**Questions?** Please direct questions about:

This checklist, the template Recording Agreement, or other Contract questions to: [contracts@pugetsound.edu](mailto:contracts@pugetsound.edu) or contact the Office of University Counsel at campus extension 2735

How Recordings will be Stored and Used to: Collins Memorial Library Archives & Special Collections at [archives@pugetsound.edu](mailto:archives@pugetsound.edu) or <https://www.pugetsound.edu/academics/academic-resources/collins-memorial-library/archives/>

**General Guidance:**

What is a “Presentation Recording Agreement”?

A Presentation Recording Agreement (“Recording Agreement”) provides Puget Sound with permission to:

* make and use a recording of an event, concert, lecture, performance, presentation, or speech (a “Presentation”) by a guest presenter/artist/musician/performer/speaker (a “Guest”);
* use materials submitted in connection with the Presentation; and
* retain a publicly-available copy of the Presentation recording in the Archives & Special Collections.

What is a “Puget Sound Release Form”?

A Puget Sound Release Form provides Puget Sound with permission to make, store, and use recordings of students, faculty, or staff presentations.

When is a Recording Agreement or Puget Sound Release Form needed?

* A Recording Agreement is needed if:
  + a recording of a Guest’s Presentation will be made and submitted to Archives & Special Collections; or
  + a third-party will be permitted to record a Guest’s Presentation (example: TVW, the non-profit government access channel).
* A Puget Sound Release Form should be used to obtain permission from Puget Sound students, faculty, or staff to record their presentations.

Is a Recording Agreement required?

No. If a presenter does not wish to grant permission to make and use a recording of their Presentation, a Recording Agreement (or Release Form for students, faculty, or staff) is not required and a recording of the Presentation should not be made.

Is there a Template Recording Agreement available?

* Yes. If a Recording Agreement is needed, Puget Sound’s [approved template Recording Agreement](http://www.pugetsound.edu/files/resources/attachment-a-template-recording-agreement.docx) should be used.
* The template Recording Agreement can be used as a standalone agreement or as an attachment to another agreement (a Puget Sound template agreement or a guest presenter’s form of agreement).
* As noted above, use the [Puget Sound Release Form](http://www.pugetsound.edu/files/resources/form-permission-employee-student-photo-recording.docx) for students, faculty, or staff to grant permission to record their presentations.
* See the remainder of this document for guidance to complete the Recording Agreement template.

**Checklist for Completing the Template Recording Agreement:**

Puget Sound’s template Recording Agreement will be (check one):

an attachment to a Puget Sound guest presenter/artist letter or agreement, or performer/speaker agreement;

an attachment to a guest presenter’s (or their agent’s) form of agreement;

a standalone agreement.

To be sure the most current version is used, begin with the [approved template Recording Agreement](http://www.pugetsound.edu/files/resources/attachment-a-template-recording-agreement.docx) from the [Contracts webpage](http://www.pugetsound.edu/about/offices-services/office-of-finance/contracts/approved-template-agreements/guest-presenterartistmusicianperformerspeaker-template-agreements/recording-agreement/).

At the top of page 1:

If the Recording Agreement will be an attachment to another agreement, keep “Attachment A” as the first line and delete the red print after it

If the Recording Agreement will be a standalone agreement, delete “Attachment A” and the red print after it

Click in the “Terms or Agreement” fillable field, click the down arrow at the end of the field, and select either “Terms” or “Agreement”

* Select “Terms” if this will be an attachment to another Agreement
* Select “Agreement” if this will be a standalone Agreement
* If using a Mac and/or this feature does not work, delete the fillable field and enter either “Terms” or “Agreement” based on the guidance above

Other information to fill in near the top of page 1:

Title or description of the Presentation

Presentation date

* If using a PC, click in the Presentation date “fillable field”, click the down arrow at the end of the field, and select a date from the “date picker” control
* If using a Mac and/or this feature does not work, click and enter the effective date

Guest (presenter) name

Within paragraph 2, at the end of the sentence in item (c) *Other Information*:

Click in the “Attachment or Agreement” fillable field, click the down arrow at the end of the field, and select either “Attachment” or “Agreement”

* Select “Attachment” if this will be an attachment to another Agreement
* Select “Agreement” if this will be a standalone Agreement
* If using a Mac and/or this feature does not work, delete the fillable field and enter either “Attachment” or “Agreement” based on the guidance above

Determine if the last paragraph (Washington State will be the governing law) should be included or removed:

Include if this is a standalone Agreement

Remove if this is an Attachment to another Agreement

In either case, delete the red print at the beginning of the paragraph

The following fields should automatically populate with the same information entered earlier in the document. If they do not, enter the correct information:

* “Attachment” or “Agreement” in paragraphs 3 and 5
* The Guest’s name in the acceptance signature section

The section on page 2 shaded with light gray is for use by the area storing the recording for future use (e.g. Library Archives and Special Collections)

Save the Recording Agreement:

Recommended file name: “Guest Last Name, Guest First Name YYYY-MM-DD”,

* where YYYY-MM-DD = Presentation Date
* (YYYY = 4-digit year; MM = two digit month; DD = two digit day)

Ask the Guest to review and sign the Recording Agreement

* Generally, Puget Sound Archives & Special Collections can accept only recordings with unrestricted use permission.
* Before modifying provisions (terms) in the template agreement, discuss questions or concerns about wording with the Office of University Counsel ([contracts@pugetsound.edu](mailto:contracts@pugetsound.edu) or ext. 2735).

Send a scanned copy of the signed Recording Terms/Agreement (for guest presenters) or Puget Sound Release Form (for faculty, staff, or students) to [archives@pugetsound.edu](mailto:archives@pugetsound.edu) (Library Archives).

If the Recording Agreement is a standalone agreement (i.e. it is NOT an attachment to another agreement), also send a scanned copy of the signed Recording Agreement to [contracts@pugetsound.edu](mailto:contracts@pugetsound.edu).

If the Recording Agreement is an attachment to another agreement, use the [appropriate checklist(s) to plan and review the main agreement](http://www.pugetsound.edu/about/offices-services/office-of-finance/contracts/contract-checklists/).

Ensure you receive the following and that all documents are complete and accurate:

Copy of the fully-signed Contract, including the Recording Agreement and (if applicable) other attachments that are referenced in the main agreement

If applicable, proof of any insurance required in the contract, including The University of Puget Sound named as an additional insured.

Send a scanned copy of the fully-signed contract and (if applicable) proof of insurance (in separate files) to [contracts@pugetsound.edu](mailto:contracts@pugetsound.edu).

**Questions?** Please direct questions about:

This checklist, the template Recording Agreement, or other Contract questions to: [contracts@pugetsound.edu](mailto:contracts@pugetsound.edu) or contact the Office of University Counsel at campus extension 2735

How Recordings will be Stored and Used to: Collins Memorial Library Archives & Special Collections at [archives@pugetsound.edu](mailto:archives@pugetsound.edu) or <https://www.pugetsound.edu/academics/academic-resources/collins-memorial-library/archives/>