

The Open Referral Initiative: Local Pilot Projects brief

Summary: A Pilot Project Framework

Open Referral primarily works through **local pilot projects**. In pilots, project stakeholders collaborate to promote access to up-to-date resource directory data in their communities. Pilot project participants use Open Referral's data format to enable *interoperable exchange* of resource directory data among existing and/or emerging systems. In return, stakeholders can receive facilitation, technical resources, and other forms of support as needed. Furthermore, feedback from such stakeholders shapes the ongoing evolution of Open Referral. Pilot projects' objectives include short-term demonstrations of the value of open + interoperable resource directory systems, and strategic plans for long-term sustainability of such systems.

Pilot projects are formed around lead stakeholders:

Local pilot projects consist of teams led by **lead stakeholders**: institutions with a specific need for service directory data to serve their communities. Lead stakeholders may include front-line service organizations (e.g. libraries, hospitals, clinics, etc) as well as referral providers (e.g. 2-1-1 hotlines), safety net funders, research institutions, governments, etc. Lead stakeholders commit time and resources to participate in the search for solutions. They have decision-making agency over the project. Stakeholders are typically joined by **partners** — civic tech networks, software vendors, etc — who play roles in implementation.

Lead stakeholders provide leadership:

Each pilot project should have a **leadership table** comprised of designated lead stakeholders who meet regularly to deliberate upon issues of sustainability and governance. This table should be coordinated by, and set the priorities for, a team of support and implementation staff — i.e. the **'backbone.'** (Open Referral recommends at least two separate roles: a lead organizer to facilitate collaboration and user engagement, and a lead technologist to assist with implementation and evaluation).

A set of overlapping objectives:

Local teams have four distinct objectives.

- **Data:** aggregating, standardizing, and validating existing community resource datasets.
- **Platforms:** building 'open' systems that can publish data to an ecosystem of tools.
- **Testing and evaluation** of data, platforms, and tools through user-centered activities.
- **Planning** for sustainability and governance, with formal reports including recommendations.

What success looks like:

- Decrease in costs of data production and increase in data quality.
- Significant improvements in service discoverability and deliverability.
- Meaningful use in research, analysis, and decision-making.

Costs:

We (very roughly) estimate that a properly-funded pilot project would budget at least \$200k-400k per year for at least two years. This includes tech leadership (probably separate roles: data and integration), service design and project management (also separate roles), programming (including activities, such as workshops and trainings) and (ideally) stipends for lead stakeholder participation.

Where to begin?

- Identify partners: lead stakeholders, civic technologists, funders, government champions, etc.
- Identify prospective implementations: what might you try to achieve in the short-term?
- See sponsorship from local funders for coordination and implementation capacities

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