

Locked Confidential Discourse Agreement – Guidance

The locked template document is intended as a way to speed up the process around CDAs. Rather than having partners impose their terms on us, we can ask our academics and departmental staff to suggest using our approved template. This comes with the advantage of bypassing our review process which, due to the large volume of work that R&KEC deal with, can take a considerable amount of time.

The intention for how it will work is as follows:

- 1) Only certain fields are editable. These are those that are project-specific and it should be clear in the document what we are asking for in each of the fields. Under part A in the Background we are looking for the Purpose of the discussions. This should be specific enough to be enforceable, but wide enough to cover all of the discussions that you would like to be protected.
- 2) The UoY representative suggests using our locked CDA template. If this approach is agreed by the partner organisation, the template is populated with the relevant partner details and the purpose and is shared with the partner organisation for their signature. Brief guidance around the purpose is contained within the template as a comment. The preference here is always that the partner organisation signs first, so that once we sign we have a fully-executed agreement for our records.
- 3) A Worktribe record is then set up for the CDA in the normal way. However, the words 'UoY Locked CDA Template' should be contained in the Worktribe record title, followed by information pertaining to the counterparty.
- 4) RKEC will then manage this process, passing the CDA to the Head of R&KEC for signature, and uploading the final document onto the Worktribe record.
- 5) If the department in question would like us to share the final version with the partner organisation, then please make this clear in the original Worktribe request and provide the email address for the relevant contact.
- 6) CDAs that come through in this way will, where possible, be signed on the same day that they are received. Hopefully this will drastically reduce turnaround times for CDAs.
- 7) If this approach is successful for CDAs, we will look to implement similar measures for more types of agreement, in consultation with departmental colleagues.