



Open Referral '24 Year in Review

Transforming our safety net
for the 21st century

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A letter from the founder

Dear friends: The world is very different today than it was when we started Open Referral.

In 2014, we set out to make it easier to share, find, and use information about the resources available to people in need. We started by aiming to enable different organizations using different technologies to "speak" the same language – so they could share resource data more easily, and in turn, transform the field of human service informatics as a whole into something more than the sum of its parts.

In 2019, the "information and referral" industry association (formerly AIRS, now Inform USA) formally recognized our Human Service Data Specifications as industry standards. This was a key milestone: our first objective, successfully achieved. This, however, was only the start of a new chapter.

Standards make possible new kinds of cooperation. Now we have to ensure that cooperation is sustainable and effective.

In 2024, we saw major breakthroughs – not just at the technical level, but in matters of *business strategy*.

As of this year, every single significant vendor in the field is using our standards (or has pledged to adopt them)!

What comes next is the important part: info-and-referral providers are now [developing new scalable business models](#) built upon the provision of resource data as a service, all made possible by our data standards (and in some cases supported by our consulting services).

In this report, [we share stories](#) of [new partnerships](#) among 2-1-1s, healthcare providers, and other human service referral services – cooperating in new ways to ensure that people in need can access resources that improve their quality of life.

This report also recaps [the evolution of Open Referral as a community-led initiative](#). This year, we formed a standing Technical Committee to oversee development of our standards. This Committee has formalized a process for proposing, reviewing, and approving new features for the standard. And they've already performed this process, resulting in [version 3.1 of the Human Service Data Specifications](#).

With this upgrade to our governance model underway, I'm personally [looking for more opportunities to promote leadership throughout our network](#). It has been an honor and a privilege to work with this community over the past decade – yet I also recognize that more leadership will be needed on the path ahead, as we continue to facilitate the transformation of the human service sectors.

2-1-1s, healthcare providers, and other referral services are cooperating in new ways, to ensure that people in need can access resources that improve their quality of life.

Toward that end, I want to hear from you: **what are your priorities for the future? Who should be at our table?** How can we best support this network as it grows into new countries and new domains?

I'm eager to hear from you – **please reach out to discuss!**

Sincerely,



Greg Bloom, Founder of the Open Referral Initiative

P.S. Have you used our protocols and materials? **We want to hear your story!** Do you want to act in your community? **We can help!** Reach out – **let's discuss:** info@openreferral.org

A summary of our strategic framework

The challenge: A landscape of siloed directories

It's hard to see the safety net. *Which agencies provide what services to whom? Where and how can people access them?* These details are always in flux.

Nonprofit and government agencies are often under-resourced and overwhelmed, and it may not be a priority for them to promote their own information to attract more clients.

So there are many referral services — such as call centers, resource directories, and web apps — that collect directory information about health, human, and social services. Many attempts to build centralized 'one-stop shop' solutions have come and gone — and new apps emerge all the time. Such well-intentioned efforts end up yielding more fragmentation and confusion. **These directories are typically trapped in silos that can't 'talk' to each other.**

As a result of this costly and ineffective status quo:

- **People in need** have difficulty discovering and accessing services that can improve their lives.
- **Service providers** struggle to connect clients with other services that can help meet complex needs.
- **Researchers and decision-makers** find it hard to gauge programs' effectiveness in serving community needs.
- **Innovators** are stymied by lack of access to data that could power valuable tools for any of the above.

The opportunity: Enabling systems to 'talk' to each other

If the many kinds of 'community resource databases' all spoke a common language, then **resource data could be published once and used simultaneously in various ways.**

So Open Referral developed the Human Service Data Specifications (HSDS) to establish *interoperability* across many technologies. **HSDS is now an industry standard in the U.S. and a national standard in the U.K.**

The plan: Local pilots to shift the global field

In Open Referral's pilot projects, lead stakeholders — such as government champions, referral providers, community anchor institutions, etc — collaborate to build open data infrastructure.

The impact: Benefits cascading throughout our safety net

As more institutions adopt Open Referral for resource data:

- **More reliable information** can be made available at a lower overall cost than in today's siloed status quo;
- **Innovative tools** and applications can proliferate, and become easier to re-deploy and adapt;
- **People can find services more easily**, and service providers can more readily meet complex needs;
- **Researchers, policy-makers and funders can better understand** community needs & resource gaps;
- **All of this can result in healthier people** and more resilient communities.

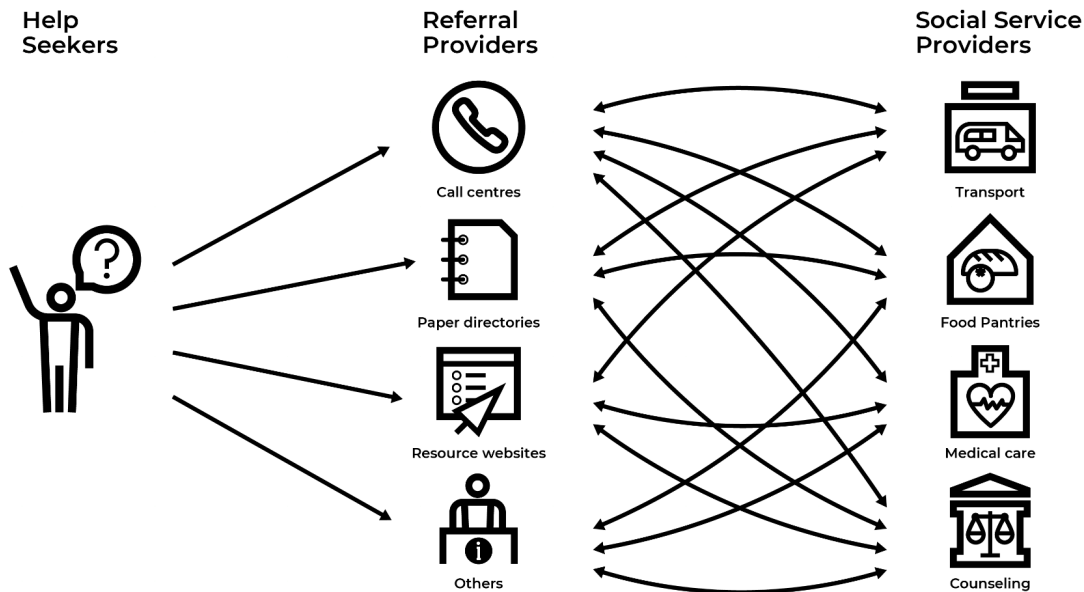
[See our explainer videos here »](#)

Check our summary diagrams on the next page – and [access all of these materials in our whitepaper!](#)

Open Referral: A Graphic Summary

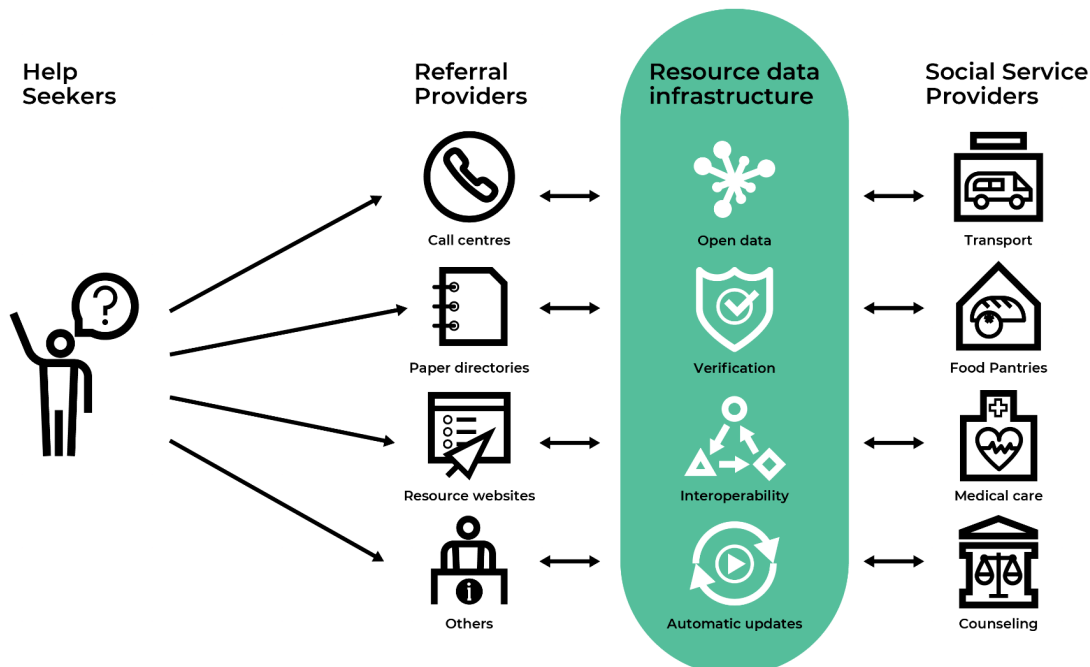
The status quo: Fragmented silos

Many referral providers collect directory information about health, human, and social services. However, these directories are all trapped in silos that can't 'talk' to each other, limiting accessibility and accuracy of this crucial data.



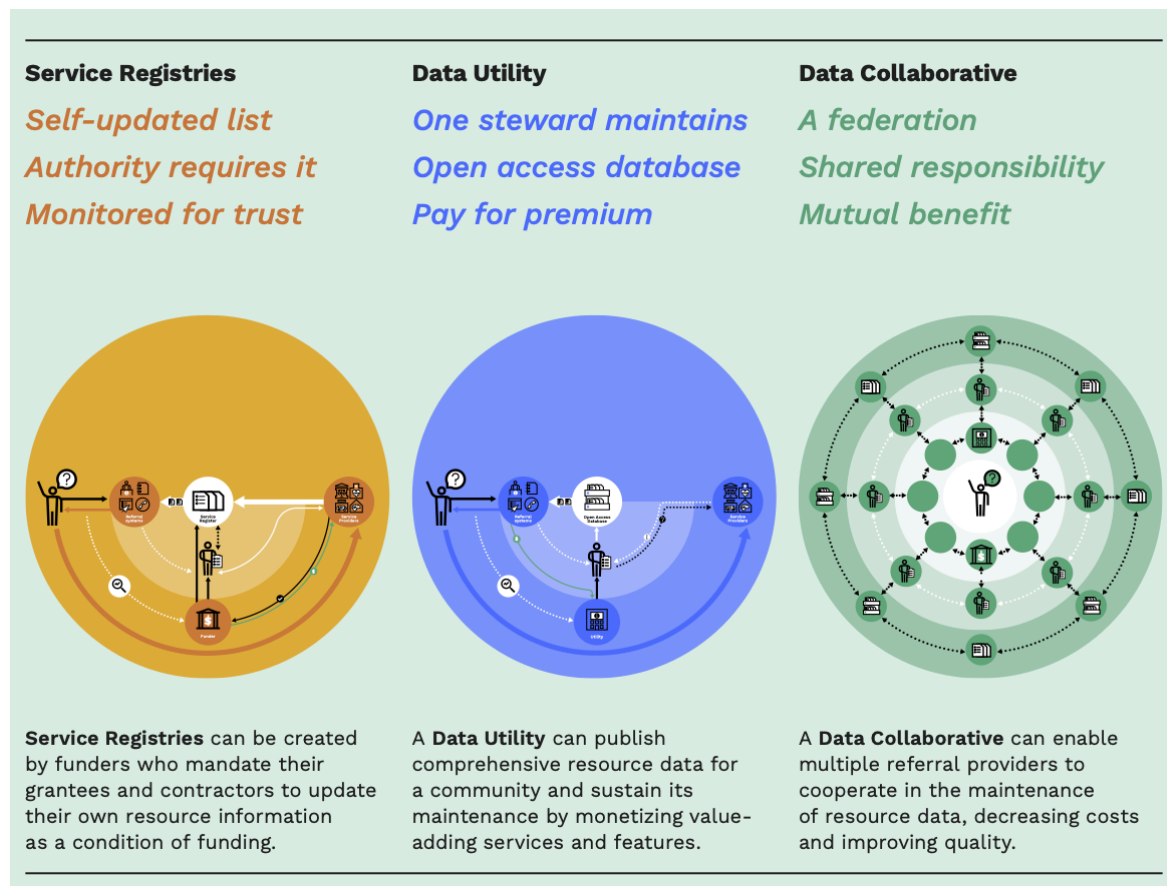
Our vision: Open infrastructure for a healthy ecosystem

Open Referral develops interoperable resource data infrastructure. We don't sell a product; rather, we help communities find solutions that meet their own needs.



Our Playbook: Developing Sustainable Data Supply Chain Strategies

Solving the resource data problem requires more than just technical interoperability. Indeed, success entails transforming the business of resource data management. In partnership with **the Ostrom Workshop on the Commons at Indiana University**, we published an academic paper in 2021, developed a set of infographics in 2022, and finally in 2023 published a whitepaper that synthesizes years of research and development of infrastructural supply chain strategies.



[Read our whitepaper here](#) to learn more about each of these strategies and how they relate to each other.

In 2024, we evolved this whitepaper into a participatory research and design toolkit that will help communities develop their own supply chain strategies! **Would you like to get involved?** [Reach out to discuss.](#)

Community Spotlights –

Sasha Reinoso, Do Good Data

I've built my career in resource data management, and I love the opportunity to do work that is so important to communities across the country.

Fifteen years ago, I started as a resource data manager in a 2-1-1 – and for the past decade, I've helped other 2-1-1s and I&R providers as a consultant who specializes in resource data quality improvement. In this capacity, I provide all kinds of assistance to organizations that are seeking to level up their resource directory – from actual data management to workflow design to partnership development.

So I've become accustomed to helping clients struggle against the constraints and limitations of the conventional approach in which everyone works in their own silo. Fragmentation, redundancy, and lack of capacity is the norm.

That's why Open Referral is such a game-changer – for my work, for my clients, and for the field as a whole. The Human Service Data Specification not only provides a clear blueprint for publishing useful data, but it also opens new doors for collaboration among organizations that share goals but previously were stuck in competitive ruts.

By cooperating among previously siloed systems, we can help this field produce higher quality data at lower collective costs – increasing the breadth and depth of impact in communities.

I'm excited by the emerging opportunities for 2-1-1s to scale and sustain their business models in new ways – and to help all kinds of smaller community groups both leverage this critical information and play a role in improving its quality.



do good data

Skyler Young, Connect211

As my website development business started to pick up with 2-1-1 providers across the state of Washington, and then across the country, I founded Connect211 specifically to serve this critical sector. It wasn't long before I realized we would need standards to be able to scale our operations across the market – so Open Referral's HSDS was a tremendous boon to our work.

I've since found it so rewarding to work with these standards, and to learn from this community of practice, that I jumped in to get involved with the development of the specification – and joined Open Referral's inaugural Technical Committee.

Meanwhile, Connect211's business solutions are now deployed in 20+ states, with 2-1-1 call centers now using our websites for their front-end resource navigation – and sometimes also for their community partners' programs.

In the past year or so, our scope of work has expanded to include data orchestration services, in which we improve the quality and usability of resource data – sometimes among many different partners in the same state. Open Referral's vision of resource data federation reflects our understanding of where this field needs to go to fulfill its promise of connecting people in need to the resources that can help improve their lives. I'm excited to help bring this vision to fruition!

We're now building tools to help our clients work together collaboratively on resource data management challenges that previously they had to struggle with in isolation. And we're making these tools open source – so that any communities can benefit from them, and even build upon them.

These problems are too big for any one organization to solve, but together there's no limit to what we can achieve.



Chris Hwang, our project lead

I am a researcher and evaluator of human services and education programs – and I specialize in finding utility in data for greater social good. Since the early 2000s, I've overseen the development and implementation of many tools to support front line case workers and warm-line care coordinators.

I first encountered Open Referral ten years ago, as a participant in its inaugural workshop alongside other Bay Area resource and referral leaders. At that time, I was leading a technology team at First 5 Alameda County, whose mission centered on early intervention strategies for families with young children.

Across four departments in First 5, I suspected that more than half our staff maintained a personal spreadsheet of community resources! Even though this was a collectively absurd way to go about managing this information, we didn't have the capacity to work together in any other way – so it was all too easy to fall back on creating and maintaining redundant, siloed resource directories.

At the time, I was quite opposed to the idea of building more technology in a field already congested with proprietary, incompatible and expensive systems. Open Referral's approach clarified for me how we might find a way out of this mess.

Today, as Open Referral's project lead for [Washington State's Early Childhood Comprehensive System project](#), I help a cohort of Early Learning Coalitions develop coordinated, cooperative approaches to the resource directory challenge. We learn about resource information management while adopting HSDS to collaborate across the state. Many of our partners represent small rural communities and counties, but they too can play a valuable role through cooperation with statewide systems such as WA211 and Help Me Grow.

I'm thrilled to put all my skills to work in this ground-up effort to find exciting new solutions for this old problem.



Progress in 2024

Upgrading our standards and tools

Human Service Data Specs version 3.1 is here.

A minor upgrade of our specifications, HSDS 3.1 makes it easier to specify granular kinds of information – like the amount of capacity available for a given human service, or different URLs associated with different services provided by the same organization – while preserving backward interoperability with any systems that use HSDS 3.0. [Learn more here.](#)



Validator Prototype

We're building the tools to make it easier to produce and use data in the HSDS format. [The prototype of a validator](#) for 3.1 enables data publishers or consumers to confirm that a given dataset conforms with all of the elements of the specification. A more fully-featured validator is under development in the Open Referral UK network. [Join discussion about these tools in our forum.](#)

Upgraded Airtable template

Airtable is a user-friendly web-based interface for relational data management – free for low levels of usage! This has made the Open Referral Airtable template a popular no-cost option for deploying a user-friendly resource database. [The template has been updated to work with HSDS 3.1](#), and some members of our community have released their own adaptations of Airtable for user-friendly data management and more.

To get involved, review [our Docs site](#), visit [our Github repo](#), join [the Forum](#), or reach out to info@openreferral.org.

Developing new business strategies



Open Referral's standards make it *possible* to share resource data as an interoperable resource – but innovation in business models and partnerships will make data sharing a common, sustainable practice. In 2024, Open Referral worked with a range of communities on strategy development. Every community is different, but we've identified common patterns:

“Utilities” providing resource data-as-a-service:

[In Maryland](#), 2-1-1 has demonstrated that resource data can be provided as a service to the entire healthcare sector in their state through their partnership with CRISP, Maryland's statewide Health Information Exchange. Open Referral helped broker and facilitate this successful pilot project.

[In South Dakota](#), the 2-1-1 provider worked with their state's department of health to develop a partnership with Findhelp, in which 2-1-1 stewards resource data used by Findhelp – with HSDS enabling the data exchange between systems.

[In Western New York](#), Tammy Owen – executive director of the regional 2-1-1 provider – introduced a comprehensive business model that would scale these kinds of partnerships by positioning 2-1-1 as a kind of data infrastructure (such as a 'utility') that can provide resource data to every organization in their community while generating sustainable revenue from value-adding fees and premium services.

“Federations” as as collaboration infrastructure

[In Minnesota](#), we facilitated dialogue among a network of organizations to envision what multilateral data management would look like – and how it would work. [Learn more about the vision for this cooperative strategy here.](#)

[And in Washington](#), we are supporting the state's network of Early Learning Coalitions to develop capacity to share responsibilities for data management between local and statewide partners – building open source tools along the way!

Advancing our partnerships

Collaboration with Inform USA

Inform USA is the industry association representing more than a thousand community resource referral programs across the U.S. (and working in partnership with sibling association **Inform Canada**). In 2024, Open Referral's founder Greg Bloom joined the Inform USA team as Senior Director of Partnerships and Strategy. In that role, Greg worked with Inform USA's committees and task forces to build capacities to advance the sector across multiple fronts.

Inform USA also [updated its standards this year](#), and now explicitly endorses the Human Service Data Specifications as *the* industry standard for resource directory data exchange.



Collaboration with the Ostrom Workshop

Greg Bloom also continued his partnership with **the Ostrom Workshop on the Commons at Indiana University**, building upon [previous research into resource directory information as a collective action problem with institutional design solutions](#).

This year, with funding from **the Midwest Big Data Hub**, the Ostrom Workshop sponsored and supported a design project to develop a toolkit for [participatory workshops](#) on the topic of resource directory information sharing. This toolkit provides a visual vocabulary to depict the complex, abstract concepts in our field with user-friendly icons – and to use those icons to describe the complex data ecosystems that members of our community are operating within. With these tools for facilitation of multi-stakeholder dialogues, human service referral providers and their partners can collaboratively develop strategies to upgrade their resource information supply chain. [Reach out to inquire](#) about opportunities to use these tools in the year ahead..



OSTROM WORKSHOP

Updating our Governance Model

As Open Referral's network grows, so too does the need for clear and accountable decision-making processes. This year, Open Referral has updated our governance model to ensure that we can continue meeting the needs of our diverse community of practice.

Standing Technical Committee:

In the past, we have formed ad hoc workgroups to support the process of developing specifications. As of this year, we have [formed a Standing Committee](#) that will work in an ongoing way to assess users' needs and prioritize our roadmap accordingly. The Standing Technical Committee is empowered to decide what features will be addressed in a new release, and also advises the leadership of the initiative on other matters pertaining to strategy and governance as needed.

Each member of the Committee (as listed in [Acknowledgements](#)) is a distinguished leader who has contributed significant insights and value to our community, and we thank them for their service! To inquire about opportunities to serve on the Committee, [please reach out](#).

Formal process for issue proposal and designation

In collaboration with **Open Data Services Cooperative** – the designated technical stewards of our Human Service Data Specifications – our Committee has developed a formal process by which issues can be developed into proposed features and approved for inclusion in future versions of HSDS. [Review this process here.](#)

Do you have issues that you would like to see addressed in future versions of HSDS? **To get involved, [join our Forum](#).**

Surveying our Community

The Standing Technical Committee wants to hear from you: your input can inform our work to develop the specification, improve our documentation, and build tools and other resources that can help facilitate adoption of resource directory data standards and use of standardized resource data. **Give us your feedback to help shape our priorities: [take this survey here](#).**

Community forum: join us on Discourse!

We've recently partnered with the Open Referral UK network to adopt their Discourse forum and open it up to the entire Open Referral community! **Go to forum.openreferral.org to join** (or start!) discussions about a range of topics pertaining to resource directory information and Open Referral.

Building new leadership for the next chapter of Open Referral

After a decade of leadership in the Open Referral Initiative, founder Greg Bloom remains committed to supporting this community. He also knows how important it is to promote new leadership and expand the diversity of those at the table. With the Standing Technical Committee in place, Greg will be engaging in dialogue with other key partners and advisors across the network to identify needs and opportunities for new, diverse leadership that can help Open Referral evolve through its next chapters. [Reach out to discuss](#).

The road ahead: Growing our ecosystem

Open Referral is taking on new challenges at greater scales. Here's a look at what's to come.

Developing standards and strategies for the use of AI in I&R.

In partnership with Inform USA, Open Referral's founder, Greg Bloom is facilitating an AI Task Force of information-and-referral specialists who are developing guidance for the sector to ensure responsible and ethical use of algorithmic technologies in the field.

Updating our tools. As HSDS evolves, we need to help adopters leverage these standards to the fullest extent. In 2025, we will upgrade our data validator, and develop other tools that make it easy to produce, share, and use resource directory data. [Join our Forum](#) to help prioritize this roadmap!

Pioneering the path to federation. Open Referral has made it easy to share information from one system to many other systems. Now we have to make it easier to collaborate among systems – many-to-many style, i.e. through *data federation*. We've already prototyped a tool to identify matching records across different data sets – [reach out](#) to learn more and get involved with the next steps!

Evolving our governance model. As our network grows, we must continue to build capacity to make wise decisions together. This year, we'll consider opportunities to promote more leadership across our network, balance the varied interests of our community, and get things done.

Interested in exploring any of these opportunities further?

Reach out to info@openreferral.org.

Together, we will transform these systems!

Acknowledgments

More people and organizations make our work possible than we can reasonably fit on a page. We appreciate and thank the hundreds of leaders, stakeholders, and experts across our network who guide this work.

Our team

Greg Bloom – Founder and Initiative Leadership

Chris Hwang – Pilot lead

Sasha Reinoso – Program support

Open Data Services Cooperative – Technical Stewards

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Thank you for reading!

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Want to discuss anything you've read about here?

[Reach out](#). Or join [our Community Forum](#) today!