



# Breaching The Walled Garden

*APIs helping organizations access multiple programs*

BY PATRICK SULLIVAN

**F**oundations of Music (formerly Rock for Kids) was missing out on money -- a lot of it. The organization had no idea that buried in its donor management software was a donor with the capacity to give \$1 million.

Foundations of Music signed up with a wealth screening service and used application programming interfaces (API) to trade data between its donor management system Neon and the wealth screener. "(Foundations of Music) said, 'We have this person giving us a nominal amount,' and we shot that information from Neon to (the wealth screener) and found the donor had the potential to give \$1 million," said Brendan Noone, chief operations officer for the Chicago-based software firm Z2 Systems, vendor of NeonCRM.

Kyle Curry, associate director at the Chicago-based Foundations of Music, said the organization is exploring a relationship with the donor. He hopes to find more buried treasure. Neon's recent strategic partnerships with wealth screening companies "will make it even easier to drill down into our list, and we're really excited about all of the potential," Curry said.

Donor management software integration with wealth screening services made the identification possible. And, end users can't tell where one program ends and the other begins. It's all handled under the hood, with code.

"Neon doesn't necessarily know (a donor's) giving pattern and wealth, but wealth screeners do," said Noone. "They don't know how Nonprofit A uses that data or how much they've given."

Not long ago it would have taken reports, spreadsheets and analysis to tease this information out. Now, all it takes is a few lines of code: an application pro-

gramming interface (API).

"Application programming interface, what does that mean? It's just a way for systems to talk to each other without a human in the middle," said Steve Birnbaum, vice president of client services for SofTrek, in Amherst, N.Y, vendor of ClearView CRM. "What makes integration so difficult is when people have to upload data, download data, massage data. If you get rid of that, it feels like one system."

While APIs are not new in the space, more vendors are adding or expanding them, especially integrations with wealth screening services. A number of companies in this year's donor management software report have added API integration.

"APIs enable your software to connect to other products so that all of your systems can work in concert," said Grant Howe, senior vice president of research and development at Abila, in Austin, Texas. "APIs empower the customer to integrate best of breed solutions across their organization and cut down on manual import/export work."

Ultimately, with successful APIs "you'll be able to unify all the interactions and data into a single system. The only way to gain a true 360 view of a constituent and measure their engagement with your organization is to have data from separate systems integrated into a consolidated and actionable format," said Howe.

An API can help a vendor unload the

development of some features onto a partner and a community. A client organization can use the API to build specialized features that the vendor's other clients might not need and that the vendor would be hesitant to develop. Birnbaum said one of SofTrek's clients, Lincoln Center for the Performing Arts in New York City, used ClearView's API to bridge to its ticketing system. That's a feature few, if any, of SofTrek's other clients would need.

"There is never an end to feature requests," said Jon Biedermann, vice president of fundraising products and services at SofterWare, makers of DonorPerfect. "We get literally thousands. We need to focus on those that affect the most people. Inventory product management is a great example. It affects a small number of clients, but with an API we can enable third-party developers to integrate with legacy systems."

"It's about flexibility and customization," said Allyson Bliss, senior relationship manager at TechSoup Global in San Francisco. "It's about customization of web forms that allows you to do it in a way that integrates better with an organization's branding. For example, for a peer-to-peer campaign, you can plug in the numbers (from the p2p platform to your website) and show how the campaign is progressing in a way that's visually appealing."

The magic of APIs happens behind the scenes. Donor management systems'

integration with other systems should look seamless to development staff. "We have many customers that use APIs today and don't even realize that an API is what they're using because most of our solutions use them behind the scenes to deliver data, process transactions, and deliver information to our customers," said Jay Odell, vice president of mass market solutions for Blackbaud, in Charleston, S.C.

Most APIs are bidirectional, able to perform what Noone called a push and a pull. A push happens when a donor management system sends its data to another system, and a pull is when a system sends its data to the donor management system.

While in its purest form, an API allows as many calls as the organization wants, but that's not always feasible. "Let's say you have a million transactions," said Biedermann. "Instead of ask-

Special Report, page 18

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Continued from page 17

ing, ‘Give me this gift for this donor for this date,’ you accidentally ask for all transactions for all donors.”

That would quickly bog down the vendor’s system and impact other customers. The answer is a governor, a technologic monitoring agent that limits transactions. DonorPerfect has a 5,000-call limit, but exceptions can be requested. Without a governor, “you’ll quickly find that a customer can overrun the system,” said Biedermann.

Organizations can benefit from a software vendor’s partnerships when the vendor uses its API to tap into another system, such as a wealth screening service or email delivery service. With the proper technical expertise, organizations can create their own bridges using the vendor’s API, as Lincoln Center did.

An API’s strength lies in not reinventing the wheel. Why build your own map when Google Maps is free, powerful and widely adapted? “If a client has a need for a customized version of say, presenting a member directory or map of where members’ businesses are, they have to program the connection into Neon to pull the types of data out and display on their website,” said Noone. This is both challenging and time-consuming. Instead, an API allows Google Maps to pull information directly from the system.



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the systems have different data.”

Almost all of Blackbaud’s donor management products incorporate APIs, and thousands of customers use them, according to Odell. “Customers have built custom solutions which leverage an API to push names, addresses and gift data into (The Raiser’s Edge),” Odell said. “Other customers have used our APIs to build customized donation forms specific to their unique design needs. Being able to call an API to make a transaction happen securely while having a lot more design and presentation freedom is a very powerful capability.”

Odell cited customers who integrate with bank software and with social media. “One of our customers uses bank data and an internal imaging system to process gifts and associated check images into Blackbaud CRM through the API,” he said. “One of our partners has built an application that identifies when an alumna from a university changes her LinkedIn profile with a job change or city change, and the application automatically pushes the information into

their profile” in the database.

APIs offer nonprofits the freedom to use whatever platforms they see fit and still have an integrated whole. But there are pitfalls to this approach, said Leigh Kessler, vice president of communications for McLean, Va.-based BIS Global, makers of CharityEngine.

“With APIs you can use a database of record like (Blackbaud’s) The Raiser’s Edge, add Constant Contact, Donor Drive, Square and Eventbrite,” he said. “But that leaves you with five different products, supported by five different teams, creating four different databases, all of which now need to send their data back and forth to each other. We believe that will have a profoundly negative effect on how efficiently you are capturing and using your data. If your data is dirty or inaccurate, you create a far worse obstacle to growth than something which feels like it has all the best features.”

That’s not to say CharityEngine doesn’t use APIs; it does. Kessler and CEO Philip Schmitz concede it’s impossible for

Special Report, page 20

Continued from page 18

one piece of software to be all things to all users. CharityEngine mainly uses APIs to link between other BIS programs, such as those for mobile payment processing, event registration and major gifts.

"There needs to be a strategic collaboration within any organization," said Schmitz. "If you have things completely decentralized, you're going to inevitably end up with a solution that's cobbled together. You need a cohesive approach, and that takes a specific, top-down approach making cultural decisions about data."

This approach to a certain extent is what Birnbaum calls a walled garden. "If you have a system that doesn't talk to anything else, you're in a walled garden," he said. "The vendors say, 'We're going to give you just enough for what you need.' You have to go back to the vendor for everything."

Salesforce, based in San Francisco and considered by many to be the granddaddy of APIs, has a new donor management system called Salesforce1, which was "built API-first," said Salesforce Foundation COO Rob Acker. The new platform has 10 times as many APIs available as its previous offering, Salesforce.com Foundation Nonprofit Starter Pack, he said.

"When Salesforce.com was launched 15 years ago, not only did Salesforce.com launch a new subscription-based business model, but we also launched a new technology model with cloud computing. Central to that new technology model was open APIs and we launched with a public API," Acker said of Salesforce's history with APIs. "The birth of the Internet was based on a set of standards: SMTP for email and HTTP for browsers. Salesforce took these standards to the next level and introduced the concept of open APIs for business applications."

Acker pointed to Polaris Project in Washington, D.C., which fights human trafficking, as one client that uses Salesforce APIs effectively. "Polaris needed to communicate with people who might not be able to make a phone call," said Acker. "They use APIs from Salesforce.com and Twilio to allow victims to send and receive text messages to connect them with Polaris Hotline staffers."

While using an API is simpler than building the functionality from scratch, it is not easy. Most nonprofits rely on the vendor API for integration, due to technical limitations. "This is not for the faint of heart, not for someone who maybe once designed a brochure," said Noone. "This is for programmers."

Birnbaum agreed with him. "To say you have an API and actually make it useable are different things," he said. "You're probably going to need some technical expertise. To get a true enterprise-level integration between two complex systems, people need to know what they're doing."

Mike Conners, director of sales and marketing for NetView maker MicahTek, said it is "very rare when dealing with a customer to have the technical ability to

work with APIs." MicahTek provides APIs for call center and e-commerce integration, but also can customize the APIs based on client need. Conners said the customized APIs usually convert data from a format that NetView doesn't use to a format that it does.



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MicahTek has had APIs since the early 1990s. "We have a data management team that does a ton of donor data entry for our clients, and we have to be able to integrate into other platforms," said Conners. "We've had to evolve and constantly update to remain current or provide solutions into mainstream apps." What started as data conversion, said Conners, has morphed into designing APIs to plug into e-commerce platforms and call centers.

Bliss suggested scouring local listservs for developers with experience working with APIs. Your vendor also might have a stable of developers who are knowledgeable of the vendor's platform. "Most nonprofits (TechSoup works with) don't have that in-house (API development) expertise and probably would need to turn to a third party," she said.

Odell said most of Blackbaud's clients either find outside developers or seek help from the software firm itself. "Building integrations takes technical talent," he said. "Generally speaking, the larger the nonprofit the greater the likelihood our customers will possess the talent to leverage one of our APIs."

Salesforce.com has the AppExchange, its version of Apple's iTunes Store, or Google Play for Android devices. "Nonprofits don't need to be deeply technical to leverage APIs," said Acker. "They can get integrated applications from the AppExchange without writing code." SofterWare will have a marketplace for DonorPerfect, called DonorPerfect Connect, by the end of the year, according to Biedermann.

While Bliss admits APIs can be powerful tools, she said not every nonprofit

would need to work with one. "It's probably good to get really clear and specific on what the nonprofit wants to get out of the experience," she said. "I can see nonprofits becoming oversold on things they don't really need. This is a new area and it's not proven yet in terms of actual ROI, if it's going to lead to more supporters, more engagement, more fundraising."

#### CHANGE OF VENUE

Along with the proliferation of APIs in the donor management space, the continued migration to the cloud and the sunset of some on-premise solutions continues. Blackbaud, Heritage Designs and SofterWare are all removing one or more on-premise options, and nearly all vendors are promoting a software-as-a-service option.

"That's a trend that's not limited to donor management," said Bliss. "For vendors it's more attractive to have recurring subscription revenue, and it's more cost effective to roll out updates continuously rather than develop one big update. From the nonprofit perspective, it's often more affordable to outsource aspects of their infrastructure."

Telosa Software, makers of Exceed!, released its first cloud product this year, Exceed! Beyond. Chris Fink, COO of the Palo Alto, Calif.-based firm, said moving to the cloud benefited both the company and its clients.

"We were somewhat limited by the development platform on the desktop, but now we're infinitely scalable," he said. "The infrastructure is elastic and we can accommodate as many clients as we need." Fink said clients can "interact with their constituents in a way that wasn't



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possible with our desktop software."

With the cloud comes questions about data security, and never were those questions louder or more urgent than this past spring when the Heartbleed bug hit the headlines. Heartbleed was a coding error in commonly used open source security architecture called OpenSSL. The exploit allowed hackers to return memory possibly containing loginIDs, passwords and credit card information.

The good news for nonprofits is that most donor management software vendors are security-minded to the point of paranoia. "The world was a very scary place before Heartbleed, and it continues to be after Heartbleed," said Birnbaum. "The fact a lot of organizations not deeply committed to security got blindsided is an indication that these organizations were not terribly worried about security. We've been terribly worried about security for a very long time." Birnbaum said SofTrek was down for about six minutes to add a patch to block Heartbleed.

Fink said jumping into an online environment under the shadow of Heartbleed wasn't an issue, mainly because people are more comfortable with the cloud. "We've found within the past five years, people have become more comfortable with cloud integrations," he said. "(Security) does not seem to be the biggest concern, and clients' concerns are more about is the product right for us, is there a good value."

Other vendors weren't affected by Heartbleed, including Z2, according to Noone. "It wasn't a factor for us because we'd already taken the baseline steps for security best practices at our founding," he said. "We're paranoid when it comes to security and we go above and beyond any standard protocol."

"I've seen the vendors be very forthcoming about their lack of exposure," added Bliss. "I don't think (questions about Heartbleed are) donor management specific, it's more about the nonprofits themselves paying closer attention to things they may have overlooked before. I think it's more about security in general, not specifically tied to donor management but a nonprofit's overall IT infrastructure."

Open source is free, and for that reason it's used by a number of large websites such as Facebook, Google and Instagram. When websites become that large, it can become expensive to scale the security software. Free use, however, comes with a lack of support. "Open source is interesting. You have all the source code, but only a few people can read and understand it," Birnbaum said.

"The issue with open source technology is less around what's right or wrong and more about misunderstandings about technology costs," said Schmitz. "Open source is free, but certain things come along with that. The biggest one is you're taking responsibility. The community is great with coming up with innovative solutions, but nobody's on the hook financially when something goes wrong."

Contrast Heartbleed with a "zero-day" exploit within Microsoft's Internet Explorer web browser, patched in October 2013, that let malware take control of a user's computer. Microsoft was responsible for patching the bug and getting the fix out to its customers. "With Heartbleed, there's nobody to step up and say, 'We got this, this is our responsibility,'" said Kessler. "Free is not always free." *NPT*

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www.myagilon.com

**Amargent****Portfolio**

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\$35/month for up to 5,000 records  
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www.blackbaud.com  
800-443-9411

**BIS Global****CharityEngine**

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www.charityengine.net

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www.campusmanagement.com

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866-999-2542, x3214  
http://clickandpledge.com

**Donorexpress Software****Lite**

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www.fundez.com

**Fundraiser Software****Fundraiser Basic**

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**FundRaiser Professional**

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www.fundraisersoftware.com

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www.giftworksconnect.com

**Global Cloud****DonorDrive**

\$4,000 setup fee; 5 percent of online revenue; \$300/month support  
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www.donordrive.com

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www.onefp.com

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www.donorperfect.com

**SofTrek****ClearView CRM**

Starting at \$550, plus \$50/month/user, up to 5 users and 25,000 database entries  
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**StratusLIVE****StratusLIVE for Fundraisers**

Starting at \$149/month/user (10-user minimum) plus start-up/service fees  
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www.stratuslive.com

**Telosa Software****Exceed! Basic**

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**Exceed! Premier**

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**Exceed! Beyond**

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Single/multi-user, starting at \$180/month, plus \$0.005/constituent record  
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**Z2 Systems****NEON Cloudware CRM**

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Up to 50,000 donors, unlimited users, \$299/month  
Up to 75,000 donors, unlimited users, \$399/month  
Over 75,000 donors, unlimited users, +\$100/month per 50k donors  
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