# Memorandum of Understanding (SAMPLE)

# XXX Event

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This memorandum of understanding, entered into by **CompassPoint Nonprofit Services (CompassPoint)** **and xxxxxx) – San Francisco Regional**, establishes an agreement by which the two organizations will combine strengths and resources to plan, produce and host a co-branded 2010 EVENT. Each organization commits to abiding by the spirit as well the letter of this agreement.

#### Partnership & Roles

CompassPoint and XXXXX will work within committee structure with specific roles and responsibilities within those committees. CompassPoint retains overall control of direction and management of the **Event.**

# Communications & Marketing Committee

Purpose:

To develop key messaging for the Event.

Plan/Design marketing and communications strategy specific to the **Event.**

**Lead = CompassPoint**

This committee will consist of members from XXXXXxxxxx and CompassPoint and will work specifically to develop key messaging for the **Event** and will work with their make recommendations on the roles for the execution of the communications and marketing strategy.

**LEAD = Accountable for driving timeline and process (set meetings, follow ups, etc.)**

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| **LEGEND****L = Lead (if not stated above)****P = Participant – executing the work****F = Feedback or Input only****S= Sign-Off** |  |  |  |  |
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 | XXXXXXXXXX  | CompassPoint  |
| **Deliverable:**  |   |   |
|  Drafting Key Messages  | **P** | **P** |
|  Finalizing Key Messages | **S** | **S** |
|  Marketing and Comm Planning | **P, S** | **P,S** |
| Execution of Plan | **P** | **P** |

# Fundraising Committee

Will consist of representatives from both organizations.

Purpose:

To develop a fundraising strategy to raise money specifically for: **the Event and Scholarships for the Event (including corporate sponsorships and philanthropic funding)**

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 | XXXXXXXXXX  | CompassPoint  |
| **Deliverable:**  |   |   |
|  Develop & Execute fundraising strategy specific to XXXXX\* scholarshipsDifference in registration price  | **P, S** | **L, P, S** |
|  Develop & Execute fundraising strategy for **the Event** | **P** | **L, P, S** |
| Fundraising for Nonconference Social Events before/after **the Event** | **L, S,P** | **F** |
| Fundraising for scholarship funds for target to “non” XXXXX participants |  | **L, P,S** |
| Fundraising for travel expenses for out of area XXXXX participants | **L, P,S** | **F** |
| Hiring/Managing Corporate Sponsorship Consultant | **F** | **L, P,S** |

# Program Committee

CompassPoint’s already existing program committee will include at least 1 representative from XXXXXXXXXX.

Purpose:

To develop overall theme, structure and content of the event. This includes speaker content and speaker selection.

**Lead = CompassPoint**

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 | XXXXXXXXXX  | CompassPoint  |
| **Deliverable:**  |   |   |
|  Conference Theme  | **P** | **P, S** |
|  Conference Structure | **P** | **P,S** |
| Speaker Selection | **P** | **P,S** |
| Content Selection | **P** | **P,S** |
| Social/Networking Activities (within the Event including the conference closing networking social) | **P** | **P,S** |

# Event Management

CompassPoint will retain all project management and logistical aspects to the **Event, exhibitors** and managing relationships with the hotel/facilities. Other events outside the **Event** related specifically to XXXXX will be the sole responsibility of XXXXX including but not limited to social events, Day 2 of the XXXXX’s National conference, pre and post conference events.

**L = Lead (if not stated above)**

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| **LEGEND****L = Lead (if not stated above)****P = Participant – executing the work****F = Feedback or Input only****S= Sign-Off** |  |  |  |  |
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 | XXXXXXXXXX  | CompassPoint  |
| **Deliverable:**  |   |   |
|  Overall Project Management Day 1  | **P** | **P, S, L** |
|  Overall Project Management Day 2 | **L, P, S** | **F** |
| Post/Pre Conference Social Activities | **L, P,S** | **F** |

# Finance

CompassPoint will retain sole management of finances for **the Event.** This includes budget development/approval, expense control and contract negotiations/approvals.

* All contracts for the **Event** will be signed only by a member of the CompassPoint management team
* All revenue and income related to the **Event** will be recorded in CompassPoint’s books/financial statements
* Any excess revenue generated from the **Event** will be shared 50/50.

# Fundraising and Partnership Benchmarks

On February 1, 2010 – both partners will meet to discuss the progress of fundraising and assess the partnership to date. This meeting will decide whether both partners will continue and/or if there will be any modifications to the partnership and MOU.

Specific items to discuss:

* Results to date on meeting benchmark of 50% of committed foundation and corporate funds.
* Effectiveness of partnership and roles as outlined in this MOU.
* Progress on all committees

**Termination of Partnership**

**Both parties can terminate this MOU with 30 days notice prior to Feb 1, 2010. At the February 1 meeting there will be determinations on any modifications or termination of this partnership and MOU.**

Signed

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Adriana Rocha

CompassPoint Nonprofit Services XXXXXXXXXXXXX representative

Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_