



INDEPENDENT OPEN RESEARCHER

Contribution Playbook

A pathway for serious mitochondrial-disease contributors working outside a university, hospital, research institution, or employer-sponsored research role.

Formal affiliation is not the entry requirement. Trustworthy contribution is.

THE INVITATION

Independent scientists, developers, statisticians, retired researchers, patients and caregivers with relevant skills, citizen scientists, and other motivated people can begin with bounded work and earn greater responsibility through verified contribution.

Open participation does not mean open patient data.

Access increases only after identity verification, training, demonstrated competence, direct contracting, conflict and IP clearance, supervision, and a documented data/ethics decision.

INTERNAL AND PUBLIC-PROGRAM DRAFT

This guide is not a signed agreement, IRB determination, legal or medical advice, or a guarantee of access, payment, patents, equity, or a spinout.

ELIGIBILITY

Is the independent pathway right for you?

Use this pathway only when you participate in your personal capacity and can personally accept MDA's data, confidentiality, security, publication, conflict, IP, and closeout terms.

You may qualify when

- No university, hospital, company, laboratory, client, sponsor, or employer directs or funds the work.
- No employment, consulting, invention-assignment, confidentiality, outside-work, grant, or sponsor term gives a third party rights in the proposed work.
- You will use only approved personal or MDA resources and can assign defined Project IP.

Use the institution-sponsored pathway when

- The work overlaps your job, laboratory, appointment, client work, sponsored research, or assigned duties.
- You will use employer time, devices, staff, funds, software, data, facilities, or confidential information.
- Another party might claim inventions, software, publications, data, or commercial rights.
- You cannot confidently make MDA's independent-status and IP certifications.

Do not use this pathway to avoid an employer, university, sponsor, technology-transfer office, or IRB.

When uncertain, disclose first. MDA may require an outside-activity approval, employer waiver, IP policy, employment agreement, or counsel review.

CONTRIBUTION

Useful work can begin without sensitive data

Open track	Example deliverables
Evidence	Literature maps, source verification, endpoint or biomarker landscapes, reproduction of public analyses.
Data and methods	Public/synthetic notebooks, statistical methods, data dictionaries, phenotype mappings, quality-control tests.
Software	Code modules, visualizations, accessibility improvements, documentation, privacy or security testing.
Patient partnership	Priority-to-question translation, burden review, outcome relevance, and plain-language return materials.
Translation	Patent landscapes, technical diligence, validation plans, partner evidence packets, and founder plans after approval.

Qualification without credentialism

MDA evaluates evidence of ability, not prestige or job title. Publications, code, notebooks, technical writing, training, work samples, lived-experience expertise, an MDA skills challenge, supervised task performance, and references can all demonstrate fit.

Permissions are matched to the task. A developer may qualify for software without interpreting clinical outcomes. A patient expert may shape priorities without seeing private records. A statistician may validate methods without contacting participants.

PROGRESSION

Earn responsibility through demonstrated work

Level	Work and boundary	Requirements	Recognition/economics
0. Explorer	Public priorities and learning	Public terms	Opportunity discovery
1. Open contributor	Public/synthetic bounded task	Verified account and task rules	Contributor credit
2. Qualified contributor	Non-sensitive or aggregate supervised workspace	Identity, training, skills evidence, agreement, IP/conflict clearance	Verified record; outcome credits if scheduled
3. Independent researcher	Approved aggregate or de-identified controlled analysis	Project and ethics/privacy approval, mentor, security, reproducibility	Authorship by contribution; pool and project economics if scheduled
4. Translational researcher	Patent, validation, diligence, or development preparation	Proven record and enhanced invention/conflict review	Patent/license economics; possible Spinout Formation Right
5. Independent founder	Approved spinout under separate agreements	Board, valuation, securities/tax, license and conflict approvals	Founder equity/options and role compensation if granted

Advancement is earned, documented, and reversible. Each new data type, purpose, collaborator, tool, system, sponsor, or commercial activity requires review.

ACCOUNTABILITY

MDA contracts directly with the individual

Before controlled access or substantive inventive work, the package includes:

Document	Purpose
Independent Open Researcher Agreement	Directly binds the individual to MDA's project, confidentiality, responsibility, remedies, and closeout terms.
Project and data addenda	Fixes the question, data, workspace, security, users, output, term, and prohibited uses.
IP assignment and schedules	Assigns defined Project IP and lists Background IP, third-party materials, funding, and possible competing rights.
Independent-status certification	Discloses employment, consulting, clients, resources, outside-work, confidentiality, and invention obligations.
Publication and outcome schedules	Sets authorship, community return, credit opportunities and rules, patent/license economics, and any spinout formation right.
Training and supervision record	Names the mentor, approved systems, competence determination, access expiry, and incident contacts.

A false or incomplete IP/employment certification can suspend access, stop publication or patent activity, require corrective assignment, trigger agreed forfeiture or clawback, and end the project.

DATA AND ETHICS

Open participation, controlled information

Default boundary

- Begin with public, synthetic, non-sensitive, or aggregate information.
- De-identified controlled access is exceptional, project-specific, supervised, and remains inside an MDA-controlled environment.
- Independent access ordinarily excludes identities, contact information, raw records, recruitment decisions, unrestricted downloads, and recontact authority.

Ethics decision

The researcher cannot self-determine that work is exempt. MDA designates a qualified person or body to decide the human-subjects, consent, authorization, IRB, privacy, and other requirements. Nonexempt work uses a qualified external/independent IRB or another compliant arrangement. HHS-supported work may require an Individual Investigator Agreement or related assurance/reliance structure.

Security baseline

- MFA, named-user least privilege, expiration, logging, export review, and incident reporting.
- No shared credentials, local storage, public AI tools, unapproved cloud/notebook services, external linkage, or reidentification.
- Every output receives privacy, confidentiality, accuracy, provenance, and patent review before release.

OUTCOMES

Supply the work. Share in realized value.

The named individual researcher earns credits under one system, not a separate milestone payment plus credits. Moderate outputs target 2,250-3,450 credits (planning value \$22,500-\$34,500), strong outputs target 3,500-4,250 credits (planning value \$35,000-\$42,500), and priority outputs target 5,000-10,000 credits (planning value \$50,000-\$100,000). The dollar ranges illustrate the same credits at the current \$10-per-credit planning reference; actual value depends on an approved distribution and total eligible program credits.

Channel	Potential researcher participation
Researcher Program Pool	Non-transferable outcome participation credits that can participate in an approved program distribution when qualifying MDA portfolio proceeds are realized and legally available.
Patent and licensing	Separately documented participation in net license, royalty, milestone, sublicensing, settlement, or other realized Project IP proceeds.
Spinout Formation Right	A time-limited first opportunity for an eligible lead researcher to propose, help form, or join an approved spinout, with possible equity, options, consulting, employment, or other economics.

$$\text{Researcher payout} = \frac{\text{approved program distribution} \times \text{researcher eligible credits}}{\text{total eligible program credits}}$$

Credits have no fixed cash value and do not promise a fixed percentage. Credit opportunities and acceptance criteria are disclosed before work begins. MDA may add credits and contributors as the program grows, but should not retroactively reduce accepted credits except through a disclosed correction, lawful clawback, or resolved misconduct process. Researchers receive a credit statement and reasonable independent appeal path.

Participation vests for objective work: accepted deliverables, reproducibility, documentation, invention and patent support, publication or regulatory work, community return, translation milestones, and compliance. It never depends on a positive result.

No payout or spinout is guaranteed. Realized proceeds, deductions, vesting, board approval, legal availability, conflicts, tax reporting, and definitive agreements apply. Equity and options require separate securities and tax documentation.

QUALITY AND INTEGRITY

Good science remains independently reviewable

Each controlled project has a named MDA owner, independent scientific reviewer, bounded analysis plan, versioned dataset, acceptance criteria, reproducibility requirement, change log, and controlled export path.

A financially interested contributor cannot alone approve:

- Their analysis as validated or any participant access, contact, or eligibility decision.
- Inventorship, patent filing, license, valuation, pool calculation, payout, equity grant, or spinout transaction that benefits them.

Community standards

- Treat patients and caregivers as partners, not datasets or recruitment targets.
- Do not provide individualized diagnosis, treatment advice, trial promises, or medical claims.
- Distinguish hypothesis, exploratory signal, correlation, reproduction, validation, and peer review.
- Avoid fabrication, falsification, plagiarism, harassment, sensationalism, undisclosed AI/data use, and unapproved fundraising.
- Return useful findings in plain language, including rigorous negative or null results.

APPLY

Bring one useful question and one bounded contribution

Tell MDA:

- What mitochondrial-disease question or problem interests you.
- What you can personally deliver in the next 30-90 days.
- One relevant work sample, or your willingness to complete an MDA challenge.
- Your employment, consulting, clients, funding, outside-work, confidentiality, and IP obligations.
- The tools, collaborators, data, AI systems, or third-party materials you would use.
- Conflicts or commercial interests MDA should know about.

Start open. Demonstrate rigor. Earn trust. Share in outcomes when real portfolio value is created.

NEXT STEP

Apply at mitodiscovery.org/researchers/apply and choose Independent Open Researcher. Submission begins a fit and qualification review; it does not approve data access.

Detailed internal playbook: docs/MDA_INDEPENDENT_OPEN_RESEARCHER_PLAYBOOK.md