

Justification Toolkit

Every day, those of us working in the nonprofit sector are trying to tackle some of the world's most difficult problems. In order to be most effective in fulfilling our personal and organizational missions, we need to be continuously learning and developing our skills as leaders and managers.

However, it can be difficult to find the time and money to invest in professional development. We all know that nonprofit organizations tend to be chronically under-resourced, which means that regardless of the merits of professional development, you'll need to justify the expense to your organization, whether it comes in the form of paid time off or financial support for your attendance.

This toolkit provides tips and resources that can help you make the case for attending the 2015 YNPN National Conference & Leaders Institute.

This toolkit includes:

- General tips for justifying conference attendance and expense
- Information on how to calculate the ROI of conference attendance
- Template for a justification letter for your supervisor

General Tips

- Focus on what you will specifically bring back to the organization as return for the investment. What skills will you gain that will be useful to the organization's work?
- Offer to prepare and deliver a short presentation and Q&A to your colleagues to share what you learned. That way others in your organization will get the benefits of your attendance, too.
- Share the conference schedule and speaker bios with your colleagues and engage them in determining which sessions to attend. Offer to meet with speakers of interest and connect them to your organization.
- Prepare a plan that shows who will cover for you while you are attending the conference.
- Show that you're conscious of the costs by finding ways to reduce the expenses, like sharing a hotel room or taking public transportation while at the conference.

How to Calculate ROI for Attendance

How to Justify Conference Attendance

by Mike Doyle

As a manager, how do you propose any allocation of resources in your organization? You need to understand two components to make decisions:

- Expense (the “investment”)
- Return on Investment

This article provides some easy-to-use tools to help you calculate the investment and identify your return.

Understanding Your Conference Expenses

Conference expenses are affected by a number of factors. Before you can even begin to justify conference expenses, you need to calculate what those expenses are. To do so, use the following *Expenses Worksheet* to develop a cost estimate for attending your selected conference.

| Expense | Guideline | Cost |
|-------------------------|--|-------------|
| Conference Registration | | \$ |
| Flight | try a Web travel service to get a quick estimate | \$ |
| Lodging | conferences usually have special rates | \$ |

| | | |
|----------------------------------|---|----|
| | with hotel | |
| Transportation: Airport to Hotel | if flying: taxi? car rental? | \$ |
| Transportation: Hotel to Airport | if flying: taxi? car rental? | \$ |
| Mileage Reimbursement | Driving to conference? To the airport for your flight? Use google maps to calculate distances, then multiply miles by 56 cents/mile (irs standard for 2014) | \$ |
| Parking Reimbursement | at airport for flight departure, or at hotel where conference is located | \$ |
| Food Per Diem | see IRS guidelines for conference locale rates . Remember, most include breakfast, lunch, & breaks | \$ |
| = total | | \$ |

Understanding the Benefits

Let's face it: many benefits from conference attendance are hard to quantify. For example, experts agree that the top benefit of conference attendance is networking value. Where else can you find so many industry contacts facing the same issues as your organization? Are there solutions you're not aware of?

Although networking is undoubtedly the most important aspect of a conference, it is also the toughest for which to quantify any value.

On the other hand, if an employee came to you and said, *"I want you to fund me for \$4,000 and I don't know what it'll do for you,"* then you would likely scoff at the offer...and maybe even mumble a few colorful metaphors about his/her suggestion.

When you propose a conference for approvals, don't focus on how much you want to go; *focus on what you will specifically bring back to the organization as payback for the investment.*

Some specific details you'll need to identify include:

- **Session content.** What sessions have particular relevance to your organization's work? Specifically identify:
 - Tools (authoring tools, Content management systems, etc.)
 - Technologies (Word Press, Member Clicks, etc.)
 - Processes (structured writing, single-sourcing, etc.)
- **Best practices.** Will there be training sessions in areas that will immediately benefit your group?
- **Training.** Will there be workshops designed to teach attendees a special skill and/or help your team overcome current or future challenges?

Quantifying the Benefits

Although you might understand the benefits of the conference that interests you, your manager may not. Therefore, to be most effective in justifying the conference, you need to clearly articulate the connection between your organization’s knowledge requirements and the conference program. DO NOT assume that your manager will be able to automatically make those distinctions.

To support this process, use the following *Benefits Worksheet* to help you focus on the benefits. Use whatever makes sense for your particular organization and conference, and omit the rest.

Benefits Worksheet

| Your Organization’s Benefits | Specific Needs and the Conference Sessions & Training that Meet the Need |
|--|---|
| Networking Benefits | This conference will allow [specific team members] to network with other professionals in the industry. We will be able to take the pulse of what is happening for tools, technologies, and processes, and hear ideas we weren’t even aware of. |
| Teambuilding (if sending a big part of your group) | This conference will help build our team, providing a forum for team members to discuss tools, technologies, and processes and how we might apply them in our company to improve our information products, workflow, and processes. |
| Current Tools | |
| Future Tools Exploration | |
| Current Technologies | |
| Future Technologies Exploration | |

| | |
|---------------------------------|--|
| Current Processes | |
| Future Processes Exploration | |

It's all in the Selling

After you have identified the specific knowledge benefits, you've provided both the expenses and benefits your manager needs to decide the value of your proposition. Salespeople work the same way. They don't let customers infer the value of what they are selling, they make that leap for them. *Sell your conference proposition!*

Sample Letter to Supervisor

< Date >

Dear < supervisor's name >,

I would like to attend the YNPN National Conference & Leaders Institute from August 6 - 8. The YNPN National Conference is the premier event for emerging nonprofit leaders. The conference will enable me to attend a number of education sessions that are directly applicable to my work and will allow me to network with a variety of experts and colleagues from around the country. Many of the presentations are tailored to the < your profession > professional and give information on how to < list benefits to your responsibilities >. I am seeking sponsorship for the registration fee, travel to the conference, and lodging expenses during the conference. A detailed cost breakdown is included below.

After reviewing the conference brochure, I have identified a number of sessions which will allow me to gain knowledge and understanding about how we can improve our processes. The presentations are facilitated by both industry experts and nonprofit colleagues who have faced similar challenges. I chose each of these presentations because it is directly related to an issue we are dealing with currently. Getting the information in a seminar format will greatly reduce the research time and costs the < your organization's name > would normally incur in researching the topics. Incidentally, I have only listed some of the seminars that I will attend. Including them all would make this memo much too long.

< You will need to insert the session descriptions which most apply to your responsibilities. >

< The numbers in brackets below will need to be adjusted to reflect the current pricing. Registration fees are listed on conference.ynpn.org. The travel costs vary as well and should be changed to reflect your costs. >

The full price conference fee is <\$xxxx>, but can be reduced \$xxx by applying for a stipend from YNPN National plus by \$xxx for a stipend from my local YNPN chapter.

< You will need to insert your travel cost numbers in here >

Here is the breakdown of conference costs:

Roundtrip Airfare: <\$xxxx>

Transportation: <\$xxxx>

Hotel: <\$xxxx>

Meals: <\$xxxx>

Conference Fee: <\$xxxx>

The total costs associated with attending this conference are: <\$xxxx>.

The opportunity for me to develop better contacts and gain knowledge in specific areas of <**your profession**> makes my attendance at the YNPN National Conference a wise investment, which will yield rich dividends for <**name of your organization**>.

Sincerely,

< **your name here** >