

February 7, 2017

To: Intellectual Property Managers, Contract and Grant Directors, Vice Chancellors for Research

Subject: Academic Visitor Intellectual Property Pilot Program Update

On March 5, 2012, RPAC issued [Operating Guidance Memo No. 12-03 \(Memo\)](#) authorizing the Academic Visitor Intellectual Property Pilot Program (“Academic Visitor IP Pilot Program”) along with qualification criteria and guidance on its implementation.

Under the Academic Visitor IP Pilot Program, University of California Campus Licensing Office (CLO), also known as the Authorized Licensing Office (ALO), Directors are authorized to execute a pre-approved Visiting Academic Patent Agreement in place of the standard University Patent Acknowledgement form for visitors that are (i) a faculty member or researcher from an accredited U.S. institution of higher education; (ii) a research scientist from a U.S. non-profit research institution; or (iii) a research scientist from a U.S. government agency. In granting such local authority, the Academic Visitor IP Pilot Program sought to cultivate a more “collegial” approach regarding the ownership of intellectual property created by academic visitors, as well as simplify the Patent Policy administrative processes and requirements for processing academic visitors to UC locations. This Academic Visitor IP Pilot Program authority was authorized through December 31, 2013.

Based upon the feedback received regarding the effectiveness of the Academic Visitor IP Pilot Program from campuses and other U.S. institutes of higher education, the Academic Visitor IP Pilot Program has been successfully utilized to streamline visitations from colleagues from other institutes of higher education, non-profit research institutions and government agencies.

We have concluded that its continued use is highly advantageous for building and retaining collaborative research relationships with academic researchers outside of UC. Thus, effective immediately and retroactive to December 31, 2013, with the concurrence of the Technology Transfer Advisory Committee (TTAC), the campus authority to operate within the Academic Visitor IP Pilot Program as delineated in Operating Guidance Memo 12-03 is extended indefinitely into the future.

[All guidance provided in Memo 12-03 remains applicable](#), including the [Academic Visitor Patent Agreement](#) and the [Frequently Asked Questions](#).

Each CLO/ALO Director and associated campus licensing office is encouraged to review the program's qualification criteria and guidance discussed in the Operating Guidance Memo referenced above. Please contact Janna Tom if you have any questions concerning this supplement or the Academic Visitor IP Pilot Program.

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A handwritten signature in black ink that reads "Wendy D Streit". The signature is written in a cursive style with a large, looping "S" at the end.

Wendy D. Streit
Executive Director
Research Policy Analysis & Coordination