

TAXONOMY DEVELOPMENT RULES

9/13/16

Background

Work on the 211 LA County Taxonomy of Human Services began in 1983. We originally developed the structure for our own use at 211 LA County (previously INFO LINE of Los Angeles), but when we were ready to implement it four years later, we decided to publish additional copies for use by other professionals in the field. The first printed edition (1987) was 376 pages in length. By the second edition (1991), the volume had grown to 565 pages. After the 1994 publication of the third edition resulted in a hardcover volume of 731 pages, both 211 LA County and AIRS (which had co-published the second and third editions after formally endorsing the Taxonomy following the release of the original edition) realized that it was no longer practical to produce the publication in hard copy. I&R agencies couldn't afford to purchase the expensive volumes in sufficient numbers for their staff to use, and 211 LA County couldn't afford to produce new editions as often as they should be published.

That dilemma was resolved in 2002 with the development of the taxonomy subscription plan and the launching of the Taxonomy website in 2004. For an annual fee, subscribers can log onto the www.211taxonomy.org website, search the current Taxonomy database, print copies of all or a portion of the Taxonomy for their own use, review the latest updates, download files that support their ability to load the Taxonomy initially and integrate changes and additions, create and download customized versions of the Taxonomy using the filters function, and easily communicate with 211 LA County by email. There is also a small library of support tools that help subscribers use the Taxonomy more effectively. Information about how to subscribe is on the site under "Help".

Beginning in March of 2005, 211 L.A. County began a working relationship with InformCanada to "Canadianize" the Taxonomy in a systematic way and transform it into a North American indexing tool. Thanks to Ontario Trillium Foundation funding made available by 211 Ontario for the project, an editorial team headed by Clive Jones worked hard to develop Canadian terms and definitions and modify some existing Taxonomy terms to produce an English language version for use in Canada. That work was completed in 2006. Under the leadership of Corinne Gallois of FindHelp in Toronto and her editorial team, and with funding from the Ontario Ministry of Community Services, the work on the Canadian French Taxonomy was also completed and is available on the website. The French version is much more than a literal translation of terminology (and definitions) from English to French. It is also a reflection of French culture and perspectives. The Taxonomy has become a key interoperability tool promoting the ability of 211 organizations throughout the province to share databases, and encourages a coordinated approach to 211 in Ontario and across Canada, just as it has been for some time in the U.S.

From the beginning, a number of principles were identified to serve as the foundation of our effort:

- ✓ Hierarchical Structure to Enable Comprehensive Scope: We wanted to build a structure that has a logical niche for every aspect of human services. Terms appear in only one place in the hierarchy.
- ✓ Clear Wording for Term Names: Terms names needed to be unique and phrased in such a way that users would understand them.
- ✓ Cross-References: At the same time, cross-references needed to be provided to direct users from equivalent but non-preferred terms (synonyms) to their preferred counterparts (for example, from *Food Closets* to the *Food Pantries* term we adopted) and from preferred terms to related terms elsewhere in the system (e.g., from *Food* to *Hunger/Poverty Action*

Groups).

- ✓ Definitions: Each term would have a definition to enable users to determine whether it was the concept they wanted for indexing or searching purposes.
- ✓ Non-Duplicative Terms: The terms needed to be mutually exclusive.
- ✓ Target Terms: We wanted to develop a branch within the taxonomy hierarchy representing populations that specific programs target. Rather than simply indexing a subsidized housing program for seniors as *Low Income/Subsidized Private Rental Housing*, we wanted to be able to index it (and subsequently search for it) under both the service term and the relevant target term: *Low Income/Subsidized Private Rental Housing * Older Adults*.
- ✓ Modality Terms: Recognizing that some terms represent the manner in which a service is delivered, we created a range of modality terms (like *Advocacy*, *Legal Counseling*, *Legal Representation*, and *Self-Representation Assistance*) that could be used to modify service terms to make indexing more specific. A program that advocates on behalf of persons who have been discriminated against could be indexed as *Discrimination Assistance * Advocacy*.
- ✓ Organizational/Facility Type Terms: For complex organizations, it's often more feasible to index what the organization *is* rather than listing all of the specific services it *provides*. Both professionals and end-users understand terms like *Public Libraries*, so there's often no need to index standard services like *Book Loan*, *Reference/Information*, or *Library Audiovisual Services*. For people wanting a list of a particular type of facility (e.g., adult schools, hospitals), these terms provide the only means of access.
- ✓ Computer Interface: Knowing that 211 LA County would eventually have a computerized database, we designed the Taxonomy for use in that environment.

From the earliest beginnings of its development, the Taxonomy has benefited from the assistance of many people who have shared their expertise and helped us identify distinct human service concepts, the appropriate placement of those concepts within the hierarchy and clear, concise and accurate wording for preferred terms and definitions. In addition to people who have helped us with individual concepts from time to time, the Taxonomy has also undergone a number of formalized reviews by subject area experts which have resulted in improvements in the Taxonomy ranging from subtle changes to massive expansions or reorganizations of individual sections. Included have been development of the Disaster Services section in conjunction with the AIRS NERIN¹ project, expansion of the U.S. Immigration/Naturalization section with assistance from Catholic Charities of the Archdiocese of New York, development of the Volunteer Opportunities section in cooperation with the Points of Light Foundation, creation of a major section on organizational development and management in partnership with the Center for Nonprofit Excellence in Akron, Ohio, and reviews of a wide variety of other sections including what was then substance abuse services (on multiple occasions), residential housing for older adults and people with disabilities, Medicare and Medicaid. The support of the National Association of State Units on Aging and Disabilities (NASUAD) has long been key in ensuring that the sections of the Taxonomy relating to aging and disability services are accurate and complete, and their contributions are ongoing.

¹ NERIN (the National Emergency Resource Information Network) was a project undertaken by AIRS to develop a national model of an Internet-based human services information infrastructure which enables information and referral programs to prepare for and respond effectively with appropriate information when a disaster occurs. The project was funded by the Telecommunications and Information Infrastructure Assistance Program, the National Telecommunications and Information Administration, the United States Department of Commerce.

A variety of authoritative publications have also been used in the design of both the structure and the contents of the Taxonomy, and many publishers have given us permission to quote, sometimes extensively, from their copyrighted materials. Also utilized in our research were, early on, brochures produced by agencies providing a targeted service, a variety of other human service taxonomies, thesauri and dictionaries and, of course, the myriad of informative websites and documents that are now available on the Internet.

Most importantly, people who use the Taxonomy are very active in suggesting changes and additions that help the Taxonomy remain relevant. Database managers routinely use the two Taxonomy communities on the AIRS Networker to raise questions that often result in the creation of new terms or the clarification of existing ones as well as to obtain indexing advice from fellow resource specialists. 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 which is available in both English and French. We ask that people who would like to request a new term include a description of the service, websites where more information can be found, placement suggestions, definition suggestions, suggestions for use references and see also references and contact information in case discussion is necessary. Their experience "on the ground" has been an essential reality check for Taxonomy growth and development. Such user warrant is broadly acknowledged as a powerful means of validation for controlled indexing vocabularies giving us a recognized quality assurance tool.

An Acknowledgments document fully details the contributions of people who have supported the Taxonomy throughout its development as well as bibliographic and other resources that have been used. It is located in the Library section of the Taxonomy website under the Resources tab but is also accessible from the Print function. A bibliographic reference field is included in each Taxonomy record and is used to indicate the source of information about specific terms.

Structure and Contents

Scope: The scope of the Taxonomy is quite broad. It was originally developed to mirror the types of human services typically found in information and referral databases² but has been broadened over time to make it applicable to all assets within a community that a database may need to encompass whether provided by nonprofit agencies, government programs or for-profit organizations. Its scope has also been broadened (and deepened) to meet the needs organizations in other fields (e.g., aging organizations, disability organizations, HMIS systems, disaster-related case managers and organizations delivering 311 services) that have recognized the value of a standardized indexing vocabulary and adopted the Taxonomy for their own use. Decisions regarding expansion of the Taxonomy to include additional commercial services or terminology for services in still other specialized areas will be made in conjunction with the needs of subscribers.

² The AIRS Board adopted the following definition for *Human Services* which reflects the narrower interpretation: "The activities of human services professionals and volunteers which help people to become more self-sufficient, sustain independence, 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 education and decision support; 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, faith-based, 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." Adapted from the definition of "Social Work" in the *Dictionary of Social Work* by authored by Robert L. Barker, published by the National Association of Social Workers, Silver Spring, MD, 1987.

Depth/Granularity: One of the trickier decisions to make is how specific the individual service and target concepts should be. As with issues relating to scope, these decisions have been largely based on user needs. The deeper the indexing, the more complicated and time consuming the database maintenance process becomes. The rule of thumb has been to break aspects of the service out only if the difference matters to people needing the information, generally if different offices or organizations handle different aspects of the service or other distinctions apply. In the *Public Assistance* section, for example, the service *Food Stamps/SNAP* is further broken down into *Food Stamp/SNAP Appeals/Complaints* and *Food Stamp/SNAP Applications*. People apply originally in one office and file appeals or complaints through another. Replacement of lost or stolen Food Stamps is not broken out as a separate concept because people apply for replacement benefits through the same office where they filed their original application or by calling a customer service number. Similarly, offices that issue licenses generally also handle renewals, so an indexing concept for renewals is unnecessary.

Steps in the process of accessing a service are not broken out as subsets of the service itself. Most organizations have an application process which may involve completing an application form, submitting substantiating documentation and going through an interview to discuss eligibility for a service, e.g., a particular type of benefit. Only the benefit itself is included as a service. There are organizations, however, that help people complete application forms for benefits or provide other supportive services. *Certificates/Forms Assistance* is a service in its own right, but it is a different service than the actual benefit; and is only used when assistance in completing forms is offered by a different agency than the one that offering the benefit or other service.

Sometimes a fairly general concept is specific enough to get people to the right place. FEMA has terminology for animal rescue and sheltering services and distinguishes organizations that provide these services for large and small animals. When building the component of the *Disaster Services* section of the Taxonomy that relates to animals, it was decided that more specificity was required than *Disaster Services for Animals* (which could encompass a lot of different services), but we concluded that the concepts for *Disaster Related Animal Rescue* and *Disaster Related Animal Shelter* as well as *Disaster Related Veterinary Services* were sufficiently detailed and that adding FEMA's large/small animal distinction was probably unnecessary. Standards in this area are emerging as dialogue with users occurs and indexing needs are clarified.

Basic Structure: The Taxonomy contains more than 9,900 terms that are organized in ten basic services categories and a separate target populations section. The level one (broadest) terms are:

- B Basic Needs
- D Consumer Services
- F Criminal Justice and Legal Services
- H Education
- J Environment and Public Health/Safety
- L Health Care
- N Income Support and Employment
- P Individual and Family Life
- R Mental Health and Substance Use Disorder Services
- T Organizational/Community/International Services
- Y Target Populations

The Taxonomy organizes terms into six tiers. It groups terms together in broad categories and then breaks them down in up to six levels, getting more specific from level to level:

- Level I L Health Care
- Level II LR Rehabilitation

Level III	LR-8000	Speech and Hearing
Level IV	LR-8000.0500	Audiology
Level V	LR-8000.0500-800	Sign Language Instruction
Level VI	LR-8000.0500-800.05	American Sign Language Instruction

Not all sections include six levels.

Facets: The Taxonomy has five facets: services (what an organization DOES), organization/facility type (what an organization IS), modalities/delivery formats (HOW a service is delivered), named programs (major programs, generally governmental, that have broad recognition e.g., Medicare, TANF and Food Stamps) and target populations (WHO the organization serves). The modalities, named programs and organization/facility type terms are identified via the Related Concepts that have been developed for these three facets. In addition, the facet to which a term belongs is identified in a Facet field of the term's Taxonomy record.

Services and Programs: The main focus of the Taxonomy is on services. Sometimes agencies will provide a group of services (some primary and some secondary³) and organize them as a program, in many cases for the express purpose of distinguishing themselves from their competitors and attracting clients. Services, on the other hand, are essentially the same across organizations. One organization's job training program may, for example, 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. Another example is a domestic violence shelter. One shelter may only offer a safe place to stay for residents. Another may also have counseling, TRO assistance, a program for the woman's children and other secondary services. Because of their eclectic nature, programs cannot be easily indexed using the Taxonomy. The exception is named federal government programs which are essentially the same throughout the country and state/provincial programs that have been adopted broadly in other locales. See the Terms section below for more information.

Target Populations: The *Target Populations* terms relate to the people at whom services are aimed rather than to the services they receive or the organizations that provide them. Virtually any type of service can focus on any particular target population making it impractical to try to set up a separate, pre-coordinated service/target group term for every possible combination. Having a separate list of target population concepts allows users to choose any service term and combine it with any target group term in an agency record (provided their software supports this feature). This provides a great deal of flexibility in the indexing process. Most of the terms in this section relate to people or organizations. The *Topical Identifiers/Issues* section (YZ) is unique in that it is the only section of the Taxonomy that functions like a subject headings listing. It is an alphabetical list of very general concepts 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*. Terms in this section are all on a single level (level three).

³ 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. In the job training example below, the vocational assessment and job placement are secondary services unless people who are not receiving job training can access them. The only primary service is job training. In the shelter example, the counseling, assistance in obtaining a temporary restraining order (TRO) and the program for the woman's children are secondary unless nonresidents are also eligible. 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. Primary services should be indexed; secondary ones should not. Both should be described in the narrative and the distinction between them drawn.

Alternative Views, Crosswalks and Other Features

Versions: There are three different versions of the Taxonomy all of which are official subsets of the full (or master) Taxonomy: the U.S. version, the Canadian English version and the Canadian French version. A U.S. Spanish version may be a reality in the future. The U.S. version includes all terms in the master Taxonomy except for those that are Canadian only (e.g., the Canadian court system, the Royal Canadian Mounted Police). Term names, definitions and use references may differ from the Canadian English version based on applicability in the U.S. but not in Canada. The Canadian English version includes all terms in the master Taxonomy except for those that are U.S. only (e.g., the U.S. court system, state police). Term names, definitions and use references may vary from their U.S. counterparts based on applicability in Canada. Differences between the two English language versions include spelling differences (“counseling” versus “counselling”), word differences (“state” versus “provincial”), differences in the names by which services that are essentially the same are known (“Community Supported Agriculture” in the U.S., “Community Shared Agriculture” in Canada), and situations where services are essentially the same in both countries but provided in different ways, overseen by different organizations or have other small differences that warrant separate definitions. Example:

Bail Bonds (U.S.): Programs that procure the release of people who have been charged with an offense by depositing money, property or bonds as a means of ensuring their future attendance in court and of compelling them to remain within the jurisdiction of the court.

Bail Supervision Programs (Canada): Programs that operate in some provinces as a form of conditional release from custody prior to sentencing. The offender may have to report to a probation officer or police detachment and abide by any conditions imposed. Failure to do so may result in revocation and a return to custody..

An effort has been made to have as many common term names and definitions as possible, supporting the concept of the Taxonomy as a North American tool, but the names and definitions must also be fully appropriate for the locale in which they will be used. The Canadian French version of the Taxonomy is drawn from and connected to the concepts in the Canadian English version.

Filters: The full (master) Taxonomy has nearly 9,900 terms, far more than most new subscribers can manage initially. The system has a filters function that allows users to create, share and maintain customized versions of the Taxonomy by excluding terms they do not want to use. Taxonomy filters work just like oil or water filters that remove unwanted impurities, and they can be applied when reports are created using the Print function or searches are run on the website. Starter set information is downloadable via a separate XML file to facilitate incorporation into I&R database software. The files are subsets of the regular Taxonomy XML that contain only terms that are included in the filter selected by the user and the locale (country/language) specified.

Users can begin their customization with the entire Taxonomy or can choose one of the current “starter sets” to use as a point of departure. They simply copy the filter using the “clone” feature and modify the copy to reflect the needs of their community. The system is also programmed to support filter maintenance. When new terms are added to the Taxonomy, the system reviews each of the filters. If terms in the same section of the Taxonomy at the same level have been included in the filter (or the new term is the first term in that section at that level), the system will add the term to the filter and flag it for review. If terms exist in the Taxonomy but have been excluded from the filter, the system will ignore new terms that might otherwise belong in that section. Filters can be created by subscribers for their own organization’s database as well as by statewide and province-wide database projects that have developed shared customizations that collaborative members agree to use.

There are “official” starter sets that were developed by the Taxonomy editor in collaboration with experts in a particular area (e.g., the aging and disability starter set developed by a work group under the leadership of the National Association of State Units on Aging/NASUA); and peer developed and shared starter sets (community filters) that subscribers (or groups of subscribers) can develop, save and share with one another. Subscribers may also have private starter sets that only they can see and use.

Related Concepts: A list of related concepts titles and associated Taxonomy terms and codes has been developed. Related concepts are target groups, issues or other concepts such as "Caregivers", "Homelessness", "Long Term Care" and "Pregnancy" that are connected with Taxonomy terms that represent services that are typically associated with these groups. The related concepts provide an additional lens through which users can view the Taxonomy. There are printed pdf files displaying the related concepts and their associated Taxonomy terms under the Print tab and a related concepts search option under the Search tab on the 211taxonomy.org website. Related concept names and codes are also included in the XML file that subscribers use to import the Taxonomy and keep it updated. Additional related concepts can be added as the need for them becomes apparent.

External Systems: The Taxonomy is crosswalked to five external classification systems: the National Taxonomy of Exempt Entities (NTEE), the Nonprofit Program Classification System (NPC), the United Way of America Services Identification System (UWASIS), the AIRS Problems/Needs List and the Canadian Problems/Needs List. Standard external system crosswalk reports are run for each locale whenever the Taxonomy website is updated. These documents are organized by external system, and within external system, hierarchically by external system code or alphabetically by external system term name. Associated Taxonomy terms and codes are listed with each external system term. They can be found under the Print tab on the 211taxonomy.org website. There is also a search based on the external systems under the Search tab. Because the first three systems vary greatly from the Taxonomy and from one another in scope and purpose, the association between Taxonomy terms and external system terms is based on general relatedness rather than strict one-to-one correspondence. The AIRS and Canadian lists, unlike the other three, were developed to help I&R programs report I&R contacts via high level concepts (17 for AIRS and 19 for Canada) based on their association with Taxonomy terms. For more information about the NTEE or the NPC which are maintained by the National Center for Charitable Statistics at The Urban Institute, see: <http://nccsdataweb.urban.org/FAQ/index.php?category=65> Additional External Systems can be added as the need for them becomes apparent.

Development Rules

Taxonomy Codes: Every term has a logical niche within the hierarchy and a unique code that marks its place and level. The computer does not know that *Food* has anything to do with *Basic Needs* or that *Emergency Food* is a subset of *Food*, but it can readily tell that *BD-1800* is a subset of *BD* and that *BD* is, in turn, a subset of *B*. The term identification numbers (codes), not the terms, create the logic of the hierarchy. Space has been left in the lettering/numbering scheme to permit growth. The letters assigned to different sections have no special meaning other than maintaining alphabetical order. We began with *B* rather than *A* in case we eventually wanted a category to precede *Basic Needs*, and we've left vacant letters throughout the hierarchy for the same reason.

Taxonomy codes have the following structure: AA-####.####-###.## where “A” stands for an alpha character and # stands for a numeric one. Codes are assigned in a way which ensures that terms are ordered alphabetically within their sections. The only exceptions are in the *Disaster Services* section where the major subsections are ordered according to the phases of a disaster (for educational purposes) and the *Target Populations* section where *Agencies/Organizations as*

Recipients falls before *Age Groups*. Whenever possible, space needs to be left between numbers to allow for the insertion of additional terms. The gaps in the numbering structure are intentional.

The following numbering scheme has been adopted for selecting codes to be assigned to new terms. The alpha characters represent the first letter of the first word in a section; the numerical elements represent the numerical portions of the code assigned to terms beginning with the letter. Terms beginning with “A” have codes at level six from 01 to 05, at level five from 001 to 050 and at levels three and four, from 0001 to 0500. Terms beginning with “B” have codes at level six from 06 to 10, at level five from 051 to 100 and so on. Example: The code for *Automobile Driver Licenses* (a level five term) is *DF-7000.1850-050*; the code for *Adult Basic Education* (a level four term) is *HH-0500.0500*. These are guidelines only.

The complete numbering scheme for level six, level five and levels three and four is as follows (read each as “up to”):

A	05	050	0500	H	30	300	3000	O-P	65	650	6500
B	10	100	1000	I	33	330	3300	Q	67	670	6700
C	15	150	1500	J	35	350	3500	R	70	700	7000
D	17	170	1700	K	40	400	4000	S	80	800	8000
E	18	180	1800	L	45	450	4500	T	85	850	8500
F	20	200	2000	M	50	500	5000	U-V	90	900	9000
G	25	250	2500	N	60	600	6000	W-Z	95	950	9500

Levels one and two cannot be further expanded. Fortunately, this is only a problem for the target population section. In other areas, there is plenty of space. Codes are not reused.

Term Names: The Taxonomy has, in the past, been regarded as a strictly professional tool, one that professional resource specialists use for classification purposes and professional I&R specialists use to search for resources during the I&R process. Now that many I&R databases are available to the general public on the Internet and others want to use the Taxonomy as a classification system for Web portals, care needs to be taken that Taxonomy concepts be easy to understand and access by people not trained in indexing and searching.

Term names are selected based on accuracy (how services are designated and known in a majority of communities), clarity (the wording should convey the meaning of a concept as clearly as possible) and consistency (i.e., avoid terms that have multiple forms of the same word: “utility” and “utilities”; use the same word, whenever possible, when there are synonyms: “automobiles” and “cars”). There are exceptions: *Car Clubs* but *Automobile Insurance*. Service terms are always plural: *Information Lines* and “*Libraries*” as opposed to “Information Line” and “Library”. In the case of some program names, there is only one program and it is singular: *Peace Corps* rather than “Peace Corps Programs”. There are no “Other” or “NEC” (Not Elsewhere Classified) terms, but in some branches generalized terms have been developed. When it was pointed out, for instance, that the level 3 term *Dental Care* had numerous specialty terms (*Dental Hygiene*, *Emergency Dentistry*, *Forensic Dentistry*, and the like) beneath it as level 4 terms but no term for routine dental care, a level 4 term (*General Dentistry*) was created. If a new concept is discovered, a new term needs to be created to address it. Service terms should always follow a “program” or “service format” and should not refer to people, e.g., *Private Therapy Practices* rather than *Private Therapists*. The people who provide the services are referenced in the *Occupations* segment of the *Target Populations* section.

In some cases, major programs are included in the Taxonomy by name. These are generally federal government programs such as *TANF* and *Food Stamps/SNAP* in the U.S. and *Spouse’s*

Allowance in Canada, that are more recognizable by their names than a general descriptor that might be created for this purpose. State/provincial and local program names are rarely added and generally not by name. If a term for a program is added, a generic name for the program is selected as the preferred term rather than one of the many specific names. This is only done when a program begun in one jurisdiction has been widely adopted elsewhere under similar enough circumstances that it is possible to write an applicable definition. Names by which the program is known locally can be added as use references (see below).

There are capitalization and punctuation rules for establishing term names. All words in terms have initial capital letters. Acronyms are all caps with no periods. Hyphens have been eliminated in all terms such as *After Hours* and *Barrier Free* where the component elements of the term are themselves words. Hyphenation is retained in named diseases and a number of terms in which removal would be confusing: *Co-Parenting*, *Ellis-van Cervald Syndrome*, *Ex-Offender*, *K-9*, *Neo-Freudian*, *Non-Hodgkins Lymphoma*, *Prader-Willi Syndrome*, *Pro-Choice*, *Semi-Independent*, *Tay-Sachs*, *U-Pick*, *Verbo-Tonal*, and *X-Rays*. Apostrophes have been retained in the possessive form of words in most cases: *Children's*, *Women's*. When possible, the issue has been avoided: *Veteran Health Insurance*, *Veteran Education Benefits*, but also *Veteran's Administration Hospital*. Commas are not used. Terms are often separated by a slash rather than using *and*: *Banks/Savings and Loans*, *Building Acquisition/Construction/Renovation Funds*. Ampersands are not used. Words in parentheses are avoided. Also avoided is the following term form which is very popular for directory indexes:

Food—Emergency
Food—Farmers Markets
Food—Meals

It is important to be conservative when changing term names, to know that a global change in the nomenclature has taken place, not a short-term “fad”, a regional change in the language or a change in one service sector but not in others where the same term is used. *Mental Retardation* became *Intellectual Disabilities*, for example, only after we confirmed that the new version of the DSM would also include the change and more recently, references to substance abuse” were changed to “substance use disorders”. It is always appropriate to add new language as a use reference (see below) but there should be good reasons for changing preferred terms, particularly those for major services such as *Case/Care Management*. Good reasons for changes include ensuring consistency and clarity where the current name for a service concept is one of many possibilities and has not been broadly accepted over time.

Different term names may be needed for the same service in U.S. and Canadian versions of the Taxonomy. For example, *Food Pantries* are known as *Food Banks* in Canada, *Ethnic Advocacy Groups* are more properly termed *Ethnocultural Advocacy Groups* and *Homeless Drop In Centers* are appropriately styled *Homeless Drop In Centres* using the correct Canadian spelling for “centre”. In most cases, the same code is used and locally modified Canadian term names are added to the Canadian Term Name field. It is, however, important to maintain alphabetical order within both versions of the Taxonomy to the extent possible. In situations where term names for essentially the same service differ and adding a Canadian term name but using the same code would create a display problem, a Canadian only term with a different code can be added. The U.S. term *African American Community* (YH-6000.0250) is a case in point. The appropriate term name in Canada is *Black Canadian Community*. If we had added that as a Canadian term name for YH-6000.0250, it would have appeared before *American Community*, *Anglophone Community* and *Arab Community* in Canadian alphabetical displays ruining the alphabetical sequence. Giving *Black Canadian Community* separate term status, even though it is logically equivalent to *African American Community*, preserves a more useful display. Assigning a different code (YH-6000.1020) achieved

this end. This is a technical Taxonomy maintenance point, but an important one to keep in mind when working with more than one locale.

Definitions: Definitions are provided for all terms and serve as a touchstone to ensure that people are using terms in the same way. In addition, they are deliberately written in a way that teaches readers something about the service delivery system in a particular service sector. 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.

We try to avoid technical language in definitions. When writing descriptions of diseases and conditions or medical procedures, for example, we look up all of the technical words we find in the definitions we research in the various medical dictionaries at our disposal and substitute plain language in the corresponding Taxonomy definitions. The resulting definitions are sometimes longer and more time-consuming to write than they might have been, but are more easily understood by people who typically use the Taxonomy than they would be if loaded with medical jargon.

Most definitions for services begin with “Programs that...”. This is a convention that has been adopted and has been used fairly consistently. When clearly preferable, some begin with “Organizations that...”.

The definitions in the Taxonomy are more than scope notes. They fully describe a service rather than focusing on differentiating one service from another. Some definitions are very straightforward, even simple:

Food: Programs that seek to meet the basic nutritional needs of the community by providing access to food products.

Others are more robust providing enough detail to thoroughly understand what is involved:

Brain Injury Rehabilitation: Rehabilitation programs that develop an individually tailored treatment plan that combines the resources of physical, occupational and speech/language therapists; physiatrists (physical medicine specialists); neuropsychologists/psychiatrists; cognitive rehabilitation therapists; rehabilitation nurses; vocational counselors; social workers and/or other specialists to help individuals who have been disabled by an acquired brain injury attain their maximum level of functioning and quality of life. Common disabilities experienced by ABI patients following acute treatment and medical stabilization include problems with cognition (thinking, memory, and reasoning), sensory processing (sight, hearing, touch, taste, and smell), communication (expression and understanding), and behavior or mental health (depression, anxiety, personality changes, aggression, acting out, and social inappropriateness). Therapy generally focuses on behavioral management, neuropsychological adaptation, environmental structuring, eating and swallowing management, cognitive and communication skills, daily living and social skills, self-care, ambulation, academic and vocational skills, and community reintegration. The goal of brain injury

rehabilitation is to restore functions and skills that can be recovered and to help patients learn to do things differently when functioning cannot be restored to pre-injury levels.

Intergenerational Programs: Programs that increase cooperation, interaction or exchange between people of different generations dispelling stereotypes about old and young, and enabling individuals, families and communities to enjoy and benefit from the richness of an age-integrated society. Intergenerational programs are structured so that both age groups benefit from the interaction, but in many programs, one age group is the provider of service while the other is the recipient. Older people may mentor children or adolescents and serve as role models for young people who are preparing for adulthood, while students who understand the latest technology may teach older adults computer skills in their homes, senior centers or long term care settings. Older adults gain opportunities to develop meaningful contact with younger people and stay in touch with their communities while children and youth develop healthy attitudes about aging, gain an appreciation for rich cultural traditions and histories, and experience the satisfaction of sharing something they know. In many communities, young and old are working together as partners on community projects, and are finding that the collaboration leads to mutual appreciation while their communities reap the benefits of their work.

Still others describe common eligibility factors and typical secondary services.

Housing/Shelter: Programs that seek to meet the basic shelter needs of the community by providing temporary shelter for people who are in emergency situations, home improvement programs, housing location assistance and a variety of housing alternatives.

Domestic Violence Shelters: 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.

And others reference variations that may be encompassed in the concept or provide background information that helps readers understand the context for a service:

Employee Assistance Programs: Programs that contract with employers to offer confidential help to employees, and in some cases their families, whose legal, financial, marital, parent-child, child care, alcoholism, drug abuse, health and/or mental health problems could have a direct impact on their attendance and job performance. EAPs vary in complexity from telephone hotlines that offer referrals for needed services to organizations that offer in-person diagnosis and referral, direct counseling and/or extensive treatment for one or a variety of problems.

Individual Development Accounts: Organizations that provide opportunities for low-income individuals and families to open individual development accounts

(IDAs) which enable them to build assets that can be used for postsecondary education and training, business capitalization and home ownership. States are authorized by the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 to create community-based IDA programs with TANF block grant funds, and to disregard all money saved in IDAs when determining eligibility for means tested government assistance. Although the program requirements vary from state to state, most are offered through a collaboration of organizations in a community including nonprofit organizations which recruit participants and provide financial planning services, banks or credit unions which provide matching funds, usually one or two dollars for every dollar saved, and foundations, state or federal government which provides financial support for the matching funds. (NOTE: U.S. only term.)

We sometimes encounter situations where services are not only called something completely different in different parts of the country (and now the U.S. and Canada) but also have other variations which affect the way they can be defined. We chose the path of acknowledging the regional differences in the definition rather than agonizing over a very focused definition that would work everywhere (probably impossible in most cases anyway) or choosing a specific one that might work in most places but would be incorrect in others. In situations where services are organized differently in the U.S. and Canada, separate definitions are used. Examples:

Conservatorship Assistance: Programs that provide assistance for people who are in favor of or want to oppose the appointment of a conservator to protect adults from physical danger and improper treatment and/or to protect their estate from exploitation or waste when they are incapable of managing their own affairs or are competent but infirm. Conservatorships differ widely among jurisdictions. In some states, conservatorships are voluntary arrangements in which a physically infirm but competent individual petitions the court to appoint the conservator of choice to manage whatever powers and property the conservatee chooses to include in the arrangement. In these jurisdictions, guardianships apply to adults who are found to be incompetent. In other states, conservatorships apply only to an individual's property while guardianships address responsibility for the person. States having no conservatorship arrangements generally have guardianship provisions which address the needs of adults who have been found by the courts to be incapable of managing their own affairs. (U.S. Definition)

Guardianship Assistance: Programs that provide assistance for people who are in favor of or want to oppose the appointment of a guardian to care for and/or manage the affairs of a child or adolescent during minority (generally younger than age 18). In some states, particularly those with no arrangements for conservatorships, whose conservatorships are voluntary covering property and powers designated by the conservatee or whose conservatorships address only the individual's estate, guardianships may also apply to adults who have been found by the courts to be incapable of managing their own affairs. (U.S. Definition)

County Controller Offices: The office of the individual who holds the position of county controller in a particular jurisdiction. The responsibilities of the county controller are financial in nature, vary significantly from jurisdiction to jurisdiction, and generally depend on the local configuration

of elected officials and their respective duties. The positions of county auditor, county controller and county treasurer are often combined in various ways as are the responsibilities associated with these positions. (U.S. Definition)

County/Regional Controller Offices: The office of the individual who holds the position of controller in a particular jurisdiction. The responsibilities of the controller are financial in nature and may vary from jurisdiction to jurisdiction. (Canadian Definition – note the Canadian term name.)

County Executive Offices: The office of the individual who holds the position of county executive and serves as the chief administrative officer of the jurisdiction. The county executive may appoint the heads of county departments and is usually responsible for general administration of county departments and services. Other responsibilities vary significantly from jurisdiction to jurisdiction, and generally depend on the local configuration of elected officials and their respective duties. (U.S. Definition)

County Treasurer Offices: The office of the individual who holds the position of county treasurer and generally serves as the chief custodian of county funds. The treasurer keeps all funds belonging to the county in designated depositories and accounts, and keeps detailed accounts of all receipts and expenditures. Other responsibilities vary significantly from jurisdiction to jurisdiction, and generally depend on the local configuration of elected officials and their respective duties. The positions of county auditor, county controller and county treasurer are often combined in various ways as are the responsibilities associated with these positions. (U.S. Definition).

Adult Residential Care Homes: Residential homes or facilities that offer personal care and individual attention for older adults, people with disabilities and other populations whose limitations prevent them from living alone. Adult residential care homes (which are also known as board and care homes, residential board and care homes, personal care homes or residential care facilities for the elderly) generally provide a room (which may be shared), meals and supervision; and may specialize in populations with specific needs such as people with Alzheimer's disease or those with developmental disabilities. Services vary from facility to facility but may include dietary and housekeeping services, monitoring of prescription medication, social and recreational opportunities, incontinence care and assistance with toileting, bathing, grooming, dressing, mobility and other activities of daily living. Some homes provide secured surroundings for confused elderly adults who may wander while others are unable to accept individuals who are incontinent or who have severe problems with memory loss. There is considerable variation among these homes in terms of size, resident mix, daily charges and services. Most but not all adult residential care homes or facilities are licensed by the state in which they are located. (U.S. Definition)

U.S. definition for Crop Insurance: Programs that enable farmers to purchase insurance which protects them from financial loss due to the

destruction of specified agricultural products as the result of rain, hail and other destructive natural forces. Also included are programs that protect grain and produce farmers who, through no fault of their own, are placed in financial risk because of the default of a wholesaler, storage facility or another part of the food production/distribution chain. Crop farmers may also be indemnified if their crops become contaminated with chemicals or toxic substances. Federal crop insurance does not cover losses that are the result of negligence or failure to observe good farming practices. Crop insurance is available through the U.S. Department of Agriculture (USDA) as well as from other sources.

Canadian definition for Crop Insurance: Programs that enable farmers to purchase insurance which protects them from financial loss due to the destruction of specified agricultural products as the result of rain, hail and other destructive natural forces. Federal crop insurance does not cover losses that are the result of negligence or failure to observe good farming practices. Also included are programs that protect grain and produce farmers who, through no fault of their own, are placed in financial risk because of the default of a wholesaler, storage facility or another part of the food production/distribution chain. Crop farmers may also be indemnified if their crops become contaminated with chemicals or toxic substances. Crop insurance is a provincially-delivered program under the federal auspices of the Canadian Agricultural Income Stabilization (CAIS).

Use References: Preferred wording has been established for terms in the hierarchy so that there is only one “right” term in that display. While we have tried to select the most common wording as the preferred wording for terms, there are many cases in which there is no consensus. So the Taxonomy has another feature: “use” references. “Use” references are synonyms for the preferred terms in the hierarchy and allow users to access terms using the wording that may be familiar either searching online or in print products. Examples: *ACAs* (an acronym) is a use reference for *Adult Children of Alcoholics*, which is the preferred term. *Commuter Rail Services*, *Elevated Railways*, *People Movers* and *Railroad Commuter Services* are use references for *Local Rail Services*, the preferred term. Use references have reciprocal “used for” references which are listed with the preferred wording for a term in printed versions.

The Taxonomy employs fairly loose rules for what qualifies as a use reference. Absolute synonymy is not required. Use references may, of course, be precise synonyms (e.g., *Food Closets* means exactly the same thing as *Food Pantries*) but they may also be more discrete instances of the concept that have not been broken out (e.g., *Beds*, *Tables*, *Couches* and *Chairs* are use references for *Furniture*) or they may be concepts that people are likely to use in searches and will be confused if they don't find them (*Home Mortgages* is a use reference for *Home Loans*; *Wishes* a use reference for *Wish Foundations*). It is important, however, to avoid adding more specific references in situations where confusion may result. We recently removed “Single Parent Support Groups” as a use reference for “Parent Support Groups” because not all parent support groups are configured for or even include single parents. People were retrieving parent support groups for other populations (e.g., adolescent parents) when they searched on “single parent” because of the misleading use reference. Even when more specific target terms have been included as part of a string in a term name, e.g., *Gay/Lesbian/Bisexual/Transgender Support Groups*, it may be misleading to have *Gay Support Groups* or *Lesbian Support Groups* as use references. It is better for users to apply target population terms in these instances: *Parent Support Groups * Single Parents*; *Gay/Lesbian/Bisexual/Transgender Support Groups * Gay Men*.

Also to be avoided is the practice of adding organizational/facility type wording as use references for service terms. However, most organizational/facility type constructions can be cast as service terms. *Barber Shops*, for example, would not be added as a use reference for *Hairdressing/Nail Care*, but *Barber Shop Services* is an acceptable candidate.

Use references may also be old program names: *CETA Programs* became *JTPA Programs* which, in turn, became *WIA Programs* (Workforce Investment Act). *CETA Programs* and *JTPA Programs* are now use references for *WIA Programs*. Likewise, *AFDC* is a use reference for *TANF*. In some states/provinces, well-known federal programs will have an AKA, e.g., *TANF* programs are known in California as *CalWORKS*.

Common misspellings are NOT included as use references regardless of the fact that people may enter them in keyword searches, nor are possessive forms of words without the apostrophe, but accepted regional variations in spelling are included as use references. Examples: *Veterans Benefits* would not be added but *Benefits for Veterans* will accomplish the same thing if the objective is to provide access by the word *Veterans*. *Child Counselling* and *Child Counseling* are both use references for *Child Guidance* because “counselling” is the accepted spelling in Canada while “counseling” is used in the U.S. The Canadian spelling is included in the Canadian English version and the U.S. spelling in the U.S. version⁴. Nor are different forms of the word added except in situations where they are part of a completely different use reference name. We don't, for example, enter the singular form of every term. *Wig* is not a use reference for *Wigs*, but *Wig Banks* has been added, accomplishing the same thing. We will consider adding use references reflecting different forms of a word when we get reports that end users are trying to search using that word. We recently added "Parenting Assistance for Expectant/New Parents" as a use reference for *Expectant/New Parent Assistance* because people were searching using “parenting” in expectation of finding the term. Software vendors should be encouraged to structure their keyword searches so that partial word searches retrieve singular and plural forms of a word when the singular form is used. Try the keyword search on the Taxonomy website to see how this works.

Use references sometimes become preferred terms in their own right, especially in the case of lower level instances of a concept that people want to be able to break out. The term is deleted as a use reference and added as a subset of its previous preferred term. A note is generally added to the update comment for both terms to explain what has occurred. When we added the 6th level to the Taxonomy structure, there were a number of concepts that previously existed as use references or were placed at the same level as a higher level term (logically speaking) that have now been broken out as 6th level subset concepts. Sometimes there is consensus that a use reference is a clearer name for a concept and the two are reversed. This may make it necessary to also change its code (to preserve alphabetical order of the concepts). An old term name is almost always added as a use reference when the preferred term name is changed. This preserves access for people who might remember old wording.

See Also References: See also references refer users to related terms in other sections 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. *Emergency Food* is linked to *Christmas Baskets* and *Thanksgiving Baskets* (terms in a completely different section) via see also references, for example. There is also a see also between *Emergency Food* and *Emergency Food Clearinghouses*, related terms within the same section (*Food*). Some see also references may

⁴ The maintenance system for the Taxonomy allows for local modifications in term names, definitions, use references and bibliographic references. When there are spelling differences in use references, both spelling alternatives are added to the Master taxonomy and the U.S. and Canadian spellings are added to their respective use reference fields.

relate to imbedded targets. All terms relating to services for veterans, for example, are linked by see also references. This is done selectively.

See also references should be made to only a single term within a branch, not to multiple terms on the same branch. For example, a see also reference can be added between *Cultural Transition Counseling* (a term in the *Mental Health and Substance Use Disorder Services* section) and *Cultural Transition Facilitation* (a term in the *Organizational/Community/International Services* section), but should not also connect with *Immigrant Mutual Assistance Associations* or *Refugee Resettlement Services* which are subsets of *Cultural Transition Facilitation*. When there is a question about which level to reference, the practice has been to link to the highest level (broadest) term so as to direct users to an entire section of relevant terms unless one of the lower level terms is obviously a better fit. It is also appropriate to have see also references between two higher level terms and others between lower level terms within those sections when there is a clear connection.

See also references are also important when there is a section like *Specialized Counseling Services* which contains the majority of counseling concepts that have a special focus and counseling concepts that exist elsewhere, e.g., *Ex-Offender Counseling*, *Student Counseling Services*, *Truancy Counseling*, *Birth Control Counseling*, *Substance Use Disorder Counseling* and others. Similarly, there are see also references between a term like *Specialized Information and Referral* and similar types of services that have been placed in other sections: *Emergency Food Clearinghouses*, *Housing Search and Information*, *Lawyer Referral Services*, *Health Care Referrals*, *Abortion Referrals* and the like. The decision to gather concepts (e.g., place all specialized I&R services in the same section) or distribute them (per the above example) is always a difficult one and must be made on a case-by-case basis. The see also references help to maintain the integrity.

Related Concepts/Codes: 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. Apart from the related concepts for Canadian only and U.S. only terms, the associated Taxonomy terms are drawn only from the 10 basic service sections of the Taxonomy (B through T) and don't include target population (Y) terms. Related concepts codes have the following structure where A represents an alpha character and # a numeric one: AA-###. The method of creating codes is different than that for Taxonomy terms and is based on the first three letters of the first word in the related concept name. The code for Advocacy/Rights Protection is AD-900. "A" was selected because "advocacy" begins with an "a"; "D" was selected because "d" is the second letter in "advocacy"; and "900" was selected because the third letter is "v" and, using the chart for Taxonomy code construction, "u" and "v" are associated with "90", "900" and "9000". While complicated, this method of assigning codes to related concepts assures that there will be plenty of space for new concepts ongoing. Decisions regarding which terms to associate with a particular related concept are basically judgment calls. Sometimes whole sections of terms are relevant and will include a lead term as well as subsets. In other cases, only individual terms are included. Questions involving the scope of a related concept may also arise. In the case of the Early Childhood Programs/Services, for example, the decision was made to include services broadly related to children of that age (e.g., adoption services, child care complaints, child care provider associations) as well as services provided directly for this population (preschools, child care, pediatrics). As related concepts become more widely used in searches, more guidance may emerge from the field regarding the best development direction for this feature.

Bibliographic References: The bibliographic references field credits the sources that were used to develop Taxonomy term definitions or make decisions about term names or placement within the hierarchy. In some cases, more than one source is used and all are credited. When there are multiple references, they appear in alphabetical order. New references are also added to the

Acknowledgments document as part of the maintenance process. An effort has been made to transfer historical references contained in the Acknowledgments document to the Taxonomy terms for which they were a source, and new references are routinely included when new terms are added. Sometimes definitions for a new term will borrow wording from the definition for a current one. A new type of clinic for a particular disease, for example, may use wording from the definition for the target term for the disease. In these cases, sources that are credited in the current term will also apply to the new term, and bibliographic references in the current record should be copied to the new one. When records are locally modified to add Canadian data, separate Canadian English and Canadian French references can be added if different sources were used to develop those definitions. Below are sample references for *Brain Injury Rehabilitation*. The links are not live in Taxonomy records but can be copied and pasted into the search field of a tool like Google to access the source.

"Brain Injury Rehabilitation: Programs and Services", National Rehabilitation Hospital website, http://www.nrhrehab.org/Patient+Care/Programs+and+Service+Offerings/Outpatient+Services/Service_Page.aspx?id=8

"Traumatic Brain Injury: Hope Through Research", National Institute of Neurological Disorders and Stroke (NINDS), National Institutes of Health, http://www.ninds.nih.gov/disorders/tbi/detail_tbi.htm

Comments: The comments field provides information about a term including tips for indexers about how a term should be used or help in distinguishing the term from others that may be similar. Below is the comment for *Disability Related Support Groups* (PH-5000.1800):

"Modify this term using disability related target population terms in the Diseases/Disabilities section. Applicable categories include Communication Impairments, Developmental Disabilities, Frail Elderly, Functional Disabilities, Hearing Impairments, Learning Disabilities, Multiple Disabilities, Physical Disabilities and Visual Disabilities."