

Climate Advocacy Lab
Field Research Collaboration MOU Template

Highlighted text below is to be completed for a given memo.

PURPOSE OF THIS DOCUMENT: To clarify working relationships and responsibilities among the Lab and partners in **field research** projects (such as advocacy organizations, consultants, social scientists).

Subject: XXXX
To: XXXX
From: XXXX
Date: XXXX

Memorandum of Understanding

Project Introduction

[Broadly describe the potential project]

Purpose of this MOU

This document represents an Agreement between the Climate Advocacy Lab, [XXXX], and [XXXX] (the parties) regarding the project outlined above. Its purpose is to clearly outline a shared understanding of the project between all parties at an intermediate stage of the work: once the concept, research design, and a concrete plan of the work to be done have become clear, but before substantial investment of time and/or money has been put into motion. This MOU is not a replacement for a formal contract (such as that legally governing transfer of funds, nor any preliminary informal design memos, and does not necessarily preclude any more detailed documents regarding research, design, planning, or logistics.

Personnel

Those involved in this project from each party are expected to be:

- Climate Advocacy Lab (key point of contact: XXX)
 - o [Name], [FTE%], [role/responsibilities for this project]
 - o [Name], [FTE%], [role/responsibilities for this project]
- [Organization] (key point of contact: XXX)
 - o [Name], [FTE%], [role/responsibilities for this project]

- o [Name], [FTE%], [role/responsibilities for this project]
- [Organization] (key point of contact: XXX)
 - o [Name], [FTE%], [role/responsibilities for this project]
 - o [Name], [FTE%], [role/responsibilities for this project]

The following individuals/offices (not listed above) may need to grant approval in some form in order for the project to be successfully completed:

- [Name], [role], [organization], [what they may need to approve]
- [Name], [role], [organization], [what they may need to approve]

KEY PERSONS

In acknowledgment that the participation of certain individuals in a project can be critical to its success, the following people commit to active involvement in the work outlined in this memo, and they will be expected to communicate any change of status (such as leaving their current organization, or significantly altered duties) that may prevent them from such active involvement to the other parties, and such change may constitute legitimate grounds for substantial reformulation or termination of the project.

Key persons for this project (if any) are:

- [name], [organization]
- [name], [organization]

Project Goals, Purpose, & Expectations

[Summarize motivation for learning, and hypotheses, and/or research questions; can be synthesized from pre-test questionnaire form, if it was circulated]

Research Design *[modify as needed]*

- Universe of people to be included in study: [XXXX]
- Test groups/conditions: [XXXX]
- Randomization process for assigning people to test groups: [XXXX]
- Outcome measurement: [XXXX]
- Probability of detecting an effect (statistical power): [XXXX]
- Planned analyses, such as comparisons between groups: [XXXX, if any]
- [Other design sections as needed]

Timeline & Activities

The project is expected to proceed as follows:

- [Date], [Activity], [Who is doing]

- [Date], [Activity], [Who is doing]
- [Date], [Activity], [Who is doing]

Roles & Responsibilities of Each Party

- [Organization]: [General description of role(s) for project]
- [Organization]: [General description of role(s) for project]
- [Organization]: [General description of role(s) for project]

Acknowledge Barriers & Challenges [Optional; if needed]

We collectively are clear that [Risk factor(s) for project] may pose a challenge in successfully completing this project, and agree to nonetheless continue, keeping it in mind and taking steps [Any optional mitigation steps] to address it.

Costs & Payment

The anticipated direct costs for this project are:

- [Expenditure purpose], [Estimated amount], [Who is incurring cost]
- [Expenditure purpose], [Estimated amount], [Who is incurring cost]

The parties agree to the follow transfers of funds/payments among them:

- [Amount], from [payee] to [recipient] for [purpose]
- [Amount], from [payee] to [recipient] for [purpose]

Final product(s)/deliverables

[XXX] will be responsible for the final production of an enduring record taking the form of a [XXXX], describing the project and reporting the results of the research, and verbally presenting this to the other parties. Other parties will have an opportunity to offer input and amendment to the final record.

At the conclusion of the project, all parties agree to produce short (such as 1 page or less written document, several minute unproduced video) reflections on the process, outcomes, implications, and lessons learned from the project (which may be kept confidential to the parties, at a party's discretion).

All parties agree to reasonable participation in activities aimed at sharing/socializing results of the project with the broader Climate Advocacy Lab community (such as presenting on a webinar, providing input on an email newsletter summarizing the project, etc.).

Sharing, Ownership & Confidentiality

Parties agree that the enduring record of results of the project (and any additional presentation of results, such as via webinars) will be shared with the Climate Advocacy Lab membership community (can be marked 'Confidential' within the Lab's site, carrying the requirement "Not publicly available. Please contact the authors before sharing their findings outside of the Lab.>"). Any broader publication of results (such as on publicly accessible websites) can occur upon agreement of all parties.

Any data or membership lists provided by a party to this document remain the sole property of the providing party. Unless explicitly specified and mutually agreed to by all parties to this document, all such data and lists involved in this project will be used by non-providing parties exclusively for the purpose of the research goals of this project as outlined in this document and will remain strictly confidential. For example, raw data from the project (with potential for it to be anonymized) could be shared with academic or other third-party researchers only upon consent of all parties.

The enduring record and all other final materials from this project will carry the branding and list as co-authors all parties to this agreement, unless a party requests otherwise.

Working through conflict or disagreement

The parties agree to proceed in their working relationship on this project in a spirit of mutuality and respect for the unique perspectives, needs, and attributes each brings to the table. We are mindful of the wisdom contained in documents such as the [Jemez Principles](#) and [The Principles of Environmental Justice](#). Decisions regarding the project will be made through consensus of the parties. Final decision-making authority over anything directly related to the on the ground work of any advocacy organization party to or otherwise involved in this project is of course solely theirs.

Legal restrictions

The Climate Advocacy Lab is a 501(c)(3) non-profit organization. The Lab cannot therefore be involved in any activity nor provide any funds to influence the outcome of a candidate election, and there are restrictions on the Lab's involvement in direct and/or grassroots lobbying. All parties warrant that this project is not designed to influence the outcome of a candidate election. All parties agree to promptly provide notification if any activity in the project may constitute lobbying under state or federal law, and the Lab reserves the right to limit and/or track its involvement in such lobbying to abide by regulations governing its legal status.

Signatures

This agreement, along with any Appendices, sets forth the understanding of the terms of this partnership and signatures indicate agreement, with one original copy retained by each party.

Accepted and agreed to by:

[Signature/name/affiliation/date lines as needed]