

Justification Toolkit



Make the Case for Furthering your Professional Development

Presented by [Queen Bee Fundraising](http://QueenBeeFundraising.com)

Those of you working in the nonprofit sector tackle some of the world's most difficult problems. You face these challenges with enthusiasm and firm resolution...and often with limited resources.

To fulfill your organization's mission and goals, you must have the tools to succeed at the tasks put before you.

The best resources available are professional development webinars, courses and conferences.

You know it can be difficult to find the time and money to invest in professional development, as many nonprofit organizations tend to be chronically under-resourced.

You will probably need to justify the expense of any professional development to your organization and its Board, and that can be a tough sell.

To help you out, here's a Toolkit to help you make a compelling case for furthering your education in the nonprofit sector.

What's in your toolkit...



Tool #1: GENERAL TIPS

Tool #2: HOW TO CALCULATE ROI FOR ATTENDENCE

Tool #3: EXPENSES WORKSHEET

Tool #4: BENEFITS WORKSHEET

Tool #5: SELL IT WITH WORDS



Tool # 1: GENERAL TIPS

Here are 5 ways to justify the investment in your development education:

1. Make your request in writing - Create a presentation that outlines the course or conference you would like to attend, and clearly outline as the costs as well as the benefits.

2. Focus on what skills you will bring back to the organization - Clearly outline how your-*+ new skills will move the organization forward. Remember, you need to clearly show the benefit gained for the money spent. Include any facts and data you have about the uptick in donations and outreach made possible by your new skills.

3. Outline what financial gain your newfound skills will bring to your organization - Be specific in correlating non-monetary engagement (volunteers and community) to long-term financial gain and mission fulfillment.

4. Offer to share what you learn - Offer to prepare and deliver a short presentation and Q&A to your colleagues. This will allow others in your organization to get the benefits of your attendance. This stretches the investment dollar benefits and makes the proposal far more attractive to the decision-makers.

5. Share the webinar outline or conference schedules with your colleagues - Engage your colleagues and board in the process of determining where these educational dollars are best spent to best meet your organization's needs.



Tool #2: HOW TO CALCULATE ROI FOR ATTENDENCE

To make your case for professional development, you will need to prove there will be a positive **Return on Investment (ROI)**. While ROI seems like a daunting accounting term, it is actually very simple!

The ROI Equation:

For your case to be made, you only have two considerations which need to be plugged into the equation for RIO:

1. The Expenses (the “investment”)
2. The Return on Investment (organizational and monetary gains)

Easy, right!

Expenses:

Expenses simply refer to the actual cost of the development training, and the time you will be spending while participating in this training.

For the sake of demonstrating this equation, we will use the amount of \$30 per hour as the gross cost for the employee's time

If a webinar costs \$99, and you spend a total of two hours watching the webinar and reading the handouts (2 hours x \$30 per hour) the employee time costs \$60.

This means **the total expense of the webinar is \$159.**

Expenses get a little more complicated if the learning takes place over the course of several days or the training is held out of town. In that case the equation could look like this:

Conference fee costs \$999, employee salary for two days (16 hours x \$30 per hour) is \$480, airfare roundtrip is \$400, hotel for two nights is \$400 and meal stipend is \$100.

This means **the total expense of the conference is \$2,379.**

There are soft expenses that don't pencil out in actual dollars, and you may need to consider these costs. An example of this would be the cost of an employee stepping in cover the workload for another employee who is away at a conference or attending a web course.

Organizational and Monetary Gains:

It is important to clearly define the anticipated benefits to make the strongest case possible for attending the webinar or conference.

Remember, benefits are not just immediate monetary gains. The skills you acquire in professional development courses and the contacts you make at conferences will create **long term opportunities** for growth and income, and those are benefits as well.



Tool #3: EXPENSES WORKSHEET

<i>Expense</i>	<i>Guideline</i>	<i>Cost</i>
Conference Registration		\$
Flight	try a Web travel service to get a quick estimate	\$
Lodging	conferences usually have special rates	\$
Transportation: Airport to Hotel	if flying: taxi? car rental? Bus?	\$
Transportation: Hotel to Airport	if flying: taxi? car rental? Bus?	\$
Mileage Reimbursement	Driving to conference or airport? Use google maps to calculate distances, then multiply miles by 56 cents/mile	\$
Parking Reimbursement	at airport or at hotel	\$
Food Per Diem	see IRS guidelines for conference locale rates . Remember, most include breakfast, lunch, & breaks	\$
TOTAL EXPENSES:		\$



Tool #4: 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	



Tool #5: SELL IT WITH WORDS

When creating your presentation to explain the expected benefits, be specific and visionary. Let them know the short-term, mid-term and long-term benefit expectations.

Don't just say: The storytelling conference would help me write better end-of-year-appeals.

Instead, say: Learning the skills to craft compelling and engaging end-of-year appeal letters is proven to boost first-time donors by up to 200%, and repeat donors' financial contributions by 50% or higher. In addition, by creating a campaign of follow-up emails over the ensuing six-month period, an additional 42% boost in engagement can be expected. On top of this, the storytelling strategies can also be employed for our Appeal from the stage at our annual gala and can potentially garner an additional expectation of increased donor participation.

Facts and data about the benefits associated with attending a conference or webinar are often found on their websites or can be found by an internet search.