
Walter Mackenzie Visiting Speaker Fund

Terms of Reference

The Walter Mackenzie Visiting Speaker Fund, Faculty of Medicine & Dentistry is sponsored by the Walter Mackenzie Visiting Professorship Endowment. This fund will support costs associated with selected visits to the University of Alberta by Visiting Speakers in the biomedical and health research areas.

Guidelines:

1. A candidate Visiting Speaker must be nominated by a Faculty member who will act as Host. The Host must have a full time, continuing primary appointment in the FoMD. Student groups wishing to sponsor a Visiting Speaker should identify a Faculty member to act as a Host for the purposes of the application. Individuals wishing to visit the FoMD may not apply themselves.
2. The Visiting Speaker must be an established scientist with an excellent record in the field of biomedical, health, or medical education research, commensurate with their years of experience. The primary functions of the Visiting Speaker are to give a research lecture that is advertised and easily accessible to all interested persons on campus and to meet with FoMD staff and research trainees. Postdoctoral fellows and visits for faculty recruitment are not eligible for funding.
3. Visiting Speakers may have special purposes during their visit, such as External Examiner for a Ph.D. defense, participation in a student-, group-, or Department organized Research Day, or may be visiting other institutions or attending conferences during the same trip. The Host letter must outline the activities in which the Visiting Speaker will participate:
 - For Visiting Speakers who are also External Examiners, a copy of the “Request for Funds for External Examiner Travel” application to FGSR must be attached to the application. If the FGSR application is successful, the Host must notify the FoMD and the amount awarded by FGSR will be subtracted from the FoMD award.
 - For Visiting Speakers who are visiting the FoMD as part of a complex trip, the part of the budget requested for the FoMD portion of the travel and the Visiting Speaker’s itinerary should be clearly documented in the Host letter. FoMD will not provide travel costs for the Visiting Speaker to participate in a conference in Edmonton. Should a conference participant also be a Visiting Speaker, expenses for additional hosting and housing outside the period of the conference are eligible. Should the conference be outside of Edmonton, return transportation expenses to Edmonton from the conference site are eligible.
4. The Host letter should include a description of activities and should address the criteria used by the Visiting Speaker Committee to evaluate applications: 1) The Visit will have a high impact and will be of broad interest to the FoMD, 2) The Visiting Speaker has a strong record of research excellence commensurate with their level of experience and 3) The Visiting Speaker will have interactions with trainees, for example through scheduled meetings, participation in a publicly available research day, or as an external examiner for a Ph.D. defense.
5. Co-funding of visits is strongly encouraged. The Host must declare total funding for the visit that has or will be sought from other sources, then indicate the amount requested from the Visiting Speaker Fund and the source of the funds for the remaining expenses. In cases where other funding is obtained for the visit either before or after the Visiting Speaker Fund application, awards may be reduced by the amount of overlapping funding. For example, for Visiting Speakers who are participating in an organized Research Day and/or participating in

named lectureships, actual or expected co-funding from the event should be clearly documented in the Host letter and budget request. Speakers at Conferences are not supported by this fund; hosts should apply to the Conference/Symposium Fund instead.

6. Funds for this program are limited and not all qualified Visiting Speakers will receive funding for their visits. Funding is limited to one speaker per event. Decisions of the Visiting Speaker Committee are final. However, applications may be resubmitted to later competitions for which they are eligible.

Maximum Award: \$2500 (travel within North America) or \$3000 (travel from off-continent). The visit must be completed within six months from the award date and all claims submitted within 30 days from the visit.

Eligible Costs: University of Alberta guidelines apply with respect to expenditures. In particular, receipts must be provided to the Office of Research for all expenses including Visiting Speaker meals; alcoholic beverages cannot be purchased using these funds except as permitted per the [UAPPOL Hospitality](#) policy.

Transportation: Hosts must make every effort to minimize costs, including purchase of economy class tickets. A copy of the flight details including the estimated cost (e.g. from the Air Canada web site or other travel site) must be provided.

Airport parking and transportation to/from airport: Actual cost in Speaker's home city (maximum \$150), maximum \$120 in Edmonton.

Living Allowance: Accommodation, with receipts, and meal allowances to a daily maximum of \$240. This amount is based on hotel costs near the University (\$170/night) and the University of Alberta meal allowance per diem (\$70 CDN), for a maximum of four days. Hosted meals should not be included in the Living Allowance, but meals during travel can be included.

Honorarium: An honorarium can be offered at \$250 CDN for visitors from Canada; \$300 CDN for international visitors.

Hosting Allowance: Maximum \$150 per day to a total maximum of \$300, dependent on itinerary and length of stay. Luncheon/dinner meetings are meant to allow the Speaker to meet with faculty members and other interested persons, not only with the Host. [UAPPOL Hospitality](#) policy must be adhered to. The itinerary must include the names of individuals who will be present at hosted meetings, and the proposed venues.

Reimbursement Procedure: Successful applicants will be notified of the amount of the award and an account from which to claim expenses related to the visit.

- All invoices, payment requests, and expense claims must be supported by original receipts.
- Timelines and eligibility must follow the [UAPPOL Travel Processes & Expense Procedure](#).
- Visiting Speaker Honorarium and non-employee reimbursement forms are available on the [UA Human Resource Services website](#).
- Employee expense reimbursements are submitted via PeopleSoft expense claims. Guidance on completing a claim can be found [here](#).

Deadlines and Application Instructions: Applications will be reviewed monthly by the Visiting Speaker Committee. Complete applications, including attachments, must be submitted by the first of each month (or the first business day if the first falls on the weekend or is a formal holiday). The Committee will not consider applications for visits occurring before the application deadline or in the same month as the application. Application deadlines can be found [here](#).

Submit one **typed** original application with signatures and attachments combined as **one** PDF to: vdradmin@ualberta.ca.