What happens after project approval

This document describes what happens after a project application is approved in principle by The Data Lab, and sets out our approach to contracting and delivering projects.

For any questions on the contractual process, the Project Agreement or the Payment Schedule, then please contact our Contracts Manager - adam.majumdar@thedatalab.com

For any questions on the Project Plan, then please contact our Project Development Manager – michelle.galea@thedatalab.com

Legal arrangements

- Any decision to fund a project is subject to all the parties to the project (including The Data Lab) signing a **Project Agreement**. Projects should only start after all the parties have signed the Project Agreement.
- The Data Lab's Contracts Manager will issue a draft Project Agreement to all parties, and a funding award letter **to the lead academic partner**.
- If there are any questions on the terms following in the agreement, parties should provide written comments to The Data Lab and other project partners, and The Data Lab will facilitate discussions.
- Once the terms of the Project Agreement are agreed, the Contracts Manager will arrange the signature of the contract: once signed the project can formally begin.
- The Project Agreement includes clauses on:

  ◦ **Project Plan**. This provides details on the project's deliverables, milestones, risks and timelines. The plan is agreed by the academic and industry parties, and approved by The Data Lab.
  ◦ **Intellectual Property** Each collaborator owns the results it generates. For results owned by the academic party, the industry party will be granted a non-exclusive commercial licence (with the option to acquire an exclusive licence) to use those results for any purpose.
  ◦ **Confidentiality.** Parties are obliged to keep confidential information confidential.
  ◦ **Publications.** It is expected that the academic partners will have the right to disseminate or publish findings from the project. The industry party will have the right to review drafts prior to publication, to delay publication to allow for patent filing, and / or remove confidential information.
  ◦ **Liability.** There is a cap on each party's liability.

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Payment arrangements

- Once the project and its funding has been approved, a **Payment Schedule** will be agreed - this forms part of the **Project Agreement**.
- The Payment Schedule should include not only the cash payments from The Data Lab to the lead academic institution, but also other any cash and in kind contributions made by other project partners.
- The Data Lab Contracts Manager will liaise with the academic legal contacts to agree the timing and number of payments.
- Where possible, payments will be linked to deliverables or milestones in the **Project Plan**.
- The number of payments will be dependent on the size of the funding award and the length of the project. For example, for projects under £5k there will usually be a single payment at the end of the project. For a £50k project it is likely that 2-3 payments will be agreed etc.
- When a payment is due the academic institution must notify the Project Development Manager.
- Payments will normally be made on receipt of a Project Progress Report from the academic partner in the project.
- The Data Lab's Finance Controller will issue a Purchase Order number to the academic institution, who should issue an invoice (preferably via email), which must quote the PO number supplied by The Data Lab.
- The Data Lab will process payment within 3-4 weeks of receiving the invoice.

Project governance

- The Project Agreement signed by partners includes an outline Project Plan, which is agreed by the academic and industry or public sector partners and The Data Lab. The Data Lab provides a template for this, which will be completed by project partners with a high-level breakdown of project activities, an outline of the project management approach, and a list of milestones, deliverables and risks.
- The Data Lab takes a **project governance** role during project delivery, and not day-to-day project management. We expect that all parties (including The Data Lab) will usually meet monthly to discuss/review project progress.
- Reporting to The Data Lab after most of these meetings will be on an 'exception' basis, i.e. written reports should only detail issues arising with the project.
- The Data Lab will ask for periodic Project Progress Reports, and these are generally linked with specific deliverables or milestones in the Project Plan - particularly those that trigger payments from The Data Lab to the lead academic partner. A template for this will be provided by The Data Lab.
- If there is only one payment deliverable/milestone at the end of a project and the project is of at least 3 months duration, The Data Lab will require at least one formal progress report to confirm progress before the project ends: the timing of this will be agreed the project partners.

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