



**Oklahoma Society of CPAs
Discussion Leader Agreement
2018-2019**

The Oklahoma Society of CPAs (OSCPA) is pleased to offer you the opportunity to present the following educational program at our upcoming educational event. This agreement describes what the OSCPAs needs to ensure the quality continuing education that has become associated with the OSCPAs events. To accept this offer, please review, sign and return this agreement by email attachment.

Name of Event: _____

Program Topic/Title: _____

Date: _____

Time: _____ to _____

Location: _____

The OSCPAs agrees to:

- Provide you with a complimentary, non-transferable event registration, including continuing education sessions, lunch and breaks.
- Secure audio/visual and room set-up needs at the facility.
- Reimburse you for reasonable travel and lodging costs associated with the event. A Discussion Leader Reimbursement Form & Policy document will be provided to you. The Reimbursement form and all related receipts must be submitted within 60 days after the course, or the OSCPAs reserves the right to refuse payment.
- Advertise and promote the event in print, email and website formats.
- Make every reasonable effort to hold the event stated above, but reserves the right to cancel or reschedule the event if circumstances beyond the OSCPAs control deem it necessary. Such circumstances include by are not limited to: unusually low event registration, loss of facility, extreme weather conditions and other acts of force majeure.

I, the Discussion Leader, and those acting under my direction, agree to:

- Comply with all program-related deadlines provided to me by the OSCPAs, including but not limited to deadlines for session information, handouts, A/V requests, etc. Further information can be found in the [Discussion Leader Portal](#) on the OSCPAs website.
- Provide the OSCPAs with a master copy of my presentation in digital format a minimum of three (3) weeks prior to the event date. If this deadline is not followed, the OSCPAs reserves the right to charge me any fees incurred to get materials to the course site in a timely manner.
- Grant the OSCPAs permission to use, reproduce and distribute my presentation (including all handouts and PowerPoint presentation) to any and all event attendees.
- Coordinate and book all related travel reservations, making every effort to obtain the most reasonable travel fares. I acknowledge that the OSCPAs will not reserve hotel, airfare or ground transportation upon my behalf.

- Arrive at the event location/facility at least one-half hour prior to my presentation start time, ensuring an OSCP representative is aware of my arrival.
- Not engage in any type of promotional marketing or selling of any product or service. This includes not promoting any non-OSCP continuing educational programs.
- Refrain from any racial, ethnic, sexual or otherwise inappropriate references or behavior before, during or after my presentation. I understand that harassing or insulting behavior or verbiage will not be tolerated.
- Maintain the highest degree of professionalism expected by the OSCP of its discussion leaders so as to not embarrass any attendee or bring discredit to the OSCP.
- Teach the FULL number of minutes specified above. I understand that if my presentation runs short, I will fill the designated time frame with a Q&A session or group discussions. This is extremely important so that attendees can receive full CPE credit for my presentation.
- Notify the OSCP program manager immediately in the event of an emergency that will prevent me from meeting my obligation as a discussion leader.
- Authorize the OSCP to use my name, likeness, photograph and biographical information in connection with the promotion of the event.
- Provide consent for the OSCP to live stream my presentation in audio and/or video format. I acknowledge that the OSCP will be the sole copyright owner of the recording and will not resell the program without my consent.
 - Additionally, if the OSCP selects my program to be converted to an on-demand educational course, I agree to provide the OSCP with the required number of multiple choice questions and answers. The number of questions and the due date will be discussed with me by the OSCP program manager. **Initial here:** _____

I attest that I have obtained all necessary permissions or licenses from any persons or organizations whose material is included or used in my presentation.


I hereby indemnify and hold the OSCP harmless from and against any and all claims, actions, losses, liability and all other expenses (including reasonable attorney's fees) relating or incidental to, or arising directly or indirectly from, the inaccuracy or breach of any of the aforementioned warranties and representations.

By signing this Discussion Leader Agreement, I understand and agree to the above terms and conditions.

Signature

Printed Name

Date



Michelle Sopp
Vice President, Learning
Oklahoma Society of CPAs

Date