

# CollaboraTeS Toolbox

## Collaborative Technical Services

### What to Include in Memoranda of Understanding

Successful inter-institutional projects depend upon clearly defined expectations for both parties. These can be defined within a memorandum of understanding, which can be a very simple document, or a very highly detailed one. The level of complexity needed in a memorandum of understanding is defined by the nature of the project and the relationship between the two institutions. Even projects that do not involve monetary payments could be guided by a memorandum of understanding. Seeking legal advice regarding the contents of a memorandum of understanding is recommended. This is particularly true if work is being done on a contract basis for payment.

### Things to Define

- The nature of the services to be provided. Define methods in detail.
- The quantity of the services to be provided.
- Local requirements, particularly non-standard practices.
- Quality assessment procedures.
- Schedule and timeframe for completion, including turn-around times.
- Duration for the agreement.
- Compensation for services, including payment amounts, methods.
- Point of contact at both institutions, including names, phone numbers and emails.
- Workflow between institutions.
- Communication of information needed to perform service.

### Additional Things to Maybe Include

- A glossary of terms used in the agreement.
- Institutionally required boilerplate language.
- Information about the libraries.
- Arrangements for policy decision-making.
- Whether the arrangement will be on-going or one-off.
- Rights, responsibilities and obligations.
- Whether or not a sample deliverable is needed.



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