



**United Way of Northern
Nevada and the Sierra**

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GUIDELINES FOR DEVELOPING A PARTNERSHIP MEMORANDUM OF UNDERSTANDING (MOU)

If an applicant is applying on behalf of a Partnership, an MOU is required to be submitted as an attachment to the proposal. This MOU must clearly outline the nature of the partnership and roles and responsibilities of each organization with respect to the proposed program.

The MOU helps to:

- Delineate client flow;
- Specify services to be provided by a provider to clients;
- Specify types of clients and how referrals are to be made (if applicable);
- Facilitate communication by defining a process for regular meetings, phone contact or data exchange;
- Protect all parties against differing interpretations of expectations;
- Enhance status of all partners within the community through formalized relationships;
- Reduce friction over 'turf issues' by specifying responsibilities.

A Memorandum of Understanding (MOU) between the partners must designate the lead agency.

Partnership MOU – Key Elements

Period of Agreement	<ul style="list-style-type: none"> List the period of time during which the agreement will be effective. (The term must be at least as long as the grant term.)
Parties	<ul style="list-style-type: none"> List the Lead (Fiscal Agent) for the partnership List all the partners in the collaboration
Common Objective	<ul style="list-style-type: none"> Summarize the partnership's shared goals
Partnership Background	<ul style="list-style-type: none"> Describe the history of the collaboration and the specific contributions each partner brings to the partnership
Distribution of Functions	<ul style="list-style-type: none"> Clearly state which functions will be performed by which organization
Fiscal Agent ('Lead Partner' Functions)	<p><i>Must include:</i></p> <ul style="list-style-type: none"> Procedures for reporting to UWNNS on behalf of the partners Procedures for monitoring usage of funds by all partners Procedures for withholding funds for non-performance of MOU – defined functions of a Partner Procedures for tracking progress towards goals Reporting of overhead percentage of each <u>partner</u>
Communication	<ul style="list-style-type: none"> State how members of the partnership will communicate, how often and for what purposes, and where communication relates to client-level issues and where communication relates to partnership-level issues State circumstances where communication is mandatory or time-sensitive Define responsibilities and functions for communications about the partnership and program to the public (outreach and marketing). Who will talk about the program and how will it be presented?

<p>Data Reporting & Recordkeeping</p>	<ul style="list-style-type: none"> • Describe data collection methods • Describe situations where data may be shared and compiled • State which data will be collected and tracked by which agency and for what purposes • Describe situation where certain data may be collected/tracked for an individual agency's purposes • Describe how data will be reported, to whom and for what purposes • Describe who owns the data
<p>Confidentiality</p>	<ul style="list-style-type: none"> • Describe how the confidentiality of client records and other information will be respected within the partnership • Explain how the confidentiality needs of each organization will be maintained within the partnership
<p>Procedure for Resolving Disputes Between Partners</p>	<ul style="list-style-type: none"> • Should disagreements arise within the partnership, explain what steps will be taken to resolve them
<p>Amendment</p>	<ul style="list-style-type: none"> • Describe the procedures for making changes to this Memorandum of Understanding (MOU) <i>(Please note that UWNNS must be notified in advance if any changes to take place within this MOU.)</i>
<p>Signatures</p>	<ul style="list-style-type: none"> • MOU must be signed by Authorized Signer of each party to the agreement. (Applicant should sign in accordance with the By-laws or Policies and Procedures of applicant organization.)