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Memorandum of Understanding (MoU) Template

Memorandum of Understanding

This document represents an agreement between

[Name of lead RTO]

and

[Name of partner organisation]

Description of collaborating organisations

[Under here include a brief description of the lead RTO and the partner organisations. For example, (The name of the lead RTO) is a Registered Training Organisation for the purpose of providing training, assessment and credentials in vocational education and training.]

[(name of partner organisation) is a company that undertakes training and assessment of workers in the industry against the XXX Training Package and wishes to have that training and assessment recognised and qualifications and/or Statement(s) of Attainment awarded.]

Objectives and scope

[Under here include a statement of purpose. Other things that can also be covered in this section are a brief description of goals and expectations, a justification for the arrangement or the identification of other compliance requirements, for example, New Apprenticeships regulations and licensing.]

The nature of the collaboration

[Under here you need to describe the ways in which the partners will collaborate.]

[Outline the services which are to be provided by the lead RTO, including such things as advice on quality assurance processes, moderation and evaluation, record keeping, records maintenance and the issuance of credentials.]

[Outline the services that are to be provided by the partner organisation(s).]

Definitions and interpretations

[If there are specific terms that need to be made clear, they should be included here. For example, you might want to make it very clear what you mean when you talk about the 'materials' that are used in the partnership. Therefore, you would provide a definition of 'materials' (documents, equipment, stored data).]

The terms of the agreement

[Here you need to include the duration or proposed life of the agreement, how amendments are to be negotiated and agreed in consultation with collaborating partners, and processes for renewal or extension of the formal arrangement.]

Organisation and management of the agreement

[Under this heading it is wise to allocate the various activities to each organisation in the partnership arrangement, eg under subheadings for the lead RTO and for each of the partner organisations.]

The lead RTO

[For the lead RTO this needs to include quite specific information on the roles and responsibilities of the personnel involved in the various components of the partnership. For example, the document should include:

- the name and contact details of the principal contact person for this particular agreement
- clear guidelines on lines of communication and agreed processes for communicating within and across the collaborating organisations, eg team meetings, assessor meetings
- details of record keeping associated with delivery and assessment including what, when, how and by whom this will managed
- an outline of the advice that can be provided on quality assurance of assessment and also how the lead RTO will be involved
- a framework for monitoring and evaluating the achievement of the objectives set by the agreement
- a strategy for ensuring the timely issuance of certification/qualifications.]

Partner organisation

[For the partner organisation this needs to include quite specific information on the roles and responsibilities of the personnel involved in the various components of the partnership. For example, the document should include:

- the name and contact details of the principal contact person/coordinators for this agreement
- an outline of the competencies/qualifications of staff involved and relevant facilities and learning resources required for delivery and assessment
- details of maintenance of record keeping associated with delivery and assessment of programs including how and by whom this will managed and then submitted to the lead RTO
- an outline of how personnel will be involved in the quality assurance processes agreed to on the advice of the lead RTO
- an outline of involvement in the processes for monitoring and evaluating the achievement of the objectives set by the agreement.]

Resources and facilities

[Under this heading you need to identify the equipment, learning materials and facilities that will be contributed by each of the partners.]

Financial arrangements

[Here include details of the fees, charges and disbursements associated with the arrangement.]

Quality assurance

[Here set out clearly the lead RTOs obligations in relation to assuring the quality of all aspects of the assessment including the assessment system, the assessment processes, the assessors, the assessment evidence and the assessment judgements. Check Chapter 3 for the sorts of things that you should have covered under this heading.]

Communication and exchange of information

[Under here include an outline of how information and data that is generated by the collaboration is to be handled by all parties to the agreement. Include issues of confidentiality.]

Intellectual property

[Here you will need to include details of who retains the rights to the intellectual property if produced.]

Marketing and publicity

[Include a simple outline of how and what activities will be promoted here.]

Settlement of disputes

[In this important section, describe the process for resolving disputes that may arise among the partners to the agreement.]

Review and evaluation

[Here set out your plan and methods of determining whether you have met your objectives. Include how you will get feedback from candidates, your partners and any other key players that you think will provide information on the effectiveness of your partnership arrangement.]

[You should also set out your strategy for regularly reviewing your operational processes and identifying issues of concern. Success rates and reassessments are data that is worth collecting.]

Further headings

[There may be other items such as disclaimers, transfer and assignment, warranty and indemnity that you want to include here.]

Effective dates and signatures

[Do not forget that for a written agreement to have the impact you need, appropriate authorities from each partner involved in the partnership, and all partners, should sign the document.]

Schedules or appendices

[Schedules or appendices may include details of what will be assessed under the agreement, including details of the relevant Training Package(s) and a full listing of the qualifications to be covered.]