

College of Arts & Letters

Memorandum of Understanding (MoU) Checklist

This checklist is designed as a guide for the writing of a variety of types of MoUs and contains potential language that should be modified so that it pertains to the details of the particular position shared by the two units. All unit heads and the faculty member must be consulted when drawing up the MOU. This is best done in a joint meeting, so that everyone is on the same page about the agreement. This document does not provide legal advice. A copy of the MoU needs to be sent to the majority unit head, the minority unit head, the faculty member, and the CAL Associate Dean in charge of personnel.

- _____ 1. State the names of the units involved in the joint appointment or joint assignment as well as the faculty member. Include faculty member's rank and type of appointment [tenured, tenure track, fixed term faculty, fixed term academic specialist, academic specialist in the continuing system]
- _____ 2. Specify the beginning date of the agreement, include the duration, and indicate any time limit on the agreement. If a joint agreement is to be terminated, then the CAL Associate Dean in charge of personnel should be consulted.
- _____ 3. Indicate location of the appointment of the faculty member. If a joint appointment, then list the percentages of both appointments and locations. If a joint assignment, then list the percentages of both assignments and locations.
- _____ 4. As applicable, outline the research, teaching, mentoring, and advising load in each unit with percentages. To the extent possible, their teaching assignment should align with aspects of their research agenda that are applicable in each unit.
- _____ 5. Provide clear definitions of expectations, so that the research and service/outreach/ leadership expectations are clear to all parties. It is important that both units take the service requirements of the other into account, so that the faculty member is able to successfully balance expectations. In certain cases, these activities could be very well defined here to include, if needed, what committee(s) would be served on, etc, particularly if this is in the interest of the faculty member involved. In other cases, this detail is not advantageous or necessary.
- _____ 6. Include Web links to the expectations for promotion and tenure in both units, as appropriate.
- _____ 7. Clarify any other research or office space, support services, equipment issues.

- _____ 8. Clarify any indirect funds generated by an external grant or other pertinent budgetary issues if they are to be shared between units.
- _____ 9. Mentors are required in both units and the mentoring policy of each should be made clear and followed.
- _____ 10. The faculty member and the head of both units should sign and date the MoU.
- _____ 11. Include the date of most recent meeting when agreement was made and/or reviewed, should it be reviewed and/or updated. Signatures should be included at this stage as well to acknowledge review of the document.

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