Open Referral UK
Overview for Local Authorities

Working towards consistent open data about local services

Tim Adams

Programme Manager (LGA)

@DrTimAdams

21 April 2022

Agenda

1. Introduction - LGA - Tim Adams
2. Business case and infrastructure - Porism - Mike Thacker
3. The Data - The Care Forum - Kevin Peltonen-Messenger
4. Systems - Placecube - Adam Harris
5. Deployment - Digital Gaps and Digital Coproduction - Simon Dickinson
6. Connecting with health - NHS – Linda Vernon
7. A generic service finder - Porism - Mike Thacker
8. Questions
9. Further help

Introduction and context

The problem to solve

- Thousands of local services are there to help

    - Local and hyper-local

- No one has a full picture – even on local basis

- Local government is complex (needs expert navigation)

- People have complex needs

- Circumstances, location, mobility, needs, aspirations

- Help to discover service availability and match to needs

The issues

- Do we know what services & activities are out there?

- Difficult to collect

- Unreliable data, ever out of date

- Diversity: 350 councils & 1000s of partners

- Unable to work across boundaries

- Hard to discover, filter and re-use

The solution

- Make use of the crowd

- Use standard schema

- Develop data collection guidelines

- Encourage local custodians and governance groups

- Align with national taxonomies

- Use a consistent means of publication

- Enthuse data platform and app developers

- Open the search capability to wider groups

The benefits

- Frontline can use reliable data to raise awareness of preventative services

- Easier data discovery

- Geographical and organisational boundaries create less challenge

- Efficiency and effectiveness of data collection improved

Objectives of the approach

- Provide useful data – relevant, up-to-date, locally oriented
- Keep it as simple as possible for publishers & consumers
- Resolve fragmentation, inconsistency and discovery
- Enable data users to accurately interpret data and aggregate it across places – *innovative "apps"*

Any partner

Br. Red Cross

AgeUK

Any local HUB

Any Place

North Yorks

Hull City
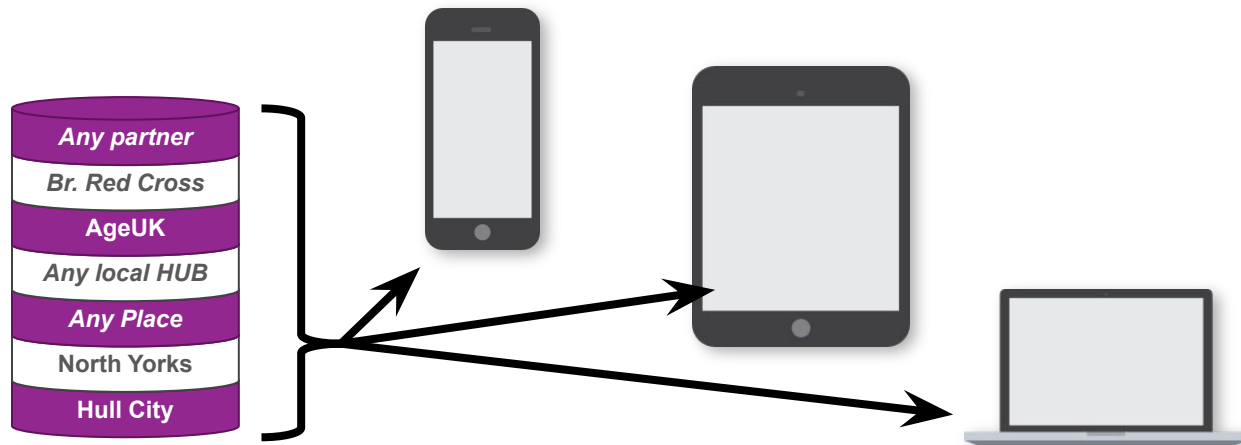
The building blocks

- Controlled definitions (or semantics)

- Technical data specification (or schema)

- Publishing guidance and support tools

- Data collection, validation, governance procedures

- Custodian services

- Discovery tools

- National endorsement and support

- Practical examples for deployment

Loneliness open services data reports


https://e-sd.org/IGODN/

https://e-sd.org/VdVca/
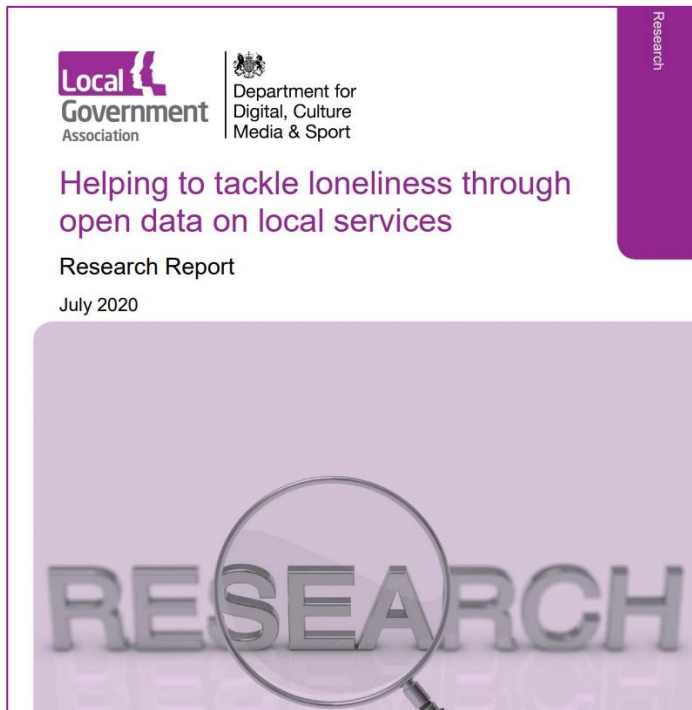
The business case for deployment

- Better use of partner wide resources through collecting information once and sharing it between partners

- Rationalise software by sharing the capability

- Saving frontline workers time from researching their own information

- Providing a reliable set of information for people at risk of loneliness or health, care or other statutory services to self-serve and self-refer into local community activities and services

- Most importantly, ensuring that initiatives such as social prescribing are successful in identifying the most appropriate support and activities to keep people safe and well.

Beyond LGA and roadmap to wider take-up
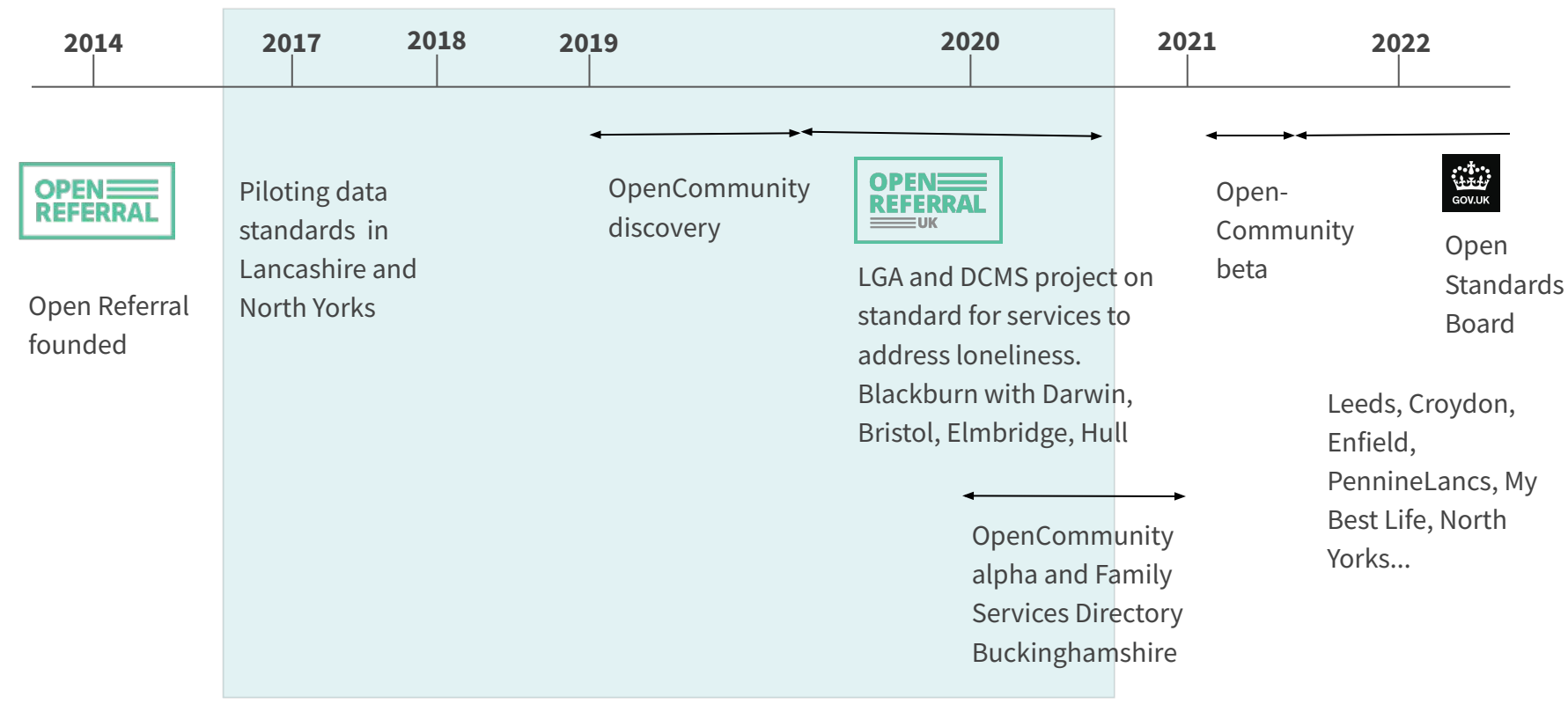
Support for Open Referral UK

Cabinet Office - backed by the Data Standards Authority

MHCLG / DLUHC - backing via the LocalDigital Fund Open Community project

DCMS - adopted in the LGA run Tacking Loneliness project

NHS - mandated by the Social prescribing procurement framework

LGA - adopted by the Tackling Loneliness project and supported by LGA taxonomies and tools

Open Referral (international) - adopting UK extensions and joining communities

CAST - adoption by this charity helping organisations use digital for social good

NPC - adoption by this think tank and consultancy for the social sector

My Best Life - adopted for directory of Lambeth youth services

Open Data Institute - supporting adoption and governance mechanisms

Local Authorities including: Bristol, Blackburn, Buckinghamshire, Elmbridge, Hull, North Lincs, North Yorks, South Gloucestershire

Private companies including: Doc&Tee, FutureGov, Placecube, Public Partnerships, VidaVia, WellAware

Business case and infrastructure

What is Open Referral UK? Why use it and how?

Mike Thacker mike.thacker@porism.com @MikeThacker

What is Open Referral UK?

A standard for the interchange of open data describing services via an Application Programming Interface (API)

Organisation	
Service	
Contacts	Eligibility
Location	Accessibility
Schedule	Taxonomies
Cost	Languages spoken

Modular design of service directories - 1

Services database

Services data capture, validation and storage

API

Service finder

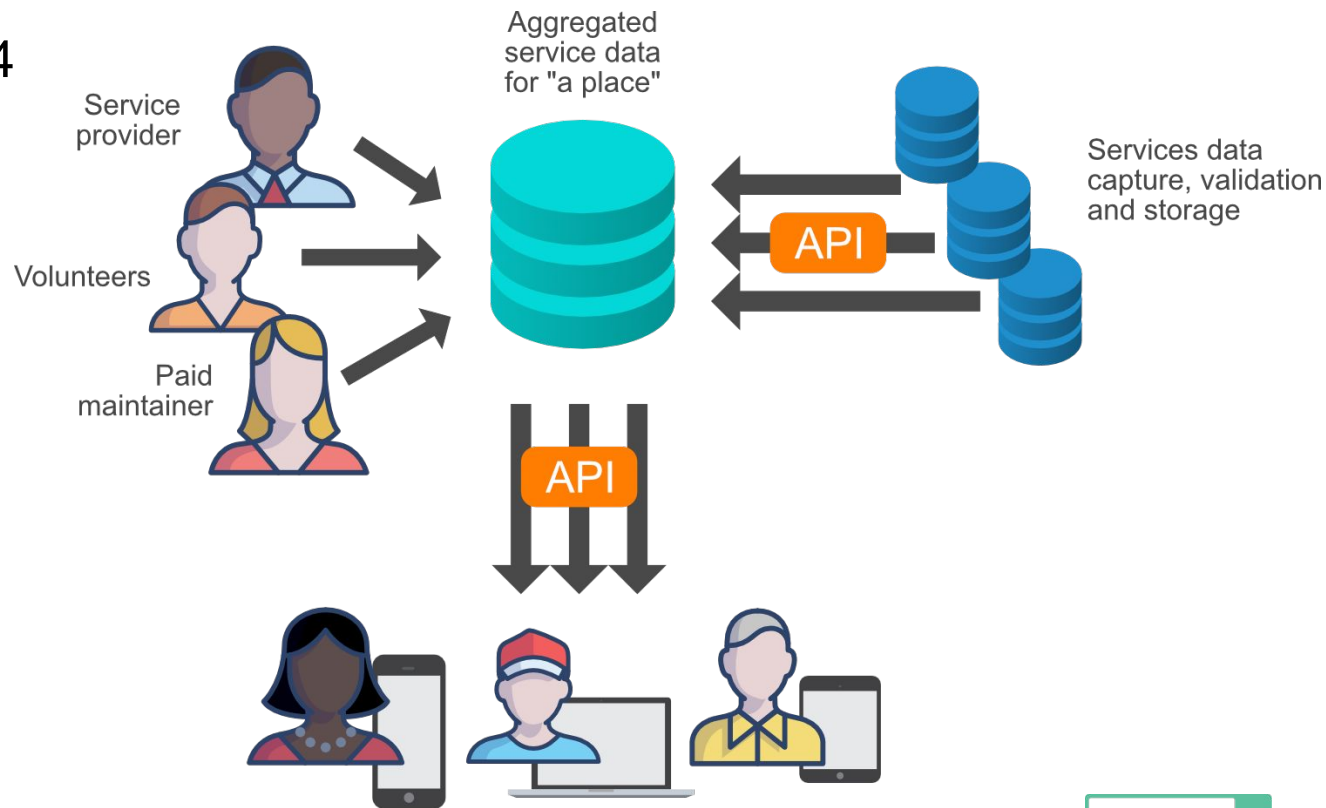# Modular design of service directories - 2

Services database

Services data capture, validation and storage

API
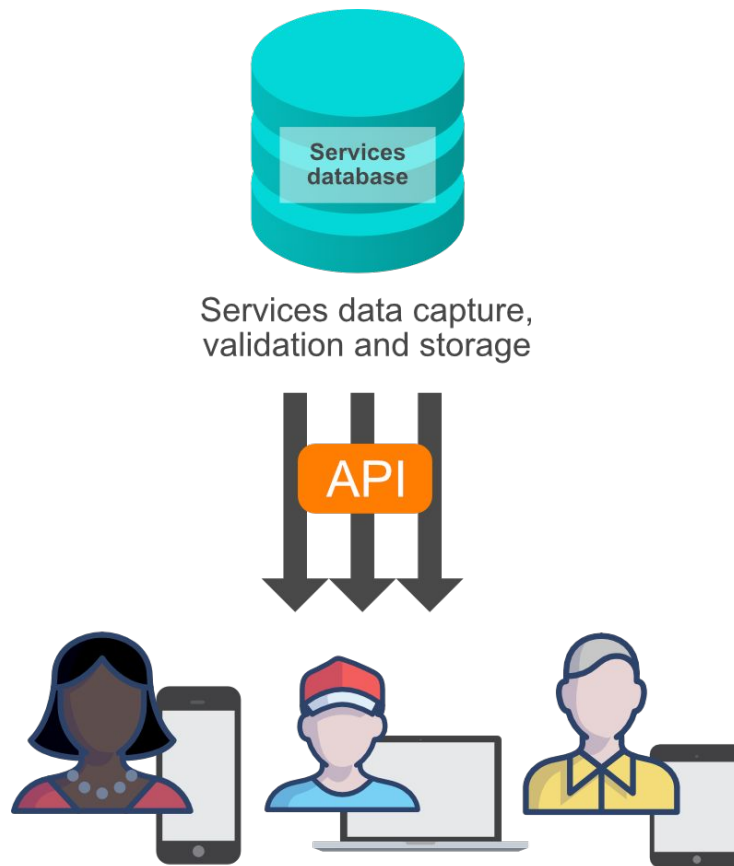
Service finders aimed at different audiences

Modular design of service directories - 3

Modular design of service directories - 4

Service provider

Volunteers

Paid maintainer

Aggregated service data for "a place"

API

Services data capture, validation and storage

API

Service finders aimed at different audiences

Local Government Association

OPEN REFERRAL UK

The business case

Good quality data maintained once for many purposes

Reduce vendor tie-in

Better targeted services

See:
- OpenCommunity [Discovery report](#) (savings of < £73k pa per council)
- LGA / DCMS [Loneliness project report](#) (save 30% of link workers' time)
- Open Data Institute - [The role of data in unlocking the potential of social prescribing](#) (diverting 3+ million GP appointments)

The mandate

Government Open Standards Board - mandates in central government

Required by NHS Health Systems Support Framework (HSSF) for Social Prescribing (see Buyers' Guide)

Implicit in the Local Digital Declaration commitment to:

- Openness
- Interoperability
- Modular design

The Digital Declaration

"We will 'fix our plumbing' to break our dependence on inflexible and expensive technology that doesn't join up effectively.

This means insisting on modular building blocks for the IT we rely on, and open standards to give a common structure to the data we create."
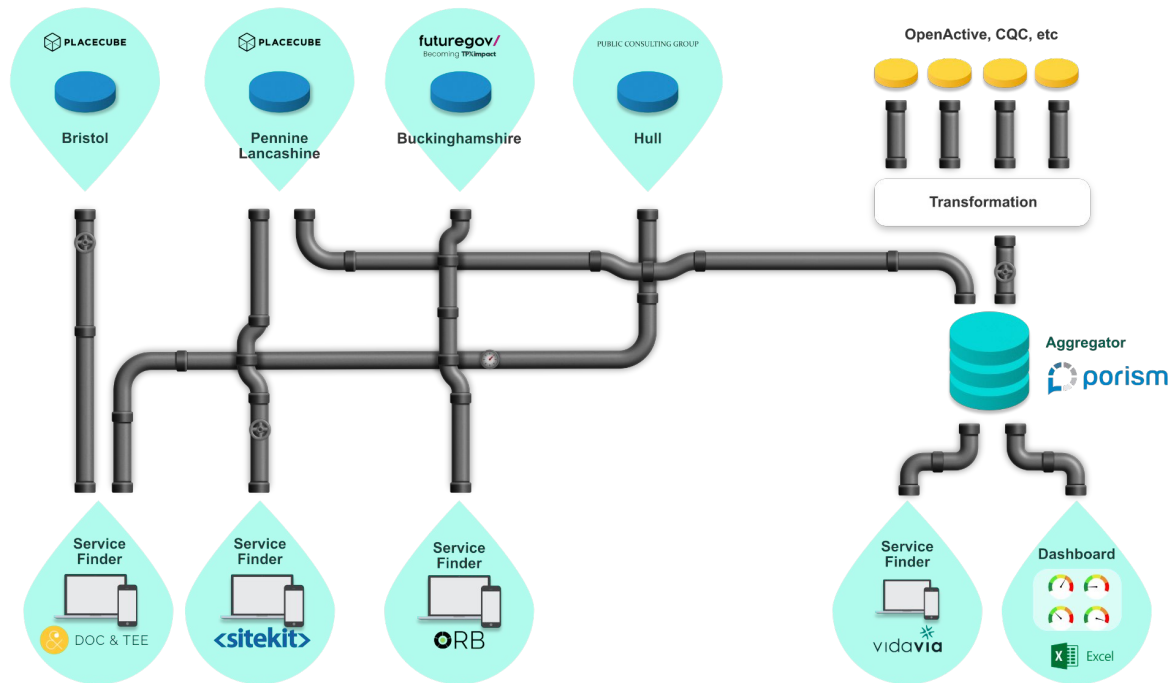
Separate deliverables

1. Services database - insist on API compliance - [see live feeds](#)

2. Front-end tools - appropriate to different audiences

3. Data maintenance - apply an SLA

See [Steps to adoption](#)

Maintaining Services Data

Kevin Peltonen-Messenger - The Care Forum

Systems applying the standard

Adam Harris - Placecube

Open Place Directory

Maintain assured local service information and publish as open data.

- Born in 2019, out of a collaboration between Bristol City Council, The Care Forum, Digital Gaps, Doc and Tee & Placecube

- Worked alongside LGA on the 'Open data to tackle Loneliness' project, resulting in adoption of ORUK data standard

- Continuous improvement of user experience, functionality, ORUK adoption and open API's over the course of 3+ years

- Only System Developer with more than 1 live feed on the ORUK dashboard. (4)

- 3,045 services, 1,597 providers, 5,000+ daily requests via webservices (API's)

Open Place Directory – Design Principles
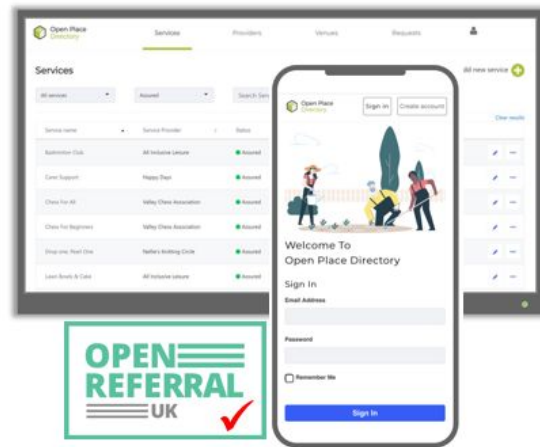
Put data quality above all else – focus on end user experience & outcomes

- Address all those things that contribute to poor data quality (inconsistency, duplication, poor maintenance).

Collect, assure, publish, maintain in one place – consolidate directory overhead

- Make it easier to collect and maintain data, have one version of the truth, publish as structured, Standard Compliant, open data to multiple use cases / front ends.

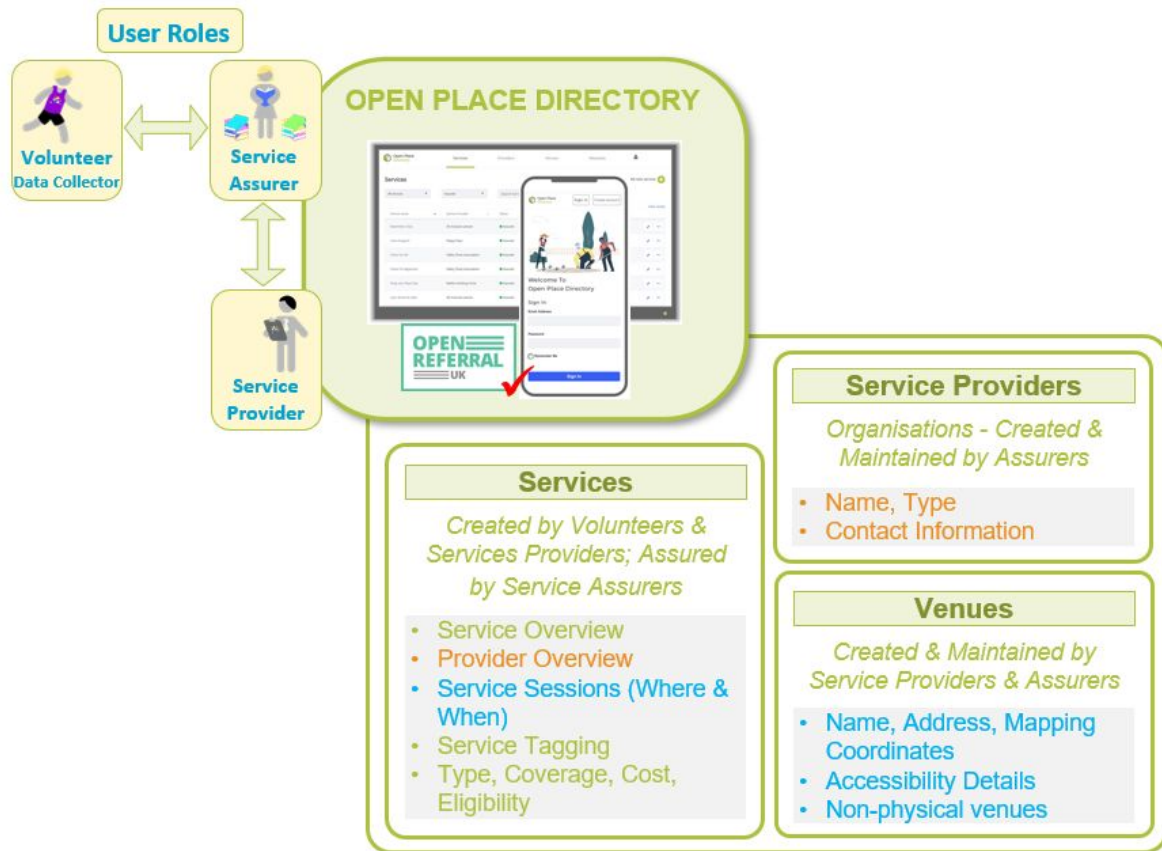## Make data collection as simple as possible

- Facilitate crowdsourcing of service information, enable bulk import.

Engage community to improve maintenance

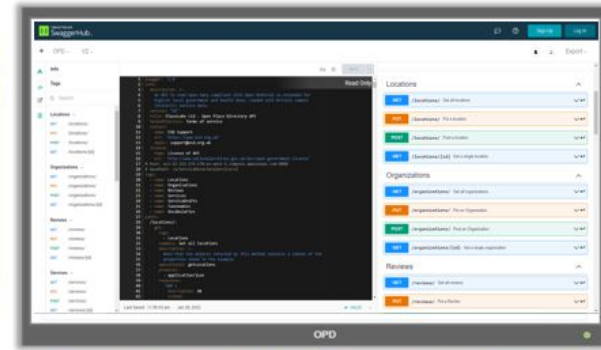- Give service providers ability to create, review, maintain & unpublish their own services.
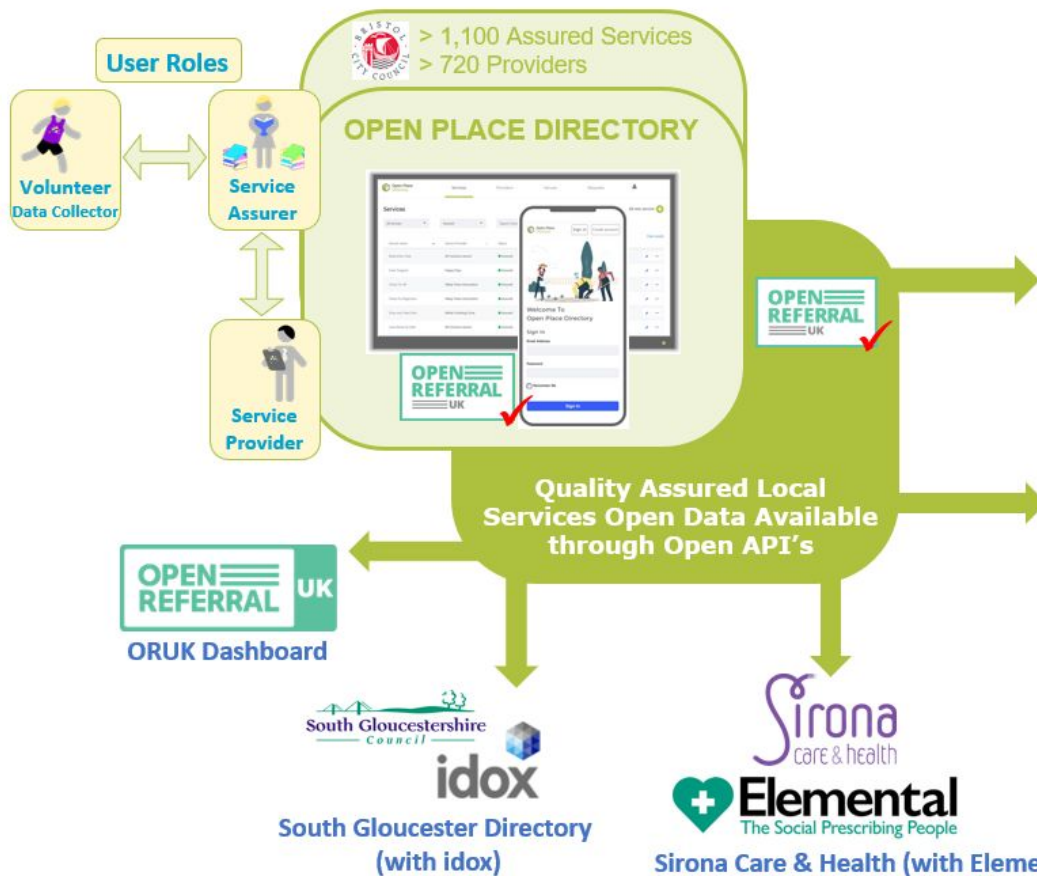
Open Place Directory – Where does it fit…?

User Roles

Volunteer Data Collector

Service Assurer

Service Provider

OPEN PLACE DIRECTORY

OPEN REFERRAL UK

Services

Created by Volunteers & Services Providers; Assured by Service Assurers

- Service Overview
- Provider Overview
- Service Sessions (Where & When)
- Service Tagging
- Type, Coverage, Cost, Eligibility

Service Providers

Organisations - Created & Maintained by Assurers

- Name, Type
- Contact Information

Venues

Created & Maintained by Service Providers & Assurers

- Name, Address, Mapping Coordinates
- Accessibility Details
- Non-physical venues

Open Place Directory – Where does it fit...?

User Roles

Volunteer
Data Collector

Service Assurer

Service Provider

OPEN PLACE DIRECTORY

OPEN REFERRAL UK

Quality Assured Local Services Open Data Available through Open API's

OPEN REFERRAL UK

https://app.swaggerhub.com/apis/placecube/OPD/V2#/

Open Place Directory – Challenges & Key Considerations

Technology is the easy part...

- Biggest challenge we've seen is securing Service Provider engagement. Requires investment of time and clear articulation of the benefits of adopting the standard and working as a community.

Embrace the standard...

- Standards are often viewed as restrictive or draconian. ORUK has very few mandatory elements as well as infrastructure for evolution. We have added our extensions to the standard, some of which we anticipate being adopted in time. ORUK is an Interchange Standard – facilitating interoperability between compliant systems.

Determine a service assurance model...

- How will you ensure the service data stays current and accurate? Centralised team or empower the community?

Team effort required...

- For both local and national success, everyone needs to pull in same direction. Bristol story demonstrated number of stakeholders and collaborators required. Tap in to the available resources and expertise available.

Commit to the change, prepare for a long journey...

- Commitment to adoption of the standard is the start. Full execution requires transformational and cultural change but business case demonstrates benefits to both the council and ultimately the service users.
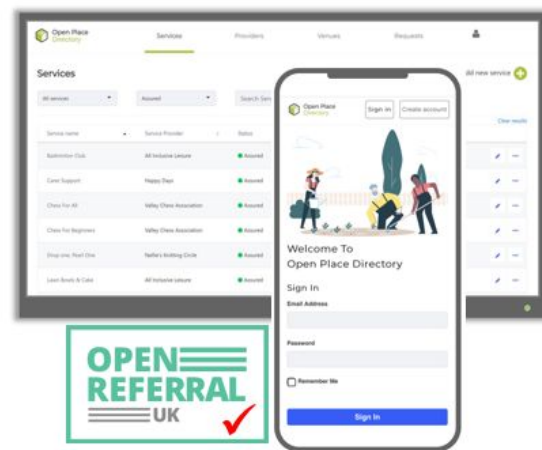
Open Place Directory

Maintain assured local service information and publish as open data.

For more information...

https://www.placecube.com/platforms/open-place-directory/

adam.harris@placecube.com

Deployment

Simon Dickinson - Digital Cooperation

Open Referral UK

Agenda

- Introductions
- Have a clear purpose / ambition
- Get a good baseline
- Have a model / FAQs answered
- Other thoughts

digital gaps

Digital CoProduction

PLACECUBE

Have a clear purpose

- Don't make this about implementing Open Referral UK
- ORUK is the sensible / inevitable decision – where you are looking to work collaboratively / inter-operably on service information
  - Implementing a new tool / algorithm around self-care / self-support
  - New contract related to a specific tool – like Local Offer or IAG contracts
  - Improving the accuracy of a **specific** data set
  - Gaining a better view of what exists across the place – and what is being accessed / searched for
  - Improving the experience for people – in a specific area / process (like SPLW or ASC or Local Offer or Early Help)
  - Improving the information related to safeguarding checks of services
  - Enabling service quality feedback – professionals / citizens

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  - New contract related to a specific tool – like Local Offer or IAG contracts
  - Improving the accuracy of a specific data set
  - Implementing a new service offer with very strong self-resilience angle
  - Gaining a better view of what exists across the place – and what is being accessed / searched for
  - Improving the experience for people – in a specific area / process (like SPLW or ASC or Local Offer or Early Help)
  - Improving the information related to safeguarding checks of services
  - Enabling service quality feedback – professionals / citizens

Good Baseline

- Service Providers perspective

- Citizens' experiences

- Professional experiences

- Numbers of current "lists" / current model

- Accuracy / overlap of the data

digital gaps

Digital CoProduction

PLACECUBE

Client

| Free exercise for +45 on Southwark website | First option is free swim | Find other options from Southwark Well Being Hub | Decide on Nordic Walking - sounds right level | Phone to book in - but wrong number | Person no longer works there - surprised - but gives us number | They have given us the wrong number | Eventually find the right number, but it is a dead dial tone |

| Feels positive | Don't want to swim - too public | Maybe there will be something | OK - I can see myself doing this | Feel like this always happens to me | Maybe it is different this time! | I just want to give up now | This is ridiculous, I wanted to join in - but it was not possible |

Persona - Linda
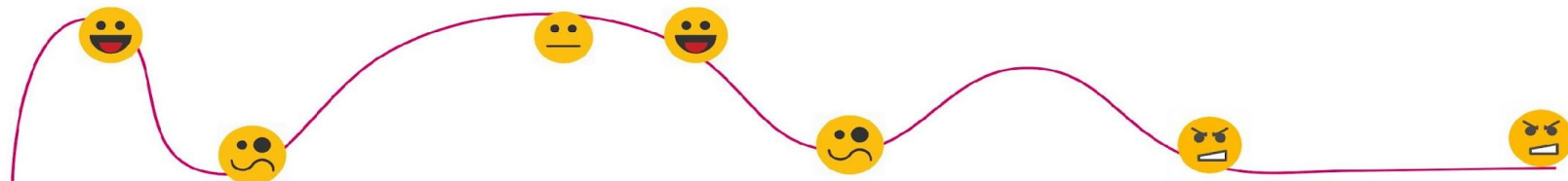
Frontline worker

| New client, this is the part of the job I like | Motivating clients to help themselves is what I love | website has interesting options - feels positive | Nordic Walking sounds like the sort of thing that lots of clients would like | That is not good - their personal number still live | I must remember to tell someone to update that info | So bad - that we cant find the information to help someone. I have spend 5 minutes and only left client more disappointed |

Persona - Tony

digital gaps
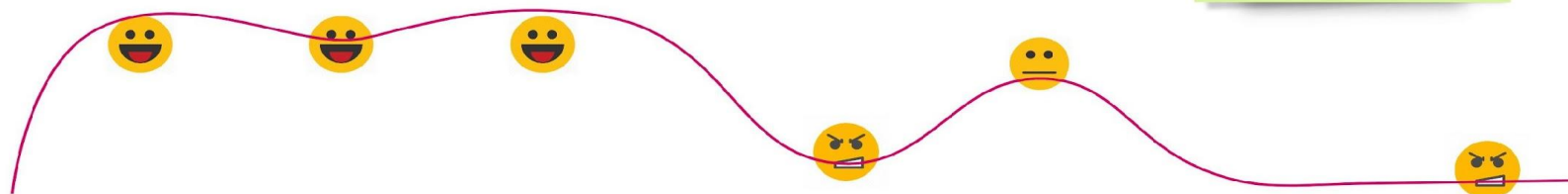
Good Baseline

- About 50% of citizen searches "fail" – as people just give up
- Over 80% of all local providers maintain their own list
- They tend to rate this as 3 out of 5 – in terms of accuracy / experience
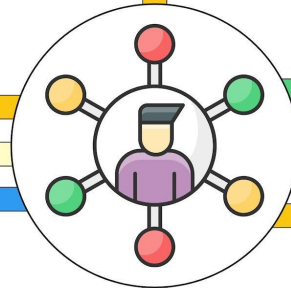- There is about 40% duplication across existing directories. 30% of these records tend to be different

Digital CoProduction

PLACECUBE

Have a Model

Assuring

Collecting
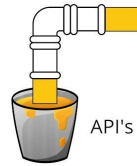
Publishing

API's

Open Active

CSVs

API's

CSV

CSV

API's
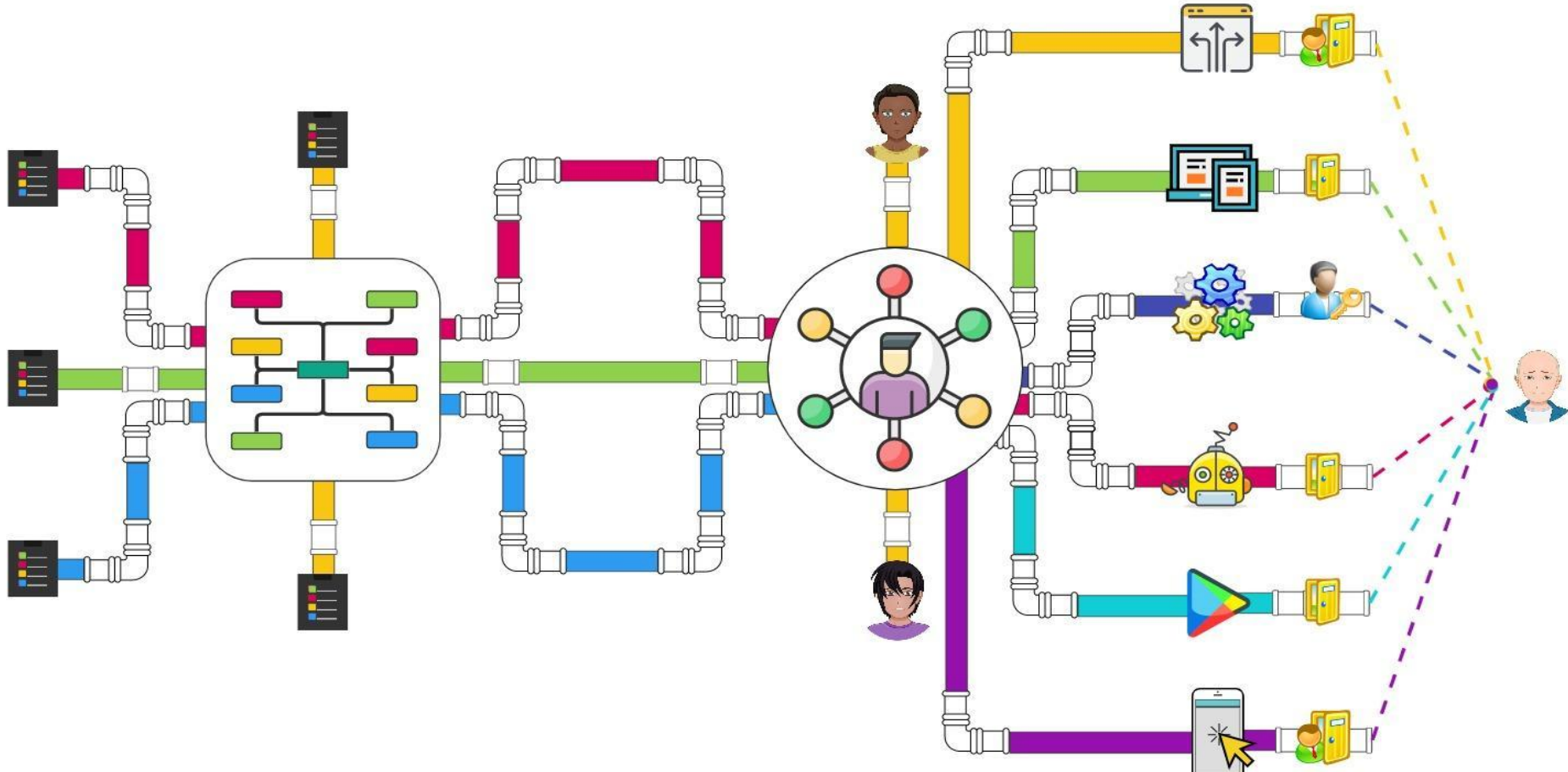
Other thoughts / tips

- Start at the front-end – it is demand that drives buy-in
- This is about data / information – and the accuracy and re-use of it
- Win:win:win - it has to be a better end-to-end experience for all stakeholders, or they wont change
- Start small – but ambitious
- Get your FAQs addressed
- Taxonomy, taxonomy, taxonomy
- It is not about finding services – it is about accessing them
- Simple English
- Empower the crowds
- It is about culture, trust and collaboration – about relying less on what you can remember and more on sharing what you know

digital gaps

Digital CoProduction

PLACECUBE

https://www.digitalcoproduction.co.uk/

https://digitalgaps.co.uk/

digital gaps

Thanks for listening

simon.dickinson@digitalgaps.co.uk

Digital CoProduction

PLACECUBE

Connecting with health

Linda Vernon - Lancashire and South Cumbria Integrated Care System

Lancashire & South Cumbria ORUK Adoption

The health perspective on reliable local service data for Directories of Services

Linda Vernon, Digital Culture and Transformation Clinical Lead,
Lancashire & South Cumbria Health & Care Partnership

@vernonlinda

ORUK Overview for Local Authorities
21st April, 2022

Health and Care Partnership
Partners

- Five place-based partnerships

- 1.8m population

- 8 CCGs

- 5 Trusts

- 2 upper tier, 2 unitary and 14 district local authorities

- NHS England and NHS Improvement

- Wider partners such as voluntary, community, faith, social enterprise and education

Morecambe Bay

Pennine Lancashire

Fylde Coast

West Lancashire

Central Lancashire
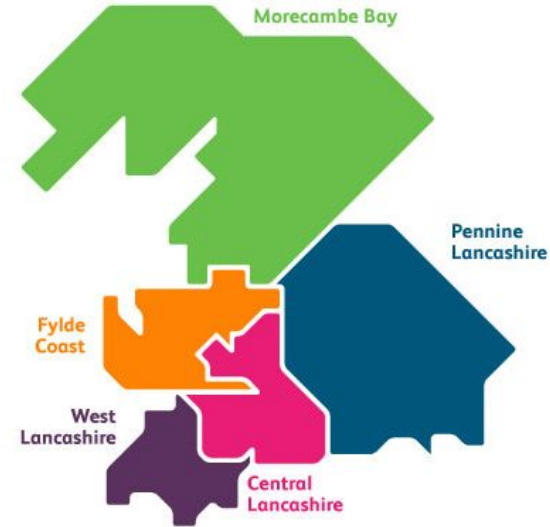
Our Challenges

- Health Inequalities & Digital Exclusion
- A need for proactive, preventative care
- Demand on services (particularly primary care) that could be met elsewhere
- Clinical pressures & lack of headspace to change behaviours
  - Short appointment times
  - Dislike of multiple systems/login
  - Lack of clarity/trust in information sources
- Multiple sources of information on commissioned and non-commissioned services
  - ~ inaccurate, out-dated, duplicated effort
  - ~ upfront investment but lack of sustainable funding & resource to maintain
- New opportunities – social prescribing link workers, care navigators, etc.
- Multiple digital systems with potential siloed data
- Inability to make data-driven commissioning decisions
- COVID-19 adding a sense of urgency

User-centred design ~ ensuring we are meeting the needs of those we serve

User-centred design ~ ensuring we are meeting the needs of those we serve

How might we...

In new groups we tried to come up with 'How might we statements for each theme, in the hope that we could peg ideas to each statement later.

How do I know stuff

How might we....
- Make it clear where to find stuff
- Make it easier for people to know where to go for help
- Provide clear guidance to access services for different problems
- Make it easier for people to know what options they have
- Make it easier to access digital services
- Make it easier to initially find out which services need to be involved with

Accessing services

How might we...
- Help people with transport to appointments
- Use technology to help people get to the services that they need
- Ensure people aren't disadvantaged if they can't access online services
- Make it easier to access services

Routes/Pathways

How might we...
- Access services without internet
- Advertise health available

Group 3

Services/digital/human. Aren't separate things

This is about personalised information.
Services/tools are peer reviewed and NHS approved.
You can filter services according to your needs (LGBTQ+ friendly etc)

Questionnaire helps you find what you are looking for
Outputs are designed for you
- Self manage
- Real world services
- Other tools that help

How to test quick and cheaply
- Put together a questionnaire for people and let them respond. For now you'll have to dig to find results but you are testing the premise of tailored support

Vision

- A single accurate and assured set of information

- Covers local and digital support, statutory services and Information/Advice and Guidance

- Captured and maintained to a data standard so the information can be re-used across all frontline worker (health and beyond) and self-help processes and tools – and websites

- A set of tools that provide non-digital access to the data set – for those digitally less able / ready

- Tracking and monitoring capability – to enable monitoring of attendance at local groups (to evaluate the impact on health outcomes)

- As a digital asset it can be re-used and can help accelerate digital transformation generally (chatbots, algorithms / health-checks that signposts people to the best support)

Model Overview

Commissioner dashboard
provides single view of all services by geography, service-type and circumstances/need

Social prescribing

Data passed to front-end system, websites and directories through APIs

Community website

Service Provider
Service Providers enter and maintain their own data

Assurer
Information assured / approved to shared assurance standard

Lancashire & Cumbria Local Services Federated Digital Catalogue

Citizen self-care

Service User
Citizen, Carer, Professional

Chat bot

ORCHA

Translator

Translation Service
Stores a translated version of the data and makes it available through an api

Service Finder

Frontline Worker
Can send updates / new service information from a phone app

Healthier Together

Progress

- Over 1200 services collected and being assured monthly – Pennine Lancashire
- Every record has the date of last update / assurance
- Over 300 providers have information live
- 70 users pan Pennine Lancashire – SPLW, Early Help Social Work, Prevention Partnership, INT
- Integration with ORCHA – search for apps and traditional services
- Monthly training and online training videos
- Filter by time, attending type, location, cost, service type, target audience, provider, venue

Web healthierlsc.co.uk | **Facebook** @HealthierLSC | **Twitter** @HealthierLSC

Illustrative Service Finder

Using standard taxonomies

Local Government Business Model

Questions

Chaired by Tim Adams - LGA

Further help

openreferraluk.org

Open Referral becoming the norm for sharing open information on services - 22 March 2022
Fixing the plumbing — What that means for local service data - 29 March 2020
Not another directory of services! - 29 September 2019

Helping to tackle loneliness through open data on local services
Open Data Institute - Forming an institution

Open Referral UK discussion forum

Knowledge Hub Open data forum

transparency@local.gov.uk
hello@openreferraluk.org
Mailing list

Local
Government
Association

OPEN
REFERRAL UK