

Open Referral OpenAPI Project Charter

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Vision:

We envision a future in which up-to-date directory data about health, human, and social services can be effectively exchanged among information providers, and openly shared with service providers and service consumers (i.e. people in need), across an open set of institutional, geographical, and technological contexts.

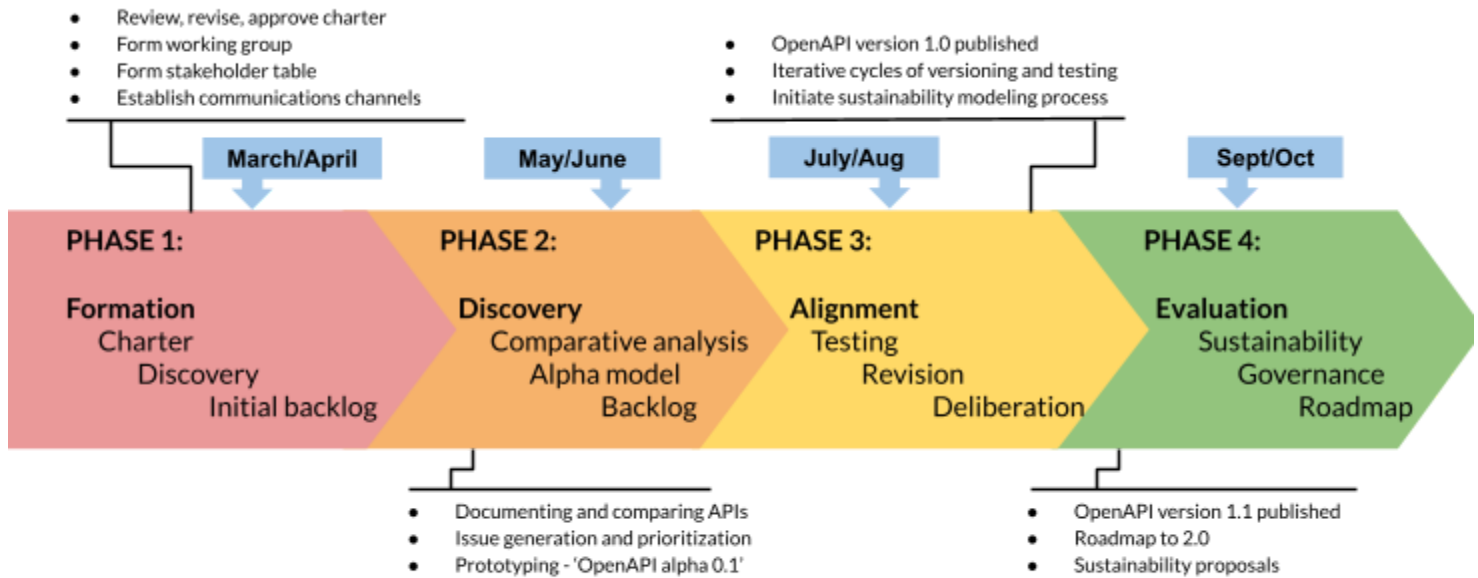
Objectives:

Through this project, we will establish a common protocol (i.e. a standardized set of API definitions) for exchange of information across a range of technologies. We will also develop open source tooling that facilitates and incentivizes the use of these standardized protocols. And we will chart a course for the journey ahead.

Deliverables:

- An OpenAPI specification building upon HSDS 1.1
- An open source 'developer's portal' and accompanying documentation
- Reference implementations of the OpenAPI spec in working open source software
- Recommendations for Human Services Data Specification v2.0
- Roadmap for future development
- Communications and collateral

Development roadmap:



Phase 1 - Formation

- Form working group
- Review, revise, and approve charter
- Establish user personas
- Establish success criteria
- Onboard to communication channels
- Review assets

Phase 2 - Discovery

- Comparative protocol analysis
- Issue generation
- Stakeholder Prioritization

Phase 3 - Alignment

- Testing and validation
- Proposals
- Upgraded spec

Phase 4 - Evaluation and final proposals

Milestones:

March 1st: Kickoff

March 31st (target): Working group formed, initial documentation (from individual participants and technical lead) shared.

May 31 (target): Initial comparative analyses conducted, stakeholder prioritization

June 30 (target): OpenAPI 1.1 proposed

July 31 (target): Tests completed and results shared

Aug 31 (target): OpenAPI 1.1 Finalized

September 30 (target): Final report issued

Partnership framework:

Project Leadership — designated leaders of the project, offering facilitation and proposal

Working Group — implementers commit to align their schema and OpenAPI spec

Peer Review Table— an Open Data Services Coop reviewer, in dialogue with end-users who receive a stipend, set priorities, resolve conflicts

Public Participants — anyone can sit in the calls and leave a comment

Project Leadership:

Project leadership - Greg Bloom

Technical leadership - Kin Lane

Data leadership - Tim Davies, Open Data Services Cooperative

Fiscal sponsor and administrator - Clive Jones, Alliance for Information and Referral Systems

Working Group:

The working group will consist of organizations with resource directory APIs who intend to contribute feedback to — and adopt the outcome of — the API specification process.

Working group participants agree to share documentation of their APIs (schema, definitions, authentication), first with the technical leader and subsequently in a public repository.

Working group members also commit to testing the iterative versions of the spec, in dialogue with a designated user-stakeholder who will participate in our peer review process.

In exchange, the technical leadership will offer up to two consulting sessions with each working group member. These sessions will both address technical issues between participants' APIs

Greg Bloom | bloom@openreferral.org | 202.643.3648 | For more information, see: openreferral.org

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and the common model — both framing and prioritizing issues for consideration, and advising on internal adjustments and/or workarounds. These sessions can also include private conversations about organizational strategy.

Peer Review:

The API specification will be subject to at least two rounds of peer review through a process led by the Open Data Services Cooperative, with participation by designated stakeholder representatives (i.e. actual users of resource data and associated technology).

We expect every workgroup participant to designate a user-representative to take place in this process. (Modest ‘honoraria’ are available from AIRS to compensate users for their time.)

In dialogue with an Open Data Services Coop lead reviewer, user representatives will test the API specification and deliberate around proposals offered by the technical lead and/or workgroup participants. These users will set priorities for future development and weigh in on disagreements according to their needs.

User Personas:

Who are the types of users for an API? What do they need?

Web developer: “I want to use the API as a source of content for the delivery mechanism that I am developing/maintaining.”

Database administrator: “I want to use this API to edit/verify/update data, possibly linking and even syncing records with identical records in my own database.”

Researcher: “I want to pull large sets of data, all at once, for analysis. I hope to be able to see changes over time.”

Service provider editing their own information (?): “I want to update information about my own organization and the services that we provide.”



Governance:

Anyone is free to suggest edits to the API specification through our Github repository.

Working group participants offer ‘weighted feedback’ that our Technical Lead will consider in the API design process.

Conflict resolution:

When we identify conflicts, we will solicit proposals from the working group and broader network of stakeholders. We will discuss those proposals in the monthly check-in; if conflict remains, we will articulate the stakes of each proposal in non-technical terms. This documentation will be brought to our table of stipended subject matter experts, who will weigh in. If there is not clear consensus, the project leadership (including the Technical Lead, Project Lead, and Fiscal Sponsor) will make a decision as a group, offering documentation and suggestions for how to constructively move forward.

Intellectual Property: developing an open layer

The Open Referral initiative’s content and schema are licensed under Creative Commons (By-Attribution Share-Alike 4.0), a license that promotes our core objectives of expanding adoption while ensuring interoperability across a diverse ecosystem. The Human Service Data API Specification will also assume this CC BY-SA 4.0 license.

Sharing schemas by core participants: Working group participants are asked to share their resource directory data schema and data structures (the field names, description, data type, and other details about the meta layer — ideally in a machine-readable format) in a public repository. A participant organization’s own internal schema can remain their intellectual property. However, one of our first steps with each participant is to ‘map’ their schema to our common model — and for this process to be effective and valid, we expect the implementers’ schema to be visible.

Contributions to an open source common model: when participants offer suggested changes and/or extensions to the API specification (through the Open Referral Github repository, Google Group, documentation, or other designated channel) the content of those proposals assume the open source license of the project (CC BY SA 4.0). [Subject to future reconsideration, we initiate this process under the same principles and parameters expressed in [the Github Contributor License Agreement](#).]



Respecting the boundaries of miscellaneous property: In some instances, participants may arrange for Open Referral's technical leadership to engage with them in conversation or even contracted consulting about internal business strategy. Some of these conversations might extend to matters beyond the common resource directory schema and data structures that are presumed to be shareable. We assume that any additional unique code or data that may be exposed through the course of these private conversations will remain the property of participants, and will not be disclosed by Open Referral's leadership — though we also ask that specific expectations should be declared in advance by the participant, and subject to *ad hoc* agreement that preserves the leadership's ability to communicate about common technical and operational concepts with other parties and the public at large.

Cadence:

One-on-one meetings:
Weekly office hours:
Monthly group chats:
Quarterly project assemblies:

Channels:

Github - issues and project hosting
Google Drive - [file folder](#)
Trello - Task management
Google Group - public forum
[Slack #openapi](#) - working group discussion



Statements of Work

Project Lead

General Responsibilities

- Regular meetings
- Big meetings
- Activity reports
- Evaluation
- Coordination

Product Responsibilities

- Co-create user profiles and user stories
- Co-design and implement user testing process
- Co-design and implement evaluation process

Communications

- Progress reports
- Co-create blog post
- Co-create final report

Technical Lead