

Annex F – Checklist for an MOU

The Memorandum of Understanding Checklist¹

Where a formal arrangement is required, the following is a checklist that can be used for basic planning purposes, after it is reviewed and adapted to the situation and parties involved:

- Situational analysis showing that collaboration is an appropriate option
- Purpose of the collaborative effort and clear articulation of shared objectives
- Clear articulation of roles (within mandate) and responsibilities
- Clear articulation of needs and expected results for each participant, for the partnership, and for the beneficiaries of the service/program
- Agreement on decision-making process, accountability (both shared and individual) and operating procedures
- Identification of risks, agreement on the allocation of risk responsibilities and how to manage them
- Agreement on measures for determining results
- Agreement on contributions from each partner (programs, expertise, information, financial resources, staff, equipment/facilities, etc.)
- Agreement on the division of benefits
- Agreement on accounting, audit and evaluation procedures
- Agreement on procedures for problem-solving, dispute resolution, and ending relationship
- Agreement on reporting, information sharing, internal and external/public communications, and stakeholders' consultations.

¹ This checklist is based on information contained in *The Federal Government as 'Partner': Six Steps To Successful Collaboration*, Treasury Board Secretariat, 1995.