Standard Training Curriculum for AIRS/211 LA County Taxonomy of Human Services

The following is just a guide and could/should be customized as much as you wish to meet the needs of your audience and/or your own presentational style.

This curriculum can be freely used by Taxonomy trainers and, if needed, by individuals with the responsibility of training themselves. It is suggested that you first review the Taxonomy Training Powerpoint Presentation as a good general introduction to the Taxonomy.

For trainers, please develop more exercises that are locally and software relevant (e.g. find a term to describe x and y, how would you index these services, etc.). Also remember that following a training session, there should be a means to review people's indexing efforts about 4-6 weeks after the training. This is when people need support to make sure they are properly implementing the correct principles in an imperfect world!

This curriculum can only be effectively delivered in tandem with participants being able to constantly explore the entire Taxonomy, either in their own I&R software or via www.211taxonomy.org.

Remember that because the Taxonomy constantly changes, some of the specific examples of terms and definitions may no longer be valid (although what they illustrate will still hold true). To update terms, check out www.211taxonomy.org.

How the Taxonomy "looks" and operates can be very different depending on the I&R softwares being used (not all softwares provide the full functions that allow the Taxonomy to be properly used). People should understand the basic principles but train within the software they will use every day.

Note that this is a very basic outline to get started. Once the concepts are understood, a Resource Specialist should review some more in-depth resources to better understand some more complex issues such as variations in the use of target terms.

<u>Informal General Advice on Learning about the Taxonomy</u>

Many (otherwise very smart!) people sometimes encounter mental blocks when learning about the Taxonomy for the first time. For example, they will type Food Pantry Programs into a search box, not find any results and conclude that the Taxonomy "does not make sense". This comment will then stay in their mind throughout the entire training session and effectively prevent *anything* from making sense.

- ❑ When studying the Taxonomy keep an open and accepting mind. It might make sense after 2 hours or 2 days but rarely straight away. Don't fight it by expecting it to fit into an image that you are carrying in your own head about how *you* think it should work.

- ❑ People often conduct searches using the Taxonomy hierarchy expecting to find some specific term. In reality, many terms could logically be located in 2 or 3 different places. The best searches are looking for a key word in either the term name or the use reference. (This last sentence being an example of something that will make more sense later!).

- ❑ The alphabetical codes for assigning names do not have any relationship with the main category. The fact that the category code for Basic Needs is B is a coincidence. It does not mean that Health is H. Actually, Education is H and Health is L. There is no relationship. The categories are in alphabetical order (Education coming before Health) with some gaps in case new categories are ever developed.

- ❑ Experienced Taxonomy users will often remember specific Taxonomy codes but you do not need to know the codes. You just need to know what they represent.

Approximate Timetable

9am   Introductions

9.15am Overview of sessions – from concepts to practice

Handout 1: Training Objectives

- Impossible to fully comprehend Taxonomy over a couple of months, let alone days

- Not everything always appears 100% logical, sometimes just need to initially accept

9.30am Reasons for organizing and indexing resource databases

Handout 2: Advantages of Taxonomy Indexing

- Organizations, sites and services

- Indexing as a tool for effective retrieval – finding answers to people's needs

- Services are indexed

- AIRS Taxonomy as national system for indexing human services

<u>Group exercise</u>

- How are the Yellow Pages organized? What might you look under if you wanted to buy a used van?

- How are the books in a public library organized?

- Why not just have text searches?

- Nature and advantages of a hierarchical classification system

9.45am   Introduction to the Taxonomy

Handout 3: Structure of Taxonomy

- Ownership of Taxonomy

- Maintenance of Taxonomy

- Illustrate through tour of www.211taxonomy.org

- 10 categories plus target terms

- Explore structure of Taxonomy through drilldown search

- Explore structure of individual Taxonomy terms
    Term Name
    Code
    Definition
    Date Created
    Date Changed
    See Also Reference
    Use Reference
    Related Concepts

- Demonstrate keyword searching for Taxonomy terms

- Show Disaster Terms

- Show sources of Resources/Help on Taxonomy web site

10.15am   15 minute break

10.30am   Types of Taxonomy Terms

Handout 4: Types of Taxonomy Terms

- Facility terms
- Service terms
- Named Program terms
- Modality terms
- Target terms

10.45am   Taxonomy searching

Handout 5: Finding Taxonomy Terms

- Using distinct keywords

Handout 6: Taxonomy Searching Exercise

11.30am   Review

Handout 7: Review Questions

- Review Answers

Handout 8: Review Question Answers

12noon   Lunch

1pm   Taxonomy Searching Exercise

Handout 9: Searching Exercises in Other Databases

1.45pm   Basic Principles of Taxonomy Indexing

Handout 10: Taxonomy Indexing Principles

- Accuracy – index as specifically as possible (unless a decision has been made not to!)

- Primary and secondary services (also ancillary services)

- "Double indexing" and the reasons to avoid it

- Indexing consistently at the same "level" of Taxonomy

- Target terms: When to use them and when to avoid using target terms

2pm   Indexing Steps Summary

Handout 11: Indexing Tips – Finding the Right Term

2.15pm   Initial Indexing Exercise

Handout 12: Initial Indexing Exercise

Handout 13: Initial Indexing Exercise Answers

3pm   Break

3.15pm   Customizing the Taxonomy

Handout 14: Customizing the Taxonomy

- No need to use all 9,000 terms

- Relevance to your database inclusion/exclusion criteria

- Availability within your community

- Assess section by section

- Reactivate terms if necessary

3.30pm   Customizing Exercise

Handout 15: Customizing Taxonomy Exercises

- BD Group

- BM Individual

3.45pm   Final Review Questions

Handout 16: Final Review Questions

- Review Answers

Handout 17: Final Review Question Answers

4pm   Final Indexing Exercise

Handout 18: Final Indexing Exercise

Handout 19: Final Indexing Exercise Answers

4.45pm   Overall summation and reflection/evaluation

Handout 20: Taxonomy Listserv

Handout 21: Evaluation

5pm   End of Day

Handout 1: Training Objectives

Taxonomy indexing requires a distinct level of understanding, consistency and experience.

The focus of this session will be on providing the participants with the following knowledge and abilities:

- ❑ To understand the reasons for organizing and indexing resource databases.

- ❑ To understand the nature and advantages of a hierarchical classification system.

- ❑ To understand the structure of the AIRS/211 LA County Taxonomy.

- ❑ To appreciate the basic principles of indexing with the Taxonomy.

- ❑ To understand the purposes and processes for customizing the Taxonomy, and to ensure that indexing for specific services takes place at the same "level" of the Taxonomy.

- ❑ To appreciate the nature and purpose of "See Also" and "Use For" references.

- ❑ To recognize the differences between facility terms, service terms, named program terms, modality terms and target terms.

- ❑ To understand when to use and when to avoid using target terms.

- ❑ To recognize the nature of "double indexing" and the reasons to avoid it.

Handout 2: Advantages of Taxonomy Indexing

Virtually all resource databases are structured in terms of:

- The organization that operates the (the "organization", "agency" or sometimes "department")
- The location(s) from which those services are available (the "sites")
- The specific details of what they do (the "services")

A further layer is the indexing system that identifies:

- The types of services available within the organization
- The types of people for whom the services are designed

Indexing allows for the retrieval of services that can provide the _solution_ to the inquirer's need, whether it is food, employment, housing, counseling, health services, financial assistance, education or volunteering.

Indexing is the process of assigning distinct and descriptive terminology to database records that identifies what services actually "do" and facilitates their retrieval.

In order to ensure consistency, indexing terms are drawn from a prearranged list of concepts called a service classification system (or taxonomy).

A taxonomy distinguishes concepts, names concepts, and organizes them in a logical structure that illustrates the relationships between them.

Used as an indexing tool, a taxonomy makes it possible to categorize information in a systematic, unambiguous way.

A common taxonomy also provides the framework for a shared language between different users to allow for broader access and potential interoperability.

Information and referral (I&R) is the art and science of bringing people and services together.

Most I&R organizations (more than 1,000 nationally) index according to a hierarchical classification system called the _AIRS_/211 LA County _Taxonomy of Human Services_ (or more commonly, just "the Taxonomy").

The <u>Taxonomy</u> is a powerful tool that:

- Is comprehensive, with a logical niche for every human service concept.

- Incorporates terminology accepted in the field.

- Contains terms that are clearly named, clearly defined and clearly cross-referenced.

- Differentiates between the services agencies provide and the target populations they serve.

- Begins with the perspective of how services are delivered rather than the administrative structures or funding streams they follow.

- Structures terms in a hierarchical arrangement with mutually exclusive categories, making logical relationships an integral part of its structure to support easier and more flexible indexing.

- Has a flexible structure that permits growth and change as the human services delivery system evolves.

- Is being continually updated.

- Can be customized to meet the unique needs of communities.

Handout 3: Structure of Taxonomy

The Taxonomy is divided into 10 service categories:

- ❑ Basic Needs
- ❑ Consumer Services
- ❑ Criminal Justice and Legal Services
- ❑ Education
- ❑ Environmental Quality
- ❑ Health Care
- ❑ Income Support and Employment
- ❑ Individual and Family Life
- ❑ Mental Health Care and Counseling
- ❑ Organizational/Community/International Services

Plus a special 11th category called:

- ❑ Target Populations

There are over 9,000 Taxonomy terms. Every term has a full definition and an alphanumeric code that positions it within the hierarchy.

There are six potential levels of hierarchy from the "broadest" category (the 1st level) to the "narrowest" category (the 6th level).

Each term may have one or more "Use References" and/or "See Also" terms.

Levels of Hierarchy

To illustrate the levels and their associated coding, this is how the term "Domestic Violence Shelters" is organized within the Taxonomy hierarchy:

B   Basic Needs (1st level term)

BH   Housing/Shelter (2nd level term)

BH-1800   Emergency Shelter (3rd level term)

BH-1800.1500   Crisis Shelter (4th level term)

BH-1800.1500-050   Crisis Nurseries (5th level term)

BH-1800.1500-100   Domestic Violence Shelters (5th)

BH-1800.1500-140   Elder Abuse Shelters (5th)

BH-1800.1500-200   Family Crisis Shelters (5th)

BH-1800.1500-650   Refugee/Immigrant Shelters (5th)

BH-1800.1500-700   Runaway/Youth Shelters (5th)

BH-1800.1500-750   Safe Houses (5th)

BH-1800.1500-800   Sexual Assault Shelters (5th)

BH-1800.3500   Homeless Drop In Centers (4th level term)

BH-1800.8500   Homeless Shelter (4th)

Within this type of view, Homeless Shelter is a "narrower" term of Emergency Shelter and Housing Shelter is a "broader" term of Safe Houses.

When discussing Taxonomy terms, Resource Specialists often use the phrases "higher level" and "lower level". The "higher level" means the term that is above another in the hierarchy. For example, in this illustration, Basic Needs is the highest possible term. Housing/Shelter is "higher" than Emergency Shelter. Safe Houses is a lower level term than Crisis Shelter.

And here are the specific details concerning a single term:

Term Name: Domestic Violence Shelters

Code: BH-1800.1500-100

Definition:

Programs that provide temporary emergency shelter for women who have experienced domestic violence/abuse, and for their children. Such facilities usually provide in-house individual, group and family counseling and the full range of secondary services related to domestic violence including referral to appropriate resources. Also included are similar facilities for battered men and those that can accommodate both men and women.

Use References: Abused Women's Shelters
                   Assaulted Women's Shelters
                   Battered Men's Shelter
                   Battered Men's Shelters
                   Battered Women's Shelter
                   Battered Women's Shelters
                   Domestic Abuse Shelters
                   Domestic Violence Shelter

See Also References:
                   Domestic Violence Motel Vouchers (BH-1800.1500-080)

Structure of individual Taxonomy terms

Taxonomy terms generally include the following components:

- Term Names

  These indicate the preferred wording for service concepts in the hierarchical display. An effort is made to select clear, unambiguous wording that accurately describes the service each term represents.

- Codes

  Alphanumeric codes mark the place and level of terms within the hierarchy. The computer program has no way of knowing that the words "Emergency Shelter" have anything to do with the words "Basic Needs". But it can readily tell that BH-1800 is a subset of BH and that BH is, in turn, a subset of B. The ID numbers, not the terms, create the logic of the hierarchy.

- Definitions

  There is a definition for every term. This helps ensure that different people use the same terms the same way. Definitions are not a substitute for service narratives or descriptions written by Resource Specialists as different organizations may offer the same service in slightly different ways.

- Use References

  These are synonyms for the hierarchy's preferred Term Names. They are alternatives to the Term Names that might be used by someone looking for the same concept. (For example, Firearm Permits is the Term Name while Gun Permits and Rifle Permits are Use References that should also retrieve the correct service).

- See Also References

  These identify related terms in other parts of the hierarchy. They help to assure that Resource Specialists and searchers find the most appropriate term. For example, there is a See Also reference from Emergency Food in the Basic Needs section to Christmas Baskets and Thanksgiving Baskets in the Holiday Programs section. The See Also reference points to other possibilities.

- Related Concepts

  These are broader sets of target groups/problems that are connected to relevant Taxonomy terms. For example, many Taxonomy terms relating to services for people who are homeless do not include the word "homeless". Related concepts allow users to look at the Taxonomy through a different lens.

The Taxonomy indexing terms themselves tend to reflect one or more of the following concepts:

- The type of place or facility (for example, a hostel or a hospital). **What the service delivery agency IS.**

  Organization/Facility type terms allow users to index the general character of an organization rather than the specific activities it engages in. Facility terms work as indexing elements because certain services are associated with a particular facility. These terms are the best option when developing a list of particular facilities such as hospitals.

- The type of service that is provided (for example, clothing or financial assistance). **What the delivery agent DOES.**

  Service terms represent the most common type of human services indexing concepts. These terms may be broad (Food, Employment) or narrow (Food Pantries, Soup Kitchens, Job Training, Work Permits).

- A type of program that is well-established and quickly-recognized (for example, Medicare). **What the program is WELL-KNOWN AS.**

  Named Program terms provide direct access to widely known, usually government-funded programs, such as WIC and TANF. Many of these pro-grams involve a package of individual services that the I&R can index with just the program term while including further details within the record's narrative description. This allows for a more intuitive option for less experienced users.

- The "modality" or way in which a service is delivered (for example, mediation). **HOW the service is delivered.**

  Modality/Delivery Format terms reflect the manner in which a service is delivered. Modalities are intended to be used in conjunction with service terms to modify the meaning. For example, the terms Landlord/Tenant Assistance, Discrimination Assistance, and Alimony Assistance may be com-bined with various legal assistance modalities, such as Advocacy or Legal Representation, to make important distinctions between the manner in which the specific legal aid is being provided.

- The type of person the service is targeted to (for example, children or immigrants). **WHO the service is for** (i.e. the target).

  Target terms refer to the people that a particular service is aimed towards. Target populations are grouped by shared characteristics such as age, gender, ethnicity and health condition. Target terms which make up the final "Y" category of the Taxonomy, are intended to be used in conjunction with service or facility type terms to enhance the meaning. For example, the term Social Clubs/Events is fairly broad, but by combining it with a target group, such as Single Parents or Older Adults, the focus is sharpened considerably. Within this category, the final set of terms coded as YZ, are really topical identifiers/issues, such as Drug Abuse Issues and Legal Issues. These can be used with very general types of services such as Directory/Resource List Publications or Speakers/Speakers Bureau to clarify the focus.

    - Organization/facility terms, service terms, program terms and modality terms are found within each of the 10 main Taxonomy categories.

    - Target terms (sometimes called "Y terms" because of their coding) can only be found in their own distinct category.

Handout 5: Finding Taxonomy terms

A search of the Taxonomy for a term including the single word "Shelters" will retrieve over 40 options – some possibly relevant to a particular use, some obviously not so. Here are just some of that list:

> Animal Shelters
> Bad Weather Shelters
> Bus Stop Benches/Shelters
> Community Shelters
> Day Shelters
> Domestic Violence Shelters
> Emergency Animal Shelters
> Environmental Hazards Shelters
> Sexual Assault Shelters
> Wildlife Shelters

This is an example of a display of Taxonomy terms drawn from several areas of the overall classification system (for example, Animal Shelters are part of the Environmental Quality category while Day Shelters are part of the Basic Needs category). Their common thread is that they all contain the word "shelters". Because the classification system is a hierarchy, it is possible to study a group of related terms within a hierarchical display.

One of the most effective ways to search is to focus on the most unique aspect of the concept that you want to find.

For example, if you are looking for a homeless drop in center, you may not know the exact wording for the Taxonomy term. If you type in "Centers", you may retrieve more than 100 Taxonomy terms that include the word "Centers" (such as Aquatic Centers and Arthritis Treatment Centers), most of which are irrelevant. Typing "Homeless" or "Drop" retrieves a much more manageable number of terms to review. Typing "Homeless Drop" may produce exactly one term. The principle works equally well when you are searching for a particular organization by its name.

It is important to be clear about what you are searching for and to have some initial strategy on how best to search.

Learning to search and understanding the most effective way of retrieving relevant information from the resource database does not come quickly. It involves lengthy practice and much initial frustration.

Handout 6: Taxonomy Searching Exercise

As individuals:

- ❑ Find a term that involves snakes

- ❑ Find an example of a Use Reference

- ❑ Find a term that relates to police services

- ❑ Find examples of three types of medical practitioners in the Taxonomy

- ❑ Find an example of a See Also Reference

- ❑ Find an example of a sport that involves throwing things

- ❑ Find an example of a term that covers a type of gambling

- ❑ Find a target term that describes very young individuals and one that describes much older individuals

- ❑ Find a term that covers an unusual nationality

- ❑ Find your favorite type of restaurant?

- ❑ Find an example of a term that covers a medical condition that you have never previously heard of …

<u>In groups:</u>

- ❏ Identify 3 examples of Taxonomy facility terms

- ❏ Identify 3 examples of service terms

- ❏ Identify 3 examples of target terms that are applicable to the County

- ❏ A 50-year-old woman leaves home to escape abuse. The resource database lists the following facilities – a domestic violence shelter, an elder abuse shelter, a family crisis shelter, an emergency shelter, a homeless shelter, a sexual assault shelter and a crisis shelter. Which of these would be the appropriate referral?

Which of the following best describes a hierarchical classification system?

(a) An alphabetical listing of keywords that would occur to most people
(b) A structured set of concepts that illustrates the relationships between listings
(c) A computer system that searches for any and all strings of words
(d) A collection of detailed definitions of various human services

Which of the following is an example of a type of Taxonomy term?

(a) Target term
(b) Delivery term
(c) Standard terminology
(d) Keyword term

Which of the following is an example of a Taxonomy facility term?

(a) Developmental Disabilities
(b) Adult Day Program Centers
(c) Financial Management Workshops
(d) Homeless Family Reunification Programs

Which is the following is an example of a 1st level Taxonomy category?

(a) Environmental Quality
(b) Financial Assistance
(c) Health Care Targets
(d) Criminal Services

What is a "See Also" reference?

    (a) A term that has the exact opposite meaning of the given term
    (b) A term that has a very close meaning to the given term
    (c) A term that has the same coding as the given term
    (d) A term that suggests a related yet distinct concept to the given term

What is a "Use Reference"?

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    (b) A term that has a very close meaning to the given term
    (c) A term that has the same coding as the given term
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Which of the following is an example of a target term?

    (a) Workers' Compensation Recipients
    (b) Workers' Compensation Fraud Reporting
    (c) Crime Victim Compensation
    (d) Community Services Work Programs

Which of the following is an example of a Named Program Term?

    (a) Head Injuries
    (b) Head Start
    (c) Domestic Violence Shelters
    (d) Couples Counseling

How many levels are contained within the AIRS/211 LA County Taxonomy?

    (a) No actual levels so much as free floating concepts
    (b) Four
    (c) Six
    (d) An infinite number depending on the specific needs of the
       community

Which of the following is an example of a Taxonomy service term?

     (a) Children's Hospitals
     (b) Utility Payment Assistance
     (c) Haitian Community
     (d) Runaway/Youth Shelters

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Handout 9: Searching Exercises in Other Databases

Knowing how to index means knowing how to search – and eventually you will be training your own users in how to access (i.e. effectively search the database).

When your search retrieves a long list of database records, try revising (or narrowing) your original search to produce a shorter, more relevant list. For example, Job Training may retrieve 200 records, a revised search for Job Training combined with the target term Youth may retrieve only 20 records – all of which are relevant to the situation.

Following are two examples of publicly accessible I&R databases. Conduct the following searches under each database:

www.infoline.org

- ❏ Find a service for persons with a specific mental health disorder

- ❏ Find a service that provides job opportunities for older adults

- ❏ Find a service for people who have arrived from another country

- ❏ Find a place where a man can get a meal

- ❏ Find a service that helps people to read

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- ❏ Find a service for people who have arrived from another country

- ❏ Find a place where a man can get a meal

- ❏ Find a service that helps people to read

Handout 10: Taxonomy Indexing Principles

- Accuracy

  The primary, if somewhat obvious, principle of Taxonomy indexing is a quest for accuracy. When deciding which indexing term to use, always read the term's definition to clarify and confirm its precise meaning. Review other terms within its hierarchical display. Look at any related terms that suggest a closer connection with what is being indexed. The final selected indexing term must be the one that most accurately reflects the service or entity that is being described.

  Once the decision is made about what term to use, this term must be used for all agencies that provide the same type of service. Consistency in indexing is vital – Resource Specialists need to carefully develop, document, and follow their own internal policies on indexing decisions.

  Indexing is an applied art and sometimes experienced Resource Specialists from different agencies make different decisions about how to index some particular services. However, regardless of the decisions they make internally, they must be applied in a logical way throughout their respective resource databases.

- Indexing primary vs. secondary, ancillary and indirect services

  Index only primary services, and avoid indexing secondary, ancillary or indirect services.

  -- Primary services are entry point services that an eligible person can directly access without being involved in other agency services.

  -- Secondary services are agency services that are offered only to people who are already involved in one of the agency's primary services.

  -- Ancillary services are agency activities that are not core services and are not worth spending the time and effort to index, e.g., an agency newsletter.

  -- Indirect services are services to which an agency may facilitate access, but not a service that the agency provides itself.

An easy way to tell the difference between primary and secondary services is to ask whether an inquirer can obtain this service directly and without needing to be a part of any other program. If talking to the agency, ask whether they want referrals for it. (If the answer is yes, it is a primary service.) Or is this a service that inquirers can only access after they are enrolled in another service? (If yes, it is a secondary service.)

Only primary services should be indexed, in order to avoid making referrals for services that are not directly available to the public. For example, if a nutritionist is available to older adults who are enrolled in a congregate meal program, it is only the meal program that should be indexed, not the nutrition component because that is only available to the people who are there for the meals. However, information about those secondary services should be included within the narrative description of the record as it provides more information and choice to inquirers.

- Double indexing

    While the Taxonomy's hierarchy and extensive references work to direct Resource Specialists to the "correct" term, these features also create their own set of indexing challenges. One very common issue is that of redundant or "double" indexing. Having accurately indexed a program under Job Banks, Resource Specialists often want to assign broader terms such as Job Information and Employment Acquisition. The reason for this is that even though they have indexed with the most accurate term, they believe their users may not be able to find it, so they "throw in" some similar terms *"just to make sure"*.

    In fact, double indexing creates long, vague lists of resources under each indexing category, forcing users to scan records that are not appropriate for their specific need.

- Consistency of indexing usage

    Once an indexing term has been accurately used, it must be used throughout the resource database by all indexers in every similar situation. Consistent indexing ensures that users always get all of the results that are associated with a particular term.

- Indexing with target terms

    With every indexing decision, the Resource Specialist should ask the question, *"Who is this service for?"*

Sometimes the target is implicitly or explicitly part of the indexing term itself (for example, the terms Homeless Drop In Centers or Adult Residential Care Homes combine the notion of both the facility and the service target). In which case, it does not generally need to be artificially added.

If a service is potentially for everybody (for example, Hospitals), then there is no need to add target terms to the main indexing term. Remember: most services are untargeted. No target is needed if the service is for "everyone" or "all adults".

But if the service is for a specific group of people, it is often necessary to add a target term to the main indexing term in order to qualify or enhance the meaning.

For example, an agency offers a parenting class for which the correct Taxonomy term is Parenting Skills Classes. If the class is open to all parents, then there is no need to add a target term. If the class exclusively focuses on mothers, then this needs to be expressed with the aid of a target term and the program would then be indexed as:

Parenting Skills Classes * Mothers

The I&R software is generally programmed to tackle this task and connect the terms in this fashion.

Similarly, a parenting class configured for teenage parents would be indexed as:

Parenting Skills Classes * Teenage Parents

Occasionally, two target terms are needed to fully illustrate the program. For example, a parenting class that specializes in helping fathers of at-risk families is indexed as:

Parenting Skills Classes * At Risk Families * Fathers

Target terms can only be used in conjunction with another term. A target term cannot be used on its own. A Resource Specialist cannot only use the term At Risk Families as it must be combined with a non-target term. (Otherwise it only indicates that a services does "something" for At Risk Families – you need to know what it does!). However, you can sometimes be more flexible about issues such as indexing on the same level with target terms.

Handout 11: Indexing Tips -- Finding the Right Term

1. Identify the service that is being indexed.

2. Has this type of service already been indexed within your database? If so, review the previous example and confirm that it is the same type of service and if so, index it the same way.

3. What is the most notable feature of the concept that you are looking to index (it could be the facility, the service or sometimes a very well-known program name)?

4. Ask yourself some questions … Who is the service for? Is the target group implied (implicitly or explicitly) within the term name? Is the service for everyone (or for all adults)? If one or more target groups (or Y terms) are required, conduct a search to find the best terms to link the concept with (using the same techniques as before).

5. Conduct a word search of the Taxonomy using the most *distinctive* word within that concept (e.g. for an assaulted women's shelter, "assaulted" would be the word most likely to produce the fewest number of relevant results).

6. Once a term name is found, <u>always</u> read the definition. Does it describe the service that you are trying to index?

7. Even if it does, <u>always</u> check where the term is within the hierarchy. There may be a lower level term or a term on the same branch that is more accurate.

8. *Generally,* you will not index with 1st or 2nd level terms, and only occasionally with 3rdor 6th level terms.

9. Always check the names of any See Also references in case they seem more appropriate.

10. Each service should only require a single Taxonomy term (plus the option of a target term). If you are using two indexing terms, then maybe we are talking about two distinct services … or if you cannot find a single term, it could be because your service description is actually dealing with a couple of different concepts or not dealing with a single concept clearly enough.

11. Select the most accurate term for indexing.

Handout 12: Initial Indexing Exercise

Remember to look for the simplest solution. Ask yourself what the program does or is … then try a key word. If that doesn't work, try another approach. When you come across a likely term, check its definition and then also check its position within the hierarchy to see if there is an even better term.

Organization name: **ALCOHOLICS ANONYMOUS**

SERVICE/PROGRAM DESCRIPTION: Self help group for alcoholics. Regular meetings at a variety of times and locations throughout County. Leave message at telephone number or check web site for times and locations.

Taxonomy Indexing:

Organization name: **SALVATION ARMY**

SERVICE/PROGRAM DESCRIPTION: Emergency shelter providing safety and diagnosis/evaluation for youth in crisis.

Taxonomy Indexing:

Organization name: **HEAD START OF HAMILTON**

SERVICE/PROGRAM DESCRIPTION: Comprehensive child development program that provides educational experiences, nutritious meals, counseling and opportunities for parental involvement to prepare low income children and children with disabilities succeed in school.

Taxonomy Indexing:

Organization name: **CHURCHTOWN PEOPLES CHURCH**

SERVICE/PROGRAM DESCRIPTION: School breakfast program.

Taxonomy Indexing:

Organization name: **TODDLERS STARTING PLACE**

SERVICE/PROGRAM DESCRIPTION: Licensed child care center

Taxonomy Indexing:

Organization name: **TURNING POINT**

SERVICE/PROGRAM DESCRIPTION: Temporary emergency shelter for homeless and runaway youth.

Taxonomy Indexing:

Organization name: **MY COUNTY CENTRAL SCHOOL DISTRICT**

SERVICE/PROGRAM DESCRIPTION: Local school district.

Taxonomy Indexing:

Organization name: **REDVALE COMMUNITY COLLEGE**

SERVICE/PROGRAM DESCRIPTION: Postsecondary educational institution. Community College.

Taxonomy Indexing:

Organization name: **LITERACY VOLUNTEERS OF AMERICA**

SERVICE/PROGRAM DESCRIPTION: Tutoring services throughout County for adults who want to learn to read, write.

Taxonomy Indexing:

Organization name: **MYSTATE WORKERS' COMPENSATION BOARD**

SERVICE/PROGRAM DESCRIPTION: Compensation insurance for workers injured on the job. Financial payments and medical treatment costs, including rehabilitation, for eligible employees who become permanently or temporarily disabled as a result of a disease or injury connected with their employment. Also provides payments for qualified dependents of a worker who dies from a work-related injury or illness. System administered through employer payments.

Taxonomy Indexing:

Organization name: **OUR CLUB SENIOR CENTER**

SERVICE/PROGRAM DESCRIPTION: Intergenerational program for older adults and preschool children.

Taxonomy Indexing:

Organization name: **GOTHAM CITY CHILD PROTECTION SERVICES**

SERVICE/PROGRAM DESCRIPTION: Investigates reports of child abuse and maltreatment.

Taxonomy Indexing:

Organization name: **NEWPORT COMMUNITY SERVICES**

SERVICE/PROGRAM DESCRIPTION: Used adult and children's clothing available for free

Taxonomy Indexing:

Organization name: **ACORN FAMILY COUNSELING AGENCY**

SERVICE/PROGRAM DESCRIPTION: Individual and group counseling for parents who are separating or who are already separated or divorced with an emphasis on the well-being of the children.

Taxonomy Indexing:

Organization name: **OURTOWN HOSPICE**

SERVICE/PROGRAM DESCRIPTION: Bereavement support to families

Taxonomy Indexing:

Handout 13: Initial Indexing Exercise Answers

Note that different indexers may well take other approaches and come up with other terms that are still technically correct!

Organization name: **ALCOHOLICS ANONYMOUS**

SERVICE/PROGRAM DESCRIPTION: Self help group for alcoholics. Regular meetings at a variety of times and locations throughout County. Leave message at telephone number or check web site for times and locations.

Taxonomy Indexing: Alcohol Dependency Support Groups

Advice: Typing "AA" should bring up Alcoholics Anonymous as a Use Reference for the correct term

---

Organization name: **SALVATION ARMY**

SERVICE/PROGRAM DESCRIPTION: Emergency shelter providing safety and diagnosis/evaluation for youth in crisis.

Taxonomy Indexing: Runaway/Youth Shelter

Advice: Type "Shelters" and then look at the hierarchy to find the most applicable term

---

Organization name: **HEAD START OF HAMILTON**

SERVICE/PROGRAM DESCRIPTION: Comprehensive child development program that provides educational experiences, nutritious meals, counseling and opportunities for parental involvement to prepare low income children and children with disabilities succeed in school.

Taxonomy Indexing: Head Start Sites

Advice: Type "Head Start"

Organization name: **CHURCHTOWN PEOPLES CHURCH**

SERVICE/PROGRAM DESCRIPTION: School breakfast program.

Taxonomy Indexing: School Breakfasts

Advice: Type "Breakfast"

Organization name: **TODDLERS STARTING PLACE**

SERVICE/PROGRAM DESCRIPTION: Licensed child care center

Taxonomy Indexing: Child Care Centers

Advice: Type "Child Care"

Organization name: **MY COUNTY CENTRAL SCHOOL DISTRICT**

SERVICE/PROGRAM DESCRIPTION: Local school district.

Taxonomy Indexing: School Districts

Advice: Type "School District"

Organization name: **REDVALE COMMUNITY COLLEGE**

SERVICE/PROGRAM DESCRIPTION: Postsecondary educational institution. Community College.

Taxonomy Indexing: Community Colleges

Advice: Type "Colleges"

Organization name: **LITERACY VOLUNTEERS OF AMERICA**

SERVICE/PROGRAM DESCRIPTION: Tutoring services throughout County for adults who want to learn to read, write.

Taxonomy Indexing: Adult Literacy Programs

Advice: Tricky. Many people probably tried "reading" and "writing" and did not come up with a result. The key word is "Literacy"

Organization name: **MYSTATE WORKERS' COMPENSATION BOARD**

SERVICE/PROGRAM DESCRIPTION: Compensation insurance for workers injured on the job. Financial payments and medical treatment costs, including rehabilitation, for eligible employees who become permanently or temporarily disabled as a result of a disease or injury connected with their employment. Also provides payments for qualified dependents of a worker who dies from a work-related injury or illness. System administered through employer payments.

Taxonomy Indexing: Workers' Compensation

Advice: Type "Compensation"

Organization name: **OUR CLUB SENIOR CENTER**

SERVICE/PROGRAM DESCRIPTION: Intergenerational program for older adults and preschool children.

Taxonomy Indexing: Intergenerational Programs

Advice: Type "Intergenerational"

Organization name: **GOTHAM CITY CHILD PROTECTION SERVICES**

SERVICE/PROGRAM DESCRIPTION: Investigates reports of child abuse and maltreatment.

Taxonomy Indexing: Children's Protective Services

Advice: Type "Protection"

Organization name: **NEWPORT COMMUNITY SERVICES**

SERVICE/PROGRAM DESCRIPTION: Used adult and children's clothing available for free

Taxonomy Indexing: Clothing

Advice: Type "Clothing"

Organization name: **ACORN FAMILY COUNSELING AGENCY**

SERVICE/PROGRAM DESCRIPTION: Individual and group counseling for parents who are separating or who are already separated or divorced with an emphasis on the well-being of the children.

Taxonomy Indexing: Divorce Counseling

Advice: Type "Divorce"

Organization name: **OURTOWN HOSPICE**

SERVICE/PROGRAM DESCRIPTION: Bereavement support to families

Taxonomy Indexing: Bereavement Counseling

Advice: Type "Bereavement"

Handout 14: Customizing the Taxonomy

Resource Specialists familiar with the Taxonomy and general indexing principles should customize the system to meet their own needs. The objective is to strike a balance between the level of indexing people need and the level of indexing that is feasible for the I&R program to maintain. Most Taxonomy users will index with only a small percentage of the terms that are available to them, and the combination of terms they select will be unique to their organization.

At a simple level, 1st and 2nd level terms are very rarely used for indexing. Following an internal assessment process, an I&R organization may create an internal guide regarding which of the terms within the Taxonomy to use. In the following sample sub-section, the highlighted terms are, for a variety of reasons, being omitted from this particular internal working version of the Taxonomy:

B	Basic Needs (1st level term)
BH	Housing/Shelter (2nd level term)
BH-1800	Emergency Shelter (3rd level term)
BH-1800.1500	Crisis Shelter (4th level term)
BH-1800.1500-050	Crisis Nurseries (5th level terms)
BH-1800.1500-100	Domestic Violence Shelters
BH-1800.1500-140	Elder Abuse Shelters
BH-1800.1500-200	Family Crisis Shelters
BH-1800.1500-650	Refugee/Immigrant Shelters
BH-1800.1500-700	Runaway/Youth Shelters
BH-1800.1500-750	Safe Houses
BH-1800.1500-800	Sexual Assault Shelters
BH-1800.1500-850	Temporary Shelters for Wandering Adults
BH-1800.3500	Homeless Drop In Centers (4th level terms)
BH-1800.8500	Homeless Shelter (4th level)
BH-1800-8500-100	Bad Weather Shelters (5th level terms)
BH-1800-8500-150	Community Shelters
BH-1800-8500-200	Day Shelters
BH-1800-8500-500	Missions
BH-1800.9000	Post Domestic Violence Shelter Housing (4th level)

In this example, any homeless shelter has to be indexed with the 4th level term Homeless Shelter. If there are four services indexed under that term, and a decision is made to re-index one of them under Missions, then the other three would have to be re-indexed to the 5th level. On the other hand, Crisis Shelter cannot be used because the decision has been made to index all of those types of crisis shelters to the 5th level. Again, if a decision is made to re-index one of those as Crisis Shelters, then the others must all be moved up to that next level.

The reason for this is to ensure consistency of search and retrieval.

When determining if there are terms in the Taxonomy that can be eliminated altogether, consider the following:

- <u>What types of resources are available in the community?</u> If there are no resources in a particular category, Taxonomy terms in that area can be eliminated with a fairly high degree of confidence.

- <u>What are the inclusion/exclusion criteria for the resource database?</u> There may be some types of services that will not be listed even though they are available. For example, most I&R resource databases do not list restaurants, but there are Taxonomy terms that cover these. Categories that are not covered by the criteria can be eliminated.

- <u>What are the priorities of the resource database?</u> Is detailed indexing more important in some areas than in others? Priority areas should be indexed in detail from the beginning. Less important records can be indexed at a higher level initially and re-indexed more specifically later.

One of the strengths (and therefore, challenges) of the Taxonomy is that it is continuously under development, with new terms and references regularly added in order to stay current. However, this is more than just a matter of importing a fresh collection of words, as each time the Taxonomy is updated, it must be "customized anew" to ensure previous internal decisions are implemented. New terms and definitions also need to be reviewed to make sure that there are no implications within the resource database that affect existing indexing practices.

<u>Summary</u>

No organization has a need for all 9,000 Taxonomy Terms and it is convenient for indexers to carve off (or de-activate) hundreds of term that are not relevant to the focus of the database.

❑ Determine the sections that are relevant (or irrelevant) to the types of resources listed within your database

❑ Section by section determine which branches and /or terms in the Taxonomy can be disregarded (bearing in mind what type of resource are availble in the database and what do you wish to include)

❑ Decide and document at which level to index certain concepts.

❑ Terms can be reactivated (switched back on) and indexing level decisions can be changed – providing all indexers obtain the new information.

Handout 15: Customizing Taxonomy Exercise

Imagine you are customizing this section for your agency – which terms would you use and which would you leave out …

B BASIC NEEDS

BD Food

BD-150 Community Wide Food Storage Facilities

BD-180 Emergency Food
BD-180.100 Brown Bag Programs
BD-180.190 Food Lines
BD-180.200 Food Pantries
BD-180.200-62 Occasional Emergency Food Assistance
BD-180.200-64 Ongoing Emergency Food Assistance
BD-180.225 Food Vouchers
BD-180.250 Government Surplus Food Distribution Sites
BD-180.800 Sack Lunches/Dinners
BD-180.820 Specialty Food Providers
BD-180.820-18 Drinking Water
BD-180.820-20 Food Supplements
BD-180.820-25 Formula/Baby Food
BD-180.820-33 Ice

BD-185 Emergency Food Clearinghouses

BD-200 Food Banks/Food Suppliers

BD-220 Food Gleaning Programs

BD-240 Food Outlets
BD-240.150 Community Supported Agriculture
BD-240.200 Farm Trails
BD-240.225 Farmers Markets
BD-240.250 Food Cooperatives
BD-240.260 Grocery Stores
BD-240.490 Markets Accepting EBT Cards
BD-240.500 Mini Markets
BD-240.700 Rent A Tree
BD-240.900 U-Pick Programs

BD-260 Food Production
BD-260.030 Agricultural Economics
BD-260.030-03 Agricultural Loans
BD-260.030-06 Agricultural Marketing Information
BD-260.030-09 Agricultural Stabilization/Conservation
BD-260.030-13 Crop Disaster Financial Aid Programs
BD-260.030-15 Crop Insurance
BD-260.030-17 Dairy Indemnity Programs
BD-260.030-20 Farmers Cooperative Purchasing/Marketing Programs
BD-260.030-40 Livestock Indemnity Programs
BD-260.050 Agricultural Support Services
BD-260.050-01 Agricultural Aviation Services
BD-260.050-02 Agricultural Pest/Disease Control Assistance
BD-260.050-04 Agricultural Pollution Prevention/Mitigation Assistance
BD-260.050-06 Agricultural Waste Management
BD-260.050-10 Animal Husbandry Programs
BD-260.050-14 Aquaculture Support Services
BD-260.050-16 Beekeeping Support Services
BD-260.050-18 Crop Production Support
BD-260.050-25 Farm/Ranch Management Support
BD-260.050-63 Organic Farming Assistance
BD-260.050-65 Pollination Services
BD-260.050-70 Poultry Farming Support
BD-260.050-80 Sustainable Agriculture Programs
BD-260.050-90 Viticulture Support Services
BD-260.150 Community Gardening
BD-260.300 Home Gardening Assistance

BD-500 Meals
BD-500.020 After School Meal Programs
BD-500.145 Child and Adult Care Food Programs
BD-500.150 Congregate Meals
BD-500.350 Home Delivered Meals
BD-500.450 Low Cost Meals
BD-500.500 Meal Vouchers
BD-500.510 Milk Programs
BD-500.800 School Breakfasts
BD-500.820 School Lunches
BD-500.830 Soup Kitchens
BD-500.850 Summer Food Service Programs

Imagine you are customizing this section for your agency – which terms would you use and which would you leave out …

BM Material Goods

BM-050 Automobiles

BM-140 Consumer Goods Information

BM-170 Discount Programs
BM-170.250 General Buying Clubs
BM-170.500 Merchandise/Services Discount Cards

BM-175 Emergency Generators

BM-300 Household Goods
BM-300.050 Appliances
BM-300.050-15 Clothes Dryers
BM-300.050-20 Fans/Air Conditioners
BM-300.050-35 Heaters
BM-300.050-70 Refrigerators
BM-300.050-80 Stoves
BM-300.050-90 Vacuum Cleaners
BM-300.050-95 Washing Machines
BM-300.100 Bedding/Linen
BM-300.150 Cleaning Products
BM-300.200 Furniture
BM-300.200-05 Adapted Furniture
BM-300.200-10 Baby Furniture
BM-300.200-13 Beds
BM-300.200-25 General Furniture Provision
BM-300.300 Household Goods Vouchers
BM-300.400 Kitchenware
BM-300.500 Mattresses

BM-650 Personal Goods/Services
BM-650.150 Clothing
BM-650.150-05 Adapted Clothing
BM-650.150-10 Baby Clothing
BM-650.150-12 Children's Clothing
BM-650.150-13 Clothing Vouchers
BM-650.150-14 Costumes
BM-650.150-15 Diapers
BM-650.150-25 General Clothing Provision

BM-650.150-50 Maternity Clothing
BM-650.150-65 Plus Size Clothing
BM-650.150-80 School Clothing
BM-650.150-83 Shoes
BM-650.150-92 Winter Clothing
BM-650.150-95 Work Clothing
BM-650.155 Clothing Banks
BM-650.650 Personal/Grooming Needs
BM-650.650-10 Baggage Check Facilities
BM-650.650-15 Bathing Facilities
BM-650.650-17 Community Voicemail
BM-650.650-19 Cosmetics
BM-650.650-25 Food Preparation Facilities
BM-650.650-30 Hairdressing/Nail Care
BM-650.650-45 Laundry Facilities
BM-650.650-65 Personal/Grooming Supplies
BM-650.650-67 Portable Storage Containers
BM-650.650-70 Public Restrooms
BM-650.650-80 Shaving Utensils
BM-650.650-83 Telephone Facilities
BM-650.650-85 Temporary Mailing Address

BM-700 Repair Services
BM-700.035 Appliance Repairs
BM-700.050 Automobile Repairs
BM-700.050-05 Automotive Body Repairs/Painting
BM-700.050-10 Automotive Systems Repairs
BM-700.050-90 Vehicle Parts

BM-850 Thrift Shops

BM-950 Tools/Equipment
BM-950.200 Farm Equipment
BM-950.300 Household Tools/Equipment
BM-950.440 Left Handed Tools/Implements
BM-950.950 Work Tools/Equipment

BM-960 Trading Stamp Exchanges

Which of the following list of Taxonomy codes and terms is an example of a 4th level term?

    (a) PH-1400 Companionship
    (b) PH Individual and Family Support Services
    (c) PH-1400.500 Mentoring Programs
    (d) PH-1400.500-650 Peer Role Model Programs

Which of the following Taxonomy terms is a possible Use Reference for Birth Control Counseling?

    (a) Family Planning Counseling
    (b) Birth Control
    (c) Contraception
    (d) Control and Signaling Aids

Which of the following is a helpful principle for good Taxonomy indexing?

    (a) Approximation
    (b) "Compound" (or triple) indexing
    (c) Individuality
    (d) Consistency

Which of the following is the most probable example of a broader term and a narrower term within the same Taxonomy section? (Check the Taxonomy if unsure!)

    (a) Transportation and Taxi Services
    (b) Car Sharing Programs and Taxi Services
    (c) Consumer Complaints and Preschool Age Children
    (d) Burial Services and Cremation Services

Read the following Taxonomy definition:

"Programs that provide an alternative, nonresidential environment for people who have mental, emotional or social problems which may offer recreational activities, socialization, individual or group counseling, mutual support group meetings, information and referral or other similar services. Included are centers that are staffed by consumers of psychiatric services as well as centers that are managed by professional staff."

Which of the Taxonomy terms listed below seems the closest match to this definition?

       (a) Mental Health Drop In Centers
       (b) Drop in Centers * Mental Health Issues
       (c) Psychiatric Day Treatment
       (d) Home Based Mental Health Services * Families/Friends of Mentally Ill

Read this scenario, and identify which of the listed services are primary, secondary, ancillary and indirect.

> The Mytown Family Services Association provides parenting classes for teenage parents and an afternoon parent-child drop in program. People attending the drop-in can also take part in cooking classes and swap children's clothing. The Association provide referrals for public health programs and also maintains a web site and monthly newsletter with plenty of parenting tips.

Now use the Taxonomy to choose terms that could be used for indexing this program.

Which of the following list of Taxonomy codes and terms is an example of a 4th level term?

    (a) PH-1400 Companionship
    (b) PH Individual and Family Support Services
    (c) PH-1400.500 Mentoring Programs
    (d) PH-1400.500-650 Peer Role Model Programs

Which of the following Taxonomy terms is a possible Use Reference for Birth Control Counseling?

    (a) Family Planning Counseling
    (b) Birth Control
    (c) Contraception
    (d) Control and Signaling Aids

Which of the following is a helpful principle for good Taxonomy indexing?

    (a) Approximation
    (b) "Compound" (or triple) indexing
    (c) Individuality
    (d) Consistency

Which of the following is the most probable example of a broader term and a narrower term within the same Taxonomy section? (Check the Taxonomy if unsure!)

    (a) Transportation and Taxi Services
    (b) Car Sharing Programs and Taxi Services
    (c) Consumer Complaints and Preschool Age Children
    (d) Burial Services and Cremation Services

Read the following Taxonomy definition:

"Programs that provide an alternative, nonresidential environment for people who have mental, emotional or social problems which may offer recreational activities, socialization, individual or group counseling, mutual support group meetings, information and referral or other similar services. Included are centers that are staffed by consumers of psychiatric services as well as centers that are managed by professional staff."

Which of the Taxonomy terms listed below seems the closest match to this definition?

   (a) Mental Health Drop In Centers
   (b) Drop in Centers * Mental Health Issues
   (c) Psychiatric Day Treatment
   (d) Home Based Mental Health Services * Families/Friends of Mentally Ill

Read this scenario, and identify which of the listed services are primary, secondary, ancillary and indirect.

The Mytown Family Services Association provides parenting classes for teenage parents and an afternoon parent-child drop in program. People attending the drop-in can also take part in cooking classes and swap children's clothing. The Association provide referrals for public health programs and also maintains a web site and monthly newsletter with plenty of parenting tips.

> Primary: Parenting classes for teenagers; Parent-child drop in
> Secondary: Cooking classes; Children's clothing swap
> Ancillary: Web site; Newsletter
> Indirect: Public health programs

Now use the Taxonomy to choose terms that could be used for indexing this program.

> Parenting Skills Classes * Teenage Parents

> Drop In Centers (from the description, it is not clear whether the drop in program is just for teenage parents or for any parents. This is a good example of needing to clarify information).

Handout 18: Final Indexing Exercise

(If time is short, this can be a "homework" exercise …)

Remember to look for the simplest solution. Ask yourself what the program does or is … then try a key word. If that doesn't work, try another approach. When you come across a likely term, check its definition and then also check its position within the hierarchy to see if there is an even better term.

Organization name: **CROCUS COUNTY. OFFICE OF THE COUNTY CLERK**

SERVICE/PROGRAM DESCRIPTION: Provides marriage licenses in accordance with County regulations.

Taxonomy Indexing:

Organization name: **MAGENTA COUNTY TOURISM OFFICE**

SERVICE/PROGRAM DESCRIPTION: Information on activities, events and attractions in County.

Taxonomy Indexing:

Organization name: **ROCKY LAKE ANIMAL CARE CENTER**

SERVICE/PROGRAM DESCRIPTION: Domestic animal adoption for pets that have been lost or abandoned.

Taxonomy Indexing:

Organization name: **FREETOWN PUBLIC HEALTH DEPARTMENT**

SERVICE/PROGRAM DESCRIPTION: Free, anonymous and confidential STD testing at walk-in clinic

Taxonomy Indexing:

Organization name: **FREETOWN PUBLIC HEALTH DEPARTMENT**

SERVICE/PROGRAM DESCRIPTION: Postnatal nutrition counseling.

Taxonomy Indexing:

Organization name: **OURTOWN HOSPICE**

SERVICE/PROGRAM DESCRIPTION: Palliative care to persons with terminal illness.

Taxonomy Indexing:

Organization name: **LILAC COUNTY POLICE DEPARTMENT**

SERVICE/PROGRAM DESCRIPTION: Public education on safe cycling practices.

Taxonomy Indexing:

Organization name: **AIDS-RELATED COMMUNITY SERVICES**

SERVICE/PROGRAM DESCRIPTION: Prevention and awareness programs.

Taxonomy Indexing:

Organization name: **FREETOWN PUBLIC HEALTH DEPARTMENT**

SERVICE/PROGRAM DESCRIPTION: Free and confidential pregnancy tests.

Taxonomy Indexing:

Organization name: **GABLE MANOR CENTER FOR CARE**

SERVICE/PROGRAM DESCRIPTION: State licensed 180-unit nursing home for older adults 60 years and up or persons with disabilities who require assistance with daily living and access to nursing support due to physical or cognitive decline.

Taxonomy Indexing:

Organization name: **NEWCHESTER HOUSING ACTION COALITION**

SERVICE/PROGRAM DESCRIPTION: Foreclosure prevention counseling to help families retain their homes.

Taxonomy Indexing:

Organization name: **NEWCHESTER HOUSING ACTION COALITION**

SERVICE/PROGRAM DESCRIPTION: Assistance in search for affordable housing

Taxonomy Indexing:

Organization name: **IRONVIEW COUNTY. DEPARTMENT OF PROBATION**

SERVICE/PROGRAM DESCRIPTION: Juvenile offender accountability and rehabilitation. Preparation of sentencing reports.

Taxonomy Indexing:

Organization name: **LILAC COUNTY POLICE DEPARTMENT**

SERVICE/PROGRAM DESCRIPTION: Responsible for law enforcement, crime prevention and public safety.

Taxonomy Indexing:

Organization name: **LILAC COUNTY POLICE DEPARTMENT**

SERVICE/PROGRAM DESCRIPTION: Provides crime victims with information on custody status of inmate-offenders.

Taxonomy Indexing:

Organization name: **GREENTOWN SUICIDE HOTLINE**

SERVICE/PROGRAM DESCRIPTION: Suicide prevention hotline.

Taxonomy Indexing:

Organization name: **GREY COUNTY. OFFICE FOR THE AGING**

SERVICE/PROGRAM DESCRIPTION: Area office on aging. Comprehensive services for persons 60 years and up. Some services supplied directly, other services contracted to community organizations.

Taxonomy Indexing:

Organization name: **THIS STATE. DEPARTMENT OF MOTOR VEHICLES**

SERVICE/PROGRAM DESCRIPTION: Applications and renewals of driver licenses

Taxonomy Indexing:

Organization name: **INTERFAITH VOLUNTEER CAREGIVERS**

SERVICE/PROGRAM DESCRIPTION: Transportation for medical appointments for homebound older adults 60 years and up

Taxonomy Indexing:

Handout 19: Final Indexing Exercise Answers

Note that different indexers may well take other approaches and come up with other terms that are still technically correct!

Organization name: **CROCUS COUNTY. OFFICE OF THE COUNTY CLERK**

SERVICE/PROGRAM DESCRIPTION: Provides marriage licenses in accordance with County regulations.

Taxonomy Indexing: Marriage Licenses

Organization name: **MAGENTA COUNTY TOURISM OFFICE**

SERVICE/PROGRAM DESCRIPTION: Information on activities, events and attractions in County.

Taxonomy Indexing: Tourist Information

Organization name: **ROCKY LAKE ANIMAL CARE CENTER**

SERVICE/PROGRAM DESCRIPTION: Domestic animal adoption for pets that have been lost or abandoned.

Taxonomy Indexing: Animal Adoption

Organization name: **FREETOWN PUBLIC HEALTH DEPARTMENT**

SERVICE/PROGRAM DESCRIPTION: Free, anonymous and confidential STD testing at walk-in clinic

Taxonomy Indexing: Sexually Transmitted Disease Screening

Organization name: **FREETOWN PUBLIC HEALTH DEPARTMENT**

SERVICE/PROGRAM DESCRIPTION: Postnatal nutrition counseling.

Taxonomy Indexing: Nutrition Education – Postpartum Mothers

Organization name: **OURTOWN HOSPICE**

SERVICE/PROGRAM DESCRIPTION: Palliative care to persons with terminal illness.

Taxonomy Indexing: Hospice Care

Organization name: **LILAC COUNTY POLICE DEPARTMENT**

SERVICE/PROGRAM DESCRIPTION: Public education on safe cycling practices.

Taxonomy Indexing: Bicycle Safety Education

Organization name: **AIDS-RELATED COMMUNITY SERVICES**

SERVICE/PROGRAM DESCRIPTION: Prevention and awareness programs.

Taxonomy Indexing: AIDS/HIV Prevention Counseling

Organization name: **FREETOWN PUBLIC HEALTH DEPARTMENT**

SERVICE/PROGRAM DESCRIPTION: Free and confidential pregnancy tests.

Taxonomy Indexing: Pregnancy Testing

Organization name: **GABLE MANOR CENTER FOR CARE**

SERVICE/PROGRAM DESCRIPTION: State licensed 180-unit nursing home for older adults 60 years and up or persons with disabilities who require assistance with daily living and access to nursing support due to physical or cognitive decline.

Taxonomy Indexing: Nursing Facilities

Organization name: **NEWCHESTER HOUSING ACTION COALITION**

SERVICE/PROGRAM DESCRIPTION: Foreclosure prevention counseling to help families retain their homes.

Taxonomy Indexing: Mortgage Foreclosure Assistance

Organization name: **NEWCHESTER HOUSING ACTION COALITION**

SERVICE/PROGRAM DESCRIPTION: Assistance in search for affordable housing

Taxonomy Indexing: Housing Search and Information

Organization name: **IRONVIEW COUNTY. DEPARTMENT OF PROBATION**

SERVICE/PROGRAM DESCRIPTION: Juvenile offender accountability and rehabilitation. Preparation of sentencing reports.

Taxonomy Indexing: Juvenile Probation

Organization name: **LILAC COUNTY POLICE DEPARTMENT**

SERVICE/PROGRAM DESCRIPTION: Responsible for law enforcement, crime prevention and public safety.

Taxonomy Indexing: Municipal Police

Organization name: **LILAC COUNTY POLICE DEPARTMENT**

SERVICE/PROGRAM DESCRIPTION: Provides crime victims with information on custody status of inmate-offenders.

Taxonomy Indexing: Crime Victim Notification Services

Organization name: **GREENTOWN SUICIDE HOTLINE**

SERVICE/PROGRAM DESCRIPTION: Suicide prevention hotline.

Taxonomy Indexing: Suicide Prevention Hotlines

Organization name: **GREY COUNTY. OFFICE FOR THE AGING**

SERVICE/PROGRAM DESCRIPTION: Area office on aging. Comprehensive services for persons 60 years and up. Some services supplied directly, other services contracted to community organizations.

Taxonomy Indexing: Area Agencies on Aging

Organization name: **THIS STATE. DEPARTMENT OF MOTOR VEHICLES**

SERVICE/PROGRAM DESCRIPTION: Applications and renewals of driver licenses

Taxonomy Indexing: Driver Licenses

Organization name: **INTERFAITH VOLUNTEER CAREGIVERS**

SERVICE/PROGRAM DESCRIPTION: Transportation for medical appointments for homebound older adults 60 years and up

Taxonomy Indexing: Medical Transportation — Older Adults

Handout 20: Taxonomy Listserv

In official speak:

"The purpose of the AIRS Taxonomy Listserv is to provide a forum for discussion by resource database managers of issues relating to use of the AIRS/211 LA County Taxonomy for classifying human services. Resource staff can post questions about indexing principles, the appropriate terms to select in specific situations or the need for new terms or modifications in existing ones. They can thus use the listserv to solicit the opinions of and exchange information with their peers. The listserv is a project of the Alliance of Information and Referral Systems (AIRS) Taxonomy Committee and although the Taxonomy Administrator and other 211 LA County staff occasionally post questions or responses, the views and opinions expressed are those of the authors."

Basically, you get to see the "mindsets" of other Resource Specialists, request help with indexing decisions, participate in discussions about issues regarding terms and be able to request new terms and/or changes to existing terms to better meet your needs.

To register on the Taxonomy Listserv go to:

http://www.211taxonomy.org/resources/listserv

Handout 21: Taxonomy Sessions Evaluation

Trainer: _____ Date: _____ _____

Name of Training Course: _____

Agency Holding Course: _____

Location: _____

	Excellent	Good	Average	Fair	Poor
OVERALL RATING (please rate this item)	5	4	3	2	1

TRAINING CONTENT

	Excellent	Good	Average	Fair	Poor
Quality of Speaker	5	4	3	2	1
Quality of Handouts....................................	5	4	3	2	1
Quality of Training Aids (Overhead, slides, etc.)	5	4	3	2	1
Workshop Provided New Information......................	5	4	3	2	1
Workshop Provided Useful Information	5	4	3	2	1
Trainer Achieved Objectives	5	4	3	2	1

The part I liked best about the training session was: _____

_____

_____

_____

If I could change something about the training, it would be: _____

_____

_____

Please help us measure the effectiveness of this session by describing something you learned and how it will benefit your organization and/or clients.

_____

_____

_____