

Making the Case for #PEAK2018

Those of us working in philanthropy are helping to tackle some of the world's most difficult issues. 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. Supervisors may not see the value of you attending the PEAK Grantmaking Annual Conference, especially if they are not familiar with all that the conference has to offer in education, knowledge sharing, and networking.

Making the Case for Conference is a toolkit you can use to explain why you should attend #PEAK2018 in Orlando.

The toolkit includes:

- General tips and talking points for justifying conference attendance and expense
- Ways to save and information on conference attendance
- Template for a justification letter for your supervisor



General Information

PEAK Grantmaking's conference is the only gathering of its kind, bringing together the philanthropy professionals who do the critical operations work of grantmaking. In 2018, we expect nearly 800 of these professionals to join us in Orlando for three days of knowledge sharing, idea generation, and networking. But what does this mean for your organization?

- **Knowledge sharing** – Foundations learn from one another when their professionals have opportunities to come together and share “This is how we do it” or talk about the challenges and solutions that work for one funder and that may work for many funders. These tested, evidence-based practices can only come from those in the field.
- **Idea generation** – Every foundation wants to be a better funder, philanthropist, support network, and partner. When the people who make up these roles get together in one space, the energy is electric and their ideas are the kind that change a sector for the better.
- **Networking** – What one grants manager knows can be what all grants managers know, if those grants managers know one another. Throughout the year, PEAK Grantmaking members get to know one another and share ideas and solutions on our members-only community discussions. But at our annual conference, they huddle together in groups large and small and share the kind of powerful perspectives that can only happen face-to-face.

All of this means knowledge, ideas, and connections coming back to your foundation to make your grantmaking better.

And your support of the PEAK Grantmaking conference demonstrates that you are committed to the sector, the act of grantmaking, and the people who do this work.



Talking Points

Here is a list of talking points that should help you get the approval you need.

- With more than 50 sessions and short talks to choose from, not to mention our exciting plenary speakers, it's like getting an entire year's worth of professional development in just three days.
- The knowledge and training that you will gain is a return on the investment many times over.
- You can share your new knowledge and training with your colleagues. This way, everyone in your workplace can benefit from your attendance.
- These are your people, shaping the way grants get made. You need to have a voice in these conversations.

Ways to Save

Although your attendance at #PEAK2018 can be seen as an expense, you can show your supervisor the different ways you can help minimize the costs. Here are some ways you can save:

- Register before February 9th and receive Early Bird registration rates. Late Registration rates take effect on March 1.
- If you become a member of PEAK Grantmaking you can register with the member registration rate! Save big—and get PEAK Grantmaking member benefits throughout the year, which include free webinars, publications, access to CONNECT and LEARN, and lots of other benefits.

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? Conversations you need to be participating in?

When you propose a conference for approval, 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:
 - » Industry relevant topics (Diversity, Equity, and Inclusion; Effective Practices, etc.)
 - » Technologies (Data Sharing Tools; Grants Management Systems and Processes, etc.)
 - » Practices (Implementing a Strategic Plan; Creating Dashboards; Results Tracking, etc.)
- **Best practices.** Will there be training sessions in areas that will immediately benefit your group?
- **Training.** Will there be workshops designed to teach you a special skill and/or help your team overcome current or future challenges?
- **Networking.** Who are the leaders in grants management and whose voices are included in conversations shaping the field? Those conversations happen at PEAK Grantmaking's conference and the people you need to meet are in the room where those conversations take place.

Quantifying the Benefits

Although you might understand the benefits of the conference that interests you, your supervisor may not. Therefore, to be most effective in justifying your attendance at the conference, you need to clearly articulate the connection between your organization’s knowledge requirements and the conference program.

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 this conference.

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 Processes	We make grants a certain way—but is there a better way? Are there tools that could help us be more effective and efficient? This is the conference where those tools are shared, tested, and explained.
Future Tools Exploration	What tools do we need that don’t already exist? We can be a voice in the creation of new tools by meeting with likeminded grantmakers to collectively define our needs.
Current Technologies	This conference includes the largest gathering of grants technology vendors, so we can meet with our vendor or ask questions and get demos from other vendors.



Sample Letter to Supervisor

Dear Supervisor:

I am excited to share with you an opportunity related to the PEAK Grantmaking 2018 Annual Conference. As you probably know, PEAK Grantmaking is the largest professional association of grants management professionals—people like me who also work on processes and practices that determine how grants get made.

PEAK Grantmaking's annual conference is happening March 19-21 in Orlando, Florida, and represents the best professional development, knowledge sharing, and networking opportunity for me. I will have opportunities to meet with other professionals who have similar challenges to ask them about the solutions they've come up with; share the ideas that we have put into place in our organization; and learn about emerging topics in the field of grantmaking.

I would like to attend this conference in order to grow in my professional development while also learning key points that I can bring back to this organization to help us in our grantmaking. The registration cost is XXX and I estimate that the entire trip (including lodging, transportation, and incidentals) will be XXX. The value of the PEAK Grantmaking conference is undeniable—I'll learn more in three days than I could throughout the year at various one-off opportunities.

I also think this represents a valuable opportunity for our organization to have a voice in the development of grants management practices, as the discussions that take place at the PEAK Grantmaking conference have immediate and important impact on how the grants management role and practices evolve.

I am excited about this opportunity and would like to discuss with you how I can make it valuable for me, our team, and our entire organization.

Sincerely,

Employee X

