Watering your own garden: Is it worth the effort?

Strategy for surviving the communal database

-an amusing musing by M.Cooper

Have you ever been out for a leisurely stroll on a sunny weekend day? You've decided to take the "long" path around the park (not the short cut through the middle when your chatty neighbour has somehow got you to commit to a weekly sojourn). The day is perfect! The light breeze feels almost tropical and the smell of the trees whiz you back to memories of your childhood. It's darn right pleasant…. But wait… Did you hear that? Was that thunder in the distance?

What's coming next.

While writing this, I struggled with punctuating that last heading with a question mark… as in "What's coming next?" but I thought that two topic headings in a row that were poised as a question might be breaking some sort of writer's credo so opted for the more stoic "What's coming next." sans question mark, which somehow (and erroneously) implies that I might know…. which I, somewhat regrettably, don't . Of course, that is the way of life (and of business)… we really don't know what's coming next. Who would have thought that 2 years ago while you were sipping margueritas in Cancun or Curaçao on a hot sunny beach that today we would be into the 14th month of pandemic prison? (For the record, my margueritas have been without alcohol for 19 years, in essence just an overly priced glass of lemonade but with fruit garnish added). Anyway, I digress.

There have been some rumblings heard in the clouds recently… the bureaucratic clouds that is. There seems to be some ideas being floated around that some provincial governments have found that it might be way easier to count things if the data magically got collected together into a common bucket, rather than teams of people providing other teams of people with streams of numbers to be manually collated. This is something that I have advocated for basically forever. "Upflow" of data. Definitely some benefits there.

As many of you know, our company Grasp Software Corporation and my company Cooper Systems Development Corporation have written software for many years (over 30 to be vague and exact at the same time). We currently have **Women In Safe Housing®**, **Visual Grasp® Accounting Software**, **Visual Grasp® Canadian Payroll**, **Visual Grasp® CRM and Fundraising Software**, and **Case Journals™** as active programs that we sell. In the past, I personally have created dozens of custom software programs many of which are still supported and in use today. And this brings me to my next point. We are already providing "Upflow" and have been for years. It is entirely possible to make this happen with **Women In Safe Housing®** or **Case Journals™**. While contemplating how to write this article, I did a quick count. Do you know that currently we are already using no less than 8 different APIs (Application Programming Interfaces) to provide some variation of data Upflow from our products?

- a JSON/REST method handles all of our product licensing

- a JSON/REST method handles SMS text messaging in our **W.I.S.H. PMP** (Private Messaging Portal) add-on to **W.I.S.H.™**

- In Portable W.I.S.H., we transfer data back to the main server via an encrypted file (known as EDI)

- a SOAP/REST interface to UPS and Purolator make it possible to get shipping cost estimates right from within the Order Entry screen in our **Visual Grasp®** accounting software

- Also in our accounting software we generate EFT files for transfer to the bank to automate payments to suppliers

- Similarly, you can pay your employees by transferring an EFT file to the bank from within our Canadian Payroll

- In **W.I.S.H.™** we created a function to build an EDI Excel file just for Alberta shelters

- We connect to send and receive calendar updates between **Visual Grasp® VG-CRM and Fundraising** to Google® Calendar using JSON/REST. (Actually we just discontinued this earlier this year because Google no longer offered this as a free hook to programmers… but the point is that we did this)

There may be others that I can't think of at this time, <u>but the point is that we can easily add this function or feature to any of our products</u> if a funder or other interested party suddenly floats the idea of a new data collection paradigm that includes a centralized database.

What…What… "Big Brother" wants what?

It seems that I am drawn to creating big orange headings that are questions. Perhaps that is because my crystal ball is broke… my Ouija Board is AWOL, and with all of the COVID conspiracy theorists and sceptics that are ranting these days, I can't help but come up with a few of my own theories.

Regardless, some form of automatic data up flow from your system to your funder may very well be a good thing and I want to submit to you right now that I am willing, ready and able to build that function/feature into our products if the opportunity comes up. The few discussions that I have been privy to (and they have only been a few … 3 to be exact), the logic that I am hearing seems to me to be only half-baked. In those few discussions, it was just assumed that agencies would willingly stop collecting their own data and input complete details (think client names, addresses, case notes, etcetera) into a bank of data controlled, owned and accessed by someone other than your agency. And to the question of, "what about data that we want to keep for our own purposes?"- An assumption seems to have been made that your agency simply has no need for data. If your agency does want its own database too, you then your staff will just have to do double entry to maintain both your own database as well as inputting into the mothership, mega-system database. As to the question "What about my client's confidentiality?", don't be surprised with an answer that sounds like, "… multi-tiered, multi-level blah blah blah…". Who knows what that really means? It might translate into "don't worry about that, its our data now".

Sidebar discussion here: Are you aware that **W.I.S.H.™** tracks and calculates hundreds of different stats based on client demographics, caseload and service delivery? Just print the Detailed Stats report from **W.I.S.H.™** and take note of the number of pages of statistics that happen automatically. The record that I have seen was just shy of 5,000 pages! Mostly I see around 1,200 to 1,500 pages of stats. The value to having this detailed statistical analysis at your disposal for any purpose albeit new funding opportunities, resource management and even research, is the huge upside of maintaining your own, autonomous database - "watering your own garden", so to speak. This in addition to the basic fundamental principle of in house Case Management – helping the Client… (you know "the core of your existence").

The benefit of some form of EDI data upload (don't worry, I've included a glossary at the end of this document) would be of course that people further up the hierarchy would spend less time collecting and collating data and more time interpreting the data. Fabulous! But… and a very BIG BUT… if they are asking you to give up your own data system and control AND OWNERSHIP of organization's data this is perhaps the slipperiest slope there ever could be. Resigning to a single communal data base model boils down and reduces the control that you have over your own agency. It puts your further down the path of lost autonomy. In essence, you will have become "franchised". Hypothetically, uniforms could be just around that corner. OK. Probably not uniforms, but you catch my drift.

I am ALL IN, if you want to find a way to send statistical reports or other data to a funder. I pledge to you right now, that if your funder asks you or will support EDI data transfer, I will facilitate it so that such a feature or function exists in our product with the sole condition that the data organically comes from you continuing to maintain your own set of data in our products. This gives you control over the ownership of your data AND a say on what gets sent further up the pipe.

Where to go from here.

When we are talking about the VAW and DV sectors, as you all know, many shelters started as grassroots operations. They were built up, organized and run often with little or no help against a backdrop of archaic and backward societal views that at the time held a very dismissive view on domestic violence. Often on fumes alone, the sheer guts, determination and steel resolve of these earlier shelter founders held a vision that is echoed in many of the shelters and agencies that our products have the pleasure of serving today.

In my opinion (and yes, it can also be said from our own selfish viewpoint) the best future is one where you maintain as much autonomy and policy control as you can. If the topic of data amalgamation does come around your way, consider what that means going forward. Is there benefit to retaining control and ownership of your agency's data? Does it make sense that you get to decide what details and information that you want to collect from your Clients and what your agency is willing to share outside your agency? What details of your Client's life and journey would you feel prudent to give up to Big Brother? What would your Client agree to?

A well-known author (ok Gloria Steinham) said: "Dreaming, after all, is a form of planning". Today I find myself dreaming about building a new API that can push data that you control to any funder that you choose to send it to. It would be an API built into our products at no cost to you and rolled out as part of our normal product updates. This would be a data transfer function that interfaces with participating hosts (be it a government or central host site). It would ultimately give you control on what gets sent, where it gets sent and when it gets sent, and equally important it retains your ownership, full control and investment in your agency's data. To make this reality our company would build the left-hand side data push API, but it would be incumbent on the right-hand side host to agree to build the receiving "hooks". Each host would provide its own specifications and then we could build the API at no cost to you to connect to that host. Easy-peazy.

As the president of the company (and the individual) who has had the sheer pleasure of working directly with many of you and your organizations for over 21 years now, you will know by now that we are always committed to building what you need. Maybe there is an EDI API is our future… just sayin'.

Michael Cooper
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Glossary:

API

Application Programming Interface – a function built into a program which enables it to communicate with anther resource or program outside of itself

EDI

Acronym for Electronic Data Interchange

HTTP

Hypertext Transfer Protocol – an application protocol for "hypermedia"… (aka "the internet")

HTTPS

Same as HTTP, except the communication between the host and the client is through an SSL (encrypted) connection

JSON

Javascript Object Notation – a data-interchange format

REST

Representational State Transfer - sn architectural style that defines a set of recommendations for designing loosely coupled applications that use the HTTP protocol for data transmission.

SOAP

Simple Object Access Protocol – A message protocol for exchanging data between two systems

SSL

Secure Socket Layer – when connecting to an external site, the communication is first established and then a unique encryption process is negotiated and maintained between the two endpoints for the duration of the connection. Think of your online banking which uses SSL to communicate through HTTPS.

Web Service

A function that is generally accessed through a direct and negotiated call from an API to a service hosted on the internet through an HTTPS host.

XML

Extendable Markup Language – a data-interchange format