



## PRIMER FOR RURAL HEALTH NETWORK MEMORANDUM OF AGREEMENT/UNDERSTANDING

This primer is created by the Network TA Team based on requests from Network Planning grantees during TA Intro Calls, December 2014. Sources are identified within the document or come from our knowledge in working with rural health networks. This primer and sample MOA/MOU are available on the [Aim for Impact](#) network resource page.

### MEMORANDUM OF AGREEMENT PRIMER

A Memorandum of Agreement (MOA), also known as a Memorandum of Understanding (MOU), is a formal business document used to outline an agreement made between two separate entities, groups or individuals. The MOA usually precedes a more detailed contract or agreement between the parties. This MOA may be used to cooperatively work together on an agreed upon purpose or meet an agreed objective and outline the discussed terms of a new relationship. (Source: <http://definitions.uslegal.com/m/memorandum-of-agreement/>)

Every MOA is unique because it describes an agreement between two or more organizations working together to achieve an already identified and agreed upon objective, project, or goal.

There are components to an effective MOA that are important to consider. Following is a MOA checklist and some specific guidance or suggestions:

- 1) **Introduce Project Name** and list participating partner organizations. For example: "This is a Memorandum of Agreement of the ABC Project/ Organization between the following organizations: 123, XYZ, and LMN"
- 2) **Purpose and Scope of the MOA**

- a. "The purpose of this MOA is to clearly identify the roles and responsibilities of each party as they relate to (achieving the goals of the project)"
  - b. Describe the scope of the project in one paragraph and briefly describe how each partner organization is involved.
- 3) **MOA Terms and Modifications** options provides the dates of the agreement, how to modify the MOA, and a review/revision process.
  - a. Provide a description of how the MOA may be terminated or procedures for a partner to withdrawal from the MOA
- 4) **Responsibilities of Partners**
  - a. List out activities or duties and expectations of each partner, such as, meeting deliverables, attending meetings, participating in events, etc.
  - b. Clearly state deliverables and expectations for each partner organization's role, such as, communication, reporting, training, etc.
  - c. If the partnership includes billing for services between the partners or in-kind support for personnel or space, identify how this will be accomplished regarding procedures, documentation, etc.
  - d. If needed describe agreed upon branding and marketing for the network organization
- 5) **Confidentiality between Partners** it may be important, if proprietary information is shared between partners, to describe expectations of keeping specific information confidential between partner organizations.
- 6) **Metrics** to measure project progress toward project goals. Identify specific metrics or milestones of the project. Referring to a workplan is an option here, but having a few significant metrics or milestones helps set expectations.
- 7) **Funding** details should be clear in order to identify what revenues are expected, what is the fiduciary responsibility of partners, and accountability or budget procedures or process.
- 8) **Effective Date and Signatures** of each partner organization leader.
  - a. Use clear language that describes agreement with the signature, for example "This Agreement will become effective when signed by all parties."