

# Open Referral UK Validator and Dashboard - Work Scope

## Purpose

This document summarises the work needed to develop an Open Referral UK (ORUK) data feed validator and dashboard of compliant feeds as part of the “ORUK Adoption” project undertaken for DLUHC between April 2024 and March 2025, as specified in [Local Digital Specialists Framework Statement of Work 11 ORUK Adoption](#) (the SoW).

We envisage the projects Subject Matter Expert (Mike Thacker) taking overall responsibility for the deliverables. This document states the skills he will need to draw on from others, particularly an Analyst / Programmer whom we need to find.

## The Validator

### Requirement

Outcome 4 of the SoW is: “Define, test and support compliance with the Standard including launching a new validation tool”.

### What exists

The initial version of ORUK is supported by [Developer documentation and tools](#) including a [validator](#) which runs tests on any given ORUK end point (aka an API stub address). [This page](#) describes the validation rules applied.

The Validator provides a non-negotiable pass/fail test of essential features of a data publisher’s ORUK API feed. Additional non-essential (but nice to have) features of a feed are also tested by the Validator.

Whilst the initial version of ORUK extended the international OR standard, version 3.0 of OR built in all UK extensions that have proved practical into one standard known as the Human Services Data Specification 3.0. ORUK is a “profile” of that standard defining which fields/properties of the full standard are required in the UK.

Open Data Services Coop (ODSC), working for OR International, has defined a profiling methodology whereby anyone can define in machine-readable terms a profile based on the full HSDS standard.

ODSC also defined web methods (API queries) that should be provided by an OR-compliant API. The content of responses to API queries is determined by the profile.

We have an ORUK profile and associated precise API calls - all documented at <https://docs.openreferraluk.org/en/latest/>. The profile was based on feedback from UK adopters with input from a Placecube developer (Paul Brown) and Digital Coproduction consultant (Ian Singleton).

Porism previously specified a Validator and Dashboard in the document [Por11474 - Open Referral Validator and Dashboard specification](#). The UK version was seen as a pilot to an international version supporting any version or HSDS from 3.0 and any profile.

## Work needed

Tasks are summarised below with these roles against each (main person in bold):

- Subject Matter Expert (Mike)
  - Content Designer or Interaction designer (Jay)
  - Analyst/programmer (TBC)
1. familiarise ourselves with what currently exists (**A**, C)
  2. bring the version 3.0 UK profile to the attention of UK implementers giving them the opportunity to raise any issues - a primary concern is that fields required by major implementers like DfE Family Hubs are mandatory in the profile. See the forum post [What constitutes compliance in the UK](#). (**S**, A)
  3. make any minor changes necessary for the profile to work for council and associated implementations. This might be done in conjunction with the international group that will work on version 3.01 (**A**)
  4. update live documentation to reflect the latest version whilst still supporting the prior version (A, C, S)
  5. specify a new validator based heavily on the existing one (A, **S**)
  6. wireframe and design the new validator pages (**C**)
  7. develop and test the new validator (**A**)
  8. launch the validator (**C**, S, A)
  9. support users in achieving compliant feeds - advising why their API feeds fail and improving any validator error handling to provide better feedback (**A**, S)
  10. specify tasks to be performed by Y 2 and 3 supplier with associated checks (**S**, A)

Note that during a transition from the original version of ORUK to version 3.0 and beyond, both the old and new validators will need to be supported, but we don't expect to do any work on the old tools

## The Dashboard

### Requirement

Outcome 5 of the SoW is: "Monitor and evaluate adoption of the Standard including updating the Dashboard of compliant feeds".

The Dashboard is the main (but not only) tool that shows which data publishers/feeds have adopted the standard.

## What exists

The initial version of ORUK is supported by a [Dashboard](#) of data feeds which are or were ORUK compliant.

Checks are run every 24 hours on each feed to check it is still live and the degree to which it is ORUK compliant. Results are shown in the Dashboard which also acts as a public directory of organisations publishing ORUK feeds and their software suppliers.

The Dashboard applies the same validation rules as the Validator.

## Work needed

1. familiarise ourselves with what currently exists (**A**, **C**)
2. specify a new Dashboard based heavily on the existing one (**A**, **S**)
3. wireframe and design the new Dashboard pages (**C**)
4. develop and test the new dashboard (**A**)
5. launch the dashboard (**C**, **S**, **A**)
6. add and remove feeds to the Dashboard as they become available or are removed (**A**, **S**)
7. specify tasks to be performed by Y 2 and 3 supplier with associated checks (**S**, **A**)

## Considerations

- All tools should be open source. They can be built from scratch or using the open source code for existing versions
- Tools and associated documentation need to be built into the Open Referral UK website. Servers need to be provisioned for growing demand
- Tools may be built from scratch to support any version of HSDS and and profile *or* built specifically for HSDS 3.0 (or 3.01) and the UK profile but with later enhancement anticipated
- The project needs a means of dealing with supplier/developer objections to aspects the ORUK standard without allowing for local interpretation leading to inconsistent feeds. This might mean accepting essential changes to the UK profile and parking other issues for consideration in later releases
- ODSC and the OR Standing Technical group can assist and will seek feedback so that our work fits in well with the international project.

## Analyst / Programmer work scope

Become familiar with:

- the HSDS specification and API, specifically as it pertains to UK local government
- the means by which profiles and resultant API responses are generated from HSDS

- how ORUK API feeds are published and consumed

Develop and release the Validator and Dashboard software, support their use and make minor improvements in response to feedback. Liaise with ODSC and the OR Standing Technical group.

Work with the wider team to:

- Develop software specifications and document the the profile, the validator and the dashboard
- Implement page designs for the Validator, Dashboard and associated online content
- Define the work scope of the Year 2 & 3 supplier to ensure the validator and Dashboard are maintained and updated

## Options for employing an Analyst / Programmer

- Use an inhouse TPX Impact developer to perform Analyst Programmer tasks and take over hosting and support of all existing ORUK online content and tools
- Use an inhouse TPX Impact developer to perform Analyst Programmer tasks but keep existing content and tools with Porism, calling on Porism for small amounts of advice and integration work (**Mike recommends this if a suitable TPX Impact person is available**)
- Commission a third party who might be:
  - Existing Porism developers
  - ODSC
  - The Open Data Institute (ODI) which has developed tools for the OpenActive standard heavily influenced by existing ORUK tools

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