# Note

This file has been created by turning the markdown source into a human friendly format.This file may be out of date with the current versions in the source repository.As a result, internal links in the document will not work correctly.Instead the links documents have been compiled into separate documents

|  |  |
| --- | --- |
| Document | Description |
| protocol.docx | The compiled protocol files |
| scenarios.docx | The compiled scenarios files |
| charter.docx | The compiled charter files |
| review.docx | The compiled review guide files |

This document has been compiled with pandoc. docx is used because the PDF version doesn't get the tables correctly.The authoritative source for these documents is online at GitHub which is the preferred way for you to view and comment on them<https://github.com/wufm/osdi-docs>

For questions, please contact [joshco@gmail.com](mailto:joshco@gmail.com)

# Open Supporter Data Interface Charter

This effort is currently in an exploratory phase to determine if consensus on a common API can be achieved. The involvement of a person or company does not reflect a commitment to implement this API.

The Open Supporter Data Interface (OSDI) effort seeks to define an API and data structures for interoperability among products in the cause-based, campaign and non-profit marketplace. The existence of a common API will reduce customer costs related to moving data between different systems, lower integration costs and enhance the ability of innovators to create products for the marketplace.

The API will define interfaces including but not limited to resources representing people, donations, questions, tags, and events. The group will determine the order in which to define resource models and which version of the API to include them in.

# Problem Space

Today, customers often seek to use a variety of digital tools from different vendors to build their optimal solution. Systems such as CRMs, email blasters, donation management systems, social media tools, voter engagement tools, and volunteer management tools may come from different vendors. However, in order to keep the data consistent, customers often need to do frequent manual imports and exports of data via mechanisms such as CSV files. Sometimes options are unavailable or are so complex that the systems remain inconsistent and valuable data are lost.

Systems typically contain a common set of resources, including, but not limited to people (supporters), addresses, donations, events, or social actions. For example, each product typically represents a person differently. How addresses are handled varies from system to system and in some cases, even the field names are different.

There is no competitive advantage for vendors to model a person differently. The difference merely serves as a cost to customers in the form of added complexity, data loss during transfer, and extra staff & volunteer time.

# Maintain Customer Focus

The OSDI team will solicit feedback from customers to review use cases and technical designs to make sure that we are building something that is cost-effective to implement and solves the problems customers care about.

# Allow Vendor Differentiation

The core API will also allow for proprietary extensions to be built on top of it. These extensions may represent vendor or party specific features, innovations, or differentiations. They may also be special purpose features that are not relevant to the wider market. They may be ideas where it is too early for industry-wide consensus to form. Over time, these may be integrated into the common API.

By using such a layered model, customer integration costs are reduced by ensuring that as much common code may be reused as possible. For resources defined by the core there should be very little differential integration code necessary to work with products from different vendors. Even when using a vendor or party -specific feature extension, the core elements and concepts can be reused, leaving only the extension as conditional code.

## Accelerate Innovation

The common API can also accelerate innovation in multiple ways, including:

1. Reducing duplicate work by each vendor. Vendors can focus on new customer features rather than solving the same problems over and over again.
2. Providing a common application platform that allows entrepreneurs, startups, and consultancies to build applications that can run across all vendor platforms that support OSDI rather than having to spend development resources writing individual connectors for each vendor platform.

# Current Deliverables

1. Requirements Overview document which outlines the use cases (i.e., user stories) and resource data models. Use cases or user stories are examples of tasks customers need to do. Example: Query new supporter signups from today that wish to volunteer.
2. V1 API Specification including resource data models defining the fields and operations of a given object. Example: A Person resource has fields like first\_name, last\_name, ZIP, etc. Also includes the definition of common operations to allow reading, updating and querying these resources
3. A prototype implementation useful for customers to experiment with, exercise scenarios, and prototype client implementations.