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IBL Project Board Policy	1.0.0	21 May 2021
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Abstract		
An important component of research in IBL is composed of individually initiated research projects. The goals of this policy are that: all IBL scientists have the opportunity to work productively on scientific projects; information about these projects is communicated broadly and in a timely manner; and disputes over project overlap are avoided where possible, and if they arise they are dealt with fairly, rapidly, and to the satisfaction of all IBL members.		

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Goals & Scope

The goal of this policy is to ensure:

1. Information about projects initiated by IBL researchers using IBL data is communicated across the organization
2. All IBL scientists have the opportunity to work productively on scientific projects,
3. Disputes over project overlap are avoided where possible, and if they arise they are dealt with fairly, rapidly, and to the satisfaction of all IBL members.

This policy covers all projects that use IBL resources and/or data prior to their public release.

Scientific work may go through many phases from idea generation through publication - Idea, Intention, Pilot and Project. Two of those phases are required to be entered in the IBL project registry:

1. **Pilot** - The initial data gathering, analysis or modeling stage, when a researcher wants to test whether it is practical and feasible to pursue the research question.
2. **Project** - When a researcher intends to pursue a full investigation of the research question

Pilots require registration but not a Project Board. Projects require both registration and a Project Board.

Project Board Working Group (PBWG)

The PBWG will assume the following roles in overseeing IBL personal projects:

- a. Support the development of projects within the IBL.
- b. Draft and maintain a body of documentation of policies and guidelines for projects.
- c. Monitor the Archiving of Project Board reports and summaries.
- d. Provide a report at the annual meeting about the state of projects across the collaboration
- e. Approve Project Boards for all registered projects and ensure regular meetings are held
- f. Make decisions about project endorsement based on Project Board recommendations
- g. Arbitrate disputes involving Projects.
 - i. The PBWG will be the first step in mediating disputes.
 - ii. PBWG members will recuse themselves from disputes involving their own lab.
 - iii. Conflicts that cannot be resolved by the PBWG will be subject to the [Conflict Resolution Policy](#).

Project Boards

When researchers intend to work on a project and claim primary responsibility for it, they recruit a **Project Board**. The Project Board represents the interests of the IBL and (if desired) advises on the work.

- a. The Project Board can raise concerns and suggest solutions (e.g. combining projects, adding co-researchers, refining scope), but does not make scientific decisions about a project. Those rest with the researchers and the relevant home institution PIs.
- b. The Project Board includes each of the advisors of the lead researchers, as well as any other IBL PIs (“external PIs”) until at least 3 PIs are part of the Board. The members must include at least one experimentalist and one theorist.
- c. The Project Board elects a chair, typically a home institution PI.
- d. If a member becomes unable to serve they may be replaced such that the Board maintains a minimum of 3 members.
- e. If the project leads to a paper, the external Project Board members will be expected to participate in the paper’s Review Board.
- f. If an external Project Board member becomes so involved in the project as to warrant authorship, they can either be replaced or transition to an internal member. In either case an additional external member joins the board.
- g. In the first meeting, the researchers discuss the project with the Board. Afterwards, the Board recommends whether the IBL should endorse the project.
- h. The Board operates according to the IBL consent decision process
- i. The Board passes its recommendation to the PBWG for a final decision about endorsement.
- j. When a project is endorsed, it takes on **Project** status and from then on the researchers meet with the Project Board annually (or sooner if circumstances change), generally after an IBL-wide presentation of the work.
- k. After each meeting, the Board and the Project team will agree to a status update statement to be posted in the project registry. The board also has the option to provide a brief confidential report to the researchers, their home PIs, and the Project Board Working Group.
- l. Projects that are **ended** or are inactive for over 12 months are closed, the materials are archived and the Project Board is dissolved.

Documentation

- Researchers should complete every field in this [template](#) to make a project proposal.

- All information about projects and project boards will be maintained in a project registry accessible to all IBL members (but not publicly available)
- Resources (data; code) associated with **all ended** projects will be saved and shared.

Project Evaluations

Criteria for approval of project status

- Is it in the scope of IBL?
- Is the project technically and practically feasible (including modifications to existing hardware/software pipelines)?
- Does it leverage IBL resources?
- Does it avoid excessive overlap with any existing or projected platform papers?
- Does it avoid excessive overlap with existing projects? (Precedence is established in order of submission on the Project Registration platform.)
- Does this researcher have the resources to finish the project successfully within a reasonable amount of time?

Ending a project

- A project can end by being: **Completed**, **Merged** (with another project), **Dropped** or **Returned** (to being an **Idea** which gives anyone in the IBL the opportunity to propose to continue working on it as a **Project**).
- Normally, the project team will make this determination; they will inform their project board, describe the situation on the project registration page, and close the project.
- If, after the annual public presentation associated with the project and taking extenuating circumstances into account, the project board considers that progress is not being made, it will flag the project to the PBWG who will investigate. In exceptional circumstances, the PBWG will reclassify the project.

Project Board Professional Behavior

- Project board members should evaluate projects in the interest of the IBL as a whole and of the researchers involved.
- Project board members should declare any personal interests in overlapping projects in their own labs.