

PCI DSS WORKSHOP JUSTIFICATION TOOLKIT

By now you already know that at the Treasury Institute for Higher Education Annual PCI DSS Workshop you can discover peer-tested ideas, learn to innovate, and make valuable connections with other practitioners and suppliers to successfully tackle the challenges and opportunities facing you and your campus. But, how do you share the value of this event with your supervisor in order to help justify your attendance? Below is some helpful information.

General Tips

Here are things to consider to justify the travel and training expense:

- Focus on what you will specifically bring back to your organization as return for the investment.
- Offer to prepare and deliver a short presentation and Q&A to your colleagues to share what you learned. That way others in your unit will get the benefits of your attendance, too.
- Share the syllabus and speaker handouts with your colleagues. As an attendee, you have unlimited access to materials posted by speakers.
- If you are working to obtain or maintain a professional designation remind your supervisor that this is a great way to earn CEUs.
- Be ready with a plan that shows who will cover for you while you are attending the Workshop.

Expenses and Benefits / Justify Your Attendance

To propose an allocation of resources for attendance, you need to understand the expense and the expected return on investment. This provides some easy-to-use tools to help you calculate the investment and identify your return.

UNDERSTANDING YOUR WORKSHOP EXPENSES

Workshop expenses are affected by a number of factors and to justify expenses you need to calculate what those expenses are and develop a cost estimate for attending. Below are some expenses to include in your estimate.

Workshop Registration

Lodging

Transportation - airfare or mileage reimbursement

Cab Fares and/or Parking

Meals per Diem

Gratuities/Tips

UNDERSTANDING THE BENEFITS

Many benefits from Workshop attendance are hard to quantify and experts agree that the top benefit of Workshop attendance is networking value. Where else can you find so many contacts facing the same issues as your organization?

When you propose the Workshop for approval, it's best to focus on what you will specifically bring back to the organization as payback for the investment. Examples are listed below.

Session content. List sessions that have particular relevance to your work. These sessions might identify tools, technologies or processes.

Vendor contacts. Identify vendors you wish to meet with to discuss products or technologies you use or are evaluating for future purchase.

Best practices. List sessions that will discuss best practices used in the industry.

Training. Identify sessions designed to learn a special skill and/or help you overcome current or future challenges?

QUANTIFYING THE BENEFITS

To effectively justify the Workshop, you need to clearly articulate the connection between your organization's knowledge requirements and the Workshop program. Do not assume that your manager will be able to automatically make those distinctions. Below are some Workshop benefits to include in your proposal.

- Networking Opportunities
- Discuss Industry Trends
- Learn Best Practices
- Discover Current Technologies
- Future Technology Exploration
- Discuss Current Processes
- Future Process Exploration
- Meet Current and Future Vendors
- Teambuilding
- Continuing Education Credit

CONCLUSION

Provide the specific knowledge benefits and expenses your manager needs to decide the value of your proposal for attending the Workshop. Express your desire to learn more about the industry and grow in your profession.

Justification Letter

LETTER TO SUPERVISOR

Below, you'll find a "justification letter" template — a letter to your supervisor explaining all of the benefits you'll get from attending the Treasury Institute for Higher Education PCI Workshop, how they will make you a better employee, and help advance your organization.

This general template will get you started while allowing you to customize it to you and your organization's particular needs.

LETTER TO MANAGER

(Date)

Dear **(supervisor's name)**,

I would like to attend the Treasury Institute for Higher Education PCI DSS Workshop **(insert program dates and location)**. The Workshop will enable me to attend several education sessions that are directly applicable to my work and will allow me to network with a variety of PCI DSS industry experts and colleagues from higher education. Many of the presentations are tailored to **(insert your primary function here i.e. finance professional, technology professional, etc.)** and give information on how to **(insert benefits/lessons here, for example: reduce costs, increase productivity, and achieve and maintain PCI compliance)**. I am seeking sponsorship for the registration fee, travel expenses, and living expenses during the Workshop. A detailed cost breakdown is included below.

After reviewing the Workshop website, I have identified a number of education sessions which will allow me to gain knowledge and understanding about how we can improve our overall processes. The presentations are facilitated by both industry experts and college/university colleagues who have faced similar challenges. Getting the information in a seminar format will greatly reduce the research time and costs that **(your organization's name)** would normally incur in researching the topics.

(The numbers in brackets below will need to be adjusted to reflect the current pricing. The travel costs vary as well and should be changed to reflect your costs.)

(You will need to insert your travel cost numbers here)

Here is the breakdown of Workshop costs:

Roundtrip Airfare: <\$xxxx>

Transportation: <\$xxxx>

Hotel: <\$xxxx>

Meals: <\$xxxx>

Workshop Fee: <\$xxxx>

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

The opportunity for me to develop better contacts and gain knowledge in specific areas of **(your area of expertise)** makes my attendance at the Treasury Institute for Higher Education PCI Workshop a wise investment, which will yield rich dividends for **(name of your organization)**.

Sincerely,

(your name here)