

Advisory Independence and Professional Boundaries Policy

How applied work relates to public research and open infrastructure

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Under Review. This first-edition record is complete for institutional review but does not become current authority until approved and published.

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1. Purpose

This policy distinguishes Sustainable Catalyst public work from advisory engagements conducted through Content Catalyst LLC. It protects client confidentiality while preserving institutional independence and honest public research.

2. Formal engagement

An advisory relationship begins only through a written agreement identifying the parties, scope, services, deliverables, schedule, fees, responsibilities, confidentiality, intellectual property, limitations, and termination terms. Visiting the site, using public tools, submitting a general inquiry, or receiving public information does not create a client or professional relationship.

3. Scope and competence

Engagements should be accepted only when the requested work is sufficiently clear, lawful, ethically supportable, and within available competence and capacity. Work requiring regulated professional authority must involve appropriately qualified professionals or be limited to nonregulated research and communication support.

4. Independence

A client may define its question and provide evidence, but it may not require Sustainable Catalyst to fabricate support, conceal material uncertainty, misstate findings, remove contrary evidence, impersonate independent review, or publish a claim as institutional endorsement.

5. Confidentiality

Client materials should be handled according to the written agreement and applicable privacy and security requirements. Confidential information should not be placed into public repositories, public AI systems, demonstrations, or the Knowledge Library without authorization.

6. Public and private records

Client deliverables and working records are private unless the agreement states otherwise. Public Foundation Documents, methods, open-source code, and pre-existing institutional materials remain separate. A client does not acquire ownership of general platform infrastructure merely because it is used during an engagement.

7. Intellectual property

Ownership and licensing of deliverables should be stated in the agreement. Pre-existing tools, methods, templates, code, and know-how remain with their existing owner unless expressly transferred. Third-party materials remain subject to their own terms.

8. Conflicts of interest

Material conflicts should be disclosed and managed. Sustainable Catalyst may decline work where independence, confidentiality, public trust, or obligations to another party cannot be protected.

9. Evidence and method

Advisory outputs should distinguish client-provided information, external sources, calculations, assumptions, interpretation, and recommendations. Methods and limitations should be documented at a level appropriate to the engagement and consequence.

10. AI-assisted work

AI may assist research, drafting, coding, analysis, or workflow, subject to the Responsible AI Standard and the engagement's confidentiality requirements. Client data should not be sent to external model providers without authorization and an appropriate data-handling basis.

11. Professional boundaries

Unless expressly agreed and appropriately qualified, advisory work does not constitute legal, financial, investment, accounting, medical, clinical, engineering certification, regulatory compliance, or fiduciary advice. Decision authority remains with the client and its qualified professionals.

12. Publication and attribution

A client's name, logo, testimonial, case study, partnership, sponsorship, or endorsement should not be published without permission. Permission to identify a client does not imply permission to disclose confidential work.

13. Public learning

General lessons from an engagement may inform future methods or tools only when confidentiality, intellectual property, privacy, security, and contractual obligations are protected. Client-specific information should not be disguised as public research through superficial anonymization.

14. Refusal and termination

Work may be refused or terminated for nonpayment, unlawful instructions, harassment, unsafe conditions, material misrepresentation, conflict, scope failure, confidentiality risk, or demands inconsistent with institutional standards. Termination should follow the agreement where possible.

15. Complaints and correction

Clients should have a clear route to report errors or concerns. Material errors in a deliverable should be evaluated and corrected according to the agreement. A correction does not guarantee a preferred outcome.

16. Relationship to public tools

Public tools and demos may be used during an engagement, but their public disclaimers remain relevant unless a written agreement provides a different responsibility. A paid engagement does not automatically convert experimental software into warranted production infrastructure.

17. Authority

This policy governs institutional boundaries but does not replace a signed agreement. Where the agreement lawfully provides more specific terms, those terms control the engagement.

Related Foundation Documents

- SC-FND-001
 - SC-FND-002
 - SC-FND-006
 - SC-FND-008
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Revision History

Version	Date	Status	Summary
1.0.0	2026-07-16	Under Review	Institutional Foundations First Edition draft prepared for review and publication.

Authority statement. This living HTML document is the proposed first-edition record within its defined scope. Fixed PDF editions preserve review snapshots. Earlier records remain available for historical reference.