**Questions?** Please send questions to: contracts@pugetsound.edu or contact the Office of University Counsel at campus extension 2735.

# There are three template agreements for guest presenters, artists, musicians, performers, speakers, and American Sign Language (ASL) interpreters (“Guests”). Please review [guidance on the Contract Resource web pages](http://www.pugetsound.edu/about/offices-services/office-of-finance/contracts/approved-template-agreements/guest-presenterartistmusicianperformerspeaker-template-agreements/) to choose the form of agreement and method of payment that is appropriate for your arrangement.

# With each new agreement, begin with the applicable [template agreement directly from the Contracts webpage](http://www.pugetsound.edu/about/offices-services/office-of-finance/contracts/approved-template-agreements/guest-presenterartistmusicianperformerspeaker-template-agreements/) to ensure the most current version is used. Avoid reusing agreements for other Guests or an earlier agreement with the same Guest.

# Except as noted in this checklist, before modifying provisions (terms and conditions) in a template agreement, discuss questions or concerns about wording with the Office of University Counsel (contracts@pugetsound.edu or ext. 2735).

**CHECKLISTS for Completing Guest Template Agreements:**

Ctrl+Click on one of the Three Checklist Titles below to navigate to that checklist

[**Checklist 1: Letter for Guest Presenters/Artists in Academic Settings**](#_Toc408491403)

[**Checklist 2: “Simple” Speaker/Performer Agreement**](#_Toc408491404)

[**Checklist 3: Speaker/Performer Agreement**](#_Toc408491409)

# **Checklist 1: Letter for Guest Presenters/Artists in Academic Settings**

[ ]  Review [guidance on the Contract Resource web pages](http://www.pugetsound.edu/about/offices-services/office-of-finance/contracts/approved-template-agreements/guest-presenterartistmusicianperformerspeaker-template-agreements/)to confirm this template is appropriate for your arrangement.

[ ]  Save a copy of the [Template Letter](http://www.pugetsound.edu/files/resources/template-1-letter-guest-presenters_artists-academi-3.docx) (“Save As”)

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

* Where YYYY-MM-DD = Presentation Date
	+ (YYYY = 4-digit year; MM = 2-digit month; DD = 2-digit day)
	+ Example: Smith, John 2015-01-20
* If the Letter is for multiple presentations on multiple days, include the earliest presentation date in the file name
	+ Example: Mary Guest will make two presentations, one each on 1/22/15 and 1/23/15. The recommended file name is: Guest, Mary 2015-01-22

[ ]  Delete red print and website address (link) at the top of the Template Letter

[ ]  Complete/edit the Template Letter to fit the situation

* *[Red italicized print in brackets]* is provided for guidance; remove from the final letter
* Replace [terms or phrases in black regular font within brackets] with situation-specific information (examples: date of your letter; your guest’s name and address; the presentation date and time; travel arrangement and/or reimbursement description)

[ ]  Confirm (test) the links to campus directions/map and campus-wide policies; update if needed (and please let us know at contracts@pugetsound.edu so we can update the template)

[ ]  The person who will sign the letter for Puget Sound must have the contract authority to do so

* Academic department chairs/heads do not automatically (by virtue of their position) have contract authority
* To be valid, contract authority must be authorized in writing by: (1) board resolution or (2) a contract authority form on file in the central finance contract file that has been signed by the individual, the responsible cabinet member, and university counsel or a financial officer
* If the department chair/head does not have contract authority, Associate Academic Dean Christoph or the Provost should sign
* Please direct questions about who should sign to contracts@pugetsound.edu

[ ]  Enclosures – list and include enclosures as applicable

[ ]  A [blank IRS Form W-9](http://www.irs.gov/pub/irs-pdf/fw9.pdf)

[ ]  If a recording of the presentation will be made for the Puget Sound archives or other university or third-party use, a [Recording Agreement](http://www.pugetsound.edu/about/offices-services/office-of-finance/contracts/approved-template-agreements/guest-presenterartistmusicianperformerspeaker-template-agreements/recording-agreement/) is needed

* When used with the *Letter for Guest Presenters in Academic Settings*, a Recording Agreement is a standalone Agreement
* Please see and use the Guidance and Checklist document on the [Recording Agreement web page](http://www.pugetsound.edu/about/offices-services/office-of-finance/contracts/approved-template-agreements/guest-presenterartistmusicianperformerspeaker-template-agreements/recording-agreement/)

[ ]  Other enclosures, if applicable

[ ]  Send the signed (by Puget Sound) Letter and enclosures to the Guest

[ ]  Ensure the Guest returns the completed and signed IRS Form W-9 and (when applicable) Recording Agreement

[ ]  Send scanned copies of the signed Letter and (if applicable) the signed Recording Agreement together in the same email message to contracts@pugetsound.edu

[ ]  If a Recording Agreement is applicable, also send a scanned copy the signed Recording Agreement to archives@pugetsound.edu (Library Archives)

[ ]  Deliver the completed and signed IRS Form W-9 to the Office of Finance in Jones Hall Rm 018 (typically with the disbursement request for payment) or send a scanned copy to finance@pugetsound.edu.

[ ]  **Well Done!** Thank you for your time and care to successfully plan, review, and complete the Letter and Enclosures!

**Questions?** Please send questions to: contracts@pugetsound.edu or contact the Office of University Counsel at campus extension 2735.

# Checklist 2: “Simple” Speaker/Performer Agreement

[ ]  Review [guidance on the Contract Resource web pages](http://www.pugetsound.edu/about/offices-services/office-of-finance/contracts/approved-template-agreements/guest-presenterartistmusicianperformerspeaker-template-agreements/)to confirm this template agreement is appropriate for your arrangement.

[ ]  Save a copy of the [Template Agreement](http://www.pugetsound.edu/files/resources/191001_template-2-simple-performer_speaker-agreeme.docx) (“Save As”)

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

* where YYYY-MM-DD = Presentation Date
	+ (YYYY = 4-digit year; MM = 2-digit month; DD = 2-digit day)
	+ Example: Smith, John 2015-01-20
* If the Agreement is for multiple presentations on multiple days, include the earliest presentation date in the file name
	+ Example: Mary Guest will speak twice, once on 1/22/15 and once on 1/23/15. The recommended file name is: Guest, Mary 2015-01-22

[ ]  Top of Page 1 – delete the red print and website address (link) in the first 3 rows, so that only the Agreement Title is at the top of Page 1

* The Agreement title is: **Agreement for Guest Presenter/Artist, Musician, Performer, Speaker, or American Sign Language (ASL) Interpreter (“Agreement”)**

[ ]  Page 1, lead-in phrase – click in the Guest’s Name field and enter the Guest’s Full Name

* This should be the full name of the Guest that s/he will use to sign the Agreement

[ ]  Section 1. Description, Location, and Date of the Presentation

[ ]  Click in the Presentation Type field, then click the down arrow at the end of the field and select an appropriate Presentation Type. If this feature doesn’t work or the correct Presentation Type isn’t on the list, click in the Presentation Type field and enter the Presentation Type

[ ]  Enter the following information about the Presentation in the Table in Section 1:

[ ]  Description

[ ]  Location

[ ]  Beginning Date

[ ]  Completion Date

[ ]  Arrival Time (for the Guest)

[ ]  Completion Time (for the Guest)

[ ]  Section 2. Description of Services

[ ]  The Presentation Type you indicated in Section 1 should automatically populate in Section 2.a. If it doesn’t, click in the Presentation Type field and enter the same Presentation Type you entered in Section 1.

[ ] Use 2.b. – 2.d. to enter details of other expectations, as applicable, such as classroom visits, meetings with students, etc.

* If not applicable, delete rows 2.b. – 2.d.
* If needed, add additional letter rows (**Tip!** To add an additional row, place your cursor at the end of row 2.d., outside of the fillable field, and press the <enter> key on your keyboard. Repeat as needed)

[ ]  Section 3. Payment

[ ]  Click in the Amount field and enter the Amount the Guest will be paid for completion of the Services

[ ]  The Guest Name you entered at the top of Page 1 should automatically populate in Section 3.a.

* If it doesn’t populate, click in the “Enter Payable Name if different from Guest Name” field and enter the correct Payable Name; or
* If the “Payable to” Name should be different from the Guest Name, highlight the Guest Name and change to the correct Payable Name.

[ ]  Edit 3.b. to describe who will be responsible for travel arrangements, accommodations, and related expenses.

* If not applicable, delete 3.b.
* See the guidance at the end of 3.b that is in *italicized red print*. Delete this guidance when you are done editing 3.b.

[ ]  Section 4. Publicity; Photographs; Sign Language Interpretation

[ ]  Edit, add, or remove items in 4.a. – 4.d. and edit the Section 4 Title (if needed) to describe authorization from the Guest for publicity, photographs, and sign language interpretation.

* If it is not applicable, delete Section 4
* See the guidance within Section 4 that is in *italicized red print*. Delete this guidance when you are done editing Section 4

[ ]  Section 5. Recordings and Materials

[ ]  If a recording of the presentation will be made for the Puget Sound archives or other university or third-party use, a [Recording Agreement](http://www.pugetsound.edu/about/offices-services/office-of-finance/contracts/approved-template-agreements/guest-presenterartistmusicianperformerspeaker-template-agreements/recording-agreement/) is needed as Attachment A to the Guest Agreement

* Refer to the Guidance and Checklist document on the [Recording Agreement web page](http://www.pugetsound.edu/about/offices-services/office-of-finance/contracts/approved-template-agreements/guest-presenterartistmusicianperformerspeaker-template-agreements/recording-agreement/)
* If you include Section 5, delete *[Remove if not applicable]* from the beginning of the section
* If a recording of the presentation will not be made (there is no recording agreement), delete Section 5

[ ]  Section 6. Cancelling this Agreement

[ ]  Click in the “Enter # of Days” field and enter the number of days’ prior written notice that either party (Puget Sound or the Guest) needs to provide to the other if they need to cancel the agreement

[ ]  Section 7. Compliance with Puget Sound Policies.

[ ]  At minimum, include (keep) the language that the Guest agrees to comply with applicable campus-wide policies.

[ ]  See the guidance in *italicized red print* at the end of Section 7. Delete this guidance when you are done editing Section 7.

[ ]  Section 9. Release for Loss of Personal Property.

[ ]  If not applicable, delete Section 9

[ ]  If Section 9 is included, delete *[Remove if not applicable]* from the beginning of the section

[ ]  Section 13. Contact Information – fill in:

[ ]  “To Puget Sound” section:

[ ]  Puget Sound Contact Name

[ ]  The campus mail box (CMB) of the Contact person’s university department (for ASUPS, use the ASUPS CMB; not a student’s personal CMB)

[ ]  The “Attn to” line in the US Mail Address should automatically populate with the Puget Sound Contact Name; if it doesn’t, click on the “Puget Sound Attn to Name” field and enter it

[ ]  Puget Sound Contact Email Address

[ ]  Puget Sound Contact Phone Number

[ ]  “To the Guest” section:

[ ]  Guest Contact Name should automatically populate with the Guest Name entered at the top of Page 1; if it doesn’t or the Contact Name should be different, click on the “Enter Name if not Guest Name” field and enter the correct Contact Name for the Guest

[ ]  US Mail Address for the Guest

[ ]  Guest Contact Email Address

[ ]  Guest Contact Phone Number

[ ]  In the last paragraph, just above the Signature Section – fill in 2 Dates:

[ ]  Date #1 - Return by Date

[ ]  To determine this date, consider the following:

* Normal payment processing time for the Office of Finance is two weeks
* Add to this time your office needs to prepare, sign, and submit the payment request
* **In rare instances, if expedited payment processing is needed, prior to making a commitment, discuss with the Office of Finance** (finance@pugetsound.edu)
* Click in the Return by Date field, then click the down arrow at the end of the field and select a date from the “date picker” control. If this feature doesn’t work, click and enter the Return by Date

[ ]  Date #2 - Agreement Effective Date

* Click in the Agreement Effective Date field, then click the down arrow at the end of the field and select a date from the “date picker” control. If this feature doesn’t work, click and enter the Agreement Effective Date.

[ ]  **Signature Section**

 [ ]  For the Guest:

* The Guest’s Name should automatically populate from the name entered at the top of Page 1; if it doesn’t, click and enter the Guest’s Full Name (as s/he will sign the agreement)

 [ ]  For Puget Sound:

* Refer to the guidance in the shaded box below and enter either one or two names and titles to sign for Puget Sound
* If assistance is needed to delete the second signature block for Puget Sound, send a request to contracts@pugetsound.edu or contact the Office of University Counsel at ext. 2735

# How many and which signatures are required for Puget Sound?

# One signature is permitted if the person is both: (1) authorized to sign the contract type, amount, and duration\*; and (2) is the budget manager, department head, or responsible cabinet member.

# Otherwise, two signatures are required: (1) the budget manager, department head, or responsible cabinet member (typically signs first to indicate operational needs are met); and (2) a person with delegated contract authority for the contract type, amount, and duration.\*

# \*To be valid, contract authority must be authorized in writing by: (1) board resolution or (2) contract authority form on file in the central finance contract file that has been signed by the individual, the responsible cabinet member, and university counsel or a financial officer.

[ ]  Review the Agreement and Attachment A Recording Terms (if applicable) to confirm the documents are complete and accurate, including:

* All information is filled in
* Any guidance (red print) within the Template Agreements has been removed.
* Section numbers begin with #1 and are in sequential order

[ ]  Determine if the Guest needs to review the Agreement and Attachment A Recording Terms (if applicable) before they are signed by Puget Sound and if yes, coordinate review.

* Except as noted in the checklist above, before modifying provisions (terms) in the template agreements, discuss questions or concerns about wording with the Office of University Counsel (contracts@pugetsound.edu or ext. 2735).

[ ]  Coordinate signing by Puget Sound. If there are two Puget Sound signers, the budget manager or department head should sign first, then the second, final Puget Sound signer.

[ ]  Send the signed (by Puget Sound) Agreement, Attachment A Recording Terms (if applicable), and a [blank IRS Form W-9](http://www.irs.gov/pub/irs-pdf/fw9.pdf) to the Guest and ask him/her to complete, sign and return all documents by the Return by Date in the Agreement.

[ ]  Send a scanned copy of the fully-signed Agreement, including any attachments (signed by the Guest, if applicable) contracts@pugetsound.edu

[ ]  If there are Recording Terms (Attachment A), send a scanned copy of only the signed (by the Guest) Attachment A to archives@pugetsound.edu (Library Archives)

[ ]  Deliver the completed and signed IRS Form W-9 to the Office of Finance in Jones Hall Rm 018 (typically with the approved invoice or disbursement request) or send a scanned copy to finance@pugetsound.edu

[ ]  **Well Done!** Thank you for your time and care to successfully plan, review, and complete the Agreement!

**Questions?** Please send questions to: contracts@pugetsound.edu or contact the Office of University Counsel at campus extension 2735.

# Checklist 3: Speaker/Performer Agreement

[ ]  Review [guidance on the Contract Resource web pages](http://www.pugetsound.edu/about/offices-services/office-of-finance/contracts/approved-template-agreements/guest-presenterartistmusicianperformerspeaker-template-agreements/)to confirm this template agreement is appropriate for your arrangement.

[ ]  Save a copy of the [Template Agreement](http://www.pugetsound.edu/files/resources/191001_template-3-performer_speaker-agreement.docx) (“Save As”)

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

* where YYYY-MM-DD = Presentation Date
	+ (YYYY = 4-digit year; MM = 2-digit month; DD = 2-digit day)
	+ Example: Smith, John 2015-01-20
* If the Agreement is for multiple presentations on multiple days, include the earliest presentation date in the file name
	+ Example: Mary Guest will speak twice, once on 1/22/15 and once on 1/23/15. The recommended file name is: Guest, Mary 2015-01-22

[ ]  Top of Page 1 – delete the red print and website address (link) in the first 3 rows, so that only the Agreement Title **PERFORMER/SPEAKER AGREEMENT** is at the top of Page 1

[ ]  Page 1, first paragraph – fill in:

[ ]  Click in the Agreement Effective Date field, then click the down arrow at the end of the field and select a date from the “date picker” control. If the date picker feature doesn’t work, click and enter the Agreement Effective Date.

[ ]  Click in the Guest’s Name field and enter the full, legal name the Guest will use to sign the Agreement and on their IRS Form W-9.

[ ]  Click in the Guest Entity Type field, then click the down arrow at the end of the field and select the Guest’s Entity Type from the drop down list – valid entity types include:

1. an Individual/Sole Proprietorship
2. a C Corporation
3. an S Corporation
4. a Partnership
5. a Trust/Estate
6. a Limited Liability Company (LLC)
* **Notes RE: Entity Types**:
	+ The list of entity types above is from the [IRS Form W-9](https://www.irs.gov/pub/irs-pdf/fw9.pdf), which the Guest will also need to complete (as a later step in this checklist). If the Guest is not an individual, to select the correct entity type, you will need to ask for their completed IRS Form W-9 or, at minimum, to provide their entity type.
	+ If the Guest provides a different entity type than one of the six listed above, please discuss with the Office of University Counsel (contracts@pugetsound.edu or ext. 2735)

[ ]  Section 1. Description, Location, and Date of the Presentation - enter the following information about the Presentation in the Table in Section 1:

[ ]  Description

[ ]  Location

[ ]  Beginning Date

[ ]  Completion Date

[ ]  Arrival Time (for the Guest)

[ ]  Completion Time (for the Guest)

[ ]  Section 2. Description of Services - use 2.b. – 2.d. to enter details of other expectations, as applicable, such as classroom visits, meetings with students, etc.

* If not applicable, delete rows 2.b. – 2.d.
* If needed, add additional letter rows (**Tip!** To add an additional row, place your cursor at the end of row 2.d., outside of the fillable field, and press the <enter> key on your keyboard. Repeat as needed)

[ ]  Section 3. Performance Fee, Expenses, and Payment Terms

* Refer to the guidance in red printwithin Section 3 and delete it (the guidance) when Section 3 is complete

[ ]  1st sentence - click and enter the Amount the Guest will be paid for completion of the Services

[ ]  2nd sentence – if applicable, edit to describe travel arrangements/accommodations and related expenses Puget Sound is providing; remove if not applicable

[ ]  3rd sentence – complete this sentence to indicate when the payment is due, taking into consideration:

* Normal payment processing time for the Office of Finance is two weeks
* Add to this time your office needs to prepare, sign, and submit the payment request
* **In rare instances, if expedited payment processing is needed, prior to making a commitment, discuss with the Office of Finance** (finance@pugetsound.edu)

[ ]  Section 4. Publicity; Photographs; Sign Language Interpretation

[ ]  Edit, add, or remove items in 4.a. – 4.d. and edit the Section 4 Title (if needed) to describe authorization from the Guest for publicity, photographs, and sign language interpretation.

* If it is not applicable, delete Section 4
* See the guidance within Section 4 that is in red print. Delete this guidance when you are done editing Section 4

[ ]  Section 5. Recordings and Materials

[ ]  If a recording of the presentation will be made for the Puget Sound archives or other university or third-party use, a [Recording Agreement](http://www.pugetsound.edu/about/offices-services/office-of-finance/contracts/approved-template-agreements/guest-presenterartistmusicianperformerspeaker-template-agreements/recording-agreement/) is needed as Attachment A to the Guest Agreement

* Refer to the Guidance and Checklist document on the [Recording Agreement web page](http://www.pugetsound.edu/about/offices-services/office-of-finance/contracts/approved-template-agreements/guest-presenterartistmusicianperformerspeaker-template-agreements/recording-agreement/)
* If you include Section 5, delete [Remove if not applicable] from the beginning of the section
* If a recording of the presentation will not be made (there is no recording agreement), delete Section 5

[ ]  Section 7. Compliance with Puget Sound Policies.

[ ]  At minimum, include (keep) the language that the Guest agrees to comply with applicable campus-wide policies.

[ ]  See the guidance in red print at the end of Section 7. Delete this guidance when you are done editing Section 7.

[ ]  Section 10. Release for Loss of Personal Property.

[ ]  if not applicable, delete Section 9

[ ]  If Section 9 is included, delete [Remove if not applicable] from the beginning of the section

[ ]  Section 13. Contact Information and Notices – fill in:

[ ]  “To Puget Sound” section:

[ ]  Puget Sound Contact Name

[ ]  The campus mail box (CMB) of Contact person’s university department (for ASUPS, use the ASUPS CMB; not a student’s personal CMB)

[ ]  The “Attn to” line in US Mail Address should automatically populate with Puget Sound Contact Name; if it doesn’t, click on the “Puget Sound Attn to Name” field and enter it

[ ]  Puget Sound Contact Email Address

[ ]  Puget Sound Contact Phone Number

[ ]  “To the Guest” section:

[ ]  Guest Contact Name should automatically populate with the Guest Name entered at the top of Page 1; if it doesn’t or the Contact Name should be different, click on the “Enter Name if not Guest Name” field and enter the correct Contact Name for the Guest

[ ]  US Mail Address for the Guest

[ ]  Guest Contact Email Address

[ ]  Guest Contact Phone Number

[ ]  Return by Date in the last paragraph, just above the Signature Section

[ ]  To determine this date, consider the following:

* Normal payment processing time for the Office of Finance is two weeks
* Add to this time your office needs to prepare, sign, and submit the payment request
* **If expedited payment processing is needed, prior to making a commitment, discuss with the Office of Finance** (finance@pugetsound.edu)

[ ]  You should be able to click in the Return by Date field, then click the down arrow at the end of the field and select a date from the “date picker” control. If this feature doesn’t work, click and enter the Return by Date

[ ]  **Signature Section**

For the Guest – Fill in:

[ ]  The Guest’s Full Legal Name should automatically populate in two places within the Guest Signature section (from the name entered at the top of Page 1); if it doesn’t, click and enter it

[ ]  Click and enter the Title of Guest Signatory or if not applicable, delete this fillable field

[ ]  Click and enter the Guest’s UBI/Business License #

 For Puget Sound:

[ ]  Refer to the guidance in the shaded box below and enter either one or two names and titles to sign for Puget Sound

* If assistance is needed to delete the second signature block for Puget Sound, send a request to contracts@pugetsound.edu or contact the Office of University Counsel at ext. 2735

# How many and which signatures are required for Puget Sound?

# One signature is permitted if the person is both: (1) authorized to sign the contract type, amount, and duration\*; and (2) is the budget manager, department head, or responsible cabinet member.

# Otherwise, two signatures are required: (1) the budget manager, department head, or responsible cabinet member (typically signs first to indicate operational needs are met); and (2) a person with delegated contract authority for the contract type, amount, and duration.\*

# \*To be valid, contract authority must be authorized in writing by: (1) board resolution or (2) contract authority form on file in the central finance contract file that has been signed by the individual, the responsible cabinet member, and university counsel or a financial officer.

[ ]  Review the Agreement and Attachment A Recording Terms (if applicable) to confirm the documents are complete and accurate, including:

* All information is filled in
* Any guidance (red print) within the Template Agreements has been removed.
* Section numbers begin with #1 and are in sequential order

[ ]  Determine if the Guest needs to review the Agreement and Attachment A Recording Terms (if applicable) before they are signed by Puget Sound and if yes, coordinate review.

* Except as noted in the checklist above, before modifying provisions (terms) in the template agreements, discuss questions or concerns about wording with the Office of University Counsel (contracts@pugetsound.edu or ext. 2734).

[ ]  Coordinate signing by Puget Sound. If there are two Puget Sound signers, the budget manager or department head should sign first, then the second, final Puget Sound signer.

[ ]  Send the signed (by Puget Sound) Agreement, Attachment A Recording Terms (if applicable), and a [blank IRS Form W-9](http://www.irs.gov/pub/irs-pdf/fw9.pdf) to the Guest and ask him/her to complete/sign and return by the Return by Date in the Agreement.

[ ]  Send a scanned copy of the fully-signed Agreement, including any attachments (if applicable) contracts@pugetsound.edu

[ ]  If there are Recording Terms (Attachment A), send a scanned copy of only Attachment A to archives@pugetsound.edu (Library Archives)

[ ]  Deliver the completed and signed IRS Form W-9 to the Office of Finance in Jones Hall Rm 018 (typically with the approved invoice or disbursement request) or send a scanned copy to finance@pugetsound.edu

[ ]  **Well Done!** Thank you for your time and care to successfully plan, review, and complete the Agreement!

**Questions?** Please send questions to: contracts@pugetsound.edu or contact the Office of University Counsel at campus extension 2735.