

## GLOSSARY

**Acknowledgments Document:** A cumulative document that lists the source material for Taxonomy definitions and structure including the contributions of people who have supported the Taxonomy throughout its ongoing development as well as bibliographic and other resources that have been used. It was drafted when work on the Taxonomy was initially begun in 1983 and has been maintained over time by the Taxonomy editor. It also solidly establishes our right to claim literary warrant<sup>1</sup>. When the Bibliography field was added to the Taxonomy record, an effort was made to copy all relevant citations from the Bibliography to the record for the terms to which they pertained. Going forward, credits are added to both the Bibliography document and the term record when new terms are added or definitions are substantially revised. The document can be accessed from the Print tab and the Library (under the Resources tab) on the Taxonomy website. See also **Bibliographic References**.

**Active Taxonomy Terms:** Taxonomy terms that are currently available for indexing services within a resource database. Active terms may or may not be currently in use. Those that have been assigned as index terms can be used to retrieve associated services when end users select them for searches. Active terms not yet used to index services should be seen by data entry staff but not by end users. See also **Available Taxonomy Terms**.

**Agency:** An organization that delivers services. An agency can be incorporated, a division of government, or an unincorporated group that offers, for example, a food pantry or support group. The agency is the main location of the resource where the administrative functions occur, where the organization's director is generally housed and where it is licensed for business. An agency may or may not deliver direct services from this location. I&R services may choose to designate a middle level of the organization as the agency. For example, a city Department of Human Services may offer hundreds of services but is often recognized by the names of its component programs: Social Services, Health Department, etc. It is acceptable to use those components as agencies as long as their relationship to the larger Department of Human Services is acknowledged in the description or by the way the database is structured.

**211 LA County Taxonomy of Human Services:** The classification system maintained by 211 LA County and endorsed by AIRS as a common language for the field of information and referral. Its use by I&R services seeking AIRS Accreditation is required. The Taxonomy is used to index and facilitate retrieval of resource information, increase the reliability of planning data, make evaluation processes consistent and reliable, and facilitate national comparisons of data. It can be accessed at [www.211taxonomy.org](http://www.211taxonomy.org). See also: **Classification System**.

**AIRS Taxonomy Committee:** An important partner in making decisions regarding the ongoing development and continuing relevance of the Taxonomy to the I&R community. Composed of individuals with resource database and indexing expertise and experience using the Taxonomy, the Committee is an excellent sounding board and source of advice on complex, controversial or difficult issues and major changes in Taxonomy structure and contents that may be desirable. The Committee is also active in discussing training and support for Taxonomy users that may be needed, educating AIRS members on the importance of the Taxonomy as a standard for field and exploring related technical issues regarding I&R resource databases and the software that supports them. Because Committee members work in I&R programs across the U.S. and in Canada, they provide a broader perspective on questions that might otherwise be difficult to obtain.

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

**Available Taxonomy Terms:** Taxonomy terms that remains active for indexing purposes. See also **Active Taxonomy Terms**.

**Bibliographic References:** A field in Taxonomy term records that acknowledges and credits the websites, publications, subject area experts and other sources that were used to develop the definition for a particular

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<sup>1</sup> "Literary Warrant" is justification for the inclusion of a concept in an indexing language or for the selection of a preferred term based on its frequent occurrence in the literature.

term, identify preferred term wording and use references and, sometimes, to determine where a concept belongs in the Taxonomy's hierarchy. See also **Acknowledgments Document**.

**Classification System:** A standardized structure, sometimes called a controlled indexing vocabulary, that is used for categorizing available information within a particular area of knowledge in a systematic, unambiguous way. Control is exerted in the careful identification of concepts, selection of preferred wording for term names and organization of the terms in a logical framework. New terms are only added when it is clear that a relevant concept has been identified for which there is no current term. A good classification system enables people searching for information to locate what they need quickly and easily. See also: **211 LA County Taxonomy of Human Services**.

**Code Search:** A search that allows users to type a code or partial code, e.g., BD for all food resources or BD5 for the subset of meals resources, and retrieve a list of all Taxonomy records that match the criterion.

**Comments Field:** A field in Taxonomy term records that offers tips for indexers about how a particular term should be used or helps in distinguishing one term from others that may be similar.

**Crosswalk:** Crosswalks map terms in one classification system to the terms in another structure. Crosswalks are sometimes used to as a conversion tool by organizations wanting to implement the Taxonomy; and the matchups can give researchers and other data users a way to compare information about organizations across databases with vastly different purposes. See also **External Systems**.

**Data Partners:** Members of a database collaborative who collect information about local human services providers, develop database records describing the organizations and the services they provide in the agreed upon format with appropriate indexing, and contribute that data to local, regional, statewide, province-wide or national information initiatives. See also **Database Collaborative**.

**Database Collaborative:** A group of I&R services that agree to share responsibility for maintaining information about community resources as a means of avoiding duplication of database maintenance activities and achieving broader and deeper coverage of different types of community resources. Database collaboratives may be local, regional, statewide, province-wide or national information initiatives. See also **Data Partners**.

**Double Indexing:** The use of multiple service terms, wherever they are located in the hierarchy, to index the same service offered by a particular agency. Sometimes called "double coding", the practice produces an inaccurate database that inflates the number of available resources and produces unreliable search results. Double indexing is distinguished from using multiple terms at different levels within the same branch of the Taxonomy to index services offered by different agencies. This practice produces inconsistent indexing and unreliable search results. There are occasions when indexing with multiple terms at different levels and double coding occur within the same record.

**Drilldown Search:** A search on the Taxonomy website that allows users to display the level 1 terms (10 basic service categories plus the *Target Populations* section), select a level 1 (very broad) term and display associated level 2 (narrower) terms, and then choose a level 2 term and display all narrower terms at levels 3, 4, 5, and 6.

**End Users:** Individuals using a software system or a website database to identify appropriate services. Included are I&R specialists using their organization's software to find referrals for people contacting the agency for help and the people who are looking for resources on a public website (the general public).

**External Systems:** The 211 LA County Taxonomy is crosswalked to five external classification systems that are maintained and used by other organizations. Included are the National Taxonomy of Exempt Entities (NTEE) and the Nonprofit Classification System (NPC), both maintained by the National Center for Charitable Statistics (NCCS) at The Urban Institute; UWASIS, developed by United Way of America and now out of print; and the AIRS and Canadian Problems/Needs Lists, tools used in the I&R industry to organize the wide range of inquiries handled by I&R services and provide a structure for the consistent and credible reporting of community needs across jurisdictions. See also **Crosswalk**.

**Human Services:** The activities of human services professionals that help people become more self-sufficient, prevent dependency, strengthen family relationships, support personal and social development and ensure the well-being of individuals, families, groups and communities. Specific human services include ensuring that people have access to adequate food, shelter, clothing and transportation; financial resources to meet their needs; consumer advice and education; criminal justice or legal services; education and employment; health and mental health care including substance abuse services; and environmental protection, both routinely and in times of disaster or other emergencies. Human services also facilitate the capabilities of people to care for children or other dependents; ensure that protective services are available to those who are vulnerable; provide for the support of older adults and people with disabilities; offer social, religious and leisure time activities; provide for the cultural enrichment of the community; and ensure that people have the information they need to fully participate in community life.<sup>2</sup>

**I&R (Information and Referral) Software Package:** An application program developed for sale to information and referral/assistance organizations that automates the process of linking people in need of human services with appropriate providers who can meet their needs, and of maintaining community resource information to support the service delivery process. Features generally include resource database maintenance, call transaction processing, database searching, geo-mapping, directory production, survey management, taxonomy/database table maintenance, report generation and other similar functions.

**Inactive Taxonomy Terms:** Taxonomy terms that have been deactivated within a database. Inactive terms cannot be seen or selected by end users or data entry staff. See also: **Taxonomy Customization, Taxonomy Term Deactivation, Unavailable Taxonomy Terms.**

**Indexing:** The process of analyzing a description of an organization to identify the type of organization it is, the services it provides, the targets for service and the conditions under which services are available; and assigning to the organization's record in the resource database descriptors and/or codes that can be used as search keys. Examples include service and target population terms/codes from the 211 LA County Taxonomy of Human Services, geographic codes/descriptors for the area served and language codes for the language(s) in which services are available.

**Indirect Services:** Services to which an agency may facilitate access, but not a service that the agency itself provides. Indirect services should not be indexed.

**Issues Terms:** An alphabetical list of very general concepts terms in the YZ section of the Taxonomy that can be used to make services like *Directory Production* and *Speakers/Speakers Bureaus* more specific by combining them with target terms like *Aging Issues* or *Parenting Issues*. This is only section of the Taxonomy that functions like a subject headings listing.

**Keyword Index:** A separate classification structure that is generally organized alphabetically and requires its own field. The resource specialist chooses one or more keywords in addition to Taxonomy terms. I&R specialists can conduct searches of the keyword index as an additional option. Use of keywords is acceptable according to the AIRS Standards, but only if they are connected to terms in the 211 LA County Taxonomy of Human Services and do not function as a separate, stand-alone classification structure requiring separate indexing decisions.

**Keyword Taxonomy Search:** A keyword search of the Taxonomy itself (sometimes called a word search or a word/phrase search) allows the user to enter a word or phrase and retrieve all Taxonomy terms that contain it. Ideally, this type of search also retrieves Taxonomy terms based on use references containing the word/phrase. The purpose of this type of search is to help users identify the most appropriate Taxonomy term to use as an index term or in a resource database search. If the list of use references were to incorporate all of the keywords in separate keyword indexes, the need for a separate keyword index search would be reduced if not eliminated. The keyword search is the default search in the subscriber view of the website.

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<sup>2</sup> Adapted from the definition of "Social Work" in *the Dictionary of Social Work* published by the National Association of Social Workers.

**Level:** Relative position or rank on a scale. The Taxonomy is organized in a hierarchy with a maximum of six tiers of increasing specificity. The level of a Taxonomy term within the hierarchy is indicated by the structure of its Taxonomy code.

**Locales:** The Taxonomy is an international classification system with three different locales: the U.S. English locale which includes terms and definitions that are appropriate for subscribers in the United States, and two locales that have been configured for use in Canada, one in English, the other in French.

**Old Codes:** Codes that were previously assigned to a Taxonomy term reflecting a different position within the hierarchy prior to being moved, merged or split to the current code. When a Taxonomy term is moved to a different place in the hierarchy, it receives a new code to mark its new position, but its old code is also assigned to the record to create a history of its previous location(s). Likewise, when a term is deleted, the system requires one or more replacement terms and the code for the deleted term becomes an old code for each of the suggested replacement terms. All terms included in the Taxonomy prior to the expansion of the code structure include the code in the old format as an old code. The old codes are used by software systems during the update process to pinpoint changes that need to be made in the I&R database in situations where a term carrying one of the deleted or changed codes has been used as an index term. Previously used codes cannot be reused – a rule that is enforced by the system.

**Parent/Child Terms:** In taxonomy nomenclature, a term's children (or child terms) are the terms which fall beneath it in its branch of the hierarchy. Similarly, a term's parent term is the term which is immediately above it and "siblings" are terms on the same branch at the same level.

**Phantom Services:** Services that the agency purports to offer, but probably does not have the resources to actually provide in a sustained way. Phantom services should not be indexed.

**Primary/Secondary Services:** Primary services are the entry point services that an individual can obtain without being required to enroll in other services, whereas secondary services are those available only to individuals already receiving primary services. A domestic violence shelter may provide a safe place to stay for residents as well as counseling, assistance in obtaining a temporary restraining order (TRO) and a program for the woman's children. Unless nonresidents are eligible, the domestic violence counseling, TRO assistance and program for the abused woman's child are all secondary services. The only primary service is the shelter itself. Most organizations do not make the distinction between primary and secondary services -- all are activities they provide. A good way to help them give you the information is to ask whether they want referrals for each service. Primary services should be indexed; secondary ones should not. Both should be described in the narrative and the distinction between them drawn.

**Programs:** Sometimes agencies provide a group of services (some primary and some secondary) and organize them as a program. One organization's job training program, for example, may also offer vocational assessment to help people determine the type of employment they are suited for and job placement assistance following training in addition to the training itself. This is a richer program than one that simply involves training. While services are essentially the same across organizations, the definitions of programs may differ significantly. Because of their eclectic nature, programs cannot be easily indexed using the 211 LA County Taxonomy. The exception is named federal government programs which are essentially the same throughout the country and state/provincial programs that have been broadly adopted in other locales.

**Recent Changes:** A function on the Taxonomy website that allows subscribers to sort recent Taxonomy changes by date, code, term name or type of change and review a description of what has occurred. Subscribers may limit the list of changes displayed by supplying a date range. In addition, users can download the following files in PDF format enabling them to print specific changes as a reference: Changes by Code, Changes by Date and Changes by Type.

**Recent Changes Change Type:** A column in the recent changes listings that indicates whether a term record addition/modification represents a new term, a code change, a (regular) change or a deletion.

**Recent Changes Description:** A description of the modification to a term record or new term information that appears on the Recent Changes page of the Taxonomy website. Change messages are locale neutral and include information important to both U.S. and Canadian English users. U.S. only or Canadian only status is noted as are U.S. and Canadian versions of definitions and use references where there is a variance. Changes and additions to the French Canadian locale are not included. Listings are not added for minor changes that do not warrant subscriber attention.

**Related Concepts:** A set of concepts like Pregnancy, Domestic Violence and Homelessness that can be attached to Taxonomy terms from different parts of the hierarchy. Related concepts are added when there are target groups, problems or other issues relating to terms in multiple sections of the Taxonomy that are of enough general interest to subscribers to be important. Their purpose is to provide different views into the Taxonomy; and they can be used to organize resources in a printed directory or on an I&R website focus page or portal where they function as a searching tool for the general public.

**See Also References:** References that point users to related terms in other parts of the hierarchy or, in some cases, to concepts within the same section, generally when it is important for indexers and searchers to know that the other term exists. **EXAMPLE:** See also references for *Home Health Care* are *Life Care Communities*, *Home Dialysis*, *In Home Hospice Care* and *In Home Assistance*, terms found in three different Level 1 sections (basic service categories).

**Services:** The discrete types of assistance an agency delivers to its clientele. Operationally, services are specific activities that can be classified using Taxonomy terms. Specific types of services should be essentially the same no matter what organization is providing them.

**Target Populations:** The individuals for whom a particular service or group of services is intended. Target populations are generally described in narrative form (e.g. "Targeted, but not restricted to, Native Americans") in the eligibility or description fields. Target populations can also be pinpointed when indexing by choosing a term from the *Target Populations* section of the Taxonomy to append to the selected service term(s). See also **Target Terms** under **Taxonomy Facet**.

**Taxonomy Code:** A unique alpha-numeric identifier that marks the place and level of terms within the Taxonomy's six-level hierarchy. The structure is AA-####.####-###.## where "A" is an alpha character and "#" is a numerical one. Each Taxonomy term has one and only one code so terms appear in one and only one place in the hierarchy. Space has been left in the lettering/numbering scheme to permit growth. Taxonomy codes may or may not be visible to end users. See also **Taxonomy Hierarchy**.

**Taxonomy Customization:** The act of choosing which Taxonomy terms should remain active for indexing and searching purposes and which should be deactivated making them invisible to resource specialists doing data entry, I&R specialists and other end users. Taxonomy customization is generally done by resource specialists to tailor the Taxonomy for their own community. See also **Active Terms**, **Inactive Taxonomy Terms**, **Taxonomy Starter Set**, **Taxonomy Term Deactivation**.

**Taxonomy Definition:** A description of the primary characteristics of the service designated by the Taxonomy term which serves as a touchstone to facilitate consistent use. Because the Taxonomy is not an advocacy tool, definitions are descriptive of the way services are provided, not prescriptive for what services ought to be. Definitions are not a substitute for agency narratives. Different organizations may offer the same service in different ways. The agency narrative needs to describe these individual differences while the broader Taxonomy definition focuses on commonalities.

**Taxonomy Facet:** A descriptor that explains the type or nature of each Taxonomy term. Facets are defined by the Taxonomy editor and include:

- **Service Terms:** Terms in the Taxonomy that represent what an organization **does**, its activities, the types of assistance it provides for the people it serves.
- **Organization/Facility Type:** Terms that represent what the organization **is**, a health clinic, an adult school, a multipurpose center.

- **Modality/Delivery Format:** Terms that characterize **how** a service is provided, e.g., in the legal area, advocacy, legal counseling, mediation, legal representation.
- **Named Programs:** Major programs, generally governmental, that have broad recognition e.g., Medicare, TANF and Food Stamps/SNAP in the U.S., Old Age Security Program in Canada. The majority are in the NL and NS sections but they are also located in other areas.
- **Target Terms:** The people an organization serves, the intended recipients of the services an organization provides. Target terms are in the Y section of the Taxonomy. See also: **Target Populations.**

**Taxonomy Filters Function:** A function available on the Taxonomy website that allows licensed subscribers to create, share and maintain a customized version of the Taxonomy by creating a filter that can be used to remove terms they do not wish to include in their set of active Taxonomy terms. It works just like an oil or water filter that removes unwanted impurities. The filter can be applied when users create reports in the Print function, run searches on the website or download their customization in XML format. Some filters are "official" (created by the Taxonomy editor at 211 LA County in collaboration with experts in a particular area). Others are created by subscribers and may be shared (community filters) or kept as private. Requests to share filters must be approved by the Taxonomy editor. Official and community filtered sets are available to all subscribers. Private filters can be seen and used only by the organizations that developed them.

**Taxonomy Hierarchy:** A view of the Taxonomy that shows the interrelationships among Taxonomy terms through use of codes that identify ten major service sections, plus target populations. Each section is broken down into up to 6 tiers getting more specific from level to level. For any Taxonomy term from any level, the hierarchy can display all parent, sibling and child terms. The codes that determine the hierarchy structure may or may not be visible to end users. See also **Taxonomy Code.**

**Taxonomy/Resource Database Communities:** Online communities set up on the AIRS Networker at <http://airsnetworker.airs.org> that offer peer-based discussion groups and the ability to create and expand searchable resource libraries for AIRS members looking for additional resources and support relating to the Taxonomy. Included are the Taxonomy/Resource Database online community intended for use by all resource specialists and the Canadian Taxonomy/Resource Database community which provides a venue for Canadian resource specialists to discuss issues relating specifically to Canadian databases and use of the Canadian Taxonomy. 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. A smaller, less structured group provides ongoing feedback on the Canadian French version of the Taxonomy.

**Taxonomy Starter Set:** A customized version of the Taxonomy created using the Filters function on the Taxonomy website and shared as either an official filter or a community filter that others can use as a "starting point" for developing their own customization. New users can review the starter sets that are currently available, clone the one they wish to use as a point of departure and use the filter function to add additional terms or remove terms they do not wish to use. Rather than having to contend with the entire Taxonomy, starter sets give users a much smaller number of terms to use as a beginning point. Taxonomy starter sets are sometimes referred to as a "starter taxonomy". See also **Taxonomy Customization.**

**Taxonomy Term Deactivation:** The process of flagging a Taxonomy term as "not available" for classifying or searching for services. The purpose of deactivation is to reduce the number of terms from which data entry staff and end users must select when using the Taxonomy, while retaining the ability to later reactivate selected terms as needed. The end result of the deactivation process is a version of the Taxonomy that has been customized for use in a particular community. Deactivation allows later reactivation of a code for use without recreating it and all its relationships, as would be the case if unwanted codes were deleted; and is one of the mechanisms used in customizing the Taxonomy. See also: **Inactive Taxonomy Terms, Taxonomy Customization.**

**Taxonomy Term Name:** A word or a phrase that is used to label concepts in the Taxonomy; the wording by which a term is known. The term name is sometimes called the "preferred term".

**Taxonomy Website Update:** The Taxonomy website is updated by the Taxonomy editor approximately once a month to every six weeks. As part of the process, the subscriber database is updated to include all Taxonomy additions and changes, new comprehensive XML files are produced and posted on the download page and new PDF files are made available on the Print page. The Recent Changes page is refreshed, the change PDF files updated and all official filters are reviewed and their contents modified, if needed, and approved. When the update is complete, an announcement is posted on the two Taxonomy/Resource Database communities on the AIRS Networker.

**Taxonomy XML Files:** XML files are extract files whose primary purpose is to store and transport data, generally over the Internet. The XML files on the website include all or a selection of Taxonomy terms as currently structured and separate Taxonomy elements (code, term, definition, facet, comments, bibliographic references, use references, see also references, related concepts, and external systems terms) using a format that is both human and machine-readable. Subscribers can download the XML files from the Download page. Options include:

- **Current Taxonomy XML Files:** The most recent comprehensive XML files containing the entire Taxonomy that are run as a part of the Taxonomy website update process. The system creates new XML files for each of the three locales and makes them available on the Download page. Depending on where subscribers are located, they will want to choose either the U.S. English or the Canadian English version of the XML file. A Canadian French version is also available. Systems in Canada with resources in both English and French will use both of the Canadian files.
- **Taxonomy Archive Files:** The system stores older versions of the Taxonomy XML files to enable organizations that are part of a statewide or province-wide collaborative (or are otherwise sharing their data) to standardize around the same version of the Taxonomy prior to contributing their updated records to the combined file. On the first of each month, a snapshot is taken of the most recent "current" XML files and archived under the previous month's name. On August 1<sup>st</sup>, for example, the current XML files are copied and archived as the July archive for that year.
- **Filter XML Files:** The system allows subscribers to create and download an XML version of any of the official and community filters on the system as well as any of the private filters their organization has developed. The "on-demand" filter XML is identical to the regular XML file except that it includes only terms that are in the selected filter.

**Unavailable Taxonomy Terms:** A Taxonomy term that has been made inactive for indexing purposes by the resource database manager in a particular I&R service. See also **Inactive Taxonomy Terms**.

**Unused Terms:** Taxonomy terms that remain active (have not been flagged as deactivated) within a database but have not yet been used to index any services. Unused terms should be available for use in data entry and search functions by resource specialists but should not be seen by end users.

**Use Reference:** Synonyms for preferred terms that allow users to easily find a type of service without knowing the exact wording used in the Taxonomy; or to find the preferred term using their own terminology. Use references have reciprocal used for references which are listed with the preferred wording for a term. Users can get a complete list of synonyms for any term by looking at the "used for" references.