**Questions?** Please direct questions about:

This checklist, the template Recording Agreement, or other Contract questions to: 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 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 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 (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.

[ ]  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.

**Questions?** Please direct questions about:

This checklist, the template Recording Agreement, or other Contract questions to: 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 or <https://www.pugetsound.edu/academics/academic-resources/collins-memorial-library/archives/>