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. They 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 visiting the FoMD as part of a multi-event 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.
   - Speakers at FoMD-held conferences are not supported by this fund; hosts should apply to the Conference/Symposium Fund instead.
   - For Visiting Speakers who are also participants of additional, non-FoMD events, only expenses for the portion of the FoMD visit are eligible. Should the non-FoMD event be outside of Edmonton, return transportation expenses to Edmonton from the event 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:

   4.1. The Visit will have a high impact and will be of broad interest to the FoMD.

4.2. The Visiting Speaker has a strong record of research excellence commensurate with their level of experience.

4.3. The Visiting Speaker will have interactions with trainees, for example through scheduled meetings, participation in a publicly available research day, lunch session, or as an external examiner for a Ph.D. defense. Note: Applications, where alternative funding sources are unavailable, where the Visiting Speaker is participating as an External Examiner for a Ph.D. defense, or events that have dedicated time to trainee interactions, will receive priority consideration.

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. 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. Hosts should notify the FoMD if overlapping funding is later secured, which may reduce the award.

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. In all cases, evidence of fundraising efforts from alternative funding sources is to be provided. Applications will be prioritized in the following order:

6.1. Visiting Speakers serving as External Examiners for Ph.D. thesis defences, provided these are not covered by other available funding.
6.2. Itineraries that include trainee-oriented events.
6.3. Student-organized research events for which alternative funding sources are not available or have been fully utilized.
6.4. Other Visiting Speakers for which alternative funding sources are not available or have been fully utilized.

7. 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.

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.
- 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 as **one combined PDF** to: vdradmin@ualberta.ca.