

Dexterity Ventures Inc./Place2Give Data Terms of Use

This document sets out the dissemination policy for the charity and aggregated donor profiling data. It is based on the premise that providing broader access to the information in the Dexterity Ventures Inc. (DVI) and Place2Give (P2G) databases would improve external transparency, increase public awareness and contribute to the effective and strategic philanthropic decisions. It also recognizes that Place2Give.com and the data provided by DVI are practical working tools and that there are no implications as to the legal status of the information contained therein.

1. Sources of Data

- 1.1 The information contained DVI data covers publicly sourced charity sector information from Canada and the United States. Additional information that is not in the public domain has been provided exclusively on notifications by charity users and donor users. The main source of information covers: 1) Contact information for charities; 2) Financial information about charities; 3) Social media links; 4) Program descriptions; 5) Supporting documentation; 6) Board documentation.
- 1.2 The DVI data base contains Donor Giving Profiles and are not provided as individual records, but may be obtained in an aggregated format.
- 1.3 Aggregated data sources available for public consumption include: CRA, IRS, Charity Intelligence, Fraser Institute, Charity Navigator, GlobalGiving, individual charities, Millennium Development Goals, Stanford Social Innovation Review, Harvard Business Review, Twitter, Facebook, LinkedIn, YouTube, other third party evaluation platforms, traditional media outlets, and other sources yet to be defined.

2. Data Lifecycle

- 2.1 The proposed dissemination policy of the DVI and P2G data described hereafter distinguishes between "provisional" and "up-to-date" data, as well as between "restricted" and "unrestricted" data as follows:
 - 2.1.1 Data files are considered "provisional" when they have undergone processing into standard format or have been substantially revised by a philanthropic advisor or other member of the internal team;
 - 2.1.2 Data files are considered "up-to-date" quarterly after a CRA or IRS upload;
 - 2.1.3 "Restricted" data are all provisional data and the algorithms that generate the search charity-donor matching results and search results
 - 2.1.4 "Unrestricted" data is the information that is publicly available on the CRA or IRS websites and are otherwise searchable, accessible and transactional on other sites.

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3. Authorized Users

3.1 Unrestricted data:

- 3.1.1 All Place2Give.com users;
- 3.1.2 All Canadian Registered Charities
- 3.1.3 All 501c(3)

3.2 Restricted Database:

- 3.2.1 GIVE-API customers
- 3.2.2 SaaS and PaaS customers
- 3.2.3 Additional requests by other organizations for access to the restricted data are subject to approval by DVI a case by case basis

4. Conditions of use and publication

- 4.1 Authorized users can use approved DVI and P2G information freely for internal purposes and in the context of market access-related analysis.¹ All users may publish approved DVI and P2G information, or analyses derived from these databases, on the condition that:
- 4.2 DVI copyright of the original data is acknowledged;
- 4.3 Any conclusions or analyses based on the DVI and/or P2G data are accompanied by a disclaimer stating that they are the responsibility of the authors and do not necessarily represent the opinion of DVI or P2G;
- 4.4 That all published research will preserve the dignity of the organizations seeking donations represented, described or listed on the Place2Give Websites;
- 4.5 Any re-dissemination by third parties of DVI and/or P2G data based on data downloads which goes beyond the purpose of publication of analytical work must be approved by DVI prior to such re-dissemination;
- 4.6 Publication of restricted data will be outlined in a contract between the **Licensee** and DVI.

5. Dissemination policies

5.1 "Internet Dissemination"

- 5.1.1 Internet access to unrestricted data from Place2Give.com database is accorded freely to the public through a user-defined identification and password system.
- 5.1.2 Internet access to restricted data from the DVI and P2G database is accorded to authorized users through a user-identification code and password or an API generated token maintained DVI and distributed directly to the authorized users. Each authorized user has its own restricted password and it is possible to establish several user accounts for a given authorized user through a user-defined identification and password system. It is the responsibility of authorized users to ensure that the DVI and P2G dissemination policy outlined above is respected.
- 5.1.3 The DVI and P2G database information is disseminated via the following Internet facilities:²

¹ "Internal purposes" is understood to mean use within the organization.

² Restrictions may be placed on public users to prevent simple download of whole data files.
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- 5.1.3.1 Google Docs – DVI will create a Licensee specific folder that may contain both provisional and approved data. All authorized users have access to all the approved data, but only individuals approved by DVI and/or P2G may access this folder.
- 5.1.3.2 Other cloud filing solutions – A licensee may request data to be sent through another cloud service or email. This type of file transfer will be approved on a case-by-case basis by DVI.
- 5.1.3.3 The Place2Give.com/Reports, which allows users to make on-line analytical queries of the DVI and P2G database via the Internet and to extract information in different formats for further use as a PDF. All authorized users have access to all the approved data, but only approved Licensee have access to restricted data. The public has access only to the unrestricted approved data.
- 5.1.3.4 DVI allows for the ordering of customized access to restricted and unrestricted approved data from the DVI and P2G databases into spreadsheet formats for further use with other PC software. Data for several charities and for several years can be downloaded in one operation.
- 5.1.3.5 Individual donor data will not be provided.

6. Ownership

- 6.1 Licensee acknowledges and agrees that the Data and Documentation are the exclusive property of DVI and/or P2G and that, except for the License, DVI and/or P2G retains all rights, title, and interest in and to the Data and its Documentation. Licensee will not use or permit others to use the Data or Documentation for the purpose of creating, improving, or assisting in the development of software that performs functions similar to or competitive with DVI and/or P2G.