

AGREEMENT TYPE	DEFINITION
FINANCIAL ASSISTANCE	Funds provided to support a public purpose (as opposed to a purchase of goods or services)
Grant	Most basic form of financial assistance, provided to support a public purpose. Further defined at 2 CFR 200.51.
Charitable Grant	Funds received from a sponsor that are for a charitable purpose. Agreement may have very limited terms and conditions. See RA04 for a full description.
Cooperative Agreement	Similar to a grant, but involving close collaboration between university and sponsor. Further defined at 2 CFR 200.24.
Equipment Agreement (Financial Assistance)	Agreement governing equipment donations and loans. These should be logged in as Financial Assistance when the college/unit provides an IAF documenting the dollar value of the equipment received. If no dollar value, these should be logged in as Equipment Agreement (Non-Financial). NOTE: Risk Management often takes the lead in reviewing and processing these agreements. NOTE 2: Property Inventory should be informed when capital equipment is received at Penn State.
Field Trial Grant	Used by College of Ag Sciences to conduct non-proprietary tests of agricultural products.
Fellowship	Scholarships and other student support funds.
Gift	Funds received from a sponsor/donor that are specifically identified as a gift and contain no terms or conditions other than a Stewardship Report. See RA04 for a full description.
Membership (Financial Assistance)	Funds provided by a consortium member to support a general field of study.
No Formal Agreement	Funds received without any identified terms and conditions. Only use this agreement type for funds that are not considered a gift or unrestricted grant.
Software Agreement (Financial Assistance)	Agreement governing software donations and loans. These should be logged in as Financial Assistance when the college/unit provides an IAF documenting the dollar value of the software received. If no dollar value, these should be logged in as Software Agreement (Non-Financial). NOTE: Purchasing may wish to take the lead in reviewing the terms of a new software agreement.
Tuition Agreement	Agreement where sole purpose is to reimburse student tuition.
Unrestricted Grant	Similar to a gift, but without a letter identifying it as such. See RA04 for a full description.
Visiting Scientist Agreement (Financial Assistance)	Funds provided to support research costs associated with a visiting scientist. NOTE: The Visiting Scientist Agreement itself (establishing IP rights, liability, etc.) should be processed by the Office of the Vice Provost for Faculty Affairs. See AC01 for further details.
Other (Financial Assistance)	This agreement type should NOT be used, except in cases where none of the other financial assistance types are appropriate.
PROCUREMENT	Agreements governing the purchase of goods or services
Contract	Most basic form of procurement. Further defined at 2 CFR 200.22.
Clinical Trial Agreement	Agreement governing the clinical testing of drugs and medical devices.
Fixed Price Agreement	This Agreement type has been retired and should not be utilized.

AGREEMENT TYPE	DEFINITION
Intergovernmental Personnel Act (IPA)	Contract with the federal government to cover costs associated with a Penn State faculty member on temporary assignment with a U.S. government agency.
ARSO/MCFA	This includes MCFA and ARSO testing agreements. See here for further detail: http://www.research.psu.edu/osp/negotiate-agreements/industry-other/industry-agreement-templates/testing-agreements
Other Transaction Agreement	A federal procurement instrument authorized under special circumstances; standard terms (such as Bayh-Dole and the UG) do not apply unless formally added to agreement.
Purchase Order	A vendor agreement identified as a purchase order. (This agreement type is NOT to be used for "billing purposes only," because this is an action not an agreement type.)
Service Purchase Contract	A contract instrument used by the Commonwealth of Pennsylvania.
Settlement Agreement	An agreement utilized by the Commonwealth to cover costs incurred prior to the execution of a COP purchase order.
Sponsored Research Agreement	Penn State's standard terms and conditions for industry sponsored research agreements: http://www.research.psu.edu/osp/negotiate-agreements/industry-other/industry-agreement-templates/standard-industry-sponsored-agreements
Other (Procurement)	This agreement type should NOT be used, except in cases where none of the other procurement types are appropriate.
SUBAWARDS & SUBCONTRACTS ISSUED BY PSU	
Penn State Subaward	An agreement issued by PSU to a collaborative partner (RA80 & RAG80)
Penn State Subcontract	A contract issued by PSU for the procurement of goods or services (RA80 & RAG80)
SUBAWARDS & SUBCONTRACTS RECEIVED BY PSU	
Subaward	An agreement where PSU receives financial assistance funds from a prime sponsor (e.g., NSF) via a prime recipient (e.g., Cornell).
Subcontract	A contract governing PSU's delivery of goods or services to a prime contractor (e.g., Boeing) in order for the prime contractor to meet its obligations to its prime sponsor (e.g., DoD).
SBIR Sub	A subaward or subcontract issued under the Small Business Innovation Research (SBIR) program.
STTR Sub	A subaward or subcontract issued under the Small Business Technology Transfer (STTR) program.
NON-FINANCIAL	
Allocation of Rights Agreement	A document established (usually at the proposal stage) identifying the Intellectual Property terms under an STTR agreement.
Data Use Agreement	An agreement identifying the terms and conditions governing PSU's use of another organization's data.
Data Security Plan	Internal document articulating data security compliance and monitoring requirements.

AGREEMENT TYPE	DEFINITION
Equipment Agreement (Non- Financial)	Agreement governing equipment donations and loans. If no dollar value, these should be logged in as Equipment Agreement (Non-Financial).These should be logged in as Equipment Agreement (Financial Assistance) when the college/unit provides an IAF documenting the dollar value of the equipment received. NOTE: Risk Management often takes the lead in reviewing and processing these agreements. NOTE 2: Property Inventory should be informed when capital equipment is received at Penn State.
Master Agreement	An agreement establishing the terms and conditions under which subsequent orders can be issued (e.g., task orders, purchase orders, work orders, delivery orders).
Export License	Formal government approvals (licenses) for the conduct or management of export controlled activities, programs, and/or transfers.
Membership (Non-Financial)	An agreement establishing a relationship with a non-financial member of a consortium. (This occurs when a consortium wants to include the participation of an organization that cannot or will not pay a membership fee.)
Materials Transfer Agreement	An agreement identifying the terms and conditions governing one party's use of another party's material. (PSU might be either the recipient or the provider of the material.) NOTE: The Office of Technology Management (OTM) typically processes these agreements, as per FNG02.
Non-Disclosure Agreement	An agreement identifying the terms and conditions governing one party's use of another party's proprietary information. (In some cases, both parties might share proprietary information.)
Non-Disclosure Agreement (student)	An NDA specifically used for use when undergraduate or MBA students are working on a senior design or similar project. Established and unique procedures are involved in the processing of these agreements. Please refer to the Student NDA page for more information.
Settlement Agreement (Non-Financial)	For Commonwealth of Pennsylvania agreements - costs have already been recorded on the agreement; just an authorization of the expenditure.
Software Agreement (Non-Financial)	Agreement governing software donations and loans. If no dollar value, these should be logged in as Software Agreement (Non-Financial).These should be logged in as Software Agreement (Financial Assistance) when the college/unit provides an IAF documenting the dollar value of the software received. NOTE: Purchasing may wish to take the lead in reviewing the terms of a new software agreement.
Teaming Agreement	An agreement establishing the terms and conditions under which parties may collaborate, usually with the intent of writing a proposal together.
Technology Control Plan	For use by Export Specialists only. Internal compliance document and monitoring mechanism for export compliance purposes.
Other (Non-Financial)	This agreement type should NOT be used, except in cases where none of the other non-financial agreement types are appropriate.

AGREEMENT TYPE	DEFINITION
Visiting Scientist Agreement (Non- Financial)	An agreement establishing the terms and conditions associated with a visiting scientist. Such agreements should be processed by the Office of the Vice Provost for Faculty Affairs. See AC01 for further details.