

Contracting For Speaker* Engagements

A service purchase contract must be executed between Bloomsburg University (BU) and the speaker or the speaker’s booking agent prior to the speaking engagement. Please follow procedures outlined below for contracting with a speaker.

1. Initiate a Purchase Requisition (PR).
 - a. Lead times below must be followed:
 - i. Over \$5,000 – 6 weeks prior to the engagement to allow Procurement time to create contract, work through contract issues with the speaker, and obtain speaker and PASSHE legal counsel signatures;
 - ii. \$5,000 and under – 2 to 3 weeks prior to engagement to permit time to review, edit terms and obtain all signatures.
 - b. Include all pertinent information on the PR in SAP:
 - i. Speaker’s quotation and/or contract (add as attachment to PR);
 - ii. Name, address and phone number;
 - iii. Social security number of the speaker or the employer identification number (EIN) of the booking agent;
 - iv. Speaker’s fee;
 - v. Travel expenses (*lodging, meals, mileage, etc.*) – select one of the following methods:

1. All Inclusive Fee (Preferred Method)			
a. Establish a set fee with the speaker, agreed upon in advance, which includes all expenses.	b. PR - Line 1 will state <i>"Speaker's Fee-Note: Bloomsburg University is not responsible for any travel expenses"</i> .	c. To determine reasonableness of included expenses, please reference current per diem and lodging rates and mileage calculator found on Bloomsburg University's Travel Information webpage .	
2. Travel Expenses Reimbursed to Speaker			
a. Estimate of travel expenses must be in accordance with university travel guidelines (see 1.c. above).	b. PR - Line 1 will state <i>"Speaker's Fee"</i> .	c. PR - Line 2 will state <i>"Estimated reasonable travel costs (lodging, meals, mileage, etc.) - receipts required"</i> .	d. Item Text will state <i>"Speaker will make travel arrangements, pay for travel costs, and invoice Bloomsburg University accordingly"</i> .
3. Travel Arrangements Made by BU			
a. PR - Line 1 will state <i>"Speaker's Fee"</i> .	b. Item Text will state <i>"Bloomsburg University will arrange and pay for travel costs (lodging, meals, etc.)". Should the Speaker cancel without adequate notice or fail to make the appearance he/she may be invoiced for any non-refundable costs the University incurs.</i>		c. Note: travel arrangements must be in accordance with university travel guidelines (see 1.c. above) and can be made using the purchasing card or purchase requisition system.

2. Procurement office will execute the service purchase contract based on the information provided by the requesting department.
3. Payment processing:
 - a. Standard practice is the Speaker is responsible for sending an invoice for services provided to the University in accordance with the terms outlined on the service purchase contract. *University departments/offices should not generate an invoice on the speaker’s behalf.*
 - i. However, if the speaker is an individual not associated with a company or corporation, does not speak routinely in the course of his/her normal employment the department may prepare and submit an invoice on his/her behalf. This invoice should be signed by the speaker prior to departure. After the engagement, the invoice must be signed for approval by the respective department who initiated the speaker request. Please refer to the link for this invoice form.
<http://www.bloomu.edu/documents/purchasing/GeneralInvoiceForm.doc>

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- b. If a speaker contracted for expense reimbursement, original receipts for actual expenses incurred must accompany the invoice to substantiate expenses claimed and satisfy audit requirements prior to reimbursement (applies to options 2 and 3, above, only).
 - c. Payment will be made **after** the speaking engagement has taken place and the requisitioner has approved the invoice for payment. Any exceptions to this rule must be approved by the Procurement office. Prepayment of speaker fees and/or expenses is only authorized under extraordinary circumstances (i.e., speakers from outside the United States).
 - d. Upon approval of the final invoice for the contract, please indicate "*final invoice*" before forwarding to the Accounts Payable office for processing. By doing so, any remaining open commitment will be liquidated and funds returned to funds center holder's budget.
4. Call the Procurement office if you have any questions or special circumstances.