**ARENA FOR JOURNALISM IN EUROPE | Arena Housing Project**

**Memorandum of Understanding (MoU) template for collaborative investigations**

*Document created by Jose on 23 April 2020 and last updated by Jose on 14 August 2020*

How to use this template:

* This is a template that can help you write up an MoU that can be useful for your project. Maybe you don’t need to cover all the points we’ve included in the template, maybe you need to add some of your own, you can merge some points into one... It’s up to you to adapt this template to the needs of your project so that it’s useful for your project.
* There can be overlaps between points in the MoU and points in the workflow document: generally, you can describe them more in general here and then go into detail in the workflow document. But be careful not to state different things or potentially contradictory things about the same issue here and in the workflow document, as that can be very problematic later on.
* It’s useful to number the paragraphs and make them about self-containing issues so that they can be easily referenced when discussing these documents and then later when working on the project itself.

If an investigation or other project may involve any kind of risk or danger, it is strongly advised that the coordinator/s get the appropriate advice and guidance from highly experienced people.

Please note that this is an open source document compiling information that is publicly available. Arena for Journalism in Europe can’t be held legally or otherwise responsible for any kind of situation arising of someone using this template document.

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# BACKGROUND ([back to index](#_INDEX_))

* Describe briefly the history and context of the project.
* For example: who came with the idea for the project and how, what has been published about it, what inspired this project.

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# PURPOSE AND SCOPE ([back to index](#_INDEX_))

* Describe briefly what the project aims to achieve.

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# SHARED VISION ([back to index](#_INDEX_))

* Describe briefly the values and ethics assumed by the project.
* Every participant should agree and identify with these values.

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# TEAM MEMBERS AND PUBLISHING PARTNERS ([back to index](#_INDEX_))

* List the team members (individual journalists who are the focal point in their media outlet, freelancer journalists, other researchers, other particular team members) and the publishing partners (the media outlets that commit to publish the results of the investigation, and which will probably be directly associated to team members).
* For the sake of simplicity, it’s normally useful to have only person as the team member representing each publishing partner and any other organisations. If a team member is a freelancer who will then publish their work in media outlet X, it’s normally OK if the freelancer is the team member representing that media outlet X.

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# EXPECTATIONS AND RESPONSIBILITIES ([back to index](#_INDEX_))

* List the expectations and responsibilities that apply in general to all the individual partners: time and financial and other commitments.
* List the expectations and responsibilities that apply in general to all the partner organisations: staff, time and financial and other commitments.
* List the expectations and responsibilities of the project initiator if there’s one:
	+ The project initiator is the person who came up with the idea for the project, starting reaching out to others, or generally took on a leading role when it came to conceptualise the project and start gathering people.
	+ Describe what particular responsibilities the project initiator may have and what particular tasks they may carry out.
	+ This can be detailed in the workflow document, but it’s good to have a general description here as a reference and agreed by all the participants.
* List the expectations and responsibilities of the project coordinator and of other coordination team members (you could have a data coordinator or other coordinators in charge of particular parts of the investigation).
	+ Describe what particular responsibilities the project coordinator may have, what particular tasks they are going to carry out and, generally, what their role will be.
	+ This will be detailed in the workflow document, but it’s good to have a general description here as a reference and agreed by all the participants.
* List the expectations and responsibilities that, at this point, may apply to other specific team members, publishing partners and other partners involved in the investigation.
	+ Are there different needs, roles or responsibilities for conventional media and for non-profit media? And for journalism and other possible types of research organisations involved in the investigation?
	+ Are there different needs, roles or responsibilities for staff journalists and for freelancers? And for journalists in general and other possible type of researchers involved in the investigation?
	+ Are there different needs, roles or responsibilities for data analysts and the data visualisation team when compared to the journalists?
* Describe who is going to do what.
	+ At this point, it’s OK if this is not very detailed; but then you should specify in the workflow document how this “who is going to do what” will be reviewed and described in detail regarding each phase of the project as the work progresses.
* How are you going to deal with turnover of team members and publishing partner? If a team member needs to leave the investigation before the end, should they nominate a substitute or what should they do? If a publishing partner decides to leave the investigation before the end, how will the team deal with that?

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# FINANCIAL CONCERNS ([back to index](#_INDEX_))

* How is the project funded? Who is managing any existing funds?
* Are you applying for (more) funding later on? If so, what’s the calendar, who is going to work on the application, what would be the next steps if you got that funding, who would manage the funds?
* If the investigation has started or is to start even though as of right now there’s not enough funding and you are betting on getting some funding in the future, outline here the contingency plans and what you would do and how would the investigation proceed if you don’t get the funding.

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# ROUGH TIMELINE ([back to index](#_INDEX_))

* State a rough timeline for the project from research to publication and post-mortem.
* It’s strongly advised to have a separate detailed timeline document stating who is going to be doing what when. The project coordinator may be in charge of this timeline document during the project.

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# ONLINE COLLABORATIVE ENVIRONMENT ([back to index](#_INDEX_))

* Describe what online collaborative environment team members are going to use.
* Is there going to be one common level of access or different levels of access to different parts of it for different participants?
* Pay particular attention to data security:
	+ How is confidential data and information going to be stored?
	+ Who is going to have access to it?

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# DECISION-MAKING ([back to index](#_INDEX_))

* State here how the decision-making process is going to work:
	+ What quorum will be needed to take different types of decisions.
	+ Define the type of majority needed to take different types of decisions (from simple majority to consensus).
	+ What happens if a majority is not reached?
	+ What happens if there’s a tie in the voting?
	+ Will the project initiator and/or the project coordinator and/or somebody else have more weight when it comes to taking some types of decisions?
* State how you are going to deal with disagreements and potential internal conflict.
* Specify what might be a basis for expulsion from the project, how that decision can be reached by the team, and what the participant expelled might be allowed to do once they are out.
* State how you are going to deal with potential external aggressions and conflict.

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# CONFIDENTIALITY ([back to index](#_INDEX_))

* If the investigation requires any degree of confidentiality, describe as clearly and precisely as possible the confidentiality terms participants agree to during and after the project.
* Who can team members tell about the project? Nobody? Only the editor in their publishing partner? Any other arrangements?

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# PERSONAL SECURITY ([back to index](#_INDEX_))

* If the investigation might be risky in terms of personal security, both for team members and for potential sources, describe here the general considerations regarding people’s security. In this case, it is strongly advised to have a separate personal security document outlining the security protocol and the procedures to deal with potential risky and dangerous situation. If the project requires a high level of security, it is strongly advised that highly experienced people write such document and be in charge of data security during and the investigation.

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# DATA SECURITY ([back to index](#_INDEX_))

* If the investigation involves getting, processing and/or publishing data sets and visualisations, specify here what the security arrangements are to be: who is going to get what data and how, how is the team going to store and process the data, which team members are going to have access to it, how is it going to be shared within the team and, if necessary, with external partners, where are the data visualisations going to be stored and how are they going to be shared and published...
* Depending on the level of data security needed, you may want to have a separate data security document outlining more in detail the data security protocol. If the project requires a high level of security, it is strongly advised that highly experienced people write such document and be in charge of data security during and the investigation.

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# OWNERSHIP OF CONTENT OR INTELLECTUAL PROPERTY ([back to index](#_INDEX_))

* If required, state here the particularities of the ownership of content and/or the its intellectual property that may go beyond the usual terms, particularly about the work produced by freelance team members, which may not have a written agreement with the publishing partner stating the ownership of the content.
* Take into consideration the content that may be published online on websites not related to media partners (for instance, if the team is releasing data or ‘reporting recipes’ online after the publication of the investigation results).

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# BRANDING ([back to index](#_INDEX_))

* Describe here how the publication of the investigation results will be branded: what will be the name of the investigation in every language, will the team have some logos and/or some other graphic material designed on purpose for the project, will the team choose a particular colour scheme or particular font types to use when publishing and promoting the investigation (in such case, it could be useful to elaborate a simple style guide outlining all those choices)...?
* You could state here that team members and publishing partners agree to state the name of the investigation and list all team members (or not) in every instance in which they publish results of the investigation or mention it publicly in any way.

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# DISTRIBUTION, PUBLICITY AND PROMOTION ([back to index](#_INDEX_))

* If necessary, describe here the possible activities team members and publishing partners will carry out to distribute, publicise and promote the published results of the investigation on their own sites, on social media and through other online and offline channels and forums.
* You could use this section to outline how team members may should proceed when wanting to promote the investigation in journalism conference and other such events.

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# POST-MORTEM ([back to index](#_INDEX_))

* After publication, it’s advised to carry out internal surveys and reflection about the project: did it achieve its purpose and scope, what went well, what went wrong, how the team did about the foreseen opportunities and challenges and what were the unforeseen ones, how the team dealt with internal or external conflict if there was any, what are the lessons learnt...
* This could be done by the project coordination team or by an external parter (an academic researcher, for example). If it’s to be done by an external partner, the team should agree beforehand what level of access that external partner would get to the project and investigation materials and to the team members and their work.

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# AWARD SUBMISSION ([back to index](#_INDEX_))

* Outline how the team may proceed in this respect: will it only be the coordination team who will submit the project to awards and who would receive any awards on behalf of the whole team or will it be up to each team member.
* What if it’s local, national or other particular awards only about the part published by particular team members?