

## BUDGETING AND FUNDING



- Keep a running excel spreadsheet of all your expenses for easy reference.
- Use the Budgeting Checklist to determine costs for your event.

### FUNDING TIPS

- 1. Funds have specific deadlines!** At least six months before the event, check with the FoMD to apply for Visitor Speaker Funding (Dean's Lecture Series or Walter MacKenzie Visiting Speaker Fund), or discuss other available funding opportunities with your unit's leadership.
- 2. Follow the right process:** All contracts (like the venue) and any vendor agreements above **\$1,000** should be signed and processed through Supply Management Services (SMS). SMS Accepts low-dollar invoices from limited types of vendors and when a UAlberta credit card cannot be used. [See "direct pay" rules.](#)

### HONORARIA & GIFTS



The policy and process for speaker honorarium can be found in the [Human Resource Services site \(HRS\)](#). This page also links to the honorarium payment forms.

The U of A has a very specific [gift policy](#). Familiarize yourself with this policy if you intend to purchase a gift for a visiting speaker.

### CHOOSING THE RIGHT GIFT

- **Is it appropriate?** There may be additional external or cultural restrictions on accepting honoraria and gifts for some visitors, communicate with your speaker, so you are in the know before the event.
- **Is it practical?** If the visitor is traveling by plane, you might not want to purchase a large, bulky gift as it will be too cumbersome to pack in their carry-on and they may have no room in their luggage.

**What SWAG is available?** Contact the [FoMD Communications Office](#) as they may have some promotional items that could be included in your gift.

# BUDGETING CHECKLIST

When creating an event budget consider the following to determine how much your event will cost—and if you'll need to reduce something.

<input checked="" type="checkbox"/>	Categories & items	Cost
	<b>Room Rentals</b> (lecture space, meal venues, outdoor space)	
	<b>Catering</b> (breakfast, luncheon, dinner, receptions, alcohol, volunteer snacks)	
	<b>Equipment</b> (AV, venue rentals like tables and chairs, decor, flowers)	
	<b>Speaker</b> (honorarium, travel, accomodations, gifts)	
	<b>Staffing</b> (AV tech, bartender, entertainment, security, photographer, videographer)	
	<b>Supplies</b> (printed items — program, posters, directional signage, name badges)	
	<b>Insurance/Permits</b> (U of A alcohol event permit)	
	<b>Other</b> (travel for staff, online event registration system, graphic designer, advertising)	
	<b>TOTAL</b>	