

CANADIAN TAXONOMY DEVELOPMENT HISTORY¹

As planning for the implementation of 211 in Canada got underway, a bilingual pan-Canadian taxonomy of human services was recognized as one of the many standards vital to the infrastructure required to deliver 211 services across the country. In 2004, the InformCanada Board recognized a need to create a classification system that would provide a "common language" for all 211 providers and their area partners in information and referral. The indexing system was seen as an essential building block for the eventual seamless delivery of 211 to all Canadians as well as a tool that could be used to generate valuable information about the human services system for social planners. After a year of study and input from the field, the 211 LA County Taxonomy of Human Services (previously known as the INFOLINE Taxonomy), already a 211 standard in the United States, was chosen as the basis for this work. InformCanada and its partners in Ontario set about securing resources to "Canadianize" the Taxonomy.

Why did InformCanada choose this classification system? The following were seen as major benefits:

- A firm structure or architecture for the overall system but with flexible development rules that anticipate growth and changes in the service delivery system. A rich network of linkages between preferred terms and their synonyms allows for local terms to be used in searching when appropriate.
- Detailed and descriptive definitions for each term, developed in consultation with subject area experts. This reduces confusion in indexing and accessing services, allows for very precise searches, and increases accuracy in describing duplication or gaps in service for social planning purposes.
- Compliance with the International Organization for Standardization (ISO) standards for development of a monolingual thesaurus (classification system) and anticipated compliance with the ISO standards for a bilingual thesaurus once the French language version is undertaken.
- 8,300 terms cover a wide range of community services, making this system appropriate for comprehensive or specialized use, and providing a common language to bridge the gaps between service delivery silos.
- The hierarchical structure facilitates data sharing among agencies and statistical comparison since referral statistics can be "rolled up" to a higher level term for easy comparison.
- Previous Canadian users in Edmonton and Calgary had a positive experience adapting the Taxonomy for their use.

¹ The material in this document is drawn substantially from a Canadian Taxonomy report prepared by Deborah Woods Consulting titled "The Canadian Taxonomy of Human Services: Update on the Initiative", November 2006; a 2012 report to the InformCanada Board by John Allec; and material currently on the Taxonomy website Home page.

- The www.211taxonomy.org website and the Taxonomy listserv provide substantial support to users through training materials, peer support and access to the U.S. Taxonomy editor, updates on changes, downloadable files.

During 2005, the first stage of the Taxonomy project was undertaken with support from an Ontario Trillium Foundation grant. From March to December 2005, the English language "starter" Taxonomy, which included only the most crucial terms for Canada, was developed by a team that included the Taxonomy Editor (Georgia Sales), the Canadian English language Editor (Clive Jones), an Editorial Group and a National Review Group whose work was coordinated by a project manager (Deb Woods). Steps in the "Canadianization" process included:

- Gathering reference material including terms and links used in the InformOntario Thesaurus (the indexing system previously used throughout Ontario), Vancouver's faceted index, Winnipeg's volunteer system and other broader systems such as the Government of Canada's Core Subject Thesaurus; and specific requests for Canadian terms from I&R organizations participating in the endeavour.
- Reviewing high level categories of the Taxonomy to identify areas for deactivation, editing, rewriting and conceptualization as well as those requiring no additional work.
- Noting areas where there was a need for subject matter experts or collaboration with other bodies.

A first stage English language version was created by a national team of editors. The work included identification of locale-specific variations in term names, definitions, use references and bibliographic references which an upgraded Taxonomy website would eventually support; and development of terms for services only available in Canada ("Canadian Only" terms). Other accomplishments included an agreement with the owner of the Taxonomy (211 LA County), and outreach to interested parties in federal, provincial and municipal governments which included introducing managers of government information to the new classification system.

In 2006, work continued with the support of Ontario's Ministry of Community and Social Services under the three-year 211Ontario.ca project. Findhelp Information Services, the 211 provider in Toronto, managed the project. On September 11 of that year, the InformCanada Board agreed to the terms of the Sublicensing Agreement with 211 LA, paving the way for use by Canadian subscribers once the Canadian terms were fully incorporated into the subscriber database on the 211taxonomy.org website. The historic agreement provided a legal framework for cross-border collaboration on this important 211 standard. Work on the remaining English language terms was complete by early in 2007.

The development of the Canadian French version of the Taxonomy began in 2006 and was made possible through the 211Ontario.ca project funded by the province of Ontario. This marked the first look at the Taxonomy in a language other than English. The work was completed by a dedicated editorial committee of French information and referral specialists and data coordinators from Ontario and Quebec working under the leadership of Corinne Gallois, French Services Coordinator at Findhelp in Toronto.

While every term in the Canadian English version has an equivalent in the French version, the French content was not generated simply by translation but developed through a thorough research process in compliance with the *ISO Guidelines for the Establishment and*

Development of Multilingual Thesauri which reflects cultural, linguistic and semantic differences. The French version has a unique set of bibliographic citations, as well as use references developed independently and based on the particularities of the French language and the specific needs and practices of Francophones across Canada.

For more information about the French version and its development, contact Corinne Gallois, French Services Coordinator at Findhelp Information Services, Toronto cgallois@findhelp.ca.

Work on the Canadian Taxonomy is ongoing. Under the current agreement with InformCanada, which administers the Canadian Taxonomy of Human Services on behalf of 211 L.A. County, Findhelp has been tasked with the following:

- Provide editorial support in both English and French.
- Share Taxonomy related materials generated with InformCanada.
- Provide reports to the Board of InformCanada on a bi-monthly basis which include all activities and time spent on deliverables.
- Document the Taxonomy process used by Findhelp for English and French.

Taxonomy editor Georgia Sales draws on a small consulting team of Clive Jones (the Canadian editor) and Findhelp's John Allec for complex issues. This is nominally to assure specific Canadian needs and perspectives are fully managed, but the lines are inevitably blurred as only a small number of Taxonomy terms are U.S. only. The team assists with research, brainstorming on structural issues, and providing or evaluating draft names, definitions and use references. Clive also provides a final review on all terms before publication.

Corinne Gallois coordinates all of the work for the French version, the *Taxonomie canadienne des services humains*. With the full version completed in March 2011, that work has settled into providing prompt French versions for all new terms and modified terms. The work positions Corinne to be able to post customized summaries for Canadian users of each month's changes, often with recommendations on how the changes can be implemented. Corinne has also worked closely with Georgia on developing the French module for the Taxonomy maintenance interface.

For AIRS members looking for additional resources and support relating to the Taxonomy, there are online communities set up on the AIRS Networker at <http://airsnetworker.airs.org> which offer peer-based discussion groups and the ability to create and expand searchable resource libraries. Included are two communities for resource specialists who use the Taxonomy in their work, 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. Most Canadians join both groups.

The Canadian Taxonomy, like its U.S. counterpart, will always be a work in progress, reflecting the changes in programs, funding and usage in the Canadian service delivery system. The growth and development of the indexing system and its ongoing relevance are guided, in part, by user input via the peer-based discussions that occur on the AIRS Networker and dialogue with a network of Canadian editors to review new terms for local relevance. Their experience "on the ground" has been an essential reality check for Taxonomy growth and development as a whole, but has also informed decisions related specifically to terms in the Canadian locales.

Such user warrant² is broadly acknowledged as a powerful means of validation for controlled indexing vocabularies giving us a recognized quality assurance tool. The extensive research conducted to support the evolution of the Canadian Taxonomy lends additional credibility in the form of “literary warrant”³.

² “User Warrant” is the use of keyword searches by or requests from users as a justification for including a concept in a classification system or selecting particular wording as the preferred wording for a term.

³ “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.