

**THE CHARTERED INSTITUTE OF MANAGEMENT ACCOUNTANTS' GENERAL
CHARITABLE TRUST FUND**

– and –

THE CHARTERED INSTITUTE OF MANAGEMENT ACCOUNTANTS

– and –

XXXXXXXXXXXX

RESEARCH AGREEMENT

THIS AGREEMENT is made on the date of the last signature on page 12 BETWEEN:

- (1) THE CHARTERED INSTITUTE OF MANAGEMENT ACCOUNTANTS' GENERAL CHARITABLE TRUST FUND, a charitable trust registered under charity registration number 257750 whose registered office is at 26, Chapter Street, SW1P 4NP ("GCT");

[The Chartered Institute of Management Accountants General Charitable Trust (GCT) is a registered charity. The activities of the GCT are governed by its trust deed and the support services are provided by CIMA.

The object of the GCT is to advance education in the subjects of accounting, management accounting, electronic data processing, costing, auditing, taxation, applied economics, finance and other related subjects of an educational nature.

In pursuit of the object of the charity, the GCT funds research in the areas of accounting and management accounting. I see no reason for inserting this material, indeed it might be inadvisable as the terms might be misconstrued as part of the Agreement. Can it go somewhere else – in promotional literature or covering letter perhaps?

- (2) THE CHARTERED INSTITUTE OF MANAGEMENT ACCOUNTANTS, a body incorporated by Royal Charter on 18th March 1976, whose principal office is at 26 Chapter Street, London, SW1P 4NP ("CIMA");

- (3) UNIVERSITY whose principal office is address

together, the "Parties".

WHEREAS:

GCT has agreed to fund, and the University have agreed to appoint a researcher (the "Researcher") to undertake, the research project described in Schedule 1 on the terms and conditions set out in this Agreement; and CIMA has agreed to provide certain indemnities to the University and receive the benefit of certain obligations from the University.

IT IS AGREED as follows:

1. DEFINITIONS

- (1) In this Agreement:

"Additional Outputs" means the items listed in Part II of Schedule 2;

"Business Day" means a day (other than Saturday or Sunday) on which banks are open for general business in London;

"Commencement Date" means the date on which the terms of this Agreement come into force being the date on which the last party signed this Agreement;

"Completion Date" means the date by which the review and revision process of the Compulsory Outputs is to be completed, as stated in Schedule 2 or as otherwise extended by GCT in accordance with clause 12;

"Compulsory Outputs" means the items listed in Part I of Schedule 2;

"Force Majeure Events" has the meaning provided in clause 11(5);

"Intellectual Property Rights" means (a) copyright, patents, database rights, service marks, trade names and rights in trade marks, designs, know-how and confidential information (whether registered or unregistered); (b) applications for registration, and the right to apply for registration, for any of these rights; and (c) all other intellectual property rights and equivalent or similar forms of protection existing anywhere in the world;

"Maximum Grant Expenditure" means the maximum amount of funds that GCT will distribute as part of the Research Grant being the sum of £xxxx including £1000 for typesetting, printing and distribution costs.

"Outputs" means the Compulsory Outputs and the Additional Outputs produced by the Researcher as set out in Schedule 2;

"Project" means the research project described in Schedule 1;

"Research Grant" means all sums paid by GCT to the University toward the cost of the Project in accordance with clause 3 and the agreed budget set out in Schedule 3;

"Researcher" means a person, or group of persons, appointed by the University to undertake the Project;

"Sales Tax" means any sales, purchase or turnover tax as may be applicable in any relevant jurisdiction, including, without limitation, value added tax chargeable under or pursuant to the Value Added Tax Act 1994 or the EC Sixth Directive (77/388/EEC); and

"Term" means the term of this Agreement as set out in clause 2(1).

(2) In this Agreement any reference, express or implied, to an enactment (which includes any legislation in any jurisdiction) includes references to:

- (a) that enactment as re-enacted, amended, extended or applied by or under any other enactment (before, on or after the date hereof);
- (b) any enactment which that enactment re-enacts (with or without modification); and
- (c) any subordinate legislation made (before, on or after the date hereof) under that enactment, as re-enacted, amended, extended or applied as described in clause 1(2)(a), or under any enactment referred to in clause 1(2)(b).

and enactment includes any enactment, statute, legislation or law in any jurisdiction.

(3) In this Agreement:

- (a) references to a person include an individual, a body corporate and an unincorporated association of persons; and
- (b) subject to clause 9, references to a party to this agreement include references to the successors or assigns (immediate or otherwise) of that party.

(4) Clauses 1(1) to 1(3) apply unless the contrary intention appears.

(5) The headings in this Agreement do not affect its interpretation.

- (6) The Schedules to this Agreement form part of it.
- (7) If there is any conflict or inconsistency between a term in the main part of this Agreement and a term in any of the Schedules or other documents referred to or otherwise incorporated into this Agreement, the term in the main part of this Agreement shall take precedence, unless the Schedule or other document which is incorporated into this Agreement is expressly stated to take precedence over this Agreement.

2. TERM

- (1) This Agreement will come into force on the Commencement Date and will end on the Completion Date unless terminated earlier by any of the Parties in accordance with the terms of this Agreement.
- (2) Upon application by the University in accordance with, and subject to, clause 12, GCT may in its sole discretion extend the Completion Date.

3. PERFORMANCE OF PROJECT AND PAYMENT OF GRANT

- (1) The University agrees to appoint a Researcher to carry out the Project as described in Schedule 1 with all due skill and care and to deliver to GCT the Outputs in accordance with Schedule 2 and to do so in accordance with the terms and conditions of this Agreement, in consideration for which both CIMA and GCT will perform their obligations under this Agreement and GCT will reimburse the University for its costs incurred in carrying out the Project in accordance with the agreed budget set out in Schedule 3 up to (but not exceeding) an amount equivalent to the Maximum Grant Expenditure, subject to the delivery of the Outputs in accordance with Schedule 2 and to GCT's right to withhold funds set out in clauses 4(3), 4(4) and 13. The University agrees that all funds paid by GCT to the University under this Agreement will be used by the University to cover the costs incurred by the University in the performance of the Project or to facilitate the on-going work of the Researcher in relation to the Project.
- (2) Payments made by GCT to the University under clause 3(1) shall only be made following the submission by the University to GCT of an invoice together with a detailed expenses account certified by the University setting out all payments for direct expenses which have been incurred and for which a claim is being made. Invoices shall be submitted to GCT by the University in respect of each calendar quarter in arrears no later than the end of the calendar month following the end of the relevant calendar quarter. Each quarterly invoice must precede or accompany a quarterly progress report. The final invoice is to be submitted no later than the end of the calendar month following the month in which the Completion Date falls (as it may be extended in accordance with clause 12) or the date of the delivery of all the compulsory outputs, should this date be later than the expected Completion Date. GCT will settle invoices submitted by the University within 30 Business Days of receipt, save in the event that GCT wishes to raise a bona fide dispute with any aspect of the invoice submitted, in which case GCT shall, within 20 Business Days of receipt of the invoice, notify the University of the details of the items that it disputes. The parties shall use their reasonable endeavours to settle any such dispute before invoking clause 22.

4. WARRANTIES AND UNDERTAKINGS

- (1) The University represents and warrants to GCT and to CIMA that they are each capable of entering into and performing this Agreement is not restricted or prohibited from doing so for any reason whatsoever.

- (2) The University undertakes to provide the services of the Researcher for the Term of this Agreement save as set out in clause 4(3) and 4(4). The University further undertakes to permit GCT to transfer the Grant or the remaining part of it to another Higher Education Institution in the event that the Researcher ceases to be employed by the University during the term of this Agreement
- (3) In the event that the Researcher leaves the employ of the University, performance of the Agreement will be automatically suspended with immediate effect. In the event of such suspension (or expected suspension) the University undertakes to use reasonable endeavours (with the prior written consent of GCT which consent shall not be unreasonably withheld) to assign the benefits and novate the burdens of the Agreement to the Researcher's new employers or to the Researcher in a personal capacity (in the latter case references to "University" shall as far as the context permits then be read as being references to the "Researcher"). Upon the occurrence of such assignment and novation, the University may submit an invoice with a detailed expenses account to GCT covering the period between the date of the last invoice and expenses account and the date performance of the Agreement is suspended (notwithstanding that it may be less than 1 calendar quarter since submission of the previous invoice and expenses account) which GCT shall settle in accordance with clause 3. Upon completion of the assignment and novation GCT shall release the University from its obligations under this Agreement. If the University fails to assign and novate this Agreement as described above (notwithstanding that such failure is as a result of GCT reasonably withholding its consent to such assignment and novation) or fail to do so within a reasonable time period, GCT may terminate this Agreement immediately by giving notice in writing to the University and the University shall be entitled to submit an invoice and expenses account covering the period between the date of the last invoice and expenses account and the date performance of the Agreement is suspended. If a satisfactory novation process cannot be agreed between the Parties, CIMA or GCT may terminate this Agreement.

The University will notify GCT and CIMA immediately in writing if the University wishes to make any change to the Researcher or the persons comprising the Researcher. If the Researcher or a key person amongst the persons comprising the Researcher proposes to leave the University during the course of the Project, the University shall give GCT and CIMA not less than three months' notice in writing (or such shorter period of notice as may be agreed between the Parties to be reasonable in the circumstances, for example, where the term of this Agreement is less than 3 months). Any change to the Researcher must be approved by GCT and CIMA in writing (such approval not to be unreasonably withheld or delayed; provided that GCT and CIMA will require the University to propose a satisfactory means of ensuring that the Project is completed and to put in place the necessary novation process acceptable to GCT and CIMA). If a satisfactory novation process cannot be agreed with GCT and CIMA, CIMA and GCT may terminate this Agreement.

- (4) In the event that the Researcher becomes permanently unavailable for any other reason than that specified in clause 4(3) (including but not limited to the Researcher's death, personal injury or sickness) the University shall (subject to the prior written consent of GCT which consent shall not be unreasonably withheld) replace the Researcher with another individual whose abilities and qualifications equal those of the Researcher (referred to as the "New Researcher"), and shall enter into a new agreement in substantially the same form as this Agreement (and when such substitution occurs "Researcher" shall refer to the New Researcher). If in such circumstances the University fails or fails within a reasonable period of time to find a New Researcher to replace the Researcher who is acceptable to GCT, and to enter into and to ensure that the New Researcher enters into a new agreement in substantially the same form as this Agreement, GCT may terminate this Agreement immediately by giving notice in writing to the University, in which case the University shall be entitled to submit an invoice and expenses account covering the period between the date of the last invoice and expenses account and the date the Agreement is terminated

- (5) Nothing in this clause 4 effects GCT's rights under clause 13.

5. INTELLECTUAL PROPERTY RIGHTS

- (1) The parties hereby agree the University will own the Intellectual Property Rights in the Outputs in accordance with law or as agreed between them, and that neither GCT nor CIMA shall acquire any right, title or interest in or to any Intellectual Property Rights in any Output as a result of this Agreement save as set out in this Agreement. This clause shall not prevent the University conferring Intellectual Property Rights in the Outputs on the Researcher
- (2) GCT and CIMA shall both be free to publish or otherwise make available all or part of, or extracts from or summaries of the Outputs and the results of the Project, either produced in written form or given by way of oral presentation, including where GCT or CIMA wishes to make such information available for use by third parties or both commercial and non-commercial use. The University hereby grants GCT and CIMA a perpetual, irrevocable, world-wide royalty free right and licence (including the right to grant sub-licences) to use the Compulsory Outputs in Schedule 2¹ including any Intellectual Property Rights vesting therein for this purpose. GCT and/or CIMA may not necessarily agree with the opinions expressed in the Outputs or other results of the Project and they shall be free to publish or otherwise make public an indication that the content of any Output or other result of the Project (or of any summary or extract of any Output or other result of the Project) do not or do not necessarily reflect the views and opinions of GCT or CIMA.
- (3) The University warrants to GCT and CIMA that to the best of its knowledge (having made reasonable enquiry of those of its employees involved in the Project or likely to have relevant knowledge but not having made any search of any public register) that neither the Outputs nor anything done by the Researcher in the conduct of the Project shall infringe any Intellectual Property Right of any third party.
- (4) The University agrees to use reasonable endeavours to co-operate with GCT and/or with CIMA in defending or settling any such claim or action as is mentioned in clause 5(3).
- (5) The University will upon receipt of a written request from CIMA consider permitting GCT and CIMA to have the opportunity, to publish any Output before that Output (or any part, extract, description or summary thereof) is published by the University, and/or by any third party (i) on a commercial basis, for example, by means of any kind of management (or similar) book; or (ii) by means of any other form of publication of that Output (excluding refereed academic outputs such as articles or conference papers authored and published by the University) such as publication on the internet. GCT and CIMA shall each use its reasonable endeavours to recognise the work of the Researcher in any refereed academic article GCT or CIMA publishes, or any article GCT or CIMA publishes in the professional press, or in any conference papers or presentations GCT or CIMA produces.

6. PUBLICATION OF RESULTS

- (1) Referred articles in academic journals: The University shall ensure that acknowledgement of the support of GCT shall be made in each such article published by or on behalf of the University and/or the Researcher by inclusion of the wording "the support of CIMA General Charitable Trust is gratefully acknowledged" Furthermore, the University shall inform CIMA and GCT details of any results and any of intended publications at least 30 days prior to the date of intended publication.

¹ Means the Compulsory Outputs and the Additional Outputs produced by the Researcher as set out in Schedule 2

- (2) Articles in the professional press: The University shall use reasonable endeavours to ensure that each such article published by or on behalf of the University and/or the Researcher acknowledges the support of GCT by including the wording "the support of CIMA General Charitable Trust is gratefully acknowledged". The University and GCT recognise that this acknowledgement is subject to the Publisher's editorial discretion. Furthermore, the University shall inform CIMA and GCT of the details of any results and any of intended publications at least 30 days prior to the date of intended publication.
- (3) Conference papers and presentations: The University shall ensure that these acknowledge the support of GCT by including the wording "the support of CIMA General Charitable Trust is gratefully acknowledged". Furthermore, the University shall inform CIMA and GCT of the details of any results and any of planned conference presentation at least 30 days prior to the date of intended publication or presentation.

7. CONFIDENTIALITY

The University shall use reasonable endeavours to ensure that there is no restriction on the free disclosure, dissemination or publication of any part of the Outputs by reason of any obligation of confidentiality owed to a third party by the University..

8. NO AGENCY CLAUSE

Nothing in this Agreement creates, implies or evidences any partnership or joint venture between the parties, or the relationship between them of principal and agent. Neither party has any authority to make any representation or commitment, or to incur any liability, on behalf of the other.

9. ASSIGNMENT

- (1) Save as provided in clause 4(3) and clause 9(2), neither this Agreement nor any right or obligation arising hereunder may be assigned, in whole or in part, by any one or more of the parties to this Agreement without the prior written consent of the other contracting parties which consent shall not be unreasonably withheld or delayed.
- (2) This Agreement and/or any right or obligation arising hereunder may be assigned, in whole or in part, by GCT to CIMA, or by CIMA to GCT.

10. LIABILITY

- (1) Subject to clause 10(3):
 - (a) CIMA ("**the first party**") shall indemnify on demand and hold harmless the University ("**the second party**"); and
 - (b) the University ("**the first party**") shall indemnify on demand and hold harmless both GCT and CIMA ("**the second party**"),

against all losses, damages, costs, expenses and other liabilities (including, without limitation, legal and other professional fees) which may be suffered, incurred or awarded against the second party as a result of any action brought or claim made by a third party in respect of loss or damage caused (wholly or partly) by the negligence or wilful misconduct of the first party where such action or claim arises out of or in connection with this Agreement.

- (2) Notwithstanding any other provision of this Agreement, neither party limits its liability for death or personal injury arising from its negligence or that of its employees, agents or subcontractors (as applicable) or for fraud.

- (3) Subject to clause 10(2), the total liability of each party for negligence, wilful misconduct, breach of contract or otherwise under or in connection with this Agreement (including as may arise under clause 5(3), clause 7 and clause 10(1)) ("**Default**") shall, for any single event of Default or series of connected events of Default:
- (a) if the Default or series of connected Defaults arises as a result of the wilful conduct of the indemnifying party, or with that party's actual or constructive knowledge, be limited to £1,000,000 (one million pounds sterling); and
 - (b) in any other case, be limited to the Maximum Grant Expenditure multiplied by 2 (two)
- (4) For the avoidance of doubt, GCT gives no indemnity to any other party under any provision of this Agreement, including (but not limited to) under clause 5(3), clause 7, clause 10(1) and clause 10(3), and further, GCT excludes (subject to clause 10(2) and only to the extent permitted by law) its liability for all loss or damage, including direct, indirect and consequential loss or damage, including all forms of economic loss or loss of chance or opportunity, whether arising in contract, tort or otherwise.

11. TERMINATION AND FORCE MAJEURE

- (1) This Agreement may be terminated by GCT, or by the University, on either GCT or the University giving twelve weeks prior written notice to the other of its intention to terminate.
- (2) GCT shall have the right, without prejudice to its other rights and remedies, to terminate this Agreement immediately by written notice the University if either the University is in material or persistent breach of any of its obligations under this Agreement and either that breach is incapable of remedy or University shall have failed to remedy that breach within 30 days after receiving written notice from GCT requiring it to remedy that breach.
- (3) Any termination of this Agreement (howsoever occasioned) shall not affect any accrued rights or liabilities of any party nor shall it affect the coming into force or the continuance in force of any provision of this Agreement which is expressly or by implication intended to come into force or continue in force on or after that termination.
- (4) Following termination of this Agreement, the University may retain all those documents and materials and all copies thereof relating to the Project in their possession or under their control and shall be free to publish such documents and materials in accordance with the provisions of clause 5 of this Agreement. For the avoidance of doubt, GCT and CIMA shall also both continue to benefit from the licence granted to each of them under clause 5 of this Agreement which clause shall survive termination or expiry of this Agreement. In the event this Agreement is terminated by the University under clause 11(1), or in the event that this Agreement is terminated by GCT under clause 11(2), the Research Grant shall be repayable by the University to GCT in whole or in part, as GCT in its sole discretion shall direct
- (5) No party shall be liable to any other party for any delay or non-performance of its obligations under this Agreement arising from any cause or causes beyond its reasonable control including, without limitation, any of the following: act of God, governmental act, war, fire, flood, explosion, civil commotion or industrial dispute of a third party ("**Force Majeure Events**"). Subject to the party so delaying promptly notifying the other parties in writing of the Force Majeure Event giving rise to the delay and the likely duration of the delay, the performance of the delaying party's obligations, to the extent affected by the delay, shall be suspended during the period that the Force Majeure Event persists. If the Force Majeure Event persists for more

than [4] calendar weeks, any party to this Agreement may terminate this Agreement immediately by written notice to the other parties.

- (6) The University agrees to document any actual delays in the Project or in the delivery of the Outputs in the Progress Reports to be delivered to GCT as a Compulsory Output under Schedule 2. If any actual or potential delay relates to the delivery of the Progress Report to GCT, or if the Project is within the last quarter of the Term and an actual or potential delay occurs to any aspect of the Project or to delivery of any of the Outputs, the University shall immediately notify GCT in writing of the actual or potential delay. This requirement is in addition to the requirements on the University under clause 12 to apply for consent by GCT to delays (save for delays resulting from Force Majeure Events under clause 11(5)) in excess of 4 calendar weeks.
- (7) If GCT terminates this Agreement in accordance with clause 11(1), GCT will reimburse the University for their reasonable costs and expenses incurred as a direct result of this Agreement and such reimbursement shall take place in accordance with clause 3.

12. EXTENSION OF COMPLETION DATE

The University may apply to GCT for GCT to give its consent to an extension of the Completion Date specified in Schedule 2. This application must be made to GCT in writing at least 3 months prior to the expiration of the Completion Date specified in Schedule 2. At GCT's sole discretion a maximum of two extensions may be granted of periods no longer than 6 months each. Save in the case of delays caused by Force Majeure Events as set out in clause 11(5), the University is required to apply to GCT in writing for delays of more than 4 calendar weeks to any aspect of the Project or the delivery of any Output, and where such delays are likely to impact on the University's ability to meet the Completion Date, the University is required to request GCT to consent to a new Completion Date. GCT is not required to consent to a new Completion Date but may do so at its sole discretion. This provision is without prejudice to GCT's other rights and remedies under this Agreement including its right to terminate this Agreement or to withhold funds. Any new Completion Date agreed between GCT and the University shall be deemed to amend Schedule 2 as necessary and be binding on the University.

13. WITHHOLDING AND/OR REPAYMENT OF FUNDS

- (1) GCT may withhold any payment otherwise due to be made by it under clause 3, if the University fails to produce any of the agreed Outputs specified in Schedule 2, until such time as the agreed Outputs have been delivered to GCT.
- (2) Subject to clause 11(5). in the event this Agreement is terminated by the University under clause 11(1), or in the event that this Agreement is terminated by GCT under clause 11(2), the Research Grant shall be repayable by the University to GCT in whole or in part, as GCT in its sole discretion shall direct.

(3)

14. SALES TAX

- (1) If any Sales Tax is properly chargeable in respect of any supply made by the University under this Agreement, GCT shall pay the amount of that Sales Tax to the University against issue of a proper Sales Tax invoice by the University.
- (2) Without limiting clause 14(1), each amount stated as being payable under this Agreement is inclusive of Sales Tax if any.

15. AUDIT

The University shall keep and maintain until two years following the expiration or termination of this Agreement, records to the satisfaction of GCT of all expenditures which are reimbursable by GCT and of the hours worked and the costs incurred by the University and the Researcher or in connection with any employees of the University or the Researcher paid for out of the Research Grant paid by GCT on a time basis. The University shall on request afford GCT or its representatives such access to those records as may be required by GCT in connection with this Agreement.

16. WHOLE AGREEMENT

- (1) This Agreement contains the whole agreement between the parties relating to the subject matter of this Agreement and supersedes all previous agreements between the parties relating to this subject matter.
- (2) Subject to clause 16(3), each party acknowledges that in entering into this Agreement it has not relied on any representation, warranty, collateral contract or other assurance (except those set out in this Agreement and the documents referred to in it) made by or on behalf of any other party before the date of this Agreement. Each party waives all rights and remedies which, but for this clause 16, might otherwise be available to it in respect of any such representation, warranty, collateral contract or other assurance.
- (3) Nothing in clause 16(2) limits or excludes any liability for fraud.

17. ILLEGALITY AND SEVERANCE

If any term of this Agreement is deemed to be or becomes invalid, or unenforceable, that term shall be construed or deemed amended to conform to applicable laws so as to be valid and enforceable or, if it cannot be so construed or deemed to be amended without altering in a material way the intentions of the contracting parties, that term shall be deleted automatically from this Agreement and the remainder of this Agreement shall remain in full force and effect.

18. WAIVER

No waiver of any breach of any provision of this Agreement shall constitute a waiver of any prior, concurrent or subsequent breach of any other provisions hereof and no waiver shall be effective unless made in writing and signed by an authorised representative of the relevant party.

19. THIRD PARTIES

A person who is not a party to this Agreement may not enforce any of its terms under the Contracts (Rights of Third Parties) Act 1999.

20. JURISDICTION

This Agreement is governed by and shall be construed in accordance with English law and (subject to clause 22) the parties submit to the exclusive jurisdiction of the English courts for all matters arising out of or in connection with this Agreement.

21. NOTICES

Any notice given under or pursuant to this Agreement may be sent by hand or by post or by registered post or by recorded delivery service or transmitted by email or other means of telecommunication resulting in the receipt of a written communication in permanent form and if so sent or transmitted to the address of the party shown on the face of this Agreement, or to such other address as the party may by notice to the other have substituted therefore, shall be deemed effectively given on the day when

in the ordinary course of the means of transmission it would first be received by the addressee in normal business hours.

22. DISPUTE RESOLUTION

The Parties shall use reasonable endeavours to negotiate in good faith and settle amicably any dispute that arises during the continuance of this Agreement. Any dispute not capable of resolution by the Parties shall be settled as far as possible by mediation in accordance with the Centre for Effective Dispute Resolution (CEDR) Model Mediation Procedure. No Party may commence any court proceedings in relation to any dispute arising out of this Agreement until they have attempted to settle it by mediation, but any such mediation may be terminated by either Party at any time of such Party wishing to commence court proceedings.

23. AMENDMENTS

Notwithstanding any other provision of this Agreement, any amendment of this Agreement shall not be binding on the parties unless it is set out in writing, is expressed to amend this Agreement and is signed by an authorised representative of each of the parties. The references in the previous sentence to being "in writing" and "signed" shall be construed as including amendments that are in electronic form including amendments that are sent and confirmed via e-mail but shall not include amendments transmitted by facsimile.

24. COUNTERPARTS

This Agreement may be executed in any number of counterparts, and by the Parties on separate counterparts, each of which so executed and delivered shall constitute one and the same instrument.

SCHEDULE 1

Signed by for and on behalf of
The Chartered Institute of
Management Accountants'
General Charitable Trust Fund

.....
Print Name
Date

Signed by for and on behalf of
The Chartered Institute of
Management Accountants'

.....
Print Name
Date

Signed by for and on behalf of
xxxxxxx

.....
Print Name
Date

SCHEDULE 1

The Project

SCHEDULE 2

Dates and forms of Outputs expected

Part I - Compulsory Outputs to CIMA

Compulsory Outputs	Due Date(s)
Progress Reports	2012 2012 2012 2013
End of Project Report	2013
Executive Summary for business audience	2013
Article or presentation (for/to a practitioner audience, for example an article in a CIMA member magazine or a presentation of research findings via a webcast to a business audience or via a roundtable discussion to CIMA members.)	2013

Part II - Additional Outputs

These Outputs can be negotiated and/or agreed during the life of the Project.

- Recommendations for identity management of CIMA to reinforce the prestigious image of CIMA and its members, providing an understanding of the gaps between current and desired identities, and leader competencies and qualities.
- Quantified information related to how leader qualities impact on multi-faceted measures of organisational performance (e.g. knowledge, attitude and behaviours).
- A concept map of issues and opportunities relevant to MAs in a leadership context, with exploratory analysis on the role of the recession in shaping the professional identity of MAs.
- A teaching case study on MA leader competencies.
- Practitioner case studies on professional identity of MAs.

Other:

- Article for business audience
- A Technical Report (either web or hard copy)
- Commercial Business Publication (hard copy) on a Print on Demand basis
- E-Book Business Publication (with ISBN)
- Presentation to internal GCT audience
- IFAC articles of merit (if the Project has this potential, it must have been previously published in FM, MAR or Insight, to meet specific criteria.)
- One-off 'round table' discussion panels, dinners and breakfasts
- Presentations at business conferences
- Papers at academic conferences
- BIZ Net or GCT branch event
- Web cast

- Web chat room

The Completion Date is

SCHEDULE 3

The agreed budget