

Education Budget Data Request

A one-page ask that gets a clinical educator the fourteen numbers every education business case depends on.

Why this form exists

Nursing professional development practitioners are asked to justify education in financial terms, then handed no financial data to do it with. The numbers exist. They sit in finance, human resources, and decision support systems that most educators have never been given access to, and they are rarely refused when someone asks for them directly.

This form is the direct ask. Print it, fill in the three lines at the top, and hand or email it to your finance business partner, decision support analyst, department director, or human resources compensation contact. Every item explains what you need and why, so the person receiving it does not have to guess what you are building or wonder whether the request is reasonable.

Ask once. Ask for the whole set. Then reuse the answers for every class, program, residency, and conference you cost out for the rest of the fiscal year.

Before you send it: ask your director who owns these numbers for your cost center. In most hospitals it is a finance business partner or a decision support analyst assigned to nursing. If no one is assigned to you, send it to the person who reviews your department's monthly budget variance report. That person always has access.

Requested by

Name and credentials	
Department and cost center	
Date requested / needed by	

A short note you can copy into the email

Hi [name],

I am building cost and value estimates for our nursing education programs so that what we bring to budget discussions matches the way finance already measures things. Rather than come back to you every time I price out a class, I would like to get one standard set of figures I can reuse all year.

I have attached a short form. It lists what I am asking for and why each figure matters, so it should take you far less time than a meeting. If any of these are not tracked the way I have described, please tell me what you do have and I will work from that instead.

Thank you,
[your name and credentials]

SECTION A Wages and hourly rates

These five figures drive the largest single cost in nursing education, which is paid nurse time. Most education budgets are wrong because this section was guessed.

A1 Fringe benefit and payroll tax load, as a percentage of wages

What I need: The percentage added to a nurse's base wage to cover the employer share of taxes and benefits. Please also tell me whether that percentage includes paid time off accrual, and whether it is expressed as a percentage of wages or a percentage of total compensation.

Why it matters: An hour of nurse time costs the organization more than the wage. Without this figure I will understate every program cost I present, and the numbers will not reconcile with yours.

Where you likely have it: The fringe benefit rate applied to salary expense in the budget model, the benefits line of the cost center report, or a negotiated rate if we hold one.

YOUR ANSWER

Include: percent, whether it is on wages or total compensation, and whether paid leave is inside it.

A2 Average hourly wage for a staff RN in my cost center

What I need: The average base hourly wage actually paid to registered nurses in the department the education serves, not the posted range and not the system-wide average.

Why it matters: Education cost scales directly with this figure. A specialty department average can sit well above the house-wide number, and using the wrong one makes the estimate indefensible.

Where you likely have it: Payroll or position control reports by cost center.

YOUR ANSWER

A3 Fully loaded hourly rate for a staff RN

What I need: The all-in cost to the organization of one paid nurse hour, wage plus load. If you would rather give me this single number instead of A1 and A2 separately, that works and I will use it.

Why it matters: This is the figure I multiply by classroom hours. Getting it from you means the cost of a program comes from your system rather than from my arithmetic.

Where you likely have it: Decision support productivity or labor cost models.

YOUR ANSWER

A4 Fully loaded hourly rate for a clinical educator or NPD specialist

What I need: The same all-in hourly figure for the educator role, and for preceptors if they are paid a differential while precepting.

Why it matters: Educator preparation, teaching, and competency validation hours are a real cost of every program and are usually left out entirely.

Where you likely have it: The same labor cost model, filtered to the education job codes.

YOUR ANSWER

A5 What we actually pay to cover a shift when a nurse is in class	
What I need: The hourly rate paid to backfill an absent nurse, and whether we typically backfill at all. Overtime, incremental shift, float pool, or contract labor. Why it matters: If we backfill, that cost belongs in the education budget. If we do not, I should stop claiming it and reduce my estimate accordingly. Either answer makes the case stronger. Where you likely have it: Premium pay and overtime reporting for the cost center.	YOUR ANSWER

NOTES ON THIS SECTION: EXCEPTIONS, CAVEATS, OR ANYTHING THAT IS NOT TRACKED

SECTION B Turnover and replacement

This is the return side of the case. Almost every dollar education gives back to a hospital travels through retention, so these three figures decide whether the argument lands.

B1 Our cost to replace one staff RN

What I need: The facility or system figure for the total cost of losing and replacing one staff registered nurse. Please tell me what it includes, particularly whether orientation, sign-on incentives, and contract labor coverage during the vacancy are inside it.

Why it matters: This is the single number that converts a retention gain into a dollar figure leadership recognizes. National averages are available, but our own number will always carry more weight in our budget meeting.

Where you likely have it: Human resources or talent acquisition cost-per-hire analytics, or the workforce section of the operating budget.

YOUR ANSWER

If we do not calculate this, please say so and I will use a cited national benchmark and label it.

B2 RN turnover rate, overall and first year

What I need: Our current registered nurse turnover rate, the first-year turnover rate, and the same figures for my department if they are broken out.

Why it matters: This tells me how many departures a program could realistically prevent. It keeps my projections anchored to what is actually happening here instead of to what I hope happens.

Where you likely have it: Human resources dashboards, the nursing quality scorecard, or regulatory and accreditation reporting.

YOUR ANSWER

B3 Average paid orientation hours per newly hired RN

What I need: The average number of paid hours a new registered nurse spends in orientation before carrying a full assignment, including preceptor hours if the preceptor is also paid during that time.

Why it matters: When education shortens orientation, this is how the savings get calculated. Without a baseline there is nothing to measure the improvement against.

Where you likely have it: Onboarding or orientation tracking, education department records, or productive versus non-productive hour reporting for new hires.

YOUR ANSWER

SECTION C Premium labor and overhead

Three figures that turn soft claims into line items. Fill in what is tracked and leave the rest blank rather than estimating.

C1 Premium we pay above a staff hour for contract or agency labor

What I need: The difference per hour between a contract or agency nurse and a staff nurse, all in.

Why it matters: When education reduces vacancy or reliance on contract coverage, this premium is the savings. It is one of the few education returns finance can verify directly.

Where you likely have it: Contract labor spend reports and the supplemental staffing budget.

YOUR ANSWER

C2 Internal charge for classroom, simulation lab, or AV use

What I need: Whether space and equipment are charged back to my cost center, and at what rate. If they are not charged back, please confirm that so I can leave it out.

Why it matters: I would rather show a zero I can explain than an estimate I cannot defend.

Where you likely have it: Facilities chargeback schedules or internal service allocations.

YOUR ANSWER**C3 Annual cost of learning platforms and licensed content**

What I need: What we pay annually for the learning management system, simulation software, and subscription content, and whether any portion is allocated per learner or per department.

Why it matters: These costs are already being paid. Allocating them accurately keeps me from double counting and shows leadership the true cost per learner.

Where you likely have it: Contracts, the education or nursing administration budget, or information technology allocations.

YOUR ANSWER

SECTION D How our budget actually treats education

Rules of the road. These three answers change the entire shape of the calculation and take about a minute to give.

D1 Is education time budgeted as productive or non-productive time?

What I need: How paid class, orientation, and conference hours are classified in our budget and productivity reporting, and whether that classification differs for orientation versus ongoing education.

Why it matters: This determines whether nurse time in class shows up as a cost against my department, against the unit, or as an accepted non-productive category. I do not want to present a cost the budget does not actually recognize.

Where you likely have it: The budget methodology or productivity standard documentation.

YOUR ANSWER

D2 Cost center and general ledger account for education expense

What I need: The cost center number and the general ledger accounts I should reference for education, travel, registration, and continuing education expense.

Why it matters: Speaking in the codes finance already uses makes my request easier to approve and easier to track after approval.

Where you likely have it: The chart of accounts.

YOUR ANSWER

D3 Effective dates, and who I follow up with

What I need: The fiscal year and period these figures cover, when they are next updated, and the name of the person I should come back to for the refreshed set.

Why it matters: So that I refresh these once a year on your schedule instead of asking you repeatedly, and so nothing I present is quietly out of date.

Where you likely have it: You would know this better than any system.

YOUR ANSWER

If your business partner cannot supply an item, that is still useful information. Write "not tracked" in the box and move on. In your business case, label that line as an assumption, state the source you used instead, and invite finance to correct it. An assumption you have flagged yourself is credible. An assumption someone else discovers is not.

ANYTHING ELSE I SHOULD KNOW BEFORE I BUILD THE ESTIMATE

What a completed form looks like

The figures below are illustrative only. They do not describe any real facility and should never be used in place of your own. They are here so you can see the shape of a usable answer, and so your business partner can see how little detail you are actually asking for.

	REQUESTED FIGURE	RETURNED BY FINANCE
A1	Fringe and payroll tax load	29.5% of wages, excludes PTO accrual
A2	Average staff RN hourly wage, cost center	\$43.10
A3	Fully loaded staff RN hourly rate	\$55.81
A4	Fully loaded educator hourly rate	\$67.30
A5	Backfill rate when a nurse is in class	\$64.65 overtime, backfilled about 40% of the time
B1	Cost to replace one staff RN	\$58,400, includes orientation and vacancy coverage
B2	RN turnover, overall and first year	15.9% overall, 21.4% first year
B3	Average paid orientation hours per new RN	480 hours, plus 320 preceptor hours
C1	Contract labor premium per hour	\$38.00 above a staff hour
C2	Classroom and simulation chargeback	Not charged back to the department
C3	Annual learning platform and content cost	\$46,000, not allocated per learner
D1	Education time classification	Non-productive, orientation is tracked separately
D2	Cost center and GL accounts	CC 6120, GL 7410 education, GL 7455 travel
D3	Effective dates and follow-up contact	FY26, refreshed each July, contact remains the same

Reading the example

Notice what the finance partner did in row A1. They gave the percentage, named the basis, and said paid time off is excluded. That one clarification is the difference between a defensible model and a model that is off by a third. If your answer comes back as a bare number, ask that one follow-up question before you use it.

Notice A5 as well. The honest answer was not a flat yes. Coverage happens roughly forty percent of the time, so only forty percent of those hours belong in the estimate. Partial answers are usually the true ones, and building them in is what makes leadership trust the rest of your numbers.

Row C2 returned a zero. Keep it visible in your model anyway. A line that reads zero with a reason beside it tells leadership you looked, and it stops someone from raising it as a gap later.

Once you have the answers

Enter them into the Education Budget and Value Calculator, the free interactive worksheet at elevatenpd.org, and it will produce total investment, cost per nurse, cost per contact hour, projected return, and the break-even point in RN departures prevented. Refresh this form once each fiscal year, and keep the completed copy where the rest of your department can find it. You are almost certainly not the only educator who needs these numbers.

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