



Contract Drafting Form

When to use this form: You're a researcher who needs a research contract/agreement drafted

Project title	
Name of UW lead	
Email of UW lead	
Phone of UW lead	

PART 1 – CONTRACTING PARTY

Contracting party: The institution with whom you plan to work

Instructions: Complete a table for each contracting party to be included in the agreement.

Full legal name of the contracting party	
Street address	
Province/State	
Country	
Postal code	
Email for person helping with the agreement	
Phone for person helping with the agreement	

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PART 2 – SCOPE OF THE PROJECT (SCHEDULE “A” OF THE AGREEMENT)

Introduction/Background Information
Scope of the project
Aims of the project

Contracting party personnel

Key Personnel (including the Principal Investigator)	
Number of full time staff	
Number of part time staff	
Students participating in the project if applicable	
Considerations Example: If either party is to recruit any key personnel, whether the approval of the other party is necessary, etc.	

UW personnel

Key Personnel (including the Principal Investigator)	
Number of full time staff	
Number of part time staff	
Students participating in the Project if applicable	
Considerations Example: If either party is to recruit any key personnel, whether the approval of the other party is necessary, etc.	



Project Management

Where the project is to be carried out	
Name of overall project manager	
Responsibilities of project manager	
Project meetings (frequency, location and representation of each party)	
Responsibilities related to the provision of information and reports to funders	
Facilities/equipment to be provided by contracting party and, if provided for use by the other, whether it is donated to the other or is on loan* until the end of the project.	
Facilities/equipment to be provided by UW and, if provided for use by the other, whether it is donated to the other or is on loan* until the end of the project.	
Tasks to be performed by contracting party (with timetable of major milestones)	
Tasks to be performed by UW (with timetable of major milestones)	
Anticipated outputs, deliverables or results	

*If any equipment is on loan, this Schedule "A" should set out responsibility for keeping it in good condition, maintaining and insuring it.)

Note: Unless you indicate otherwise, all equipment bought by the University with the Financial Contribution or External Funding will belong to the University.



PART 3 – PAYMENT (Schedule “B”)

Unless you advise otherwise, we will include standard payment terms.
Is anything we need to know about timing or terms of invoicing and payment?

PART 4 – BUDGET (Schedule “C”)

Please attach a budget with this form.

PART 5 – CONFIDENTIALITY, INTELLECTUAL PROPERTY & DATA

Background

Any Background (including materials, data and intellectual property) that the Contracting Party must provide	Background confidentiality considerations
Any Background (including materials, data and intellectual property) that the University must provide	Background confidentiality considerations
Any Background (including materials, data and intellectual property) that is to be obtained by either party from a third party	Background confidentiality considerations

Data

Who owns the data?	
Is there data sharing, or access to data granted from one party to the other?	
Do principles of OCAP apply?	
Is there Personal Health Information or Personal Information involved?	
Does data need to be anonymized (pseudonymized, or other) before data sharing can take place?	



Intellectual Property Ownership

Who will own Arising Intellectual Property?	
Will there be Joint Arising Intellectual Property?	
Will there be licences for Arising Intellectual Property (i.e. authorizations) between the parties (ex. for non-commercial research and education, or internal use)?	
Are there publication rights that need to be addressed?	
Is there a potential for commercialization of Arising Intellectual Property?	