


Name of Policy: Material transfer Policy Number: 3364-70-12 Approving Officer: President Responsible Agent: Vice President, Research Scope: All University of Toledo campuses		 Effective date: October 20, 2023 Original effective date: January 29, 2009	
Keywords:			
	New policy	X	Minor/technical revision of existing policy
	Major revision of existing policy		Reaffirmation of existing policy

(A) Policy statement

All research material including, but not limited to, data, organisms, human tissue, biological or chemical materials, is transferred into or out of the university of Toledo (“university”) requires review by technology transfer prior to transfer of materials.

(B) Purpose of policy

The purpose of this policy is to ensure that the technology transfer department has an opportunity to review the materials, as well as the terms and conditions applicable to the transfer before the transfer is initiated. This review is required as transfer may include provisions that can cause providers or recipients to lose the rights to their creations or inventions or may include language that can prevent the recipient from publishing or even continuing research. The result of this review may include a formal material transfer agreement (MTA), executed by technology transfer, which will govern the use of the material, as well as the rights of both parties.

(C) Procedure

- (1) University employees are required to complete and submit an MTA checklist for all material transfers. The checklist is located at <https://www.utoledo.edu/research/TechTransfer/material-transfer-agreement/mta-checklist-form/>. Once complete, please submit the checklist, along with the provider's MTA (if the faculty member is receiving material), to the technology transfer department.
- (2) The MTA checklist will be reviewed by the research compliance staff in the research and sponsored programs office while the MTA is reviewed by technology transfer staff.
- (3) After the MTA checklist is approved by the research compliance staff and the terms of the MTA are finalized, the MTA will be processed for signature by the technology transfer department.
- (4) Upon receipt of all the requisite signatures on an MTA, technology transfer staff will provide the department or employee with a copy of the fully executed MTA and the department or employee may proceed with shipping or receiving the material.
- (5) If the technology transfer staff determines that an executed MTA is not required, the technology transfer staff will inform the employee/department they may proceed with shipping or receiving the material.

<p>Approved by:</p> <p><i>/s/</i></p> <hr/> <p>Gregory Postel, MD President</p> <p>Date: September 15, 2023</p> <p>Review/revision completed by:</p> <ul style="list-style-type: none"> • Vice President, Research 	<p>Policies superseded by this policy:</p> <ul style="list-style-type: none"> • None <p>Original effective date: <i>January 29, 2009</i></p> <p>Review/revision date: <i>February 11, 2011</i> <i>September 23, 2011</i> <i>September 17, 2012</i> <i>February 21, 2017</i> <i>April 20, 2020</i></p>
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<ul style="list-style-type: none">• <i>Associate Vice President, Technology Transfer</i>• <i>Senior Leadership Team</i>	<p><i>October 20, 2023</i></p> <p>Next review date: <i>October 20, 2026</i></p>
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