Suggested Cost-Saving Guidelines for Academic Events

To promote fiscal responsibility while maintaining high-quality programming, the Dietrich School's Event Management Team provides the following comprehensive recommendations for faculty and staff organizing academic events. These strategies are designed to minimize unnecessary expenditures without compromising the value of our events.

1. **Timely Event Planning**
   Plan events well in advance as much as possible. Room availability and service availability or restrictions are important event tasks that can affect overall budget spend. Submitting an event, no matter how big or small, four to six months in advance can mean securing access to a high priority campus space that has the benefit of being low or no cost. Early planning can also help to determine if your preferred dates fall during a period that typically has surge pricing, like Homecoming or March Madness. Planning ahead can help the Events Team to lock in favorable terms that can keep costs down and minimize last-minute changes that can incur unintended rush fees and premium costs that cause budget overages.

2. **Event Format Optimization**
   Fully virtual events are strongly encouraged to reduce costs associated with venues, travel/lodging, and catering. If hosting an in-person event is essential, opt for *fully in-person* formats to eliminate redundant virtual costs. While hybrid events can be viewed as the best of both worlds, it can sometimes double expenses due to the required additional technology and staffing. *Simple hybrid events* that use a self-managed OWL and no technological support are encouraged when hybrid structures are desired.

3. **Efficient Event Scheduling**
   Condense multi-day events into shorter durations (e.g. reduce a 3-day conference to a 1 – 2 days) to save on venue, lodging, and catering expenses. Evaluate whether a multi-day event or an event series can be consolidated by combining like-topics into singular sessions or opting for concurrent sessions when programming is dense.

4. **Strategic Speaker Selection**
   Prioritize virtual participation when possible. Virtual participation can help minimize variable cost that can affect staying on budget. In the case of international guests these costs can be associated with unexpected visa rejections, flight insecurity between the home country and the U.S., and currency conversion issues. For domestic speakers unexpected flight delays, issues with travel from rural areas, and densely populated cities can greatly increase travel costs and after-event reimbursements.

5. **Security and Technology**
   Determine security needs and technology requirements early in the planning process to ensure proper funding for necessary protection measures. While virtual events and hybrid setups likely require minimal physical security, all must comply with university IT policies for data protection and accessibility. A number of our in-person events cover sensitive topics, have high-profile speakers, and/or large public audiences which may require additional security personnel or a police presence. These necessary services can incur additional costs that cannot be omitted from the planning process or the budget. Specialty services that increase event reach and accessibility (livestreaming, captioning, ASL interpretation) have limited internal availability and can come with increased pricing if we have to outsource these services. Early determination allows for

these services to be secured prior to service deadlines and increases the likelihood of internal availability which can keep the costs down. It's important to have all technology and security arrangements finalized at least one month before the event date to ensure proper budgeting and compliance. If you are unsure what technology and security measures you need for your event, the Events Team can help assess these needs during the initial planning phase and provide recommendations.

6. **Venue Selection**
Host events on-campus whenever possible, utilizing classrooms or departmental spaces to avoid rental fees. Using the William Pitt Union and O'Hara Student Center can incur fees, but they are significantly more cost-effective than non-campus locations. Please note, some on-campus spaces will incur Facilities Charges for specialty setups and extra cleaning or trash pickups. These fees can vary and fluctuate due to possible overtime rates and furniture orders. Possible facilities setup charges should be considered when budgeting on-campus venues. *The University Club and off-campus venues should be avoided*. They often include hidden service charges, higher rental costs, catering stipulations, and exorbitant cancellation fees.

7. **Catering and Meal Management**
Event catering:

> *Limit catering* to light refreshments (e.g. cookies, pastries, water/juice) unless meals are critical to the event design. Catering can often lead to significant food waste, particularly when attendance is overestimated. To help reduce environmental impact and unnecessary costs, event organizers are strongly encouraged to be conservative in their attendance estimates and order only what is reasonably needed. If catering is necessary, **America To Go (ATG)** offers more diverse menu options and better per-person pricing compared to University Catering. However, ATG orders require personal purchase of plates, napkins, and utensils, as well as the labor for setup and cleanup—consider on-site staffing needs and associated costs when making your decision. To further limit waste and streamline event planning**, avoid scheduling receptions if the guest speaker will already be hosted for a meal** (e.g., lunch or dinner) following their engagement. Thoughtful planning ensures both a positive experience and responsible resource use.

Dining and Entertainment:

> For multi-day guest visits, *restrict business meals to one lunch and one dinner for the full duration of their stay with no more than four attendees per meal.* Minimizing dinner guests and large meal gatherings can be an easy way to cut back on variable costs, which are estimated using an educated average spend when budget developing and has the risk of exceeding the expected expense amount. When dining out is a necessary part of guest relations, *choose budget-friendly restaurants* near campus (e.g. Ali Baba's) and avoid high-cost locations like Mt. Washington or á la carte eateries.

8. **Print and Promotional Materials**
Replace printed programs with QR codes linking to digital versions. Programs tend to get discarded at the end of events leading to significant paper waste. Focusing on digital materials over print materials is both cost effective and environmentally sustainable. In this same regard, prioritize *digital advertising* (marketing screens, social media) instead of physical flyers. If your department doesn't have social media pages, reach out to Carly Petree (cmw175@pitt.edu) to amplify your events on the Dietrich School Instagram and LinkedIn accounts. When physical

flyers are needed, keep them to a minimum (a max of 10) and only print them for targeted advertising. Additionally, you are strongly encouraged to ***avoid purchasing event swag*** (e.g. folders, lanyards, pens, bags) unless imperative to the flow of the event. While swag can be a nice way to show your event/organization branding to participants and give them a keepsake, branded materials are costly with high shipping costs and even higher rush printing costs for last-minute changes or adjustments. When an event is limited on funds this is an easy way to save a few dollars for items that have a more direct impact on the success of your event.

9. **Reimbursement and Guest Expenses**

   A lot of variable costs come from coordinating travel and reimbursements for guests. To mitigate the varied fluctuations in cost associated with travel there are several highly recommended steps that can be taken to establish stronger controls on guest travel reimbursements:

   > **Offer per diems** in lieu of blanket travel expense reimbursements. Per diems come with caps on per day expenses that are determined at the federal level. So, you can prepare a budget using the maximum allowable spend associated with the federal rate and not have to worry about going over that amount.

   > **Refrain from offering reimbursements without maximum reimbursable amounts established first.** The university has stipulations on what they are able to reasonably reimburse, and the personal flight preferences of guests don't always adhere to these stipulations. Agreeing on what will be covered prior to bookings or visits keep everyone from overspending. Maximum reimbursable amounts should be established for:

   > - Flights (based on average flight cost between start/end location)
   > - Rideshares (excluding tips, which should be the guest's responsibility)
   > - Taxis (accounting for the average cost to/from designated locations)

   > Maximum reimbursable amounts can be determined by your primary event coordinator. You should not communicate these amounts to guests without first confirming with your primary coordinator and fiscal manager that your budget can cover the maximum spends.

10. **Lodging and Incidental Costs**

    Lodging and incidental costs can vary widely, so it's essential to prioritize cost-effectiveness when selecting accommodations for guests. While the Courtyard Marriot is a preferred university provider and typically offers competitive rates, **booking at nearby hotels on Forbes Avenue** (such as the Residence Inn or Hilton Garden Inn) can result in savings of up to $50 per night. These options also feature more affordable onsite dining, making them an overall more economical choice without compromising on quality. However, because these hotels are farther from the main campus, they should only be used for hosting guests without mobility concerns. The Oaklander, though preferred by some faculty organizers, tends to be significantly less cost-effective and should be **used only when no lower-cost alternatives are available**. Regardless of the hotel selected, **guests are responsible for covering incidental charges** (e.g., room service, international calls) and **any personal stay extensions** using their own payment method. To avoid unnecessary expenses, guest stays should be limited to the duration of their visit (e.g., up to two nights for a one-day lecture) and should not accommodate personal travel plans. <u>Any exceptions or travel-related concessions must be pre-approved; otherwise, university funds may not be used</u>.

11. **Collaboration and Event Sponsors**
    You are encouraged to *co-sponsor events with neighboring institutions* to maximize audience reach and to share costs (e.g. splitting travel and lodging for guest speakers). If you co-sponsor with neighboring institutions, make sure to clarify funding responsibilities in advance of booking anything event related. This will ensure transparency of expectations and equitable contributions for all parties. When collaborating with internal groups (departments, institutions, programs, centers) similar steps should be taken to ensure equitable contributions and clear funding expectations/timelines.

12. **Budget Adherence**
    Cost savings should be a priority as soon as you start budget planning for your event. On average **most academic events cost between *$1,500 – $3,000***. This range is a great target cost for most simple lecture and symposium style events, with flexibility for endowed or grant-funded programming. Since many events are funded by the department's operational account and there are now stricter timelines for processing event charges, it's important to *plan event scope based on secured fund*s, and not projected or anticipated funding. Event planning can always be scaled up but it's nearly impossible to scale down once the funds are committed.

Questions? The Dietrich Events Management Team (asevents@pitt.edu) is available to assist with budgeting, vendor selection, and cost-saving strategies. Contact us for personalized guidance.

By adopting these practices, we can maximize the impact of our events while adhering to fiscally responsible principles.

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Dietrich School Events Management Team