### INTERNATIONAL AGREEMENTS MATRIX

**For Agreements with Outside Organizations**

<table>
<thead>
<tr>
<th>Type of Agreement</th>
<th>Description</th>
<th>Example</th>
<th>Initial Steps for UCSF Requestors</th>
<th>Approved Before Submisson to Affiliate</th>
<th>Signed (and then recorded in Salesforce)</th>
<th>Renewal Tracked (and notification at expiration sent if desired)</th>
</tr>
</thead>
<tbody>
<tr>
<td>International Letter of Intent to Cooperate (LIOC)</td>
<td>- Intent to cooperate or collaborate in future or for signing ceremonies - Not legally binding - No institutional obligation</td>
<td>UCSF faculty and faculty from University of X abroad have decided generally on future collaboration. They want to express this desire in a document.</td>
<td>- Use LIOC template on EVCP website - Submit signed document to Government &amp; Business Contracts with copy to department leadership</td>
<td>- Modifications to template require review by Government &amp; Business Contracts²</td>
<td>- UCSF Originator</td>
<td>Not applicable</td>
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<tr>
<td>International Memorandum of Understanding (MOU)³ Partner-imposed. Not recommended for use</td>
<td>- UCSF only uses if required by foreign collaborator - Can be legally binding - No funding is exchanged via an MOU</td>
<td>U of X abroad describes possible specific projects involving UCSF faculty. U of X requires an MOU³ with UCSF to allow collaboration.</td>
<td>- Requires UCSF Affiliation Checklist¹ - See IUAA Work Flow (to submit via DocuSign)</td>
<td>- Department Chair/Director or Designate - Dean or Designate if school-wide - Requires review by Government &amp; Business Contracts²</td>
<td>- Department Chair/Director or Designate - Dean or Designate if school-wide - Others per delegated authority</td>
<td>Salesforce to UCSF Originator and MSO or Division Administrator</td>
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<tr>
<td>International Teaming Agreement for a Sponsored Project</td>
<td>- Project specific and time limited - May be required in order to submit competitive research proposals - Gives specific role of each partner</td>
<td>U of X abroad requires agreement with UCSF before submitting a collaborative proposal.</td>
<td>- Department/PI contact OSR</td>
<td>- To find an OSR contact visit: <a href="http://osr.ucsf.edu/content/find-support">http://osr.ucsf.edu/content/find-support</a> - For more information about extramurally funded collaborative and research contracts visit: <a href="http://osr.ucsf.edu/content/find-support">Guidelines and Requirements for Funds Received from Extramural Sources</a></td>
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</tr>
<tr>
<td>International Research or Collaboration Agreement</td>
<td>- Agreement between 2 institutions to collaborate on specific project - Typically involves funding but can be an unfunded collaboration</td>
<td>A UCSF researcher obtains funding or wants to partner with research faculty at U of X abroad.</td>
<td>- Department/PI contact OSR</td>
<td>- To find an OSR contact visit: <a href="http://osr.ucsf.edu/content/find-support">http://osr.ucsf.edu/content/find-support</a> - For more information about extramurally funded collaborative and research contracts visit: <a href="http://osr.ucsf.edu/content/find-support">Guidelines &amp; Requirements for Funds Received from Extramural Sources</a></td>
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<td></td>
</tr>
<tr>
<td>International Professional Services Agreement (PSA) Physician Paid or Volunteer</td>
<td>- Contract for specific clinical activities or medical services by UCSF - Required if touching patients or involved in patient care - Legally binding</td>
<td>UCSF faculty member(s) are to teach and provide clinical care at U of X abroad for payment or as volunteers.</td>
<td>- Requires UCSF Affiliation Checklist¹ - If Telemedicine request, contact Linda Branagan - MSO or Division Administrator submits request via Salesforce</td>
<td>- Department Chair/Director or Designate - Dean or Designate (Dr. Neal Cohen) - Agreements drafted and modifications reviewed by Government &amp; Business Contracts²</td>
<td>- Department Chair/Director or Designate - Dean or Designate (Dr. Neal Cohen)</td>
<td>Salesforce to UCSF Originator and MSO or Division Administrator</td>
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# INTERNATIONAL AGREEMENTS MATRIX

## For Agreements with Outside Organizations

<table>
<thead>
<tr>
<th>International Unit Affiliation Agreement (IUAA)</th>
<th>International Institutional Affiliation Agreement (IIAA)</th>
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</table>
| - Agreement between a UCSF school, department, program, or unit and a corresponding school/unit at a foreign institution for a range of collaboration activities  
- Long term (usually 5-year, renewable)  
- Need sub-agreements for specific activities  
- Legally binding | - Agreement for broad & significant collaboration over time involving 2 or more schools or independent campus units.  
- Institution to institution  
- Long term (usually 5-year, renewable)  
- Need sub-agreements for specific activities  
- Legally binding |
| UCSF faculty from a School or Program plan a specific educational faculty and trainee exchange program with U of X abroad.  
- Requires Affiliation Checklist - See IUAA Work Flow - Submit via DocuSign - Agreement drafted using UCSF IUAA template by DocuSign submission | UCSF SOM and Global Health plan specific large educational and research projects with U of X faculty abroad.  
- Requires Affiliation Checklist - See IIAA Work Flow - Submit via DocuSign - Agreement drafted using UCSF IIAA template by DocuSign submission |
| - Department Chair, Director, Division Chief, or Designate  
- Dean or Designate if appropriate per activity  
- Revisions to template require review by Government & Business Contracts  
- Others per delegated authority | - Dean or Designate of involved schools  
- Revisions to template require review by Government & Business Contracts  
- Others per delegated authority |

## FOOT NOTES

1. **Checklist:** The request for an affiliation agreement must be accompanied by a checklist. There are 2 kinds of checklists:
   - Use the UCOP Affiliation Checklist if this agreement is within the authority of the UCOP (involves corporations, UC-Health-related joint ventures, establishment of international subsidiaries, facilities construction, acquisition of real property, UC system-wide involvement, or UCEAP)
   - Use the UCSF Affiliation Checklist if this agreement is within the authority of UCSF (involves a number of routine activities like education, training of faculty/staff/trainees, faculty collaborations, cooperative study programs, training development programs, faculty research and fieldwork, and scholarly exchanges)
   - For further explanation of the UCOP International Activities Policy: [https://policy.ucop.edu/doc/2300651/IAP](https://policy.ucop.edu/doc/2300651/IAP)
   - For questions, consult your MSO or Division Administrator or email UCSF Government & Business Contracts at: ORBusinessContracts@ucsf.edu

2. Modifications to UCSF templates require review by UCSF Business Contracts. Modifications may require negotiation or approvals by legal, compliance, etc.
3. A partner-imposed memorandum of understanding (MOU) is not recommended for use by UCSF because of the inconsistent meaning of this document between countries. Depending on the activities occurring under the MOU, alternate agreement templates may be preferred.
4. For international agreements that do not fit any of the descriptions in the matrix, email UCSF Government & Business Contracts for consultation: ORBusinessContracts@ucsf.edu