

2002 Roundup, April 11-14, Orlando, FL Data Standards for Nonprofits

Greatest challenge: Getting the data you need

Michael Gilbert, Gilbert Center

- Define the issue: Is it politics or technology? Making it happen is about politics.
- Schemas - a way of describing data - and protocols - moving the data around
- We are on the brink of an interactivity revolution
- We want a standard - this is what a donor looks like and this is how he behaves so that we can focus on using the data, not transferring it

Marshall Mayer, Technology Works for Good

- Interoperability of data is critical
- Data integration is the next big challenge for nonprofits
- In order for our field to grow, need a set of standards to start accelerating linkages between nonprofits and assistance providers
- N-TEN's capacity map can grow a national effort to jump-start linkages between nonprofits and assistance providers
 - (1) IT Users ... problem: different taxonomies among data collectors - goal is to standardize on one of them
 - (2) Describe technology assistance providers and their services on a consensus basis
 - (3) Technologies and the services themselves
 - Will follow a normal RFC (request for comments) for developing standards
 - Get involved in the working groups - go to www.nten.org/capacity-map
 - Will develop a data model and a national tool that is scalable
 - Develop standards that local organizations can use to participate
 - N-TEN now owns OPX standards
 - TechAtlas - could inter-operate with the Capacity Map

Vince Stehle, Surdna Foundation

- We already have a data standard: the 990 form
- The fact that it is not digital handicaps our sector; lots of institutes are working on changing this ... how we can accelerate the time table for e-filing of 990 forms
- This will require everyone to e-file, providing a technical assistance challenge for the sector
- IRS is now requesting comments - see www.independentsector.org – Electronic Data Initiative for Nonprofits
- Will free up Guidestar for productive management of the data

Group Discussion -

- Are they asking for inter-operability?

- Yes - especially those needing to meet reporting standards for different funding organizations
- They want their databases simplified
- Inter-operate with other social-service agencies
- Want to integrate with accounting, donor, client tracking, etc. - more often than not, they never follow through
- Government reporting requirements are not standardized, which causes most of the problem
- What do you tackle first?
 - (1) Grass-roots inter-operability level
 - (2) Be involved in N-TEN's OPX and capacity map projects
- Really, the packages are not that different - their similarities are more important than their differences
- There are great possibilities around volunteer data
- National XML groups - this is the framework of inter-operability; XMLPRC.com (It's a command-line interface)
- Support or implement XMLPRC ... it will be a high-leverage way to build for interoperability
- SOAP is hard
- There is no manifestation of demand - clients feel unpleasant urge - but they can't voice it
- How can we sense the market demand and have them recognize what they are demanding
- For trade vendors, it's not in their interest to be inter-operable
- Let's look at the I&R industry - the Info Line Taxonomy has transformed the industry
- How can we get them to have a voice in the development of the services?
- HIPAA - anyone who interacts with 3rd party health insurance (e.g., social service agencies) - must meet compliance requirements with how data is managed
- HIPAA can be an opportunity to develop standards
- Nonprofits do very little business with each other, so incentive to work together is lessened
- Creating and implementing standards takes time and resources - our little orgs don't have the resources
- LCV list enhancements - LCV developed a standard - Unified Field Exchange - that made it possible to use data across state boundaries
- Some times, there are times when there is a leverage point that does not need tremendous resources
- Rating system for block-in software
- Plan for entire life-cycle of the technology - what is the cost for getting out?
- Community foundation data exchange - NPO solutions - MicroEdge - open API
- NTE standards for coding
- Legal Services XML - index standard for posted documents
- Tool Shed - Press related materials
- Educate users on why standards matter

- Grantmakers Association - common forms
- TN project - go out and understand that their data looks like and how they
- Can send that data to them to incorporate into one database
- Web services are the way to go...
- Most valuable web application is Google - they announced a web-services interface
- Photo.net - aggregator of community photos
- eGrants - planning a new service with TechRocks & E-Base to download donation history
- Will e-filing be a serious imposition on nonprofits? Consensus - nope
- Access is not an issue - make sure directions are easy to follow
- Huge opportunity here for innovation - open sources and independent software companies thrive on standards
- http and smtp standards were set by nonprofits
- Serve Net, VolunteerMatch, Points of Light Foundation - can we get them to agree on a standard?
- Learn about XML!!
- Let's keep the conversation alive through N-TEN
- Let's be aware of confidentiality issues!! A Philadelphia AIDS Association did a URN (third character of first name, date of birth)
- Big issue: how to identify people. .. Perhaps a nonprofit passport
- Keep an eye on the Liberty Alliance
- Giving Space - working on identity and trust issues - a portable identity based on European privacy laws
- Pittsburgh survey - volunteer management was lowest need

Thank you for coming.