

**INTERNATIONAL AGREEMENTS MATRIX**  
**For Agreements with Outside Organizations**

EVCP: Executive Vice Chancellor and Provost

OSR: Office of Sponsored Research

TYPE OF AGREEMENT <sup>4</sup>	DESCRIPTION	EXAMPLE	INITIAL STEPS FOR UCSF REQUESTORS	APPROVED BEFORE SUBMISSION TO AFFILIATE	SIGNED (and then recorded in Salesforce)	RENEWAL TRACKED (and notification at expiration sent if desired)
International Letter of Intent to Cooperate (LOIC)	-Intent to cooperate or collaborate in future or for signing ceremonies -Not legally binding -No institutional obligation	UCSF faculty and faculty from University of X abroad have decided generally on future collaboration. They want to express this desire in a document.	-Use <a href="#">LOIC template</a> on EVCP website -Submit signed document to <a href="#">Government &amp; Business Contracts</a> with copy to department leadership	-Modifications to template require review by <a href="#">Government &amp; Business Contracts</a> <sup>2</sup>	-UCSF Originator	Not applicable
International Memorandum of Understanding (MOU) <sup>3</sup> <i>Partner-imposed. Not recommended for use</i>	-UCSF only uses if required by foreign collaborator -Can be legally binding -No funding is exchanged via an MOU	U of X abroad describes possible specific projects involving UCSF faculty. U of X requires an MOU <sup>3</sup> with UCSF to allow collaboration.	-Requires <a href="#">UCSF Affiliation Checklist</a> <sup>1</sup> -See <a href="#">IUAA Work Flow</a> (to submit via <a href="#">DocuSign</a> )	-Department Chair/Director or Designate -Dean or Designate if school-wide -Requires review by <a href="#">Government &amp; Business Contracts</a> <sup>2</sup>	-Department Chair/Director or Designate -Dean or Designate if school-wide -Others per delegated authority	Salesforce to UCSF Originator and MSO or Division Administrator
International Teaming Agreement for a Sponsored Project	-Project specific and time limited -May be required in order to submit competitive research proposals -Gives specific role of each partner	U of X abroad requires agreement with UCSF before submitting a collaborative proposal.	-Department/PI contact OSR	-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="#">Guidelines and Requirements for Funds Received from Extramural Sources</a>		
International Research or Collaboration Agreement	-Agreement between 2 institutions to collaborate on specific project -Typically involves funding but can be an unfunded collaboration	A UCSF researcher obtains funding or wants to partner with research faculty at U of X abroad.	-Department/PI contact OSR	-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="#">Guidelines &amp; Requirements for Funds Received from Extramural Sources</a>		
International Professional Services Agreement (PSA) <i>Physician Paid or Volunteer</i>	-Contract for specific clinical activities or medical services by UCSF -Required if touching patients or involved in patient care -Legally binding	UCSF faculty member(s) are to teach and provide clinical care at U of X abroad for payment or as volunteers.	-Requires <a href="#">UCSF Affiliation Checklist</a> <sup>1</sup> -If Telemedicine request, contact <a href="#">Linda Branagan</a> -MSO or Division Administrator submits request via Salesforce	-Department Chair/Director or Designate -Dean or Designate (Dr. Neal Cohen) -Agreements drafted and modifications reviewed by <a href="#">Government &amp; Business Contracts</a> <sup>2</sup>	-Department Chair/Director or Designate -Dean or Designate (Dr. Neal Cohen)	Salesforce to UCSF Originator and MSO or Division Administrator

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International Unit Affiliation Agreement (IUAA)	-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	UCSF faculty from a School <u>or</u> Program plan a specific educational faculty and trainee exchange program with U of X abroad.	-Requires Affiliation Checklist <sup>1</sup> -See <a href="#">IUAA Work Flow</a> -Submit via <a href="#">DocuSign</a> -Agreement drafted using UCSF IUAA template by DocuSign submission	-Department Chair, Director, Division Chief, or Designate -Dean or Designate if appropriate per activity -Revisions to template require review by <a href="#">Government &amp; Business Contracts</a> <sup>2</sup>	-Department Chair, Director, Division Chief, or Designate -Dean or Designate if appropriate per activity -Others per delegated authority	Salesforce to UCSF Originator and MSO or Division Administrator
International Institutional Affiliation Agreement (IIAA)	-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 SOM and Global Health plan specific large educational and research projects with U of X faculty abroad.	-Requires Affiliation Checklist <sup>1</sup> -See <a href="#">IIAA Work Flow</a> -Submit via <a href="#">DocuSign</a> -Agreement drafted using UCSF IIAA template by DocuSign submission	-Dean or Designate of involved schools -Revisions to template require review by <a href="#">Government &amp; Business Contracts</a> <sup>2</sup>	-Dean or Designate of involved schools -EVCP or Chancellor -Financial Vice-Chancellor if resource commitment -Others per delegated authority	Salesforce to UCSF Originator and EVCP Affiliation Administrator

FOOT NOTES

- 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>
  - For questions, consult your MSO or Division Administrator or email UCSF Government & Business Contracts at: [ORBusinessContracts@ucsf.edu](mailto:ORBusinessContracts@ucsf.edu)
- Modifications to UCSF templates require review by UCSF Business Contracts. Modifications may require negotiation or approvals by legal, compliance, etc.
- Partner-imposed documents, whether a Memorandum of Understanding (MOU), a Letter of Intent, or other agreements, are not recommended for use by UCSF because processing will require longer review time. The form should be dictated by the activities contemplated and the parties' intentions, as set forth in the matrix.
- For international agreements that do not fit any of the descriptions in the matrix, email UCSF Government & Business Contracts for consultation: [ORBusinessContracts@ucsf.edu](mailto:ORBusinessContracts@ucsf.edu)