**SPEAKER AGREEMENT PROCEDURE**

**(All forms links shown below)**

**STEP I:** Project Director/ Investigator (PD/PI) completes Guest Speaker Agreement (name, address, fee amount, location, date and time of event) including a brief description of the event, what the speaker will be doing and how it relates to the goal of the sponsored program or research project. It must be signed by the PD/PI.

**STEP II:** PD/PI sends the following forms to the Guest Speaker for signature by US mail or electronically scanned:

* Completed Agreement for Speaker’s signature (electronic signatures are accepted) including the Social Security number or EIN.
* W-9 for Guest Speakers who have not previously been a paid presenter for the Old Westbury Research Foundation.
* Direct Deposit Form enabling payment to be remitted electronically, eliminating waiting time for mailed checks.

All completed forms are returned to PD/PI via US Mail or scanned PDF via email. Please note scanned documents must be clear so the content is legible and readable. Any scanned documents that are not readable cannot be accepted.

**STEP III:** Upon receipt of signed forms; PD/PI sends Agreement, W-9 and Direct Deposit Form to Grants Management Office via US mail, or legible PDF scan, at least one month prior to event date. Grants Management Office will coordinate approval, including forwarding Agreement to the Operations Manager, who must sign and return the Agreement.

**STEP IV:** A completedPurchase Requisition for the Speaker Fee should also be sent to Grants Management Office approximately one month prior to event via legible PDF scanned copy. Purchase Requisition should state, as an example, “John Doe; guest speaker for How to Create an Invitation to a Zoom Call event – April 30, 2021 being held at the Huntington Marriott Hotel.” ***Please note:*** If speaker agreement, W-9 and direct deposit form have been sent prior to Purchase Requisition – it should be noted at bottom of Purchase Requisition form.

**STEP V:** Immediately after the event, PD/PI should receive an invoice for services performed. Speaker’s invoice should include:

* Name of Speaker or DBA company
* Date
* Description of Services provided
* Dollar Amount of the fee for the engagement

Speaker’s invoice should be submitted to PD/PI for signature approval to pay invoice.

**STEP VI:** PD/PI should submit approved (signed) invoice to the Grants Management Office for processing payment. Payments may take up to 30 days. Payments by mailed check will take longer.

**FORMS (links):**

1. [**Guest Speaker Agreement and Payment Authorization Form**](https://www.oldwestbury.edu/sites/default/files/documents/Bus-Finance/rf/Form%20-%20RF%20Guest%20Speaker%20F%20Ext.pdf). - https://www.oldwestbury.edu/sites/default/files/documents/Bus-Finance/rf/Form%20-%20RF%20Guest%20Speaker%20F%20Ext.pdf
2. [**W-9 Form**](https://www.oldwestbury.edu/sites/default/files/documents/Bus-Finance/rf/W-9.pdf) - <https://www.oldwestbury.edu/sites/default/files/documents/Bus-Finance/rf/W-9.pdf>
3. **Direct Deposit Form** – <https://www.oldwestbury.edu/sites/default/files/documents/Bus-Finance/rf/ACH%20Payment%20Enrollment%20Form.pdf>
4. **Purchase Requisition** – Excel version shown on top of forms list on the website. <https://www.oldwestbury.edu/business/research-foundation/grant-management-forms>