



Partnership Memorandum of Understanding (MOU) Checklist

- **Overall intent** — Reflects what the key parties are intending to do and may include Mission, Vision, Goals and Objectives.
- **The parties** — Name, type of organization, key contacts, contact information, city and state of headquarters.
- **Timeline** — Start and end date of the partnership and key milestones.
- **Assignments/responsibilities** — Describes the role of each organization as well as individual's responsibilities separately, beginning with those that are the sole responsibility followed by any shared responsibilities.
- **Disclaimers** — Employee's relationship to each partner, and what the partnership isn't intended to do, guarantee or create.
- **Financial Agreements** — Financials and budget spelled out in detail, including which entity will pay for each item and when payment is due. Can also identify use of shared resources including budget, staff, equipment, space and intellectual capital.
- **Risk Sharing** — Describe who will bear risk of a mishap. Never assume responsibility for something over which you don't have control. Ideally indemnification provisions should be mutual: each party is responsible for its own acts or omissions. (Make certain each partner isn't only willing but is able to pay.)
- **Signatures** — Signed by each partner's representative who is authorized to bind the organization contractually.

In summary, understand your partners' motives, communicate your expectations, develop a conflict resolution process and document the agreement in writing. With care, caution and due diligence, collaborative efforts with other organizations can be an effective way to conserve resources and advance your organization's missions.