

The Better Deal for Data

Playbook

Practical data governance for the social sector.

This Playbook is for **nonprofits** and **social sector organizations** who are ready to align with the Better Deal for Data Commitments and Standard in their practices of **collecting, sharing, and using data**.

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Welcome

Better Deal for Data Playbook, September 2026

Welcome to the Better Deal for Data (BD4D) Standard and Playbook! This document contains the information you will need to understand the Better Deal for Data Standard, as well as information to help you adopt it in your organization. Let's provide a brief tour of the Standard and the Playbook.

The core of the Standard is its Declaration and seven Commitments made by an organization adopting the Standard (a "BD4D Adopter"). This captures the essence of BD4D in an accessible way that should be meaningful to the general public, and follows this Welcome. In the next section is the full text of the BD4D Standard, including an Introduction which sets its context, and the Declaration and seven Commitments with explanatory text for each.

The Playbook continues with information that is not part of the Standard but is intended to help guide BD4D Adopters. We start with Sample Use Cases, which are representative examples of data collected and used by social sector organizations, and how BD4D can support those uses. We continue with the Adoption Guide, which provides the steps most BD4D Adopters will take as they implement the Commitments. Next are Snapshots, which look at actual BD4D Adopters and their experiences, starting with Tech Matters' own Terraso project. And, we conclude with a Glossary to define how BD4D uses certain terminology.

As founder of Tech Matters, I want to particularly thank the small but mighty team that made the Better Deal for Data come into being, especially:

- M Celine Takatsuno
- Dr. Katy McKinney-Bock
- Courtney Tiberio
- Derek Caelin
- Amaya Webster
- Steve Francis

Let's work together to spark a responsible data movement!

Jim Fruchterman, Founder and CEO, Tech Matters

The Better Deal for Data Declaration and Commitments

Declaration. We make the following commitments to *You*, all of the individuals or organizations that we serve and whose data we touch. We make these commitments to You about *Your Data*, nonpublic information related to You which we collect, analyze, store, and/or share.

1. **Purpose.** We are using Your Data to benefit You, your community, humanity, and the planet, not for private gain or profit.
2. **Ownership.** We don't claim ownership of Your Data.
3. **Control.** We will delete Your Data, correct it, or transfer it to You if You ask.
4. **Monetization.** We will not sell or share nonpublic information about You ("Your Data") in exchange for compensation from third parties..
5. **Protection.** We will steward Your Data with care, and comply with applicable data privacy laws.
6. **Research.** If we or a trusted partner do research based on Your Data, we will follow best practices around the anonymization of personal data, and published research papers or reports will be made available to You for free.
7. **Binding.** We will be legally bound by these Commitments, and anyone we share Your Data with will be similarly bound.

The BD4D Standard

Introduction

The Better Deal for Data (BD4D) is a lightweight data governance standard for the social sector. It offers a practical alternative to the norm of collecting extensive data on individuals and organizations and often using that data against their interests. In adopting the BD4D, and publicly declaring that they will uphold its seven Commitments, organizations will demonstrate that their data practices are trustworthy.

At the core of the BD4D is its Declaration and seven Commitments. These are plain language statements about an organization's use of data. The Commitments are supported with explanatory text that details when the Commitments apply and don't apply, and what an organization needs to do to comply with each. The Declaration, Commitments, and explanatory text make up the BD4D Standard.

Trust is key to the Better Deal for Data. The BD4D is not formulaic legal language, although adopting organizations are expected to be legally bound to the commitments they are making. BD4D is not a technical standard, with extensive specifications on what is and is not permitted in data handling. It is a trust standard, defined by a set of principles that the great majority of nonprofit leaders would find reasonable and consistent with their nonprofit mission.

We believe that the concept of “no surprises” is essential to trust: that the individuals and communities served by an organization should never be surprised by its actions when it comes to data. Thus, a BD4D Adopter should provide information about its data handling in a spirit of honest transparency. Its community should find that the organization's use of their data is clearly consistent with its social mission. Organizations looking for a loophole, or to do the bare minimum on data responsibility, are not good candidates for BD4D adoption.

We encourage organizations to see the BD4D Commitments as a floor, a set of minimum requirements that could and should be exceeded, and never as a ceiling that limits their commitment to ethical data practices. Organizations in many fields and jurisdictions will have more stringent practices or requirements placed on their data activities, and we see complying with such as being wholly consistent with the BD4D.

The initial three years of our user research and outreach efforts focused on nonprofits, and our version 1.1 release reflects community feedback from social sector organizations

adopting version 1.0 of the Standard. While the BD4D Standard is not currently designed with government agencies or for-profit businesses in mind, we certainly would not discourage them from adopting these principles. In the future, we may expand its scope for these and other entities.

We offer the BD4D Standard to the social sector in a spirit of co-creation. We hope it fills a major gap in data governance norms for nonprofits, helping establish practical and reasonable data use policies for the field. And, as additional organizations adopt BD4D, we look ahead to learning even more on what could be improved to make it better fit for purpose.

Declaration

We make the following commitments to “You,” all of the individuals or organizations that we serve and whose data we touch. We make these commitments to You about “Your Data,” nonpublic information related to You which we collect, analyze, store, and/or share.

What this means in practice.

In adopting the BD4D Standard, an organization makes and upholds a set of promises to all the people and communities it serves, and specifically to those whose data it collects, uses, and shares.

Defining the parties and the data.

- “We” is defined as the organization that has adopted Better Deal for Data (the “BD4D Adopter”). This may be an organization that collects data directly, an organization that stores data, an organization that analyzes or processes data, or an organization that uses data to create additional products such as datasets, reports, or AI models based on the data. A single organization may engage in one or more of these activities, and several organizations might touch the same raw or processed data. Data is often processed in sequence by multiple entities, and the BD4D Adopter may be touching data considerably downstream from the original data collector.
- “You” is defined as the people and organizations served by the BD4D Adopter organization, and whose data is being collected, analyzed, stored, and/or shared. These people and organizations have a right to be concerned about how data

about them is used. Multiple people and organizations might be considered “You” with respect to the same data.

- For example, if a BD4D Adopter works with a community partner to collect data about individuals in their community, “You” would include both the partner and the individuals in their community.
- “Your Data” is defined as data and information where “You” would have an expectation that the data would not be made public. This includes data which is collected from, and about, individuals. In short, any nonpublic information that could be reasonably linked to an individual or their household is part of “Your Data.”
 - Examples include personal and sensitive data such as name and address, employment, financial, or medical information, identifiers such as a driver’s license or passport, geographic location, property records, physical characteristics, biometrics, behavioral data, the content of communications, and more.
 - Your Data does not include aggregated data or processed data where identifiable details about You cannot be extracted.

In addition, the data of organizations, such as information about their internal operations, or their employees, customers, beneficiaries, users, or other constituents would also be part of “Your Data,” unless it was collected or shared with the expectation that the data would be made public.

What a BD4D Adopter needs to do.

In making these Commitments, an organization must ensure that its operations and data practices fulfill the requirements of the BD4D Standard, particularly with respect to its handling of the data of individuals, groups of individuals, and organizations, referred to in the Commitments as “You.”

- It must ensure that its consultants, subcontractors, and vendors meet applicable requirements of the Standard.
- It must respect any additional commitments made to data subjects and stakeholders regarding further restrictions on data access, publication, or sharing.

When does this Declaration apply?

This Declaration applies to all data-related activities of a BD4D Adopter for nonpublic data which meets the definition of “Your Data” above. This includes data collected, stored, or shared in analog or digital forms. The Commitments apply equally to paper and printed data, locally saved documents and spreadsheets, and large datasets stored with a cloud

service. This Declaration also applies to human and machine data processing that is not specific to collection, analysis, storage, and/or sharing.

When does this Declaration not apply?

This Declaration does not apply to data that cannot be directly associated or linked to an individual, organization, or community.

“Your Data” does not include:

- Processed or downstream data which is no longer linked to an individual or community.
- Datasets or reports that effectively anonymize the data, such as a nonprofit impact statement (“we served more than one million hot meals in 2025”), or a research report (“a transition to no-till farming practices resulted in an average fertilizer expense reduction of 22%”).
- Data collected with the expectation that it would not be kept as confidential, such as information being gathered for a public directory, as long as that expectation was explicitly communicated and agreed to by the data stakeholders who meet the definition of “You.”
- Data which was collected with the explicit intent of making it open, as long as that intent was fully communicated to data stakeholders who meet the definition of “You.”
- Responsibly sourced data which has been made open or publicly available through the deliberate action of the associated data subjects, including public government data or records.
- Collections of de-identified data which are only made available to third parties who agree to not re-identify the underlying data.
- AI models (including weights) built on top of, or trained on, data, as long as the original data cannot be extracted from such a model.
- Nonpublic data that is held or processed, but not otherwise controlled or used, by a BD4D Adopter solely as part of a product or service they provide to another entity.
- Data about third parties who are not providing data directly to, nor are served directly by, the BD4D Adopter or its partners, where the purpose of this data collection would be to support the interests of the communities served, and not the third parties.
 - For example, a human rights organization that serves victims and witnesses, and collects information from them about human rights abusers, does not need to make the BD4D Commitments to the abusers about their data provided by the affected communities.

1. Purpose

We are using Your Data to benefit You, Your community, humanity, and the planet, not for private gain or profit.

What this means in practice.

The Better Deal for Data starts with the good intent of the organizations that adopt the BD4D Commitments. These adopters back up this good intent with their actions, using data to support and improve the welfare of the individuals and communities they serve, rather than to create commercial value to enrich themselves. No one should be surprised about the data practices of a BD4D Adopter, especially not stakeholders who meet the definition of “You” in the BD4D Declaration.

What a BD4D Adopter needs to do.

- A BD4D Adopter must consider the people it serves, and collects data from, to ensure that its data activities clearly align with the community’s best interests, and that the benefits of the organization’s work actually flow back to those individuals or communities.
- It must engage its community to understand members’ expectations, ideas, and concerns about data collection, use, and sharing, aligning its activities accordingly. Its community should not be surprised by the organization’s data practices or activities.
- It must balance the potential for social benefit with the risk of human exploitation or harm resulting from its data practices when making decisions about data use.
- It must communicate sufficiently to all its stakeholders about how, and why, collected data will be used, shared, and stored. This often includes transparent disclosure about the organization’s data uses and data management practices, and the partners, vendors, and others who may also access that data.
- It must provide channels for its community to communicate directly with the organization about the organization’s activities or data practices.
- A BD4D Adopter must be consistent: it cannot publicly declare its intent to abide by the Commitments, and then make material exceptions to those Commitments, whether explicitly in practice, in its terms and conditions, or in separate policy statements.

When does this Commitment apply?

- Data use is contextual: what is appropriate for one organization might be entirely inappropriate for another. There are, however, some common practices that are generally acceptable or unacceptable for a BD4D Adopter.

- For example, analyzing data about how people interact with a service in order to improve a program's benefit, or sharing aggregated and anonymized data for funder or regulatory reporting, would both be acceptable.
 - Conversely, selling or trading a list with the names and phone numbers of program clients or donors, even if the list is being sold or traded to an aligned nonprofit organization, is not acceptable.
- Private gain or profit in the context of this Commitment pertains to for-profit activities, or the active selling or trading of nonpublic data that meets the definition of "Your Data."

When does this Commitment not apply?

- This Commitment does not apply to an organization's use of public government, open, or responsibly sourced commercially available data or information.
 - For example, a public interest organization compiling public data and offering it for a fee does not contradict this Commitment.
- This Commitment does not apply when an organization generates revenue through programs that include, or are informed by, aggregated data, as long as that earned income is then used to support the organization's programs, for the benefit of the organization's community, or for greater social good.

2. Ownership

We don't claim ownership of Your Data.

What this means in practice.

- When an organization collects data from individuals or communities under the Better Deal, that organization does not assume legal ownership of the raw data provided by those individuals or communities.
- This also means that the individual or community that provided the data may also use their own data for any other purpose, including contributing it to a commons, making it open, or monetizing it if they have a way to do so.

What a BD4D Adopter needs to do.

Organizations adopting the Better Deal for Data should not assert an ownership interest in data that meets the definition of "Your Data," in contrast with the practices of many for-profit companies.

When does this Commitment apply?

This Commitment applies to any data that would qualify as Your Data under the Declaration, even if the individual or community providing the data was compensated for their time or participation.

When does this Commitment not apply?

- A BD4D Adopter may transform collected data through aggregation, anonymization, or other means, so that individuals or communities can no longer be reasonably identified or linked to the new dataset. This “processed data” may be used in many different ways, from creating new programs, reporting, or research, to informing policymakers, or being shared with other organizations that similarly align with the BD4D Commitments.
- Processed data, and any products or services that are derived from it, are owned by the organization that created them. However, this processing does not remove the obligations of the Purpose and Research commitments.

3. Control

We will delete Your Data, correct it, or transfer it to You if You ask.

What this means in practice.

Individuals or communities whose data is being collected, stored, used, and/or shared by an organization adopting the BD4D Commitments must also have the ability to request that their data be deleted, corrected, or provided to them.

What a BD4D Adopter needs to do.

- The organization must have a way for someone to submit such a request (often referred to as a “Data Subject Request”), if it holds data meeting the definition of “Your Data.” This may be via a general, regularly monitored email account, or it may be part of a larger, more complex compliance and fulfillment system.
- When a request is received, the organization must acknowledge it and respond in a reasonable timeframe. If an organization has the data described in the Data Subject Request, it should verify the identity and authority of the individual (or organization) making the request; however, care must be taken to minimize the amount of personal information needed to do so.

- Internally, there must also be a process in place with which to identify the requested data and all its locations, and then to remove, edit, or provide it securely to the data subject in a usable digital format, all at no cost to the requestor.

When does this Commitment apply?

- This Commitment applies both to data that was initially collected or originated by the BD4D Adopter, and to data that the organization received from others that meets the definition of “Your Data.” If this data was received from others, the adopting organization should generally forward the request to the original data collector, regardless of whether they have also adopted the Commitments.
- Likewise, if Your Data has been shared by a BD4D Adopter to others, then the adopting organization should pass the request to the data recipients for appropriate correction or deletion.

When does this Commitment not apply?

- In all cases, the BD4D Adopter must respond to the request. However, there are some cases where the request itself may not be fulfilled, as noted below.
- If an organization does not save the data it collects, or no longer has access to it in a form where it can be identified for deletion, correction, or transfer, then any requests to do so cannot be fulfilled.
- Some organizations, especially in regulated fields like finance or healthcare, may be subject to data retention or records laws which require them to retain copies of the data for a certain amount of time. In this case, the organization must still respond to the requestor, explaining any such limitations.
- Data may have been made public, with the explicit permission of the data subject, or been aggregated as part of a larger dataset, such as those used for research or reporting. In these cases, a request to delete or correct the data will only affect any future updates or uses of that data in its original and identifiable form, not any existing aggregation, anonymized dataset, or publication.

4. Monetization

We will not sell or share nonpublic information about You (“Your Data”) in exchange for compensation from third parties

What this means in practice.

The first of the BD4D Commitments speaks to their Purpose: that data will be used for

good and not for profit. This Commitment expands on the monetary element of that Commitment.

What a BD4D Adopter needs to do.

- A BD4D Adopter must not actively sell any data it has collected that qualifies as Your Data, or that can be reasonably linked directly to the individuals or communities it serves.
- An organization must consider its data sharing practices to ensure that it does not make such data available as part of partnerships or transactions involving financial, in-kind, or quid pro quo consideration.
- If a BD4D Adopter shares aggregated or de-identified data for economic gain, it must clearly communicate that it does so to those whose data is involved.
 - For example, a BD4D Adopter operating a subscription-based data exchange platform which includes de-identified data subject to the BD4D Commitments must ensure that it has communicated such use to those whose underlying data (“Your Data”) is included in the platform. It must also ensure that its subscribers and partners have agreed (a) not to re-identify the data, and (b) to the applicable BD4D requirements, such as those set forth in the Binding commitment.

When does this Commitment apply?

This Monetization commitment applies whenever an organization that has adopted the BD4D Commitments actively exchanges or shares Your Data, or makes it available to others who may directly profit from it.

- Sharing raw data about an organization’s beneficiaries in exchange for compensation or economic gain is not acceptable under this Commitment, even if those funds are intended to support the organization’s services. For example, sharing the personal contact or case information about a group of clients to a company that markets related services to those clients is not acceptable.
- Similarly, receiving payment or discounts for providing donor lists or email addresses to a company that specializes in lead generation is not acceptable under the Better Deal, nor is providing those lists in exchange for access to funder leads from that same company.
- Marketing partnerships that depend upon a third party placing a web beacon on an organization’s website specifically in order for that third party to track and monetize individual visitors’ behavior are not acceptable under this Commitment. Cases where the organization earns revenue based on purchase behavior of the people and organizations it serves, such as clicking a third-party link on the organization’s blog to buy a product the blog recommended, are allowable only if such links are clearly marked as compensated.

Data subject to the BD4D Commitments should not be treated as a data asset if an organization shuts down, receives investment funds, or enters into a joint venture, merger, or acquisition. While in some cases this may be legally mandated, a BD4D Adopter must make best efforts to notify those whose data is affected, and provide them adequate opportunity to delete their data prior to this type of transaction.

When does this Commitment not apply?

- All organizations require funding to operate. For many, this requires grant proposals, impact reporting, and third-party audits, many of which contain data about programs, beneficiaries, staff, or donors. Thus, this Commitment does not apply to anonymized, aggregated, or other processed data provided in order to receive funding, or fulfill grant requirements—as long as the data cannot be linked to a specific individual.
 - For example, reporting that “our programs delivered services to 25,000 children last year,” or “more than 100 donors contributed nearly \$1MM during our general campaign,” are acceptable under this Commitment.
- This Commitment does not apply when an individual, organization, or community voluntarily chooses to share their own data for their own benefit, including economic rewards.
 - For example, a rancher might elect to share information about their rangeland, herd movement, forage, and grazing patterns in exchange for payment to them or their community, or to receive services using that data. In general, the BD4D supports data sharing that economically benefits parties meeting the definition of “You,” where the party in question is actively choosing to share such data.
 - Furthermore, an organization that facilitates such an exchange may retain a reasonable fee to defray their costs of providing this assistance or service, as long as its primary objective is to benefit the individual or community and not private enrichment or profit.
- This Commitment does not apply to datasets which include data about individuals or organizations that is publicly available and responsibly sourced.

5. Protection

We will steward Your Data with care, and comply with applicable data privacy laws.

What this means in practice.

Adopters of the BD4D Commitments have a duty of care to be diligent, with the resources they have, to adhere to best practices and legal requirements for data privacy, protection, and security.

What a BD4D Adopter needs to do.

- An organization that has adopted the BD4D Commitments must establish reasonable administrative, physical, and technical safeguards so that data covered under BD4D is kept securely, and cannot be accessed by unauthorized parties.
 - For example, emailing an unprotected spreadsheet of donor, client, or employee records puts that data at risk of exposure, and would not be acceptable. Sharing that data via a link to secure document storage, with access limited to authorized users, would be.
- The organization must follow best practices for data minimization and retention, collecting only what data it needs for its stated purposes, and retaining it either (a) only as long as is necessary for the organization's intended work, or (b) as long as required by applicable law.
- All staff, advisors, and volunteers who can access Your Data must be trained in proper data handling procedures, including confidentiality and security.
- If a data or security breach results in unauthorized disclosure of sensitive data, affected data stakeholders should be notified as soon as reasonably possible or as required by law.
- Depending where an organization operates, and who its data stakeholders are, it may be subject to one, or many, (sometimes conflicting) regulations with regard to data privacy and protection. It is the responsibility of the organization adopting BD4D to be aware of the laws that apply to it, and to take steps to protect all of its clients or users equally.

When does this Commitment apply?

- This Commitment applies to data in both analog (e.g. paper) and digital forms.
- It applies to data in use, meaning data being actively worked with, in transit, meaning data which is being moved or transmitted, and at rest, meaning data which is being stored in a cabinet, on a device, or in the cloud.

- When using online tools, including AI, data storage, records management, email services, or social media, an organization must maintain the same level of confidentiality as it would offline.
 - For example, the organization must ensure that its staff do not include confidential or personally identifiable information in insecure channels, such as posting such information on social media without permission, or inserting such data into a chatbot or generative AI prompt, where such confidential data is likely to be retained by the vendor, or worse, used to train commercial AI products.

When does this Commitment not apply?

This Commitment does not apply to data which is already public information, such as in a government publication, or to data which has been made open with the express consent of its data subjects.

6. Research

If we or a trusted partner do research based on Your Data, we will follow best practices around the anonymization of personal data, and published research papers or reports will be made available to You for free.

What this means in practice.

This Commitment means that researchers conducting primary research on behalf of, or together with, an organization adopting BD4D must take appropriate technical safeguards to protect any nonpublic data relating to individuals, and that those individuals or communities whose data is studied can access published work that is based on their data at no cost.

What a BD4D Adopter needs to do.

- Researchers associated with an organization that has adopted the BD4D Commitments must follow then-current accepted best practices for anonymization and de-identification of any nonpublic or other data related to an individual person which is used in its research.
- Organizations should consider which data is actually required, and how different data practices may affect risk.
 - For example, collecting location data may not need to be precise, as it can often be linked to an individual person. Similarly, the practice of data

aggregation requires well-populated categories to be effective, because even with aggregate data there is a risk of re-identification.

- BD4D Adopters who are collaborating with external research affiliates or partners must ensure that those “trusted partners” have either (a) adopted the BD4D Commitments themselves, or (b) have agreed to similar terms under a formal agreement governing data sharing, in accordance with the BD4D Binding commitment. These may include other nonprofit organizations, academic institutions, think tanks, and for-profit companies.
- Release of anonymized data is not allowed if there is any possibility of re-identification (which is often the case with detailed data). If there is such a risk, such data must not be released publicly, and any third party given access to such data must agree to not attempt to re-identify the data subjects.
- The free access requirement can be met by open access publication, or sharing on a public website, as long as the resulting publication can easily be found by data subjects. Otherwise, organizations must provide research subjects with a channel to directly request published papers or reports.
- In general, a BD4D Adopter should be transparent with its data stakeholders about the research it conducts based on their nonpublic data, and why this research is beneficial to its community or society at large.

When does this Commitment apply?

- This Commitment applies to publications or reports that are published externally, or shared openly with third parties, by a BD4D Adopter. It does not require a BD4D Adopter to generate new reports or publications.
- It also applies to research conducted by an affiliate, partner, or recipient of data from a BD4D Adopter, if that research is carried out using data that is subject to the BD4D Commitments.

When does this Commitment not apply?

- In the case of research that is being conducted by a BD4D Adopter under Institutional Review Board (IRB) oversight, the research data practices required in this Commitment would not apply if the IRB requirements conflict with those contained in the Better Deal for Data. In this case, all other BD4D Commitments still apply, and the research organization must still make published research papers or reports available to those whose data was used in the study.
- This Commitment does not apply to research that is conducted only for internal usage (such as internal program improvement or impact measurement), or that is only shared confidentially with external program evaluation consultants or auditors.

- This Commitment does not apply to research conducted solely with public data, secondary sources, or other data that is not subject to the BD4D Commitments. For example, a research study or review article analyzing or interpreting others' existing research on a topic, which does not include primary research sources under BD4D, would not be subject to this Commitment.

7. Binding

We will be legally bound by these Commitments, and anyone we share Your Data with will be similarly bound.

What this means in practice.

In adopting the Better Deal for Data, an organization is making a binding promise that it will follow these Commitments with respect to its own data practices, and that it will require organizations with whom it directly shares Your Data to follow comparable data policies and practices, or agree to the BD4D Commitments. This promise may be legally enforceable in many regions.

What a BD4D Adopter needs to do.

- A BD4D Adopter must display, post, or link to the BD4D Commitments where they can be easily viewed by its staff and anyone whose data the organization collects, uses, or shares.
 - For example, the Commitments may be published on a page on the organization's website, incorporated into its data use or sharing agreements or policies, referenced in legal terms of service or privacy policies, and/or placed directly into an app or tool operated by the BD4D Adopter.
- Organizations that share Your Data, as allowed under the Commitments, must make reasonable best efforts to ensure that the recipients of this shared data have committed to data practices that are consistent with the Better Deal for Data, or are BD4D Adopters themselves.
- If an organization ends its adoption of the Better Deal for Data, it must notify affected data stakeholders, and provide adequate time for them to request data deletion. Data collected, used, or shared prior to such notice shall continue to be subject to the BD4D Commitments.
- This Commitment does not require a BD4D Adopter to create any new legal agreements.

When does this Commitment apply?

- This Commitment applies to all organizations that adopt the Better Deal for Data.
- In some cases, a BD4D Adopter may be providing or sharing Your Data with auditors, attorneys, or others who have a legal duty to keep such data confidential and secure.

When does this Commitment not apply?

- This Commitment does not apply to the extent it conflicts with, or is legally superseded by, law or government regulations or requirements which apply to a BD4D Adopter.

Generally, in order to avoid negative surprises to affected data stakeholders, a BD4D Adopter should be transparent about any exceptions based on legal compliance. For the avoidance of doubt, organizations adopting the BD4D Standard should consult their own counsel for specific legal guidance.

Sample Use Cases

Certification Data

Many organizations collect and use Your Data in order to gain a certification, qualify for a permit or special designation, or support an audit. This example highlights an agricultural data use case that parallels similar efforts in other sectors.

What do we want to do?

We want to help agricultural producers—farmers and ranchers—collect, organize, and present the necessary information to obtain certifications that can enhance their income, and permits which allow ongoing operation.

Who are the data stakeholders?

- We, the primary data collectors, are agricultural cooperatives, extension agents, local businesses, and nonprofits that advise and support these producers.
- The primary data collectors may also be organizations that provide infrastructure to hold data, and services to complete the forms and reports required for agricultural certifications and licensing.
- The data is collected from the producers and coops, employees and workers, as well as their advisors and agents.
- Downstream users of the data may include the certifying or licensing agencies and organizations, supply chain intermediaries, or consumers. Regulators and policymakers considering standards and adoption levels, and researchers seeking to understand practices and outcomes, may also use this data.

What types of data do we use?

- We mainly collect and use agricultural data, including inputs such as seed, fertilizer, or water, and practices, such as tillage, planting, weed and pest eradication, harvesting, or herd movement.
- Data may also include data about workers, and financial data related to farm or ranch business and operations.
- Data may be collected verbally in an interview, gathered manually via pen and paper, captured in a mobile application, or submitted online.

What benefits, challenges, or risks do we encounter?

- This data provides documentation that is necessary to maintain operational licenses, and may provide beneficial opportunities for government incentives and market premiums.
- Agricultural data can be challenging to capture. It can be time-consuming to gather, and its benefits may be uncertain or take a long time to be realized. Producers often lack the time or resources needed to provide the data, and may distrust the certification systems themselves.
- The data can hold risk for both producers and their workers. Data may be used against them if it is inconsistent, to target them by competitors or corporate interests, or it can create future liabilities, such as if a fertilizer that was considered best practice at the time of application is later determined to be damaging or even dangerous.

Is this use case appropriate for BD4D?

- Yes. Collectors and producers alike should be able to trust that collected data will be used only for its intended purpose: for the primary benefit of the producers.
- Uses such as contributing to research efforts or policymaking can similarly advance the interests and opportunities of producers. Adopting BD4D provides a path to evaluate an organization's data practices and stewardship, especially where sensitive data is involved.
- Adopting the BD4D Standard changes the status quo. Without it, data gathered for this use case may include Your Data that is not required for certification, might be used for other purposes, or might be shared or stored beyond a reasonable time period—all without the data stakeholders' knowledge or ability to request deletion or transfer.

Impact Data

Most philanthropic institutions will request information based on Your Data from those who request or receive their funds. This example can be applied more broadly across the social sector, to any institution that manages a nonprofit portfolio.

What do we want to do?

We, funders of nonprofits, want to collect data from our current and potential grantees to learn about the impact of our funding.

Who are the data stakeholders?

- The primary data collector is an individual donor or foundation that provides funding to a nonprofit organization.
- The data is collected directly from organizations that have received grants or other philanthropic funding from such a donor or foundation.
- Secondary data stakeholders may include the individuals and communities the recipient nonprofit serves, as this data may include information that the nonprofit has collected from or about them.
- Downstream data stakeholders may include monitoring and evaluation consultants, peer foundations, policymakers, press, researchers, or others who use this data in their work.

What types of data do we use?

- Data is generally collected from funding applications, proposals, and budgets, as well as periodic financial or narrative reports.
- Data might include overall program metrics or impact statistics, such as the number of individuals served in a given year, or the percent decrease in a beneficiary community's need.
- Data may also be more granular, such as demographic or population data about those being served, e.g. age, ethnicity, gender, geography, health, housing, or status.
- Data is generally anonymized, however in some contexts individual beneficiary information may be shared. For example, a nonprofit might share the names of, and schools attended by, its scholarship recipients.

What benefits, challenges, or risks do we encounter?

- This data is used to improve and inform grantmaking and the broader field, help measure progress against portfolio objectives, manage program resources, and ensure compliance with ethical and legal obligations, for example, verification that a grant was used for legitimate charitable purposes or completing government mandated reporting.
- Grantees, and the larger philanthropic sector, benefit from measurable objectives, shared milestones, and quantifiable reporting,
- Challenges stem from the high stakes nature of fundraising, especially for large grants, which create some incentive to bend the data to increase the odds of renewed funding.
- While detailed data about individual beneficiaries should not be requested by donors, there is a risk that even aggregate data that is collected to provide impact statistics may endanger the community a grantee serves, for example, sharing

data about how many people receive addiction or immigration services in a given location.

Is this use case appropriate for BD4D?

- Yes. Individuals and institutions who provide philanthropic funding to nonprofit organizations are increasingly reliant on data to guide and gauge their giving. Aligning with BD4D for their own data practices assures strong stewardship and trustworthiness.
- BD4D adoption can also be a reasonable requirement for a funder's grantees, providing a common, trusted standard for data collection, sharing, and use across organizations.
- Adopting the BD4D Standard changes the status quo. Aligning with the BD4D Commitments ensures that philanthropies' own data practices do not place their grantees, or the communities their grantees serve, at risk by sharing more data than is necessary in order to fulfill impact data requirements.

Sensitive Data

Many nonprofit organizations work with highly sensitive data from and about individuals, especially those organizations providing direct services or supporting people in crisis. Child helplines provided one of the original inspirations for the Better Deal for Data, and exemplify this complex sensitive data use case.

What do we want to do?

- Collect data via our helpline about children who need assistance.
- Use the data to provide counseling services, and referrals for resources, to the person seeking help.
- Record the most significant problems using a case management system so that we can follow up with stakeholders, including the child who reached out, families, service providers, law enforcement, or government social services.
- Support our internal staff and volunteer teams.
- Analyze the data to improve our programs, report to donors, do research on the problems faced by children, and aggregate the data to advocate for funding and policy change.
- We want to ensure that children, and their data, are protected from harms and exploitation.

Who are the data stakeholders?

- We, the primary data collectors, are the nonprofit organization or government agency that operates a child helpline.
- The data is collected directly from children themselves, or from other children and adults who contact us about a child who needs help. For example, this might be a neighbor who has observed a child being abused, or knows a child is working instead of being in school.
- Downstream users of the data may include first responders, social service agencies, researchers trying to understand child abuse, or sector-wide membership associations.
- Consumers of aggregated data reports include funders, policymakers, journalists, and others in the field of child protection.

What types of data do we use?

- Collected data generally includes telecommunications metadata such as phone number, IP address, length and number of calls or texts, and call recordings or text conversations and transcripts.
- A counselor will collect demographic data such as name, city, age, or gender identity, issue data, including the issue raised in a call (e.g. mental health, stress, or violence), and they will log the referrals provided. They may also include a summary of the conversation, and next steps for the case.
- Note: while this is a representative use case, some helplines operate anonymously and go to great lengths to not collect personally identifiable data.

What benefits, challenges, or risks do we encounter?

- The benefits of using this data are all about increasing the impact of child helplines: delivering better services, serving more kids per staff member, improving staff performance, growing funding, and becoming stronger advocates for children.
- The challenges mainly result from a lack of funding, such as too few resources or services to refer to children who need them, or the inability to fully leverage the data for children's benefit.
- Collected data creates risk because many of the issues faced by children are highly sensitive, and children have concerns about the impact of reporting certain incidents, for example, being taken away from their parents in the case of child abuse. In addition, data about child survivors of sexual assault is especially sought after by pedophiles.

Is this use case appropriate for BD4D?

- Yes. Child helplines hold highly sensitive information about children. They have the responsibility to protect that data, use it to benefit the children, and keep them safe from further harms.
- Adopting the BD4D Standard changes the status quo. Organizations that work with highly sensitive data, such as the child helplines presented in this example, can mitigate risks to their already at-risk beneficiaries that could arise when collecting and using Your Data. For example, encrypting and limiting access to sensitive data as required by the Standard is critical for child helplines. In communicating that their data practices align to the BD4D Commitments, these organizations may increase the trust placed in them by their community.

Adoption Guide

Readiness

Is your organization ready to adopt the Better Deal for Data? Before you adopt the BD4D Standard, it's critical to understand the role of Your Data in your organization. These questions will guide you through key considerations.

1. Read through the BD4D Commitments and their explanatory text.

- Is your organization aligned in mission and principle with Better Deal for Data?
- Is data used primarily for social benefit, or are there other factors?
- Can your data practices be transparent enough to ensure that there are no surprises to the individuals and communities you serve?

2. Review your data practices.

- What types of data do you collect? Many organizations collect similar general categories of data, such as:
 - case or client management
 - demographic
 - financial
 - lived experience, or social determinant factors
 - personally identifiable information
 - program activities, usage, impacts, indicators, outcomes, or performance
 - workforce or volunteer management
- Is data that qualifies as Your Data under the BD4D Standard collected directly from the individuals or communities you serve? Is information gathered about them from other sources?
- How is that data administered? Who accesses, manages, or uses it?
- Is any of that data shared externally, or processed by third-party vendors? How?

3. Consider your data stakeholders.

- Do the individuals and communities you serve know how you analyze, use, and share their data? Have they given implicit or explicit permission for you to do so?
- Who is directly, or indirectly, affected or impacted by your data practices?
- How do you communicate with these “data stakeholders”? Have you engaged those whose data you collect to understand their concerns, sensitivities, and perceived risks about your use of their data?

4. Evaluate your data policies.

- Do you have a data privacy policy? Do you have data use agreements with your partners and vendors? If not, is it feasible for you to do so?
- Are your staff, volunteers, advisors, board members, and contractors aware of your data policies? Are they bound by confidentiality or non-disclosure agreements?
- What local, regional (e.g. state or provincial), national, or international data protection and privacy laws or regulations apply to your organization?

Implementation

Once you have a strong understanding of how Your Data works in your organization, you're ready to start aligning your specific practices to the BD4D Standard. These steps will guide you through key areas of focus, and provide recommended actions to implement the Standard.

BD4D offers a practical approach to data governance that can be adapted across many nonprofit contexts. Depending on your organization's size, sector, and scale of data operations, this may be a simple or complex task. This section recommends a general series of steps that may not apply in every context; adopting BD4D does not require taking these actions or setting new processes to fulfill them if they do not apply in your particular context. For example, if your Data & IT review shows that your organization does not share Your Data with any third parties, you would only need to communicate that fact to your data stakeholders.

In all contexts, adopting Better Deal for Data consists of more than just completing a one-time implementation checklist. It requires a continuous process of data stewardship across the organization, and engagement with the individuals and communities you serve. Your clients, funding, programs, technology, and your external environment are all likely to change over time, affecting your use of data.

Organizational

The BD4D Standard is designed to be adaptable, and implementation may look much different for a small community nonprofit than it will in a large global NGO. In a smaller organization, the Executive Director and a volunteer may be managing the entire process, while in a larger organization, a data manager may be leading a cross-departmental team in a year-long data governance initiative.

This section outlines the general areas of organizational accountability, common roles, and initial tasks to support most BD4D Adopters. Note that in some organizations, one person might fill multiple roles; what's important is that all of an organization's functions are represented and engaged in the process.

Leadership

In any organization, successfully adopting BD4D requires strong leadership, ideally:

- An executive sponsor who can lead organizational accountability, and will ensure that the entire organization, including the board, is strategically aligned around the principles the Commitments represent.
- A “champion” who will drive adoption and awareness, often bridging an organization's data culture, strategic priorities, and tactical processes.
- A project lead who will coordinate activities, teams, and timelines, managing planning and execution.

Administration & Operations

A critical step in adopting BD4D is to understand what data exists in your organization. Often, this involves working with administrative, program, operations, or IT teams to determine how, and where, both paper and digital data are collected and stored and the processes that keep it secure. Specific data practices and program requirements are detailed later in this Implementation section.

Recommended Actions:

1. Identify and designate the people who will act as executive sponsor, champion, and project lead. Ensure that there is clear ownership, accountability, and succession: are you prepared if someone in a key role leaves, or if there is a reorganization?
2. Determine whether BD4D adoption is part of a larger data governance initiative, or if it is a standalone project. Does its implementation require additional budget allocation or funding?
3. The project lead should:
 - a. Create and maintain a shared workplan for internal project management.
 - b. Work with administrative, operations, and/or IT team members to map data processes and workflows.
 - c. Work with representatives from every department to determine how adopting BD4D might affect their operations. It's key that each person brings their unique knowledge and expertise to BD4D adoption, and considers the Readiness questions in the context of their department's responsibilities.

- d. Develop an internal communications and training plan to ensure that the BD4D Standard is understood, met, and its Commitments fulfilled across the organization.

Community & Programs

Community engagement is a core tenet of the Better Deal for Data, and successfully implementing the BD4D Standard requires intentional and ongoing engagement with data stakeholders. Often, this happens at the program development and delivery level.

Referring back to the Readiness questions, do the individuals and communities you serve know how you collect, analyze, use, and share their data? Have they given implicit, or explicit, permission for you to do so? Do they have a clear way to request data deletion or transfer?

If you have not communicated how you use your constituents' data to them, or if members of your community have ever expressed surprise at something your organization does with data, BD4D implementation offers the opportunity for thoughtful and positive change.

Recommended Actions:

The project lead should work closely with community and program teams to:

- Identify how and what data is collected, used, and shared for program delivery, monitoring, evaluation, and learning.
- Consider whether there are others who are affected by your organization's collection and use of data, and how they may be impacted.
- Understand the expectations, needs, and concerns of your constituents and your community around how their data is used.
- Learn how BD4D adoption might impact all your data stakeholders.
- Establish the least disruptive paths to delivering on the BD4D Commitments within your programs.
- Build communication channels that provide consistent transparency about your programmatic data practices, and offer a continuous feedback loop for stakeholders.

Data & IT

Organizations collect and use data for a myriad of reasons: delivering and improving programs and services, administration and finance, legal compliance, research, development, marketing, and more. This means that Your Data might be processed and stored across an organization's functions and teams, with multiple owners and uses.

Meeting the BD4D Standard requires first understanding how Your Data is being managed, then ensuring that the Commitments are being met in practice.

Recommended Actions:

1. Complete and maintain a Data Inventory:
A data inventory provides a detailed assessment of the data your organization collects, stores, processes, and shares. With respect to the data governed by the BD4D Standard, identify:
 - a. What data is being collected, by whom, and from whom? Can any of the data be classified as “sensitive data”? Is any data collected from, or about, children or other protected or vulnerable populations?
 - b. Why is Your Data being collected or gathered? Is it only used for its intended purpose? Have your data stakeholders provided informed, voluntary consent for those uses?
 - c. How is the data, including copies, being stored? Is it on a third-party cloud service, such as AWS, Box, or Drive? Are there versions saved on individual employee computers, or on a shared, private server in your office?
 - d. What happens to the data when it is no longer needed for its intended purpose? What is your data retention policy?
2. Review how Your Data is shared:
 - a. Are your data stakeholders aware that the data is being shared, and why?
 - b. Are your data recipients and sharing partners mission-aligned, and using the data for social benefit? Are they BD4D Adopters?
 - c. Is the data anonymized, aggregated, or de-identified? If not, should it be?
 - d. Is the data being exchanged, sold, or otherwise monetized by you or its recipients? Does this use align with the BD4D Monetization commitment?
3. Review how Your Data is secured:
 - a. Who can access the data? Does anyone have access to the data who doesn't require it? Are permissions audited and revoked regularly?
 - b. Is sensitive data encrypted when it is being transmitted and stored?
4. Ensure that the outside processors and third-party software, platforms, and services used to collect, analyze, store, or transfer Your Data keep your organization's data confidential, private, and secure. Accounting, collaboration, CRM, email, fundraising, social media—what tools does your organization use?
 - a. Check each provider's data protection, privacy, and security settings to disable inadvertent exposure.
 - b. Is the data being combined with outside companies' records to profile or re-identify individuals or communities?
 - c. Is the data being used to train a third-party AI tool?

- d. Is identifiable data being passed to third parties via beacons or widgets on fillable forms or your website?

Legal Review

Although some organizations may choose to incorporate the BD4D Commitments in their terms of service, privacy policy, or other legal agreements that govern their organization's data practices, this is not a requirement for BD4D adoption.

Many organizations do have existing legal agreements which address data collection, storing, and/or transfer. Common examples of these, and what should be reviewed, are included in the Recommended Actions below.

Recommended Actions:

1. Consult your legal counsel to determine how implementing Better Deal for Data affects your operations and legal agreements.
2. Review data protection and privacy laws which may apply to you to ensure that your data practices comply.
3. Identify any agreements or contracts which touch Your Data and do not align with the BD4D Standard. For example:
 - a. Beneficiaries: do your terms of service reserve the right to sell data as an asset?
 - b. Funders: do your grant agreements require the disclosure of sensitive data?
 - c. Partners: do your partnership agreements require you to provide identifiable data about your clients or users without adequate guarantees of confidentiality?
 - d. Vendors: do your third-party tools include a data processing agreement which allows AI model training on personal data, or doesn't commit to confidentiality?

Contracts that require you to take actions that directly conflict with the BD4D Commitments must be amended in order to implement the BD4D Standard. Other conflicts may be remedied as contracts are renewed, as long as any discrepancies are communicated to those whose data might be involved.

BD4D in Practice

As your organization begins to operationalize the BD4D Standard, you may find yourself wondering how certain practices align with the BD4D Commitments. In this section, we offer some pointers and examples.

BD4D and Third-party Tools

Most organizations use a variety of third-party services in the course of their day-to-day operations. Online platforms provide convenient, cost-effective tools for nonprofit administration. Unfortunately, some of the companies that provide these tools also use and trade your organizational and stakeholder data for their own growth or profit. A BD4D Adopter does not have to stop using these tools, but they should take all reasonable steps to protect Your Data as they use them. Many tools offer privacy and security settings which provide stronger data protections than are required by the Better Deal, and BD4D Adopters should choose these options whenever stakeholder data is at risk of being shared.

For any service that relies upon Your Data, the most basic question to consider is whether your community would be surprised by what happens to the information they've entrusted to you. For example, Facebook is known to be part of an extensive online surveillance ecosystem involving thousands of companies, and tracking billions of users' actions. Its social media platforms are also used by many nonprofit organizations to engage with their communities, because that's where their constituents are online. Thus, a nonprofit's community members should not be surprised that Facebook is tracking their interactions with the organization.

We've listed several common categories below, along with recommendations for aligning your usage with the Commitments. If you use others that should be included, please [let us know](#).

AI

It's difficult to discuss third-party technology services without addressing machine learning and artificial intelligence. AI is now enhancing many commonly used tools, from writing and editing to video and web conferencing. While it can offer tremendous efficiencies, it can also put organizations, and their stakeholders, at risk.

- Review vendor data and privacy policies to ensure that prompts or other information related to your outputs are not being retained or used to train public AI models.

- Avoid entering confidential or sensitive data into commercially available chatbots or generative AI tools, or using these tools to analyze information which should not be made public.
- If using notetakers, recording, or transcription tools, such as those for live or video meetings, ensure that you inform, and gain permission from, all participants, and respect any requests to stop their use.

Analytics

Website analytics services can offer a wealth of information to help nonprofit organizations improve site visitor experience, test new messaging, tailor their content, and more. These services work by tracking the behavior of people who visit your website, potentially raising data privacy concerns.

- Ensure that the service you use is transparent about the data they collect, and how it is used and stored. Choose vendors that explicitly respect user privacy settings such as Global Privacy Control.
- Limit the amount and granularity of data you track about each visitor: are you using that information to their benefit?
- Disable or opt out of settings which identify your visitors, or allow the provider to sell or share visitor data to data brokers or other third parties.

CRM and Donor Database

Customer (or Constituent) Relationship Management and donor databases work in similar ways, and are invaluable for everything from case management to fundraising campaigns to records storage. As such, they are usually a central repository for large amounts of Your Data and sensitive information, accessed by many members of an organization's team.

- Confirm that constituent and donor information and financial records are not mined for vendor's use, or shared to a provider's advertising network or that of their partners. These lists should not be bought, sold, or traded by your organization or by your vendor.
- Verify that information which includes Your Data or other confidential information—such as a custom view or an internal report—is private, and not accessible or sharable without authorization or on a public web page.
- Practice regular “database hygiene” tasks: update contact records, delete records which are no longer needed, and ensure that user access permissions are current and appropriate.

Email Marketing

Email is an indispensable communication channel for announcements, newsletters, and outreach. Several email tools are built specifically for nonprofits, making it simple to create visually attractive designs, and easily manage both content and subscribers. Some

of the most popular services also provide strong data privacy controls, which BD4D Adopters should enable as a default.

- Your subscribers should all have opted in directly to receive your communications, and have a way to easily unsubscribe. Unsubscribe requests should be processed immediately, without creating a burden on requestors.
- When setting up new campaigns, consider what performance data you actually need, and disable unnecessary tracking.
- As with your databases, confirm that your recipients' personal information is not combined or connected with a provider's own database or advertising network, or to those of their partners. Subscriber lists must not be bought, sold, or traded, by you or by your vendor.
- If sending bulk email without using an email marketing platform, use the BCC field to make sure your subscribers' names and email addresses are not visible to other recipients.

Social Media

Social media has become a key channel to increase visibility for social sector organizations and their missions. Popular platforms, used responsibly, provide highly effective ways to actively engage a community, attract donors, staff, and volunteers, manage and promote events, and share milestones and stories.

- Disable settings that allow a platform to track your followers' behavior beyond the platform itself.
- If you link to your social media from your website, manually create a link to your page instead of using the platform's widget or sharing feature, as these can often (re)identify individuals once they've left your website.
- Do not allow ad or content targeting based on Your Data. This is true whether selling ads on your page or placing ads on others'.
- When posting content that features your community, make sure you have received permission to do so. This is especially true when tagging individuals in photos, videos, or posts that show location.

BD4D Commitments in Practice

Declaration. We make the following commitments to “You,” all of the individuals or organizations that we serve and whose data we touch. We make these commitments to You about “Your Data,” non-public information related to You which we collect, analyze, store, and/or share.

Do

- Announce that your organization has adopted BD4D, and encourage your partners to adopt it as well.
- Make BD4D part of your employee, consultant, and volunteer onboarding and regular training.
- Regularly and systematically review how you work with Your Data.

Don’t

- Announce that you have adopted BD4D and then never think about it again.

Purpose. We are using Your Data to benefit You, Your community, humanity, and the planet, not for private gain or profit.

Do

- Clearly communicate your mission, and how and why you use Your Data, being transparent about your organization’s intentions and goals.
- Encourage mission-driven organizations with whom you share data to also adopt the Better Deal.

Don’t

- Obscure important information about your data use in jargon, legalese, or “fine print.”
- Establish new policies, partnerships, or programs without thoughtful consideration of how they align with the BD4D Commitments.
- Allow even anonymized data to be used in a way that creates risk or harm to those you serve.

Ownership. We don’t claim ownership of Your Data.

Do

- Review data, partnership, and technology agreements and other legal documents to ensure that none claim ownership of data that meets the “Your Data” definition.
- Communicate major changes in organizational mission or structure to your constituents promptly, with adequate means to request data deletion or transfer.

Don't

- Enter bankruptcy, shutdown, or corporate transfer proceedings that include Your Data as an asset.

Control. We will delete Your Data, correct it, or transfer it to You if You ask.

Do

- Respond in a timely manner to inquiries about Your Data, including requests to delete, correct, or export it, even if you are unable to fulfill the request.
- Provide any requested data in a format that can be accessed and used by a majority of non-technical users.

Don't

- Delete, correct, or transfer only part of the requested data without providing an explanation with reasonable details to the requestor.
- Require payment or compensation for correcting, deleting, or transferring Your Data.

Monetization. We will not sell or share nonpublic information about You (“Your Data”) in exchange for compensation from third parties.

Do

- Review business transactions, relationships, and software tools to ensure that Your Data is not being analyzed, mined, or shared in exchange for economic value.

Don't

- Buy, sell, or trade donor lists or “lead lists” to companies brokering contact information or personal data.

Protection. We will steward Your Data with care, and comply with applicable data privacy laws.

Do

- Limit access to sensitive data to those with a need to know and who also have strict confidentiality commitments.
- Secure both analog and digital forms of Your Data.
- Provide timely notification of any data breaches or unauthorized access to your community.

Don't

- Send unprotected documents containing Your Data via email or other insecure channels.
- Assume that data privacy or protection regulations don't apply to nonprofit organizations.

Research. If we or a trusted partner do research based on Your Data, we will follow best practices around the anonymization of personal data, and published research papers or reports will be made available to You for free.

Do

- Proactively notify stakeholders if you use their data in research projects and publications, and provide them a simple way to request a copy.
- Release publications and reports under “open access” provisions.

Don't

- Require data stakeholders to pay for access to research papers based on their data, or condition access on a value exchange.
- Allow research partners to violate the terms of this Commitment.

Binding. We will be legally bound by these Commitments, and anyone we share Your Data with will be similarly bound.

Do

- Ensure that data recipients' data agreements and data uses align with BD4D whenever you share Your Data.
- Immediately address practices that don't meet the Commitments, and make reasonable efforts to rectify any damages.

Don't

- Ignore a stakeholder who asserts that you are misusing Your Data.
- Publicly adopt the Commitments, but intentionally violate them in your organization's day-to-day practices.

BD4D Adopter Resources

You've finished implementing the BD4D Commitments into your organization's data practices. What happens next?

First, congratulations!

Second, it's time to let your community and data stakeholders know that you are a BD4D Adopter:

- Post a statement that you have adopted the BD4D Standard. This might be on your website, in your data use policy, a newsletter or blog post, and/or another relevant and visible location. If you like, you can even list the BD4D Declaration and Commitments. Whichever method you choose, include a link to the Better Deal for Data website. We've included titles, descriptions, links, and logos below for your use.
- You can refer to the program using the titles and descriptions listed below.
- You can also display the BD4D logo using any of the variations provided below.

We ask that you do not alter the titles, descriptions, or logos provided. If you need a special format or size, please [contact us](#) directly.

Finally, now that you have completed the process, we'd love to know. Please take a few minutes to [fill out this short questionnaire](#) to tell us about your organization, and your experience with the BD4D Standard and BD4D Playbook. We invite your feedback on what worked, and what could be better.

Thank you for being a part of this movement to unlock the power of data for social benefit. We're thrilled to have you join us in building a better deal for all!

Please use these titles and descriptions:

- Better Deal for Data
- BD4D Standard
- BD4D Commitments
- BD4D Adopter (that's you!)
- Better Deal for Data is a practical data governance standard for the social sector.

Link to our website: <https://bd4d.org/>

Link to the [BD4D Commitments and BD4D Standard](#)

If you list the BD4D Commitments, please copy them as written on the pages above.

BD4D Logos and Usage Guidelines

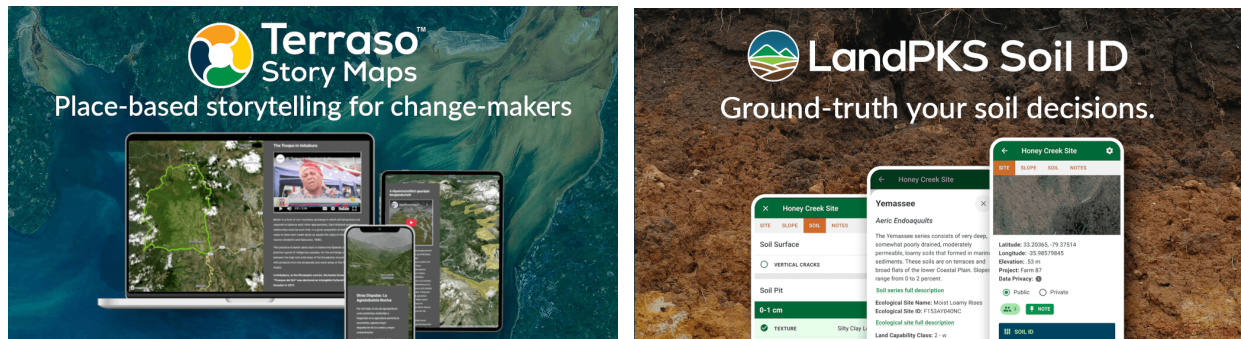
Please visit the [Resources page](#) of the online BD4D Playbook for logo download links and usage guidelines.

Snapshots

Privacy Policy & Terms of Service

Terraso

One way of implementing the BD4D Commitments is through a legal agreement, such as an organization’s Privacy Policy or the Terms of Service established for users of its products and services. Terraso, an open source software project that provides web and mobile applications designed for use by students, farmers, and community leaders, incorporated the Commitments into both its Privacy Policy and Terms of Service. Here’s a snapshot of what they did.



Terraso software is used to capture, visualize, and share place-based data, media, and narratives. It was developed following principles of community-centered data stewardship and data sovereignty, but the first Terraso Privacy Policy reflected neither. It was adapted from a common corporate legal template and didn’t provide the desired clarity or user protections. The software itself was initially released without any Terms of Service.

The handling of data within the Terraso applications already fulfilled the spirit of the Better Deal for Data: data was always considered to belong to the users, was never monetized, and was not shared without an explicit user request. Thus, a key goal in updating its legal documents was to codify this publicly.

Adopting the BD4D Standard required both revising the Privacy Policy, and creating a new Terms of Service that fulfilled the BD4D Commitments. Working closely with experienced pro bono legal advisors who specialize in software privacy law, the Terraso team:

- Created clear, plain language section titles in both documents to make it easy to find specific topics, and to summarize the intent of the legal language. For

example, using the title “Your Feedback is a Gift” instead of just “Feedback,” “We Only Use Your Content on Your Behalf” instead of “Permissions to Your User Content,” and “The Services May Not Last Forever” instead of “Termination.”

- Simplified complex legal provisions. For example, “Removal of User Content” was retitled to “Content Removal is Unlikely to be Complete,” with language explaining that public posts or shared content might have been copied and stored by others, and that the act of removing them from the platform won’t necessarily delete all copies. They also removed language that was designed solely to minimize legal exposure in a potentially contentious environment, for example, provisions designed to inhibit class action, force binding arbitration, or disallow jury trials.
- Explicitly referenced the Better Deal for Data, and stated compliance with its Commitments.

Reviewing legal documents is only one aspect of adopting the BD4D Standard, and not every organization will elect to incorporate the BD4D Commitments directly into theirs. What is important is that a BD4D Adopter’s data practices, organizational philosophy, and legal agreements are all aligned.

Web & Mobile Data Platform

The Soil Inventory Project

Data platforms combine data from multiple sources, offering a way for individuals and institutions to contribute, create, and share datasets generated from their combined and aggregated data.



The Soil Inventory Project (TSIP) builds one such tool. Its flagship Fieldvision platform is a mobile and web system used by farmers, researchers, trusted industry partners, and others to manage their land, study agricultural outcomes, and gain novel insights based on the data. TSIP's goal is to provide free access to multi-model predictions for soil carbon, emissions, and yields across the country, critical because soil data has historically been fragmented and locked away in proprietary systems. As a nonprofit, they build neutral, science-based infrastructure that serves everyone, not just commercial interests, while keeping the data they hold secure and under their contributors' control.

The TSIP team was introduced to Better Deal for Data while they were in the process of revising the Fieldvision Data Use Policy. They were seeking a way to communicate to their community that they would be a steward for their stakeholders' data, decreasing uncertainty and increasing trust. Initially, they'd planned to simply reference the BD4D Commitments in their policy. However, by inserting BD4D directly into the Fieldvision signup process, they are able to highlight and demonstrate their commitment to the BD4D principles:

- When a user first creates an account on Fieldvision, they are asked a series of questions through a “wizard” that guides them through the onboarding process.
- Users are given a brief overview of TSIP’s mission, and why data sharing is essential to the organization’s success. This section includes a link to view their Data Use Policy, a statement that the policy is consistent with the Better Deal for Data, and a link to the BD4D website.
- Next, the new user is given the option to have their personal information anonymized, and to select which level of spatial anonymization they are comfortable with. (Spatial anonymization removes identifiable or sensitive information from geographic and land data.)

The image displays three sequential screenshots of the Fieldvision onboarding wizard interface, set against a background of a field with rows of crops under a blue sky.

Screenshot 1: Data Use Policy
 The header reads "Data Use Policy". The text states: "TSIP's mission is to establish confidence in agricultural impact claims by providing foundational data infrastructure accessible to all and free from commercial conflict. Toward this mission, we aim to make data available to the public while maintaining your privacy. We have adopted the Better Deal for Data as part of our commitment to ethical data management." It continues: "When you upload data to the Fieldvision platform, you are sharing your data to the TSIP database. By doing so you agree to TSIP's Data Use Policy, which is summarized at the top of the document." Below this, it says: "In the next step, you'll choose how you'd like your data anonymized before any public download. If you have any questions or concerns about data sharing and anonymization, please contact us at contact@tsip.org." At the bottom, there is a checkbox labeled "I have read and agree to the terms in the TSIP Data Use Policy" and two buttons: "Continue" and "Go Back".

Screenshot 2: Data Anonymization
 The header reads "Data Anonymization". The text states: "By sharing your data with the TSIP database, your data will be made available for public download through Fieldvision at the level of personal/organizational and spatial anonymization you choose below. Individual soil sample analytical results will be available (i.e., data will not be aggregated) at the level of spatial anonymization selected to enable statistical analysis. Please select from the following options regarding how your data will be shared with the public:" Below this, there are two sections: "Personal/Organizational Anonymization:" and "Spatial Anonymization:". Under "Personal/Organizational Anonymization:", there are two radio button options: "I consent to sharing my Personal Information, such as the name of my organization, field name or IDs, and site name or IDs, along with my soil, land, and management data (data defined as Ag Data in the Data Use Policy)." and "I do not consent to sharing my Personal Information, such as the name of my organization, field name or IDs, and site name or IDs, along with my soil, land, and management data." Under "Spatial Anonymization:", there are three radio button options: "Full Sharing: I consent to sharing my soil, land, and management data with the public with no spatial anonymization (i.e., full GPS coordinate is visible).", "County-Level Anonymization: I consent to my soil, land, and management data being shared with the public after being anonymized to the county level.", and "State-Level Anonymization: I consent to my soil, land, and management data being shared with the public after being anonymized to the state level." At the bottom, there is a "Finish" button and a "Go Back" link.

Screenshot 3: Data Anonymization
 This screenshot is identical to the second one, showing the "Data Anonymization" screen with the same text and options.

Adopting Better Deal for Data involved much of TSIP’s small organization, engaging leadership, operations, and data teams to work through the details of implementing BD4D into Fieldvision. First, they reviewed how their Data Use Policy aligned with the BD4D Commitments, and how it did not. Next, they determined how to change policies and practices that did not meet the Standard. In some cases, this meant working through existing challenges to identify creative solutions. In others, it required revisiting previous decisions about data practices and policies, considering why they were made and discussing how they could be adapted.

TSIP has now fully implemented Better Deal for Data on the Fieldvision platform, and is looking ahead to benchmarking the impact of BD4D on data sharing and trust in their community!

Glossary

Aggregation (Data)

The process of combining individual data points into groups or a summary of information. Aggregation can be used to minimize the risk of specific identification of individual data points; however, aggregation alone does not always eliminate re-identification risks in the use (or reuse) of a dataset.

Anonymization (Data)

A process intended to irreversibly remove or transform identifying information so that individuals cannot be re-identified. Anonymization represents a stronger standard than de-identification and implies that re-identification is not reasonably possible.

See also “De-identification,” which refers to a weaker standard where the risk of re-identification is reduced, but not necessarily eliminated.

BD4D Adopter (Adoption)

An organization that has adopted the BD4D Standard.

See also “We.”

Context

An understanding of (i) the environment and origin/provenance from where data is collected, (ii) people, organizations, or communities that the data is about, and (iii) the social power relations present in relation to the data. Based on a definition in Data Feminism.

Data Inventory

A documented record of data assets held or managed by an organization, describing what data exists, where it is stored, how it is used, who is responsible for it, and applicable governance or compliance requirements.

Data Minimization

The practice of collecting only the data necessary for a defined purpose and retaining it only for as long as needed to carry out that purpose or as required by law.

See also “Data Retention.”

Data Privacy

Ensuring that data is collected, stored, and used in ways that respect individuals' confidentiality and consent.

“Data Privacy” may be defined differently by other organizations, industries, or regulations.

Data Processing

Any operation(s) or transformation(s) done on data, including collection, digitization, storage or transfer, cleaning, analysis, copying, or deletion. Data processing may be carried out by humans (Human Data Processing) or by software and automated systems (Machine Data Processing).

Data Retention

The policies and practices that determine how long data is stored and when it is deleted or archived, based on legal, operational, or ethical requirements.

Data Sharing

The practice of making data available to another individual, organization, or other entity, whether under a set of formal conditions or agreements, or by informal access.

Data Sharing Agreement (DSA)

A mechanism for sharing data, such as a formal document outlining the terms under which data is shared by or between parties. Data sharing agreements may be legally required, and are often used to enable sharing for data that cannot be shared openly.

Data Stewardship

Care of data or digital assets using industry standards and/or best practices for data, often by a nonprofit organization on behalf of a community or individuals.

Data Subject

A person whose information is collected, stored, processed, or shared as data.

Data Subject Request

A request made by a data subject to exercise their rights regarding their personal data, such as access, correction, deletion, or other restrictions on processing.

De-identified / De-identification

A process that changes or removes information from a dataset that can be used to identify a person. De-identification is intended to reduce the risk of re-identification, but it

may not eliminate that risk entirely, particularly when datasets can be combined with other data or external information.

See also “Anonymization,” a stronger term that tends to mean that data cannot be re-identified.

Downstream Data Use

Any use, processing, analysis, or application of data that occurs after its initial collection or sharing.

Downstream Users

Individuals, organizations, or other entities that use data after its initial collection or sharing.

Monetization

A practice of collecting revenue or other economic value from data (including selling data, exchanging data, charging fees for accessing data).

Sensitive Data

Any information that, if disclosed or accessed, could cause harm to an individual and/or would surprise the individual if shared openly. In other contexts, sensitive data may refer to a category of personal information that, if disclosed or accessed without authorization, could result in significant harm to an individual. Laws typically require stronger protections for this type of data, but definitions and laws vary.

Stakeholders (Data)

Individuals, organizations, or communities who are affected by or involved in the collection, use, and governance of data.

Trusted Partner

An individual, organization, or other entity such as a research affiliate that collaborates with BD4D Adopters and is authorized to access or use data for defined purposes under agreed-upon terms, including requirements to follow best practices for data protection, de-identification, and responsible research use. Trusted partners have either adopted the BD4D Commitments or agreed to comparable obligations under a formal DSA.

We

The organization that has adopted the BD4D Commitments and is responsible for stewarding data in accordance with those commitments.

See the *BD4D Standard, Declaration*.

You

The individuals, organizations, or other entities served by a BD4D Adopter, whose nonpublic data is collected, analyzed, stored, used, or shared.

See the *BD4D Standard, Declaration*.

Your Data

Nonpublic data that relates to “You” and that “You” would reasonably expect not to be made public, which “We” steward under the BD4D Commitments.

See the *BD4D Standard, Declaration*.

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