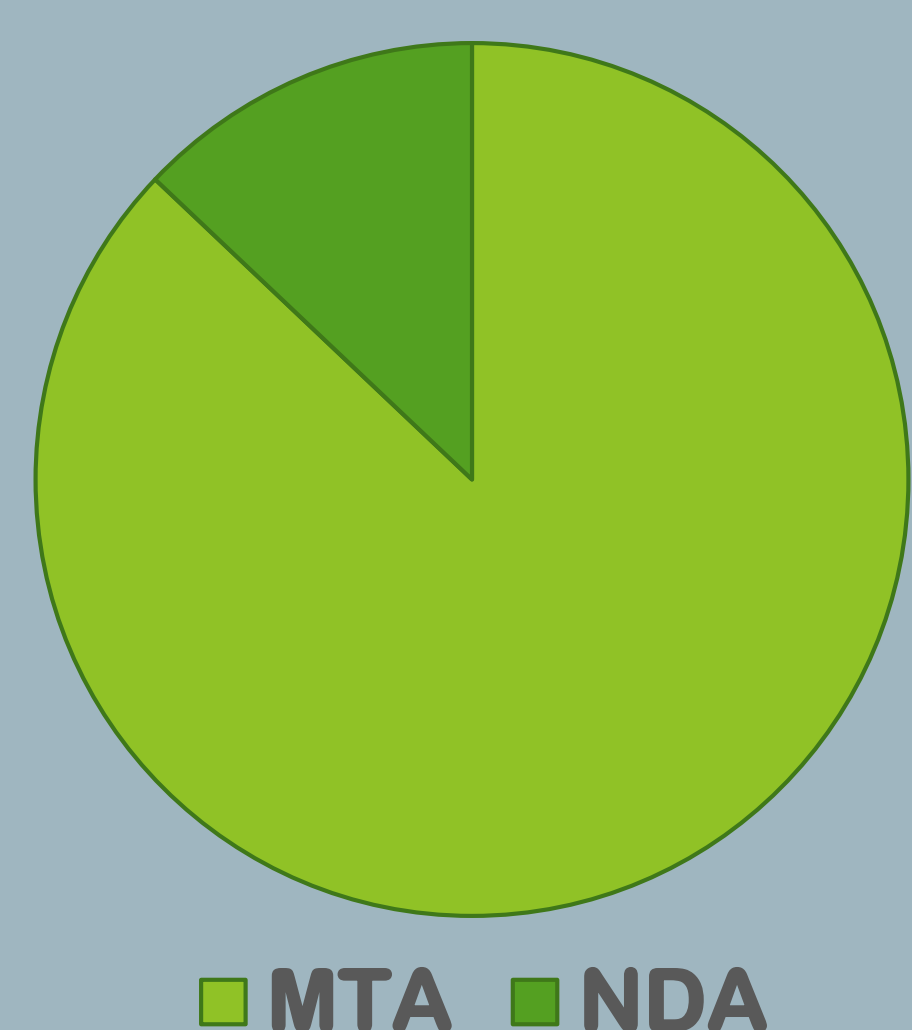
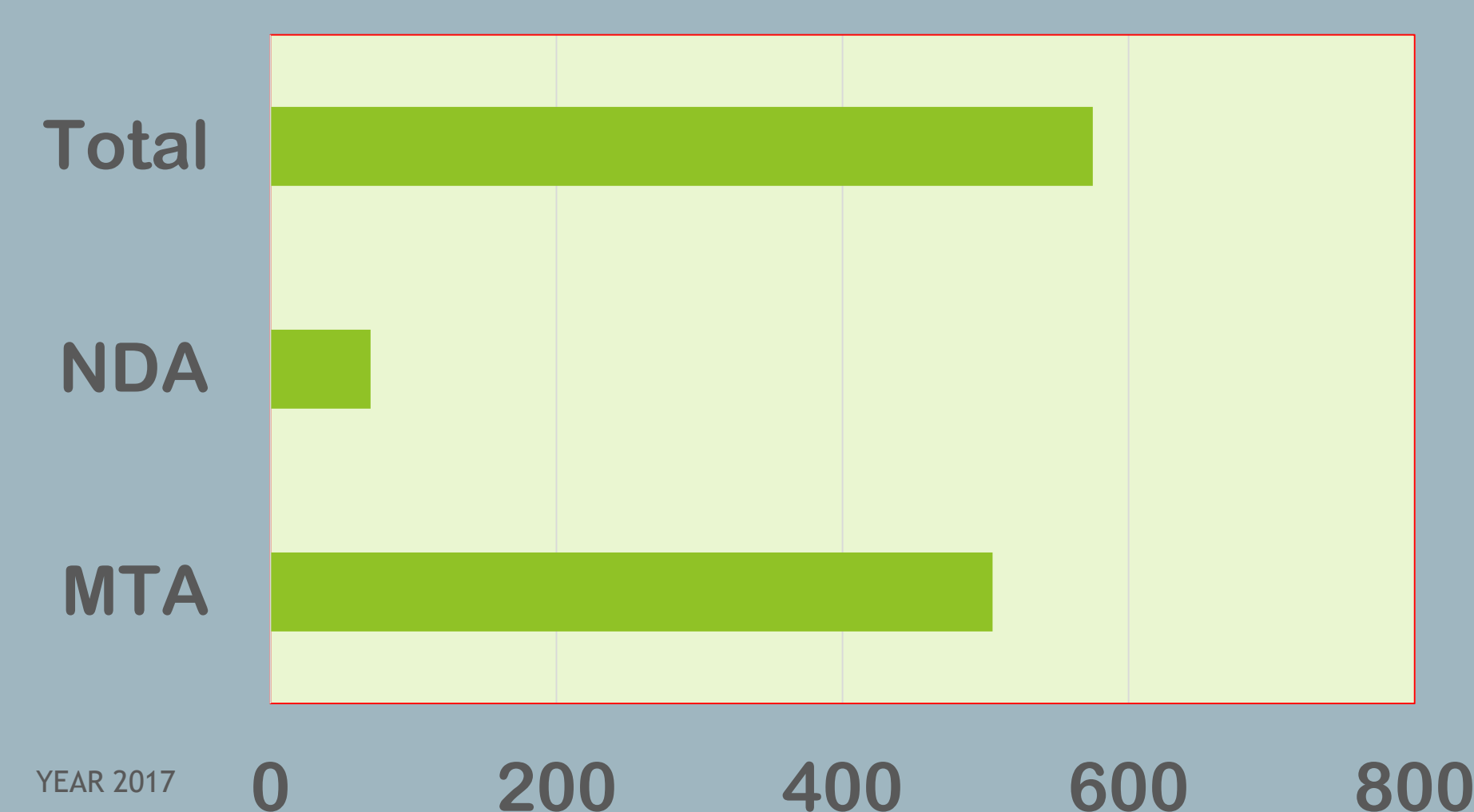


DUAs and MTAs of Tomorrow: Creating a model for **MASTER AGREEMENTS** for incoming DUAs and MTAs

DUAs and MTAs

Incoming Data Use Agreements (DUAs) and Material Transfer Agreements (MTAs) are contracts that govern incoming data and research materials for use by UC Berkeley researchers. Often times, the Industry Alliances Office will negotiate and sign a DUA or MTA for every single project that requires the use of the data or materials with the same provider or company. For providers that are allowing access to their data or materials for more than one project, IAO is exploring the use of a Master Agreement.

Currently, **IAO negotiates and signs an average of 575 MTAs and NDAs** per year. There are several departments that receive the same datasets or materials from the same provider for different research projects.



Benefits of Master Agreements

When providers and/or UC Berkeley researchers anticipate that multiple Berkeley projects could use data or research materials, IAO should explore using a Master Agreement instead of individual agreements for each project.

Master Agreements:

- **Reduce the turnaround** time for negotiating and executing new agreements
- **Reduce the risk** of having different terms for different projects based on the negotiators on each side
- **Reduce the administrative burden** required for requesting new MTAs and DUAs
- **Streamline the process** for future projects
- **Increase tracking and management** of DUAs and MTAs using Phoebe Search

Proposed Process

IAO plays an important role in creating Master Agreements. Instead of using a provider's individual agreements, IAO will engage the provider in discussion about the many benefits of a Master Agreement (see the Benefits of a Master Agreement above). IAO's proposed process is provided below:

1. PI/Lab Manager initiates request in Phoebe by entering required data points and uploading the agreement and any correspondence from the provider
2. IAO Negotiator contacts PI and/or Lab Manager to discuss the option of a Master Agreement.
3. IAO and PI identify the appropriate type of Master (repository or master terms with individual project identifying data or material needs)
4. Send a pitch to the providing agency/company outlining the benefits
5. Once approved, use IAO or the provider's template to establish the terms and conditions, negotiate, and finalize the agreement.
6. For each new project requesting the data or materials, use the template one page project approval form, quickly circulate for required signatures, and...
7. Start the research!!

What are Master Agreements?

Master Agreements for materials and data are agreements between UC Berkeley and a material or data provider that define the standard terms and conditions that will govern a set of projects. Sometimes, a Master Agreement defines the terms for the use, storage, and disposal requirements for specific research materials (such as cell lines) or for one or more specific data sets, and PIs will be granted access to the materials or data for their individual projects.

Other times, the Master Agreement will set forth the terms for any project for use of any data or materials from a provider, and the individual project will define the parameters of data or identify specific materials in addition to defining a scope of work.

Success Stories

CALIFORNIA POLICY LAB

In collaboration with UCLA, IAO has helped to develop a framework for Master Agreements with various state and local government agencies, correctional agencies, and district attorneys offices. Individual researchers can access the data from these agencies through a simplified approval process.

ZILLOW

IAO negotiated a Master Agreement with Zillow earlier this year, and we have 12 projects using Zillow data.

CORIELL

IAO entered into a Master Agreement with Coriell to allow a lab in MCB to redistribute materials to researchers in several departments.

GLADESTONE INSTITUTE

IAO is in the process of entering into a Master Agreement with Gladstone to bring in cell lines for further internal distribution to other researchers and labs.

Future Steps

- Develop templates for Master Data Agreement and a Master Material Transfer Agreement
- Consult with CSS IT to develop a standard security plan for data
- Draft a pitch to providers outlining the process and the benefits, including reduced negotiation time, standard terms and conditions, and simple approval process for new projects
- Implement a process to standardize naming conventions and filing conventions for simple tracking, reporting, and maintenance of the agreements and projects

