

SERVICES AGREEMENT

This services agreement (the "**Agreement**") between Policy in Practice ("**we**", "**us**", "**our**") and you (being the person identified within the relevant Order Form as the Customer) provides the terms and conditions upon which you may access, use and receive the Services (as defined below). This Agreement shall take effect upon you accepting these terms either by executing a document by which you agree to be bound by this Agreement (such as an Order Form), directly executing this Agreement or by clicking an "I Accept" button or similar device to indicate your intention to be bound by this Agreement (the date expressed within the applicable Order Form to be the Start Date shall be the "**Effective Date**"). By completing any of the above acts, you represent to us that you (being the individual providing such acceptance) are authorised to bind the company or other organisation on whose behalf you are entering into this Agreement.

1. SERVICES

- 1.1. In consideration for the receipt of the Fees from you, we hereby agree to provide to you the services specified within the relevant Order Form and described in the Call Off Contract. Further detail on the engagements or service may be detailed in the optional Annex D or in the accompanying email.
- 1.2. To the extent that any of the Services include the use of Software, we hereby grant you a revocable, non-exclusive, non-transferable license for the Term to use such Software in accordance with the terms of this Agreement.

2. DURATION

- 2.1. This Agreement will commence on the Effective Date and shall continue in force for the Term unless otherwise terminated earlier in accordance with its terms.
- 2.2. The purchase of a software license for the LIFT analytics platform requires data specified in the data processing agreement to be transferred securely on a monthly basis to Policy in Practice. Clients must send consistent data each month for LIFT to be processed accurately and efficiently. We recommend setting up automated monthly batch transfers and can assist your teams where required to set this up.
- 2.3. For the Council Tax Reduction scheme modeling service, all model scheme structures must be commissioned and agreed upon in draft with a Policy in Practice analyst within six months of the Effective Date in order for the original data cleaning and modeling to remain valid. If models are not commissioned within six months of the Effective Date, the data may need to be updated which may incur additional charges.
- 2.4. The contract will be automatically renewed at the end of the term unless we are notified in writing 30 days prior to the end of the term. Upon renewal, the contract value may be subject to increase in accordance with the Retail Price Index (RPI).

3. PAYMENT

- 3.1. In order to receive the Services, you hereby agree to pay the Fees to us in accordance with the Payment Terms.
- 3.2. In the event that you fail to make payment to us of any Fees in accordance with the Payment Terms, we may charge you interest at the rate of 3% per month on all overdue amounts.

- 3.3. The Fees and all other charges stated within this Agreement are exclusive of VAT and other applicable taxes.
- 3.4. You shall reimburse all reasonable expenses properly and necessarily incurred by us in the course of providing the Services to you, subject to production of receipts or other appropriate evidence of payment.

4. YOUR OBLIGATIONS

- 4.1. Passwords: When receiving, or utilising the Services, you will be required to choose a password for your Account. It is your responsibility to ensure that your password is sufficiently complex and kept secure to prevent unauthorised access to your Account and/or use of the Services. You will promptly notify us of any such unauthorised access of which you become aware.
- 4.2. Restrictions on Use: Unless we agree otherwise in writing, you will not: (a) sell, resell, or sublicense the Services to a third party or provide access to your Account or the Services to any third party; (b) reverse engineer, disassemble or decompile any software included within the Services; or (c) attempt to modify, alter, tamper with, repair, or otherwise create derivative works of any software included within the Services or attempt to create a substitute or similar service to any of the Services.
- 4.3. Unlimited licences: In agreed cases a Software licence model may be 'Unlimited'. Unlimited numbers of licences can be granted to a council with the following exceptions.
 - 4.3.1. Housing departments are not included in the unlimited licence
 - 4.3.2. Licences to third parties such as supporting charities can be issued with a maximum of 5 per organisation. A limited list of potential third parties must be provided and agreed with Policy in Practice in advance and reviewed quarterly. Policy in Practice retains the right to deny access to any third party
 - 4.3.3. Licences are issued through the provision of log in information. The sharing of login data is not permissible and is monitored by Policy in Practice.
 - 4.3.4. Unless otherwise agreed in writing, unlimited licenses allow access to five additional linked organisations, with a maximum of five uses for each of these five. You must inform Policy in Practice of these organisations, and share their details with us.
- 4.4. Whitelisting domains: Ensure that the domain *.betteroffcalculator.co.uk is whitelisted in any firewalls. If this is not possible due to your organisation's firewall policy please whitelist:
 - 4.4.1. Betteroffcalculator.co.uk
 - 4.4.2. www.betteroffcalculator.co.uk
 - 4.4.3. Dev.betteroffcalculator.co.uk
 - 4.4.4. Api.betteroffcalculator.co.uk
 - 4.4.5. Address.betteroffcalculator.co.uk
- 4.5. Proxies: Ensure that any proxy used by your organisation, if any, allows CORS to be sent to and from any of the above domain and subdomains.

- 4.6. We will always aim to inform clients before adding in new subdomains however to ensure your access to our systems we strongly recommend you whitelist the whole domain.

5. INTELLECTUAL PROPERTY

- 5.1. You hereby agree that all Intellectual Property in, to, connected with or generated by or during the course of the provision of the Services shall remain the property of Policy in Practice or our licensors at all times and shall not vest, be transferred, assigned or licensed to you other than in accordance with the express provisions of this Agreement.
- 5.2. We hereby grant you for the Term a non-exclusive, revocable licence to use the Intellectual Property in, to or connected with the Services solely to the extent strictly necessary for you to receive the Services pursuant to this Agreement.
- 5.3. The Buyer agrees that any software developed or created for their specific use shall not be made publicly available as open source

6. SUSPENSION

- 6.1. Late Payment: In the event that you fail to make payment to us of any Fees in accordance with the Payment Terms and such amounts remain outstanding for a period of 15 days following the date on which they were due to be paid, we may, at our discretion, immediately upon notice to you, suspend access to your Account until such time as payment of such overdue Fees is made (including any interest which has accumulated in relation to such amounts).
- 6.2. Software: In the event that any of the Services includes Software, we may suspend your Account in the event that: (i) either you or any user authorised by you causes or threatens to cause a security risk to such Software or the technology used to provide the Software; (ii) you otherwise act in a manner which may cause damage or loss in relation to such Software or technology; or (iii) you fail to comply with any of your obligations under this Agreement.
- 6.3. Other: In addition to the above we may suspend access to your Account in the event that you breach any of your obligations under this Agreement.
- 6.4. Reinstatement: At any time whilst access to your Account is suspended, we may, at our sole discretion, reinstate your access if we are satisfied that the reason for the suspension has been rectified by you.
- 6.5. Our right to suspend access to your Account under this section is in addition to any other rights we may have under this Agreement, including, but not limited to, our termination rights as set out in section 7, below.

7. TERMINATION

- 7.1. Either party may terminate this Agreement for any or no reason by giving one months' prior written notice.
- 7.2. In the event of suspension of access to your Account as set out in section 6, we may terminate this Agreement if such suspension continues for a period of 30 days.
- 7.3. In addition, either party may terminate this Agreement if:
- 7.3.1. the other party is in material breach of the Agreement and fails to cure that breach within thirty days after receipt of written notice; or

- 7.3.2. the other party ceases its business operations or becomes subject to insolvency proceedings and the proceedings are not dismissed within 90 days.

8. LIABILITY

- 8.1. Where you are unable to use or receive the Services for a period of time in excess of 24 hours, we will, upon receipt of notice from you claiming the same, repay to you an amount equal to 50% of the Fees you have paid for such 24 hour period (calculated pro-rata). In order for this clause to take effect, you must notify us of such claim no later than 10 business days following the end of the applicable outage. Failure to provide notification by such date shall invalidate such claim and shall absolve us from any liability under this section to pay any such amounts. Those amounts stated within this section 8.1 shall be your sole remedy in respect of the Services being unavailable for any reason and, upon payment of such amounts or your waiving the right to receive such amounts by failing to make the relevant notification, we shall have no further liability.
- 8.2. We shall not be liable in any event for: (i) any loss arising from or in connection with loss of revenues, profits, contracts or business or failure to realise anticipated savings; (ii) any loss of goodwill or reputation; or (iii) any indirect or consequential losses, suffered or incurred by you arising out of or in connection with the use by you of any Service, or any other matter under this Agreement.
- 8.3. Our aggregate liability in respect of any loss or damage suffered by you and arising out of or in connection with this Agreement, whether in contract, tort (including negligence) or for breach of statutory duty or in any other way, shall not exceed the amount of the Fee payable by you to us under this Agreement.
- 8.4. Nothing in this section shall limit either party's liability for death or personal injury resulting from negligence or for fraud, fraudulent misstatement or fraudulent misrepresentation.
- 8.5. You acknowledge and agree that the limitations contained in this section are reasonable in all the circumstances and that you have taken independent legal advice.

9. INDEMNITY

- 9.1. You shall indemnify us and each of our officers, directors, employees, agents, shareholders and partners (the "Indemnified Party") on demand and hold us harmless from and against any and all losses, demands, claims, damages, costs, expenses (including consequential losses and loss of profit, legal costs and expenses and VAT thereon) and liabilities suffered or incurred, directly or indirectly, by the Indemnified Party in consequence of any breach or non-performance by you of any of the obligations, warranties, representations and undertakings on your part contained in this Agreement.

10. DISCLAIMER

- 10.1. We will use commercially reasonable endeavours to provide the Services to deliver a reasonable level of accuracy rate, based on the input data provided. However, other than as expressly set out in this section 10, we provide no further guarantee nor make any representation as to the accuracy of any of the Services.

11. GENERAL

- 11.1. Confidentiality: Each party undertakes that it will not at any time hereafter use, divulge or communicate to any person, except to its professional representatives or advisers or as may

be required by law or any legal or regulatory authority, any confidential information concerning the business or affairs of the other party which may have or may in future come to its knowledge and each of the parties shall use its reasonable endeavours to prevent the publication or disclosure of any confidential information concerning such matters.

- 11.2. Data Protection: You acknowledge that, in respect of any Personal Data (as defined in the Data Protection Act 2018), you shall act as data controller and we shall act solely as your data processor. Both parties agree that they will at all times comply with their respective obligations under the Data Protection Act 2018 and any subsequent amendments or superseding regulation such as the UK GDPR, and any other applicable laws and regulations in the performance of this Contract. For more information, please refer to our Data Protection Policy and Information Security Policy (available on request).
- 11.3. Data Delay: The client will provide the necessary data for agreed analysis within a period of six weeks from the contract start date, as defined by the issue of a purchase order (unless otherwise agreed in writing). A discount of £500 has been applied subject to the data being received within this six week period.
- 11.4. Status: The relationship between us and you will be that of independent contractor and nothing in this Agreement shall render us or any of our staff an employee, worker, agent or partner of you, irrespective of the nature of the Services being provided to you by us.
- 11.5. Amendment: No modification or variation of this Agreement shall be valid unless it is in writing and signed by or on behalf of each of the parties to this Agreement. For the avoidance of doubt, no modification or variation of this Agreement shall be valid if made by e-mail.
- 11.6. Assignment and Subcontracting: We may at any time assign or sub-contract any or all of our obligations under this Agreement. You may not assign or transfer this Agreement or any rights under this Agreement, or purport to do any of the same without our prior written consent.
- 11.7. Rights of Third Parties: Except insofar as this Agreement expressly provides that a third party may in his own right enforce a term of this Agreement, a person who is not a party to this Agreement has no right under the Contracts (Rights of Third Parties) Act 1999 to rely upon or enforce any term of this Agreement but this does not affect any right or remedy of a third party which exists or is available apart from under that Act.
- 11.8. Entire Agreement: This Agreement constitutes the entire agreement and understanding of the parties relating to the subject matter of this Agreement and supersedes any previous agreement or understanding whether oral or written between the parties in relation to such subject matter.
- 11.9. Waiver: In no event will any delay, failure or omission in enforcing, exercising or pursuing any right, power, privilege, claim or remedy conferred by or arising under this Agreement or by law, be deemed to be or construed as a waiver of that or any other right, power, privilege, claim or remedy in respect of the circumstances in question.
- 11.10. Severance: If any provision of this Agreement shall be found by any court or administrative body of competent jurisdiction to be invalid or unenforceable, such invalidity or unenforceability shall not affect the other provisions of this Agreement which shall remain in full force and effect.

- 11.11. Governing Law: This Agreement shall be governed by the laws of England and Wales and, in the event of any dispute (including non-contractual disputes) the parties hereby submit to the exclusive jurisdiction of the English Courts.
- 11.12. Automatic Renewal: Service agreements shall be renewed automatically for succeeding terms of one (1) year unless either party gives notice to the other at least thirty (30) days prior to the expiration of any term of his intention not to renew.
- 11.13. The prices outlined in this service order form are subject to increase in accordance with the prevailing rate of inflation. Such increases will be applied proportionally to the relevant services and will take effect on the date of renewal.

12. DEFINITIONS

- 12.1. "Account" means your method of accessing the Services, set up by us for you which allows you to receive the Services by logging in via the applicable website.
- 12.2. "Business Hours" means 9:00 to 17:00 GMT, Monday to Friday.
- 12.3. "Fees" means the amounts due to us from you in respect of the Services, as set out in the applicable Order Form.
- 12.4. "Order Form" means a form (whether online or otherwise) specifying the details of the order made by you, including as a minimum, the Services ordered and the fees due in respect of such Services, your details (such as address and contact details), the start and end date of the term of this agreement and the relevant payment terms.
- 12.5. "Payment Terms" means the terms for payment of the Fees as set out in the applicable Order Form.
- 12.6. "Term" means the duration of the Agreement, being the period of time expressed as such in the applicable Order Form, commencing on the Effective Date.

ANNEX A: Service Description

The following sets out a description of the Services which we may provide to you. For a list of those specific Services which you have purchased, please see your Order Form.

Overview

Policy in Practice was founded by Deven Ghelani to bridge the gap between policy and its implementation. As a team, we have deep policy insight into the welfare system with practical frontline experience.

Policy in Practice offers claimants and advisers a calculator that provides an assessment of benefit eligibility and an income / expenditure budgeting assessment, also known as the 'Better Off Calculator' (BOC) for both the legacy and the Universal Credit benefit systems. We also offer analytics to proactively support residents and strategic advice and consultancy to help organisations affected by changes in policy to adapt and deliver an outcome-focused service to benefit recipients.

Service offerings

1. Better Off Calculator (SaaS)
2. LIFT: Low Income Family Tracker Analytics platform (SaaS)
3. MAST: Multi Agency Safeguarding Tracker (SaaS)
4. Council Tax Reduction Scheme Modelling
5. Support and Training
6. Bespoke Customisation / Additional Development Work
7. Commissioned Research, Policy Advice, Consultancy and Retained Services

Service 1: Better Off Calculator

The Better Off Calculator accurately shows the value of available support including Universal Credit, legacy benefits, social tariffs, grants and more, to help build financial strength. It combines over 4,000 pieces of legislation to give people a clear picture of their financial circumstances and help them access over £23 billion in unclaimed support.

It is available as a hosted web based application for advisers and claimants or as an API to integrate into your current systems and processes. Basic customisation of layout and presentation is included within the service at no extra cost.

The tool is:

- **Accurate and Comprehensive:** Covering all DWP benefits (UC, legacy, contributory, PIP/DLA, Carers, Child Benefit etc), all locally administered benefits (CTR, Discounts, HB), Benefits in kind (FSM and other passported benefits), all Scottish, Welsh and NI national support, social tariffs for water, energy and telecoms, including energy efficiency and fuel vouchers, locally administered discretionary support, funeral expenses, charitable grants and other priority services. We capture changes in benefit rates and rules to ensure users are always up to date with policy.
- **Fast and easy to use:** Users benefit from one click applications, integrated assessments and pre-population of the calculator to prevent double-keying alongside Single Sign-on via your active directory. The Calculator is designed to save advisors and users time, whilst also providing live chat support from our team of policy experts.
- **Engaging and Impact focused:** Highlights the benefits of work and shows the impact of changing circumstances for users. Clients benefit from comprehensive reporting capabilities to understand the impact of their work. Integration and application processing improves take-up of support and reduces administrative burden on organisations.

Services available include:

- Self-serve calculator for customers to use to submit to advisors
- Better Off Indicator to triage users towards a full assessment
- Advisor licenses (with single sign-on)
- Integration with your CRM or customer portal
- Apply Once - application processing for your support schemes
 - Modeling of your social tariffs and support schemes
 - Verification services including a) Document upload; b) Identity verification; c) Income verification and d) Open Banking integration
- Grant Search powered by Lightning Reach enabling access to thousands of grants from organisations across the UK

We also offer a Better Off score, using your customer data (with or without PII) alongside our data analytics capability, modelling engine and policy expertise we can score your portfolio of customers on

the value and likelihood of benefit eligibility. This helps organisations to understand their customer base and engage customers through a positive interaction. Better targeting support ensures maximum impact with limited operational burden and improved customer experience. Our clients have built brand loyalty and improved the financial resilience of their customers.

Service 2: LIFT Analytics Platform

The LIFT analytics platform is an online tool that combines our analytics with local authority data to drive strategic and operational decisions in the provision of a range of welfare services. This is a fully interactive software service attained through license agreement.

1. **Impact of welfare reform:** Understand the cumulative impact of welfare reforms on each low-income household.
2. **Track your residents:** Track the changing circumstances of low-income households to check the effectiveness of interventions, policy changes and socio-economic factors.
3. **Household finances:** Understand changes in income relative to household needs and identify struggling, just managing, and in crisis households based on household incomes, spending and debt.
4. **Poverty analysis:** Identify households that are in poverty with respect to national relative and absolute poverty lines.
5. **Single view of the household:** Bringing together disparate datasets to have a single view of low-income households.

LIFT can be **integrated into the Better Off calculator**, this service allows records within LIFT to be ported to the Better Off Calculator to improve individual action and take-up of benefits without additional operational effort.

LIFT can include an **integrated communications platform** enabling you to run benefit take-up and other information campaigns directly through LIFT. This facilitates sending letters and text messages to eligible residents increasing take-up of Pension Credit, Healthy Start, Free School Meals, Social Tariffs and more.

Service 3: Multi Agency Safeguarding data matching and search tool

An online tool that receives automated daily data feeds from multiple partner organisations working collaboratively under a single data governance framework. Data is matched to form a consolidated chronology of customer interactions across partners to aid safeguarding decisions and associated processes.

- **Ingestion of daily data feeds:** automated flows of data indicating customer interactions processed into the MAST database and matched across partners
- **Search facility:** execute single criterion or combination searches allowing users to access interaction records over a 12 month period.
- **Search result:** interaction records associated with people or places surfaced including; date, organisation and officer contact details (if recorded) and graphical chronology.
- **Analysis:** Interaction records retrieved by: person, place, time period. Download facility.

- **Alerting:** Define and set alert criteria to proactively receive automatic notification when customer interactions escalate.

This service is available through a license agreement with each partner organisation, and single sign-on access is managed by an administrator within the partner organisation.

Service 4: Council Tax Reduction Scheme Modelling

This service models an agreed number of Council Tax Reduction schemes side by side based on specific priorities. Full analysis of your current and future schemes are considered in addition to advice on how you can best meet your goals and priorities to help you to shortlist your most suitable Council Tax Reduction scheme options. Full report and recommendations are provided, including in-depth analysis of the impact on specific groups. Compare proposed CTR schemes with current scheme to understand:

1. Financial costs / savings and administration cost implications
2. The impact on vulnerable groups
3. The impact of Universal Credit migration on your council tax reduction scheme costs
4. The impact on arrears and enforcement

We will deliver analysis and recommendations of current, current-updated and modelled schemes within 6-8 weeks of receipt of data.

If there is a requirement to reserve one of the modelled schemes until after some interim findings have been provided, then the final scheme must be defined within one month of delivery of the interim findings unless agreed in writing with your account manager.

Service 5: Support and Training

Policy in Practice will deliver training sessions for your team to promote use of the products and ensure you achieve the maximum impact. We are committed to helping improve financial stability so want to work with you to achieve this.

The trainer will be experienced in use of the software tool and in training delivery. Details will be specified in the order form but training can be delivered online or in person at your office. Depending on needs, training may take between 1 hour and a half day depending on the number of advisors and whether the session is in person or online. In person sessions require a training room with seating for all attendees and a working projector, working internet connection. Travel, training materials and reasonable hotel / subsistence costs for trainers will be recharged to and payable by you according to our standard payment terms, at cost price.

We will be happy to provide reasonable additional training subject to agreement of the above parameters for each additional session. We reserve the right to re-arrange the date of training or the allocated trainer if the trainer becomes unavailable for any reason, and will inform you promptly should this become necessary.

Service 6: Bespoke Customisation / Additional Development Work

Policy in Practice can develop web-based 'Software as a Service' applications to your requirements. We will invest time to understand the requirements from you to scope and cost the project. The specific details will be agreed with you and set out in the order form or in a separate quotation.

Example projects that we've successfully delivered for clients include:

- Incorporating specific application criteria into the Better Off Calculator to help administration (e.g. for social tariffs, discretionary grants or council tax support)
- Income and Expenditure form with income maximisation for debt collection
- Building affordability and alternative payment arrangement questions for housing associations
- Information-gathering form for a customer 'census'
- 'What if' tool for income protection insurance

We anticipate ~6-8 weeks to deliver the first iteration for you and your team to test. We will limit iterations to 1 round of additional feedback (beyond 'fixes' to what was previously agreed) and offer a training session to demonstrate / train teams if required.

The service description can be found in your order form, or quoted for separately. Change requests will be processed remotely and time will be billed in 20 minute increments at a standard hourly rate as detailed in your order form.

The prices quoted are for development and testing against the latest versions of Google Chrome, Safari and Edge browsers, charged at our standard rates. Testing and debugging on additional browsers will be charged at an hourly rate for additional work.

Service 7: Commissioned Research, Policy Advice, Consultancy and Retained Services

Policy in Practice was established to bridge the gap between policy development and its implementation.

We carry out Policy, Research, advisory and consulting activity for clients on a project or a retained basis.

Our work with organisations and advisors delivering services on the frontline, combined with our deep policy expertise puts us in a unique position to be able to influence policy development at the outset, based on evidence gathered from our work with clients.

Our access to administrative data on low income residents allows us to ask and answer a different set of questions and to link data on incomes to other social outcomes. Each of these projects will identify a suitable legal gateway for the work, link and anonymise data where appropriate, and agree all projects

with the data controllers, assessing each on its own merits with appropriate backing from a reputable research institution where necessary.

The exact specification of the work will be set out in an engagement letter accompanying the order form and will specify as a minimum the parameters set out below:

- Name of consultant(s) –
- Days, hours and locations of consulting –
- Outputs to be produced, with dates –
- Consulting fee –

The work may be funded by grants from trusts and foundations, or research institutes such as Nuffield or ESRC, central or local government bodies such as DWP, ONS, or GLA / LGA and all work will meet professional standards for ethics, governance and research quality.

Any travel and reasonable hotel / subsistence costs for consultants will be recharged to and payable by you within 30 days of invoice, at cost price. We reserve the right to re-arrange the dates of consulting or the allocated consultant if the consultant becomes unavailable for any reason, and will inform you promptly should this become necessary.

We may use insights gathered from our work with clients (on an anonymous basis) to inform future policy development.

ANNEX B: Metrics

Response Times

Support in relation to service 1, service 2 and service 3 will be provided in accordance with the following response times:

- A "Major Issue" leading to the software being entirely unavailable to Customer: Response within 4 hours during Business Hours.
- A "Significant Issue" leading to the functionality of the software being materially reduced: Response within 6 hours during Business Hours.
- A "Minor Issue" leading to no significant reduction in the functionality of the software: Response within 24 hours during Business Hours.

Planned Maintenance Downtime of the Services shall be scheduled outside Business Hours wherever possible and shall be notified in advance to the Customer.

Logging and Change Requests

- Minor Issues (also including any Change Requests such as, for example, amendments to labels or tooltips) or requests for a change to the Services are to be logged internally through the Customer operational owner. These change requests are to be consolidated into a single weekly email to Policy in Practice.
- A Major Issue or a Significant Issue should be logged by telephone and also confirmed via email on the day they occur by the Customer operational owner.
- Emails should be sent to helpdesk@policyinpractice.co.uk and cc: admin@policyinpractice.co.uk. Telephone numbers are Deven: 07863 560677 or the general office number: 0330 088 9242.
- Within a reasonable period of time following receipt of a report of an issue, Policy in Practice will provide a time estimate for the work to resolve such issue or implement such change.
- Change requests will be processed remotely and time will be billed in 20 minute increments at a rate of £150 per hour (ex vat).

ANNEX C: Data Processing and Data Retention policies

Clause 11.2 states with respect to our licensed services: You acknowledge that, in respect of any Personal Data (as defined in the Data Protection Act 2018), you shall act as data controller and we shall act solely as your data processor. You may require that a separate data processing agreement be signed alongside this agreement, and we would be pleased to support your internal information governance processes, e.g. a data privacy impact assessment or information security questionnaire.

Both parties agree that they will at all times comply with their respective obligations under the Data Protection Act 2018 and any subsequent amendments or superseding regulation such as the UK GDPR and any other applicable laws and regulations in the performance of this Contract.

Better Off Calculator

Our standard data retention terms cover saving, storing and holding all data entered into the calculator from the point the license agreement begins to its termination. This means that cases are retrievable for the duration of the contract unless they are deleted by a client user. When a client user chooses to delete a case(s) they will be archived (and remain retrievable) for 28 days, after which they will be permanently deleted and no longer be retrievable by client users or Policy in Practice users.

Retaining data allows users to save and retrieve records, print records, and carry out analysis on usage. We provide details of account usage available to client user accounts with manager access to download and view themselves. This would measure overall usage in terms of e.g. number of calculations per month, total number of saved calculations, and the email addresses and last login dates of all client user accounts.

Our standard data retention terms are from the beginning of the contract to within six months of the termination date. Alternative data retention policies can be agreed with your account manager and may incur a cost.

LIFT analytics platform

Our standard data retention terms involve the secure transfer of administrative data into our LIFT analytics platform.

Data transferred includes some elements classed as personally identifiable information. These are specifically the Housing Benefit Reference Number, so the record can be quickly matched back to specific households by the data controller, and dates of birth for adults and children in the household, and the postcode, to enhance the accuracy of our analytics.

The data is retained for the duration of the license agreement plus twelve months, to enable a quick return to longitudinal analysis for clients. You can amend your data retention terms to delete all of your records within six months after contract termination at no charge, simply let us know should you decide to terminate your contract. Any alternative data retention policies need to be agreed with your account manager and will incur a management overhead that will need to be costed.

MAST

The data is retained for the duration of the license agreement or three years whichever is shorter.

Our standard data retention terms are from the beginning of the contract to within twelve months of the termination date. This period will enable reasonable longitudinal analysis of trends and tracking effectiveness of interventions. Alternative data retention policies can be agreed with your account manager and may incur a cost.

Council Tax Reduction Scheme modelling

Our standard data retention terms involve the secure transfer of administrative data into our LIFT analytics platform.

Data transferred includes some elements of personally identifiable information, specifically the Housing Benefit Reference Number, so the record can be quickly matched back to specific households by the data controller, and dates of birth for adults and children in the household, and the postcode, to enhance the accuracy of our analytics.

The data may be stored within the LIFT analytics platform for duration of the license agreement, or for the purpose specified in the agreement plus twelve months, to enable a rapid movement onto the LIFT analytics platform for clients that decide to make the switch.

You can amend your data retention terms to delete all of your records within six months after the completion of the purpose at no charge. To do this you must provide written confirmation of your termination of your contract.

Any alternative data retention policies need to be agreed with your account manager and will incur a management overhead that will need to be costed.

Consultancy and Research Services

Our consultancy and research project may involve the use of administrative data for research purposes. In these instances, analysis of the data will be carried out anonymously and the results presented in aggregate.

Where consultancy and research services involve the use of linked personally identifiable information, this will be for a specified purpose as set out in the client data privacy impact assessment. The data will be linked and retained for the purpose specified in the agreement plus twelve months (to enable a rapid re-run of the analysis within twelve months, or to facilitate a move to LIFT analytics).

You can amend your data retention terms to delete all of your records within six months after the completion of the purpose at no charge, simply let us know at the outset and again at the end of your contract.

Any alternative data retention policies need to be agreed with your account manager and will incur a management overhead that will need to be costed.

ANNEX D (OPTIONAL)

Policy in Practice partnership proposal