

The Open Referral Initiative: AIRS Conference Reportback

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Brief:

I attended the 2014 conference for the **Alliance of Information and Referral Systems** (AIRS) in Atlanta, representing the **Open Referral Initiative**, which is sponsored by **Code for America** and piloted in partnership with municipal governments and community anchor institutions in **San Francisco** and **DC**. (See [documentation on the Open Referral Initiative here](#), and [a memo about the DC pilot project here](#). [Slides from the presentation I gave at the conference are here](#), and accompanying documents here.)

Broadly speaking, the Open Referral Initiative is undertaking a course of research and action into two concurrent questions: First, how can modern community resource directory systems **leverage the distributed knowledge within networks of various stakeholders** who manage information about health, human, and social services? Second, how can we **make such data available to an ecosystem of applications, search engines and other means of inquiry/delivery** (above and beyond the conventional forms of calling center, printed directory, and single-point-of-access websites)?

In other words: how can we lower the costs of maintaining directories by sharing data? And how can we increase the value of this data, by enabling it to be used in more ways?

The AIRS 2014 experience revealed a mix of challenges and opportunities for the prospects of developing 'next-generation' service referral systems. Amid various levels of concern and interest expressed by AIRS participants, our initiative gained commitments of support and partnership from various partners, including some who can be of immediate assistance to the District of Columbia.

Outcomes:

AIRS: Extensive conversations with AIRS staff, board members, and technology committee yielded a number of provisional commitments. **Clive Jones**, AIRS staff, is planning to attend the Open Referral Workshop (July 9-11, in San Francisco). Data architect **Eric Jahn**, who led the design of the current AIRS XSD, a standard for transferring information between 2-1-1 systems, has agreed to join the Open Referral Work Group to consult on the development of a data exchange format that can be interoperable with 2-1-1 systems but easy-to-use for community partners and civic technologists. **Members of the AIRS technology committee have offered to review and advise our progress.**

Vendor support: I&R vendor **iCarol** (which provides the software for 2-1-1 systems in both of our pilot localities) **has agreed to participate in the Open Referral Work Group and Workshop**, provisionally pledging a commitment to redesign their API (the first in its field) in accordance with the emerging Open Referral model. In San Francisco Bay, iCarol is already advising on a transfer of data between local 2-1-1 systems (such as 2-1-1 San Francisco and 2-1-1 Santa Clara) and local governments, which are currently producing siloed resource directories that could be consolidated into a data pool system. **iCarol has committed to explore a parallel course of development and testing in DC.**

Other DC I&Rs: Our effort continues to identify new sources of community resource directory data currently being produced in the DC metro area, and this AIRS conference surfaced one of the most professionally staffed, trained, and rooted systems yet. The [J-Connect program](#) (previously known as the **Jewish Information and Referral Service**) operates in Rockville as a part of the Jewish Federation, with full-time resource specialist staff who collect and distribute information about DC area services, with a

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particular but not exclusive focus on services for elderly and disabled Jewish residents. J-Connect is currently struggling to sustain the resources needed to continue serving its community. **We will follow up to explore how a data-sharing project might be mutually beneficial to DC 2-1-1, the J-Connect program, and in turn, metro DC communities at large.** In the event that J-Connect joins our 'Local Team,' the DC Open 2-1-1 project will have interfaith representation from Jewish, Lutheran, and Catholic community anchor institutions — a potentially invaluable source of long-term support.

Federal services: A major source of potential near-term value for Open Referral participants is access to standardized data about federal and national services. At the AIRS conference, we explored this potential with federal agencies such as the Consumer Financial Protections Bureau, which offers various kinds of services designed to protect consumers from fraudulent savings and loan schemes, foreclosure, etc. With the Open Referral format, agencies like CFPB (and others such as Health and Human Services) could publish their service information in a single, standard, machine-readable format — so that systems like DC 2-1-1 can automatically consume federal service directory in bulk, rather than the status quo of manual maintenance of individual records on each agencies' services. **The Open Referral Initiative is exploring the 'low-hanging fruit' of federal service directory data, and excited about the opportunity to demonstrate this potential in our nation's capital.**

Aging populations: We established contact with **the National Association for Area Agencies**, which is based in DC and may be able to advise on various means of responsible and effective integration between the **DC Office on Aging** with the DC 2-1-1 system.

Applications: Various examples of system integration were discussed during the conference, including near-term potential for integration with **intake and case management systems** (such as the unified intake system in development by DC gov, and the Salesforce case management system used by Bread for the City), **disaster preparedness efforts** (such as Resilience DC, an initiative of the DC Department of Health), and **3-1-1 calling center systems**. Representatives of these and other potential 'use cases' have joined the Open Referral forum and are scoping possible pilot implementations.

Next steps:

The Open Referral Initiative has completed a round of fundraising (\$120,000 for a year of development and facilitation support) for its pilot project in San Francisco. **We are in the process of securing full funding for our DC Project Lead** (\$25,000 has been pledged by the family foundation of Patty Stonesifer of Martha's Table, conditional upon matching commitments from others in the DC community). Support from parties engaged in the AIRS conference will be helpful in this effort.

During July 9-11, the Open Referral Initiative will host its first Workshop in San Francisco Bay — funded by the California Health Care Foundation and hosted by the California Endowment. This Workshop will convene subject matters specialists, technologists, funders, government leaders, and community stakeholders to review, evaluate, and plan for implementation of our 'alpha' Open Referral model. **We invite representatives of the District Government to join our Local Project Lead in representing DC through this workshop.**

We are also currently soliciting sponsors for **the second Open Referral Workshop to be held in DC sometime during Fall or Winter of this year.**

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