

Writing a Medical Education Grant Budget

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The Challenge

Securing grant funding for medical education initiatives is a critical yet formidable task for those in graduate medical education (GME). A key grant element is creating an accurate budget and associated justification. While trainees and faculty may have fabulous ideas, limited experience in budget writing can result in underbudgeting, misappropriating items by category, or denial of the grant application altogether. Understanding the funder's budgeting requirements is essential for success and must then be aligned with how money flows within your institution. This alignment can be elusive, as financial operations and policies can vary significantly among institutions, grant types, and sponsors.

What Is Known

Crafting an accurate, convincing budget demonstrates project feasibility and underscores your stewardship of funds, which enhances your proposal's credibility. A clear budget and associated justification complement the proposal narrative delineating what's needed to execute the grant: protected time, supplies, and access to expertise (eg, statistician), resources (eg, technology and software), and costs associated with scholarship dissemination, on occasion.^{1,2} Developing the budget and its justification may also help you to understand how your organization works, create new opportunities for collaborations, and support academic advancement. The similarity of required budget and justification elements across grant size and types supports the use of a template that can be adapted for future grant applications.

How You Can Start TODAY

1. **Understand funding guidelines.** Immediately review the call for proposals to determine eligible budget items. Funding agencies vary significantly in allowable costs and the level of detail required for justification. For example, some funders may allow indirect costs (ie, expenses incurred by the institution but not directly related to the project, sometimes referred to as administrative overhead, or facilities and administrative costs); expenses related to visiting professors, food, or travel for conference presentations; or costs of computers and software. They may also have a minimum or maximum for personnel. When in doubt, reach out to

RIP OUT ACTION ITEMS

1. Early on, determine funder's eligible budget items and your institution's presubmission approval processes.
2. Collaborate with institutional experts and perform initial budget calculations.
3. Build your team and itemize and justify your budget to ensure each expense is necessary, reasonable, and allowable.

the grant's program officer or listed contact with questions about allowable expenses.

2. **Follow institutional processes.** Start early! Grant submission processes take time. Consult with GME leadership, your department or division colleagues, *and* division administrators to understand how grant and budget approvals get processed at your institution. Most institutions have an Office of Sponsored Programs (OSP) that must review and approve all proposals several weeks before submission. If the funder has a preferred budget template, use it. If not, ask if your institution has one. The OSP professionals and your unit's financial administrator can often help you draft your budget and justification.
3. **Contact prior recipients.** Previously successful grant applicants are often listed on the sponsor's website. Review these listings to find similar projects and reach out to the principal investigators (PIs) to request access to their applications and budget details (omitting actual salaries). Examples from a successful submission can provide valuable insights into effective budgeting for your grant.
4. **Write in parallel.** As you draft your grant proposal narrative, consider both the effort and costs involved. Ask yourself questions such as: How much time will it take? Who has the necessary expertise? Do I need technology or statistical support, supplies, hardware, or software? Note why each item is needed, to create a running list for the foundation of your budget.
5. **Perform preliminary calculations.** Do some "back of the napkin" calculations to begin assessing whether your project goals are feasible within the sponsor's budget constraints. Avoid optimistic assumptions or magical thinking about time and resource requirements. Often, a small grant will not cover the total costs required to complete the work, so determine what institutional resources are already available.
6. **Build your team.** Grant budgeting is best done collaboratively. Assembling a team of diverse experts,

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Sample Budget Template for One Academic Year

Project Title: Program Director Leadership Development Curriculum		
Item	Description	Amount
Personnel: Salary + Fringe Benefit (FB) for Full-Time Equivalent (FTE)		
Principal Investigator: J Smith, MD .15 FTE	Plan, lead, and summarize sessions	Salary: \$254,000*.15 = \$38,100 + FB = \$5,700 Σ = \$43,800
Admin/project staff .10 FTE	Clerical, logistical project support	Salary: \$55,000*.1 = \$5,500 + FB = \$1,400 Σ = \$6,900
Statistician .05 FTE	Analysis support	Salary: \$76,000*.05 = \$3,800 + FB = \$600 Σ = \$4,400
Travel		
Dissemination	Travel, registration ACGME Annual Educational Conference	\$2,500
Supplies & Expenses		
Hardware and software	Project laptop and AI software	\$1,670
Supplies and materials	Trainee project posters, office supplies	\$275
Meals/food	Lunches to increase trainee participation	10 sessions x 20 participants at \$20/session: Σ = \$4,000
Total \$63,545		

including individuals who understand how to craft a budget, improves the odds of developing a comprehensive and accurate budget.

What You Can Do LONG TERM

1. **Itemize the budget.** Before formally drafting your budget, review the running item list you created while writing the grant proposal narrative. Brainstorm other items that might be needed, ideally with your team and an astute department or division financial analyst.
2. **Categorize expenses.** Using the sponsor's instructions, categorize your expenses (see sample budget template). GME grant budgets often include:
 - **Direct costs:** Personnel (faculty effort, project assistants, trainee stipends, statistical support), consultant services, conference travel and registration fees (if allowed), participant incentives, standardized patients, article processing charges for open access publishing, food, equipment, postage, and statistical or other software. Check for institutional licenses and any associated costs. Note that "personnel" costs are usually listed in a dedicated section under direct costs, separate from "other than personnel services" expenses.
 - **Indirect costs:** An institutional overhead rate is typically a percentage of the total grant budget. This rate may vary based on the funding source. Smaller education grants may not allow indirect costs. Consult with your OSP to resolve differences between the sponsor's and your institution's indirect cost policies.
 - **Matching funds:** Some funders require your institution to demonstrate its commitment to the project with financial support, often in the form of space,

specific services (eg, statistical support), or in-kind faculty time. Institutional leaders may need to write a letter of support outlining the match.

3. **Write a budget justification.** The budget justification details the necessity for each budget item. Include a breakdown of all costs and justify each expense in relation to the project aims and methods. For example, if offering incentives to participants, explain why these are necessary. Justify personnel costs by aligning them with the individuals' project roles and time they will dedicate to the project. Ensure that each expense is necessary, reasonable, and allowable under the sponsor's and your institution's guidelines.

References and Resources for Further Reading

1. Blanco MA, Gruppen LD, Artino AR Jr, Uijtdehaage S, Szauter K, Durning SJ. How to write an educational research grant: AMEE guide no. 101. *Med Teach*. 2016;38(2):113-122. doi:10.3109/0142159X.2015.1087483
2. Gruppen LD, Durning SJ. Needles and haystacks: finding funding for medical education research. *Acad Med*. 2016;91(4):480-484. doi:10.1097/ACM.0000000000000983



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