Community Engagement Roundtable Series

Meeting Summary
February 28, 2017

Topic:
Recording and Tracking Your Community-Engaged Research, Teaching, and Service

Speakers:
Debra Garrard (CNEP Coordinator)
Becky Schlais (Research Support Services Manager)

Summary:
The conversation centered on the purpose and structure of effective memoranda of understanding (MOU). MOUs created for university-community relationships are generally designed to clarify the terms of a partnership, especially timelines and specific responsibilities. MOUs also help ensure that collaborations are equitable and enduring.

Other key points from the conversation include:

- MOUs are important tools to help coordinate college members' off campus partnerships. They should be completed for every off-campus partnership.
- MOUs are an important tool for faculty, staff, and grad students.
- The College of Human Sciences is the premiere academic unit at OSU in its commitment to creating and tracking effective MOUs.
- MOUs are a good way to make sure faculty, staff, students and their community partners are on the same page as a project begins.
- There are several different types of agreements (e.g., MOU, service agreement, research agreement, affiliation agreement) that faculty, staff, or students may create with an organization depending on the type of partnership.
- The College of Human Sciences has created a template and set of guidelines to help create effective MOUs (these were discussed at the event and the guidelines document is included below for ease of reference).
- Original copies of each completed MOU should be given to each community partner, each faculty member’s department, and Becky Schlais.
- If you have any questions about MOUs, you can contact Becky Schlais (becky.schlais@okstate.edu) or Dave Lassen (dlassen@okstate.edu).
Creating a Memorandum of Understanding (MOU)
February 27, 2017

I. What is a MOU?

A memorandum of understanding (MOU) has several purposes, including to clarify the terms of a collaboration, inform key stakeholders and administrators of the details of a collaboration, and help ensure that collaborations between Oklahoma State University (OSU) and community partners are equitable and enduring. In short, a MOU is a formal recognition and commitment by all parties to complete specified tasks and share specified resources during a specified time period. MOUs represent an agreement between institutions, with OSU as one signatory.

Please note that a MOU is a limited document. If your collaboration with an off-campus group or organization includes any activities related to human subjects research, finances, or intellectual property, such as transferring funds, creating products, or gathering data on human beings, please contact either Dave Lassen (dlassen@okstate.edu) or Becky Schlais (becky.schlais@okstate.edu) for assistance. For legal reasons, partnerships of this type typically require additional documentation and approval.

Note also that MOUs are centered on both organizations and projects. Therefore, while an organization may potentially collaborate with multiple individuals or units at OSU at the same time, a MOU should be created for each distinct project or collaboration. Thus, an off-campus organization may at any time be listed on more than one MOU related to OSU.

This guide includes a series of topics to consider when creating a MOU. It covers the most common, important elements of most MOUs. Note that this guide is not, however, an exhaustive list of potential MOU elements. Your MOU may need to include language not specifically covered here, especially if it includes transferring funds, products, or research data about human beings.

II. What should a MOU cover?

There is no university-wide template for MOUs at OSU. The content and scope of a MOU is therefore governed by the nature of its related project and relationship. Before creating a MOU, you should take some time to consider the nature of the relationship you want to create and what your collaboration is intended to achieve. You should also ask yourself where potential misunderstandings may occur. A MOU is an important opportunity to prevent problems before they arise by fostering an open, focused conversation before a project begins.

III. What do MOUs commonly cover?

Many MOUs cover a similar range of issues. They include the following:

1) Purpose of the Relationship/Project
   a. Why are you collaborating with each other?
   b. To what activities will the MOU apply?
   c. Specify in this section the ultimate goals of the relationship and why it was created. Often this is because parties recognize a shared goal that they want to work toward together.
2) Definitions of Key Terms
   a. What are important technical or community-specific terms or acronyms that should be defined to ensure commonly agreed language?

3) Party Responsibilities/Commitment
   a. What do you commit to do/provide as part of the relationship/project?
   b. What does your partner(s) commit to provide as part of the relationship/project?
   c. This section is where the bulk of project activities should be addressed.

4) Policy for Usage
   a. If there are any rooms, equipment, software, or other common resources involved in the relationship or project, you may consider specifying who may use the resources at what time.
   b. How will usage times be determined and communicated with each party?
   c. Note that shared usage of resources may require additional review of your MOU.

5) Resource Maintenance
   a. If any rooms, equipment, software, or other common resources will be involved in the relationships or project, you may consider specifying who will be responsible for maintaining the resources during the period of the relationship.
   b. How will maintenance activities be determined and communicated with each party?
   c. Note that shared usage of resources may require additional review of your MOU.

6) Time and Renewal
   a. For how long will the MOU be in effect? Most MOUs are in place for one year, at which point they may be renegotiated or extended.
   b. Will the parties be required to review and renew the MOU prior to its expiration? How and when shall the review/renew process take place?

7) Updating the MOU
   a. How will future changes to the MOU be created and implemented?

8) Termination
   a. How may the MOU be terminated? Will parties be independently able to terminate the MOU? How much advance notice will they need to give the other parties?

9) Authorization
   a. At what point will the MOU take effect?

IV. Who should sign a MOU?

MOUs should be signed by all stakeholders related to the relationship/project, especially those with administrative responsibilities for the parties entering into the agreement. A MOU is an effective, efficient way to inform administrators, department heads, deans, and other executives of the details of a project.

At a minimum, all MOUs to which a member of the College of Human Sciences is a party should be signed by the Vice President for Research at OSU and a representative of all off-campus parties. Depending on the elements of the MOU and related partnership, one or several other college or university offices may need to review and/or sign the MOU. All agreements that include faculty, staff, funds, or other resources associated with Oklahoma Cooperative Extension Service, for example, will need to be reviewed and signed by Dr. Jorge Atiles. Other MOUs may need to be reviewed by the Office of the Legal Counsel, Institutional Review Board, Division of International Studies and Outreach, or other campus unit or office.

Note that even though they may not sign the final version of each MOU, several offices within the College will need to review your MOU before it can be completed. These include the academic department(s) associated
V. How do I start?

Before you begin drafting your MOU, take some time to create a list of the essential actors, resources, and activities that will be involved in successfully completing the project your MOU will cover. Be as thorough as possible.

Using the list you created of essential project elements, begin filling in the MOU Template offered through the Office of Extension and Engagement. Filling in the existing fields of the template will produce a document that is sufficient for many collaborations, but may not be appropriate for your project. Modify the template as needed to ensure that every actor, resource, and activity you previously identified is included in your draft MOU in some fashion and that every relevant actor has signed the document.

Draft your MOU collaboratively with feedback from all parties involved. Obtain preliminary approval from each party before asking anyone to sign the document.

Once you have created a document that all parties can agree to and before anyone formally signs the agreement, send a copy to Becky Schlais (becky.schlais@okstate.edu, 744-8558), Manager of Research Services, in the College Office of Research and Graduate Studies. Becky will coordinate with relevant OSU administrators to acquire all signatures needed from individuals at OSU. Coordinating with Becky early in the process in this manner generally shortens the overall time required to complete a MOU. If necessary, Becky will also coordinate requested revisions to the MOU.

When the MOU has been approved and signed by all parties, ensure that the College Office of Research and Graduate Studies, College Office of Extension and Engagement, and all parties covered by the MOU have a final copy for their records. Consider sending a copy of the MOU to all individuals in the college—including department chairs—who will be affected by the work addressed in the MOU.