



## SECURITY & CONFIDENTIALITY POLICY

### *TechServe Alliance Operating Practices Report*

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#### **Your Data Is Protected**

TechServe Alliance takes the security of your survey data seriously. The OPR platform is maintained by TechServe and its technology partner, Data Minds, and is built on enterprise-grade infrastructure — specifically, Microsoft Azure cloud services and Microsoft SQL Server — designed to keep your information safe, available, and protected throughout the benchmarking process. Microsoft Azure is one of the world's leading cloud platforms, providing industry-standard encryption, access controls, and compliance certifications including SOC 2, ISO 27001, and GDPR readiness.

#### **Platform Access & Password Requirements**

Access to the OPR platform is restricted to authorized users only. To protect your account and your organization's data, the platform enforces the following password requirements:

- Minimum 8–12 characters
- At least one uppercase letter
- At least one lowercase letter
- At least one number
- At least one special character (e.g., !, @, #, \$)

Your company name must also be entered.

Passwords are encrypted in transit and at rest.

#### **Data Handling & Confidentiality**

In connection with the Program, your organization may disclose to TechServe and its affiliates, vendors, and service providers acting on its behalf (collectively, "TechServe Parties") certain non-public, proprietary information, including ATS data, financial and operational data, and other information disclosed in any form ("Confidential Information"). TechServe will maintain reasonable administrative, technical, and organizational safeguards to protect Confidential Information and will not disclose it outside the TechServe Parties except as necessary to perform the Program or as otherwise expressly permitted under this Policy.

## **Permitted Uses**

TechServe Parties granted a non-exclusive license to use your data, including Confidential Information, to: (a) generate benchmarks, peer medians, and comparative metrics for display within Program dashboards; (b) identify and recommend additional resources, products, or services; and (c) in aggregated, de-identified form that does not identify your organization, inform TechServe's development of programs, products, and services, conduct industry research, and support marketing and related business purposes. TechServe will not identify your organization by name in benchmarking outputs shared with other participants or third parties and will present such outputs only in aggregated form.

## **Exclusions**

Confidential Information does not include information that: (a) was rightfully in TechServe's possession prior to disclosure; (b) is or becomes publicly available through no breach of this Agreement; (c) is received from a third party not under a confidentiality obligation to your organization; (d) is required to be disclosed by applicable law or court order, provided TechServe gives prompt written notice to the extent legally permissible so that your organization may seek a protective order or other appropriate relief; or (e) is independently developed by TechServe without reference to your organization's Confidential Information.