



## Developing a Memorandum of Understanding (MOU)

### Description:

This tool outlines the principles for developing an MOU, lists the key elements, and provides a sample template.

### How it can be used:

An MOU formalizes the relationship between two or more partners. It defines mutual roles and responsibilities and helps build a strong partnership that benefits all parties. This tool provides guidance on how to develop a successful MOU and what its key components should be.

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### General principles for developing an MOU

Before discussing the structure and content of an MOU, it is important to consider some key principles.

- The MOU needs to be generated through a mutual desire by both parties to enter into an MOU, with a shared and equal commitment to working together;
- The provisions in the MOU should not conflict with any existing arrangements between the parties, nor with any arrangements either party might have with other organizations;
- The structure and content of the MOU should be clear and easy to review and update. The simpler and more straightforward the language, the less likelihood there is for misunderstanding or confusion;
- An MOU is a 'living' document and should include provisions for keeping it under review and up-to-date;
- Since an MOU is a formal agreement, it should be developed with the assistance of relevant legal, financial or other relevant experts. This is to ensure that the provisions are sensible and do not have unintended implications or produce unreasonable expectations;
- In some instances, the MOU may be between more than two parties, e.g., a three-way agreement between a community health organization, a Tribal Council, and a health authority. This will add some complexity to the process of developing the MOU since it will be a three-way negotiation. Nevertheless, the general principles outlined in this document still apply.

Key elements of a MOU.


1. Introduction or background – explains the agreement content, including the need, the partners involved and the reason for working together. It should be a simple explanation and doesn't need to include many details.





2. Purpose – a concise statement that explains the intention of the health service integration initiative.
3. Scope – explain the partners and jurisdictions included in the agreement.
4. Definitions – if required, explain any relevant or technical terms associated with the work.
5. Partner expectations – this explains the obligations of each of the partners. May include training, communication etc.
6. Funding – explains any funding implication in the MOU.
7. Reporting – this explains how information will be communicated through the accountability channels and outside the health service integration initiative.
8. Duration – this provides the length of the agreement.
9. Governance – this explains who is responsible for oversight, either of the entire health service integration initiative and/or the guiding group.
10. Signatures – of the accountable leaders of the partners.





## Sample Memorandum of Understanding Template

### Memorandum of Understanding

Between

*(Partner)*

and

*(Partner)*

This Memorandum of Understanding (MOU) sets out the terms and understanding between the *(partner)* and the *(partner)* to *(insert activity)*.

### Background

Why the partnership is important.

### Purpose

“This MOU will *(purpose/goals of partnership) ...*”

### Scope

List and describe the activities that are planned for the partnership and who will do what.

“*The above goals will be accomplished by undertaking the following activities:*”

### Definitions

Explain the key terms that are relevant to the health service integration initiative.

### Roles and responsibilities

Outline the roles and responsibilities of all parties. Like in a contract, this is where the workload and obligations of the parties are detailed.

- periods of review;
- how the partners will use their expertise to support the effort;
- whether compensation is provided;
- project schedule for the tasks.

### Reporting

Identify who will evaluate effectiveness and adherence to the agreement, when it will be evaluated, and how information will be shared.





**Funding**

Specify whether this MOU includes a commitment of funds.

**Governance and accountability**

Note who is accountable for the ongoing oversight of the agreement and the activities.

**Other provisions**

Explain other elements such as how to address conflicts of interest, handle confidential information, resolve disputes, etc.

**Designation of the representatives**

Specify who will represent each partner, including potential alternates.

**Duration and administration**

Clarify who signs the MOU and the expected term or duration.

*“This MOU is at-will and may be modified by mutual consent of authorized officials from (list partners). This MOU shall become effective upon signature by the authorized officials from the (list partners) and will remain in effect until modified or terminated by any one of the partners by mutual consent. In the absence of mutual agreement by the authorized officials from (list partners) this MOU shall end on (end date of partnership).”*

**Contact Information**

Partner name \_\_\_\_\_

Partner representative \_\_\_\_\_ Position \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_

Partner name \_\_\_\_\_

Partner representative \_\_\_\_\_ Position \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_

\_\_\_\_\_ Date: \_\_\_\_\_

(Partner signature)

(Partner name, organization, position)

\_\_\_\_\_ Date: \_\_\_\_\_

(Partner signature)

(Partner name, organization, position)

