP.

Budget Summary

In the budget summary, the total amount requested from WorkRise should be broken out by the project's key activities, tasks, or phases. The estimates provided should be based on projected costs for project-specific personnel, subcontracts, other direct costs, and indirect costs, as applicable.

SAMPLE BUDGET SUMMARY*

Primary Applicant Organization:	Urban Institute	
Period of Performance:	01/01/2023 - 06/30/2024	
Activity/Task/Phase	Timeframe	Total Estimated
<i>Phase 1 Implementation</i>	01/01/23 - 05/30/23	\$ 50,000
<i>Analysis</i>	06/01/23 - 07/31/23	\$ 27,500
<i>Phase 2 Implementation</i>	06/01/23 - 03/31/24	\$ 50,000
<i>Evaluation and Dissemination of Findings</i>	04/01/24 - 06/30/24	\$ 42,500
Total Amount Requested from WorkRise		\$ 170,000

*This sample budget is for illustrative purposes only. Please refer to the guidance presented in this document and adhere to your organization's policies, procedures, and cost structures when preparing your budget for submission to the WorkRise RFP.

Budget Narrative

The budget narrative should provide a brief explanation of how funding from WorkRise will support the proposed project and each of the major activities, tasks, or phases described in the LOI narrative. Note how and when key personnel, organizational partners, or other key stakeholders will be engaged in the work; highlight major deliverables to be produced; and share any additional sources of funding and/or plans to secure additional resources to support the proposed work.

Full Proposals – Invited Finalists Only

Finalists invited to submit full proposals will be asked to prepare a line-item budget and budget narrative that details the costs required to accomplish the proposed project. In the budget proposal, line items should be categorized according to the primary applicant organization's policies, procedures, and cost structures. For example, some organizations may include rent as a direct cost; others may incorporate it into overhead. The budget should reflect the total amount requested from WorkRise in a way that is consistent with how the primary applicant organization typically allocates costs. No profit or fee can be included in the budget proposal.

Line-Item Budget

The budget proposal should include the following line items. Applicants may add other line items or omit certain line items that are not applicable to their project. The budget should fit on a single page. A sample budget is included below for reference.

- **Salaries or wages:** Provide details for all project personnel employed by the primary applicant organization. Include their name and position title, annual salary with percentage of time or full-time equivalent, or the number of hours and their hourly rate.
- **Fringe benefits:** If fringe benefits are added to personnel costs in the budget, they must be itemized separately in the budget narrative.
- **Subcontracts/subawards:** List any services purchased by your organization in support of the project (e.g., subcontractors, partners, and consultants).
- **Other direct costs:** Itemize all other direct costs to the project. Typical costs include rent, communications, information technology, travel, and honoraria.
- **Indirect costs:** Please see an explanation of WorkRise's policy on page 1.

SAMPLE BUDGET*

SAMPLE BUDGET*			
Primary Applicant Organization: Urban Institute			
Period of Performance: 01/01/2023 - 06/30/2024			
	Year 1	Year 2	Total
	01/01/23 - 12/31/23	01/01/24 - 06/30/24	01/01/23 - 06/30/24
Salary/Wages			\$ 51,750
Principal Investigator (0.4 FTE)	7,500	3,750	\$ 11,250
Co-Principal Investigator (0.4 FTE)	12,000	6,000	\$ 18,000
Project Manager (0.5 FTE)	15,000	7,500	\$ 22,500
Fringe Benefits (30%)			\$ 15,525
	10,350	5,175	\$ 15,525
Subcontracts/Subawards			\$ 50,000
Partner Organization Subaward	50,000	0	\$ 50,000
Consultant Name	0	10,000	\$ 10,000
Other Direct Costs			\$ 20,552
Travel	552	0	\$ 552
Project Website	10,000	10,000	\$ 20,000
TOTAL DIRECT COSTS	105,402	42,425	\$ 147,827
Indirect Costs (15%)	15,810	6,364	\$ 22,174
TOTAL AMOUNT REQUESTED			\$ 170,000

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Budget Narrative

Applicants must submit a budget narrative that corresponds to the line-item budget. The narrative should include a detailed justification of each of the proposed costs, to include any assumptions, methodologies, or formulas used to estimate costs. The budget narrative can be approximately 2-5 pages in length in order to provide a sufficient explanation of the budget for the proposed project.

- **Salaries or wages:** Describe the project's personnel and their role. This cost category should only include personnel employed by the primary applicant organization. Staff from partner organizations, consultants, and other subcontractors should be described under the *Subcontracts/Subawards* line item.
- **Fringe benefits:** Explain the numerical rate and provide a description of the components (e.g., health insurance, insurance contributions, pension); or submit a copy of your organization's Negotiated Indirect Cost Rate Agreement.
- **Subcontracts/subawards:** Provide details about any services performed by an entity outside of your organization (e.g. subgrant to partner organization, consultant fees), to include a description of the purpose of the services and cost estimates or rates. Justification is required if more than 50 percent of requested funds are allocated to this category.
- **Other direct costs:** Describe other direct costs (e.g., travel, honoraria) and their relevance to your project. Avoid *Miscellaneous* line items. A single line-item representing multiple costs must be explained in detail in the budget narrative.
- **Indirect costs:** If your organization incorporates any costs as an overhead rate, please provide an explanation of how your organization calculates indirect costs or submit a copy of your organization's Negotiated Indirect Cost Rate Agreement (NICRA).