Types of International Agreements

UCSF has a number of different types of agreements, reviewed below, that are initiated with outside international organizations.

- Please refer to the International Agreements Matrix[1] and International Training Affiliation Agreements Matrix(coming soon) for further details, procedures for requesting, and approval/signatory requirements. Some affiliation requests require the UCSF Checklist for International Activity[2].
- Whenever an international partner requests modifications to a UCSF template below, these must be reviewed by the Government & Business Contracts (GBC) Office [3].
- Some projects or international locations require review by specific UCSF offices which are part of the International Affiliations Council (GBC, Legal, Compliance & Export Control, IT, EVCP, IGHS) and these are arranged by the GBC Office before proposed agreements are sent to the international partner.
- International agreements of particularly large scope, or requiring large resource requirements or higher risk activities will require approval from the University of California Office of the President (UCOP). Please see the UCOP Checklist for International Activity [4].

Types of Agreements

Letter of Intent to Collaborate (LOIC template [5]): This initial document can be used to indicate the desire for further discussions or planning toward a partnership. It describes the general intent for a collaboration and suggests some project areas that can be defined in the future. This document is useful for goodwill or ribbon-cutting ceremonies, and can be signed by any level of faculty (from faculty researcher or educator to the chancellor). There is no legally binding language in this document for a specific activity, but it serves to express a desire for future discussion on collaboration. After the document is signed, it must be submitted to the Government & Business Contracts Office, which will send a copy to the leadership of the faculty member’s department or unit. Usual duration is 3 years.

Memorandum of Understanding (MOU): UCSF strongly discourages the use of international MOUs, because these agreements may or may not be legally binding, and because they are used for a confusing array of different purposes. MOUs are also problematic because the terms and conditions may be not be consistent with UCSF requirements, and may not be within the authority of a faculty member to carry out or to promise. In rare instances UCSF will approve a legally binding MOU created by an outside entity (e.g. foundations, non-profit organizations) only after it has been reviewed and approved by the Government & Business Contracts Office in conjunction with the Office of Legal Affairs, particularly in the case of international agreements.

International Teaming Agreement: These research-oriented agreements are often used when a funding organization requires evidence of collaboration between two or more partners
before grant applications can be reviewed. Roles of each partner are usually specified. Interested principle investigators or research teams do not need to decide if their research collaboration request is best served by an International Teaming Agreement. The Government & Business Contracts Office considers the specifics of each situation and chooses the appropriate category of research collaboration document.

**International Research or Collaboration Agreement**: These research-oriented agreements are often used when two or more institutions (with one institution located abroad) agree to collaborate on a specific project, funded or not. Research may take place at UCSF, abroad, or both. Interested principle investigators or research teams do not need to decide if their research collaboration request is best served by International Research or Collaboration Agreement. The Government & Business Contracts Office considers the specifics of each situation and chooses the appropriate category of research collaboration document.

**International Professional Services Agreement**: These agreements are contracts for a UCSF faculty member to participate in hands-on clinical activities or medical services involving patients. Whether the faculty member is paid, funded, or volunteer, UCSF requires this agreement to protect the collaboration partners, including patients and faculty members, for legal and insurance purposes. International telemedicine arrangements involving UCSF faculty members who deliver care also need specific professional services agreements (see the Matrix).

**International Unit Affiliation Agreement (IUAA)**: These international agreements typically include a range of planned academic activities within the collaboration. These are not campus-wide but involve one or several smaller units, often within the same UCSF school or institute. Each IUAA requires a specific UCSF faculty champion (who may work in concert with a designated administrator or Management Services Officer or MSO) to be responsible for the affiliation agreement process and for the ongoing collaboration. IUAs are legally binding, have UCSF-required language for various domains (insurance, use of name, etc.), and last 5 years. As each specific collaborative activity is planned, a new specific sub-agreement is required, but typically these are a simpler agreements, since the overlying IUAA provides the UCSF-required language. Sub-agreement templates are available for coordinating committee agreements and individual faculty work agreements, as well as TAAs (see below). Other sub-agreements can be provided by the Government & Business Contracts Office as needed. If several units or departments at UCSF are interested in collaborating with the international partner, the Government & Business Contracts Office will consider the scope of the planned activities in order to select an IUAA or IIAA template (see the next entry). Please refer to the Workflow for Unit Agreements [6] and the UCSF Checklist for International Activity [2].

**International Institutional Affiliation Agreement (IIAA)**: This type of agreement is for a UCSF campus-wide collaboration, initially involving at least 2 schools or independent institutes. Each IIAA requires a specific UCSF faculty champion (who may work in concert with a designated administrator or Management Services Officer or MSO) to be responsible for the affiliation agreement process and for the ongoing collaboration. Similar to IUAs, the campus-wide IIAs cover a range of planned academic activities, are legally binding, have UCSF-required language for various domains (insurance, use of name, etc.), require specific sub-agreements for specific activities, and last 5 years. IIAs require a higher level of approval and signature authority involving deans or designates, as well as the Executive Vice Chancellor and Provost (EVCP). Sub-agreement templates are available for coordinating committee agreements and individual faculty work agreements, as well as TAAs (see below). Other sub-agreements can be provided by the Government & Business Contracts Office as
needed. If several units or departments at UCSF are interested in collaborating with the international partner, the Government & Business Contracts Office will consider the scope of the planned activities in order to select an IUAA or IIAA template. Please refer to the Workflow for Institutional Agreements [7] and the UCSF Checklist for International Activity [2].

**International Training Affiliation Agreements (TAAs):** Due to the complexity of individual school or program requirements across UCSF for learners and post-docs, the International Training Affiliation Agreement Matrix (coming soon) provides details and requirements for specific types of learners. A campus-wide TAA template also is available for schools or programs wishing to use this document.

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**Source URL:** https://evcprovost.ucsf.edu/agreements

**Links**
[3] https://osr.ucsf.edu/content/government-and-business-contracts