

An Orientation to the Structure and Contents of the AIRS/211 LA County Taxonomy

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Provides an overview of the organization and contents of the classification system endorsed by both AIRS and United Way of America for indexing community resource databases. The Taxonomy's editor describes the contents of the system's ten service categories and the separate Target Population branch. In discussing the various sections, she provides insights into how database managers can establish policies that will ensure consistency in indexing and maximize access to the indexed data. This article was originally published in the AIRS Journal in 2003. It was revised in Fall, 2004, again in August, 2006, again in April, 2009 and again in April of 2010 and again in December, 2010 following Phase 2 of the AIRS Taxonomy Committee restructuring project. The latest revision was in April, 2018.

Work on the 211 LA County Taxonomy of Human Services began more than 30 years ago.²

When 211 LA County (previously INFO LINE of Los Angeles) was established in 1981, the agency inherited a resource system with an indexing scheme that was less than optimal in terms of design and contents. Problems that impacted effective retrieval of resource data included an inadequate two-level structure, limitations on the number of terms that could be included in each category, first level categories that represented inconsistent perspectives, and terms that were so general that our I&R specialists had to spend an inordinate amount of time reading program descriptions to weed out agencies that didn't provide the desired service. Analyzing what was wrong with that system allowed us to identify features that would make a classification system work.

We also had a good model for structuring the codes and sections of the Taxonomy: the *NICSEM Special Education Thesaurus*, which I helped to improve while working at the National Information Center for Special Education Materials at the University of Southern California (USC). That system taught me the logic of a hierarchical structure, the value of an alphabetical index and the incredible usefulness of a permuted³ display,

¹ While dozens of people have contributed thoughts to the Taxonomy over the past two and a half decades, special acknowledgment should go to Margaret Bruni of the Detroit Public Library whose involvement in early structure and content decisions helped to assure a strong foundation for future development of the Taxonomy and whose insights regarding its use as a service classification system, documented in her landmark article on the subject, form the core of today's training for resource specialists.

² Anyone who wants to know more about origins of the Taxonomy and its early history should consult the following publication: Georgia Sales. "Developing a Human Services Taxonomy: A Case Study." *Reference Services Review* 15 (4): 35 – 44 (Winter, 1987).

³ A rotated alphabetical display which allows users to access terms based on any word in a multiword term.

a feature that is no longer needed now that the Taxonomy can be accessed in a computerized environment.

While we were able to do some emergency patchwork to make the existing indexing system somewhat more functional, we realized that, ultimately, we would need to replace it. When an extensive review of other human service classification systems didn't turn up any viable options, we decided to create our own taxonomy.

From the beginning, we identified a number of principles that would serve as the foundation for our effort:

- Hierarchical Structure to Enable Comprehensive Scope: We wanted to build a structure that had a logical niche for every aspect of human services.
- Clear Wording: Terms needed to be phrased in such a way that users would understand them.
- Cross-References: At the same time, cross-references needed 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 unfamiliar with the term 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 Population Terms: We developed a hierarchical taxonomy branch representing groups that specific programs target. Rather than simply indexing a subsidized housing program for seniors as *Low Income/Subsidized Private Rental Housing*, for example, 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/Delivery Format 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 people who have been discriminated against, for example, could be indexed as *Discrimination Assistance * Advocacy*. An authoritative list of modality terms has been developed and is available on the Taxonomy website. Use the Related Concepts search to access them or print the Related Concepts display. The Related Concepts search is one of the options available under the Search tab on the www.211taxonomy.org website.
- Organization/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 specific services like *Book Loan*, *Reference/Information*, or *Library Audiovisual Services*. An authoritative list of facility type terms has also been developed and is available on the Taxonomy

website. Use the Related Concepts search to access them or print the Related Concepts display.

- Computer Interface: Knowing that 211 LA County would eventually have a computerized database, we designed the Taxonomy from the beginning for integration into such an environment.

Over time, the Taxonomy has continued to grow. 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. The experience of resource database staff “on the ground” has been an essential reality check for Taxonomy growth and development. Such user warrant⁴ is broadly acknowledged as a powerful means of validation for controlled indexing vocabularies giving us a recognized quality assurance tool. We have also been fortunate to recruit subject area specialists whose advice has been invaluable in validating (and sometimes restructuring) entire sections. The *Acknowledgments* document, which is available on the Taxonomy website, provides a comprehensive list of contributors and other sources.

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 publish new editions as often as they were needed.

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 are able to 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”. Non-subscribers can also visit the website to get a feel for its features and the Taxonomy’s organization, but their searches are limited to ten items

⁴ “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.

per search (unless they register for evaluation purposes) and they're entirely locked out of some areas of the site. When an agency subscribes, it receives a password which allows full access.

Following the publication of the first edition, the Taxonomy was adopted as the AIRS standard for indexing community resource databases in the United States and, beginning in 2006-2007, Canada. Despite the web of cross-references built into it, however, novice and veteran users alike sometimes have difficulty understanding its structure and locating terms for particular concepts. The overview that follows began as an effort to capture Margaret Bruni's observations regarding what was significant about different sections of the Taxonomy (information she included in her many training sessions presented at AIRS Conferences) but ended up being something more: an attempt to describe the logic underlying the Taxonomy, the basis on which decisions are made regarding where new terms should be placed. It also references some of the major changes that have occurred in the structure of the Taxonomy over time. I hope you will find it helpful and enlightening.

Basic Needs Section (B)

The first section of the Taxonomy is *Basic Needs*, which is divided into the following subsections:

- *Food*
- *Housing/Shelter*
- *Material Goods*
- *Transportation*
- *Utilities*

Most of the services in the *Basic Needs* section are intended for people with very low incomes, including those who are homeless, but may also be applied more broadly. Though they may be worded differently, the core services in this section appear in most taxonomies. The way the services are structured is very common and should feel familiar. Most users find that this is the easiest section of the Taxonomy to learn and use.

1. Some of the terminology in this section relates to concepts that can be found in other portions of the Taxonomy. For example, while some types of temporary financial assistance from nonprofits appear here in *Basic Needs*, *TANF*, *Food Stamps* and other government financial services are in the *Public Assistance Programs* (NL) section, because we wanted to group all of the safety net services together and juxtapose them to social insurance programs. Similarly, while housing options and support services are here, services for tenants and landlords involved in housing-related disputes are in the *Legal Services* (FT) section.
2. The *Food* section includes options for agricultural and animal husbandry support services (e.g., *Agricultural Loans*, *Crop Insurance*, *Livestock Indemnity Programs*, *Agricultural Water Management*, *Aquaculture Support Services* and *Sustainable Agricultural Programs*) in addition to food distribution programs, meal programs and

food outlets. Terms relating to the commercial fishing industry also appear in this section.

3. The *Housing/Shelter* section includes emergency shelter options (crisis shelter and homeless shelter), home improvement/accessibility concepts, independent and supportive living options, transitional housing and a wide variety of housing-related support services such as housing counseling, housing location assistance, financing for home purchase or construction, housing expense assistance and moving assistance.
4. The *Home Improvement/Accessibility* (BH-3000) section includes terms for home barrier evaluation and removal services, energy and water conservation improvement services, landscaping services and low cost building materials and supplies. A concept for accessible home construction is also here as is one for construction and home improvement cost estimates. An important component of the section is *Home Rehabilitation Programs* (BH-3000.3550) which includes concepts for home rehabilitation grants, home rehabilitation loans and home rehabilitation resource lists as well as home rehabilitation services – programs that do the actual work. Various categories of home construction and purchase loans, which used to be in the same section as the home improvement funding options, are located in the *Home Purchase/Construction Financing/Refinancing* (BH-3500) section.
5. It is important to distinguish the terms in the *Home Rehabilitation Programs* (PH-3000.3550) section from related concepts in the *Home Maintenance and Minor Repair Services* section, a subset of *In Home Assistance* (PH-3300). Home rehabilitation services involve major repairs, system upgrades and replacements whereas services for people who need to do routine maintenance on their homes or make minor repairs are included in the latter section. Replacing a few roof tiles or shingles, for example, is a minor repair; replacing the whole roof is a fairly major home rehabilitation project.
6. The *Residential Housing Options* (BH-7000) section has terminology for residential options—those that put a roof over people’s heads but provide no supportive services. The *Supportive Housing* (BH-8400) section, on the other hand, includes community care facilities for older adults, dependent children, veterans and people with disabilities while the *Transitional Housing/Shelter* (BH-8600) term rounds out the continuum of housing options and designates extended shelter programs that help homeless people live independently and transition into permanent housing. Nursing facilities (intermediate, skilled, and subacute care and special care inpatient units) are in the LL section, inpatient and residential options for people with psychiatric problems are located under *Mental Health Facilities* (RM) and facilities for people with substance use disorder problems are in the *Substance Use Disorder Services* (RX) section. The full range of community care facilities can be found by using the Related Concept search term “Community Care Facilities/Arrangements” on the Taxonomy website or by printing the Related Concepts report. The Related Concepts search is one of the options available under the Search tab on the www.211taxonomy.org website, and the reports can be found under the Print tab.

7. *Residential Housing Options* has three subset sections: *Low Income/Subsidized Rental Housing*, *Market Rate Housing* (including both rental housing and market rate home purchase) and *Subsidized Home Purchase*. The BH-8300 section, titled *Subsidized Housing Administrative Organizations*, is a related facility type section. Subset terms include *Housing Authorities* and *HUD Management Companies*.
8. The facilities in the *Supportive Housing* (BH-8400) section are structured according to the service networks that operate them and by the populations on which they focus, e.g., veterans, dependent children, and older adults/people with disabilities (which have been combined because many facilities accommodate both). This is an extremely difficult area of the Taxonomy to structure and describe because different states/provinces have different licensing requirements and use different terminology for designating facility types. We have tried to identify the true choices that potential residents have, regardless of where they live, and have delineated those as clearly as we could. Terms in the related *Supportive Housing Placement/Referral* (BH-8300) section are for organizations that help older adults and people with disabilities find a suitable supportive housing option. You may want to list only placement organizations and deactivate the operating facilities.
9. *Transitional Housing/Shelter*, which used to be located in the *Emergency Shelter* section, is a level three term in its own right. The major housing/shelter options are now on a par: *Emergency Shelter*, *Residential Housing Options*, *Supportive Housing* and *Transitional Housing/Shelter*.
10. The *Material Goods* (BM) section groups together household goods, clothing, personal grooming supplies, mobile devices, tools/equipment and other similar services as well as terms for programs that do repairs. Programs that accept donations of these types of goods can be found under *Donated Specialty Items* (TI-1800).
11. The *Personal/Grooming Needs* section lists support services for people who are homeless—services like *Bathing Facilities*, *Public Restrooms*, and *Temporary Mailing Address*. *Delousing/Body Parasite Treatment* (LT-1750.1680)⁵, however, is in the *Specialized Treatment* (LT) section because it is viewed as a health issue rather than a grooming issue.
12. The *Office Equipment and Supplies* (BM-6000) section, previously located under *Community Services* (TF) was moved here during the second phase of the structural reorganization recommended by the AIRS Taxonomy Committee that took place in December, 2010. The TF section was virtually gutted in the process and most of the terms moved to other, often more prominent, locations.
13. The *Transportation* section of the Taxonomy provides terms that can be used to index local and long distance transportation services as well as agencies that issue transportation passes, provide transportation-related financial assistance, offer training that orients commuters and other residents to the public transit system or provide driving directions and/or trip planning services. A facility type term,

⁵ *Delousing* was previously in the *Personal/Grooming Needs* section.

Transportation Organizations, is available to help pinpoint state, provincial/territorial or regional level transportation planning entities, private transit companies, public transit authorities, transit customer service centers, transportation information clearinghouses/511 services and transportation management associations by what they are instead of or in addition to what they do. Note that the *Travelers Assistance* section, previously TF-8500, which includes emergency services for tourists and other travelers who have encountered problems, is now here in BT while support services for people who want to travel for vacation or business purposes are in the *Travel* (PL-8700) section and *Travel Training for Older Adults/People with Disabilities* (LR-8500) is in the *Rehabilitation/Habilitative Services* (LR) section. *Transportation System Orientation Programs* and *Travel Directions/Trip Planning*, previously separate concepts in this section, were wrapped into the *Travelers Assistance* section as part of the 12/10 reorganization.

14. Early in 2010, all of the terms relating to utility services were moved from the *Housing/Shelter* (BH) section and relocated under a new level 2 term, *Utilities* (BV)⁶. There are three sections of services relating to utilities. *Utility Assistance* (BV-8900) includes discounted utility services, financial assistance with utility bills and other types of support that help residents pay their bills and avoid disconnection. *Utility Service Connection and Repair* (BV-8950) includes services provided by the utility companies related to processing utility connection orders; installing, maintaining and repairing necessary equipment; activating service; accepting and responding to reports of outages or other problems; reading meters or otherwise measuring usage; and/or billing and collection. *Utility Service Providers* (BV-9000) is a facility type section that includes terms for the utility companies themselves as well as for alternative energy suppliers.

Consumer Services Section (D)

The *Consumer Assistance* section is divided into four parts:

- *Consumer Assistance and Protection*
- *Consumer Regulation*
- *Money Management*
- *Tax Organizations and Services*

The *Consumer Assistance and Protection* section includes services that help to empower consumers. Included are *Consumer Action Information/Support*, *Consumer Complaints*, *Consumer Education* and *Consumer Protection Agencies*. The second section, *Consumer Regulation*, contains government services that are designed to protect consumers from fraud and abuse, safety risks or other problems. The third includes terms for services which help people manage their personal finances while the

⁶ This change was one of a number of major section relocations proposed by the Taxonomy editor, discussed in several meetings of the AIRS Taxonomy Committee and put out for comment by the field prior to implementation. Phase 2 of the restructuring process, also an outcome of AIRS Taxonomy Committee meetings and a survey of the field, took place in December, 2010. The changes were made available to the field at the end of January, 2011.

fourth relates to payment of federal, state, provincial/territorial and local taxes. Unlike the *Basic Needs* section, which is structured in a familiar way, the *Consumer Services* section brings together concepts that may have been organized in a different way in other classification systems. You will need to spend some time with the section to understand its structure, which is very logical even if not cast in a traditional mold.

1. The *Consumer Complaints* section is extremely detailed, allowing access by the area in which complaints arise. If your software permits, you may want to deactivate all of the fourth and fifth level terms and only reactivate specific terms when you need them. If you have a very small database, you may want to use only *Consumer Complaints* as the index term. There's also a *General Consumer Complaints* term for offices that deal with a range of issues. Use that term if you choose to use selected lower level complaints terms rather than the higher level *Consumer Complaints* term.
2. Terms in the *Consumer Complaints* section represent organizations (such as consumer protection agencies, professional associations or licensing bodies responsible for legal oversight of specific types of facilities) that help consumers work within the system to resolve difficulties. A related set of terms in the *Legal Services* section applies to organizations that people can turn to when consumer assistance fails and legal action is required. A *Consumer Law* term in that section is available for organizations specializing in this area of law rather than limiting their practices to specific consumer issues. These sections are related and should be reviewed together.
3. *Consumer Protection Agencies* is a facility type section. It is here that you can find terminology for Better Business Bureaus, government consumer protection agencies and the like. (You should always use facility types when they are available. You may use them alone or in conjunction with applicable service terms.)
4. The *Licensing/Certification/Accreditation* section contains terms for programs that authorize the practice of a profession or the operation of a facility or business, establish a review process and evaluate applicants to ensure that they meet minimum standards before allowing individuals/organizations to open their doors. Remember that you can use terms in the *Occupations* section of the Taxonomy (YO) to narrow the focus when you use *Occupational/Professional Licensing and Certification*.
5. Terms in the *Records/Licenses/Permits* section represent services that usually involve obtaining a piece of paper which documents specific events (a death, a marriage) or permits an individual or business to engage in a particular activity on a short-term (hunt, fish, set off fireworks) or long-term (sell alcohol, own a firearm) basis. It is important to read the definitions to fully appreciate the differences.
6. While the *Regulations/Standards* section also involves a regulatory process, that regulation is applied at a very broad level to entire industries (transportation, communications, public utilities) rather than to specific types of facilities or professions. These terms apply almost exclusively to regulation by governmental

agencies.

7. The *Money Management* section, previously a subset of *Consumer Assistance and Protection*, was elevated to level 2 status in 2010 and given the code DM. It includes services for people who need assistance in obtaining and responsibly using credit, obtaining or correcting information in their credit reports, paying their bills in an orderly way, reducing their debt burden and managing their financial resources more effectively.
8. Tax assistance⁷ services are in a separate section (DT) called *Tax Organizations and Services*. A distinction is made among *Tax Appeals/Audit Assistance*, *Tax Collection Agencies*, *Tax Information* and *Tax Preparation Assistance*. Additional terms at level three are *Online Tax Preparation/E-Filing Sites*, *Tax Forms* and *Tax Preparation Software*.

Criminal Justice and Legal Services Section (F)

The *Criminal Justice and Legal Services* section contains terms that represent three different types of organizations: courts and the correctional system; police/law enforcement agencies/services; and legal services (e.g., legal aid). The first two sections contain facility type terms followed by service terms (*Courts* and *Correctional Facilities* followed by *Judicial Services*; *Law Enforcement Agencies* followed by *Law Enforcement Services* and *Legal Services* followed by *Legal Services Organizations*). If you include these types of organizations in your database, you should always pick up the facility type term. The sections relating to legal assistance include legal assistance modalities (representing the way legal services are delivered—advocacy, representation in court, legal counseling, various forms of alternative dispute resolution) and specific areas of law (family law, insurance law). The complete list of major components is as follows:

- *Courts*
- *Criminal Correctional System*
- *Judicial Services*
- *Law Enforcement Agencies*
- *Law Enforcement Services*
- *Legal Assistance Modalities*
- *Legal Education/Information*
- *Legal Insurance*
- *Legal Services*
- *Legal Services Organizations*

1. The *Courts* section contains terminology for federal and state courts in the U.S. as well as federal and provincial/territorial courts in Canada⁸. Depending on the size

⁷ The *Tax Assistance* section was originally a part of the *Legal Services* (FT) section, then moved to its own section within Criminal Justice and Legal Services (FX) and, in one of the section reorganizations of early 2010, moved to the Consumer Services section as a level 2 term (DT).

⁸ Note that terms that are applicable exclusively in Canada or the U.S. are only included in the version of the Taxonomy structured for each of the respective countries. Searches on the website are also sensitive

and complexity of your database, you may want to use the level two term *Courts* and deactivate all of the lower level terms. If you choose to index more specifically and you are in the U.S., you will likely find the terms in the *State Trial Courts* section most useful. Included are *Civil State Trial Courts*, *Criminal State Trial Courts* and *Juvenile Courts* as well as a separate subsection for *Specialized State Courts* section which breaks out the following:

- adoption courts
 - business courts
 - community courts
 - drug courts
 - family law courts
 - gun courts
 - homeless courts
 - housing courts
 - mental health courts
 - probate courts (estates)
 - reentry courts
 - small claims courts
 - traffic courts
 - veterans courts
 - water courts
2. The terms in the *Criminal Correctional System* section represent services for people who are under the jurisdiction of the court system because they have been charged with or convicted of a crime. If you maintain information about correctional facilities, you should use the facility type terms in that section. An extensive list of alternative sentencing/supervision options such as diversion, parole and probation is available as well. This is also where ex-offender and inmate support services (including services for family members) can be found.
 3. The terms in the *Judicial Services* section enable you to pinpoint the offices within the judicial system that handle specific responsibilities related to court procedures, e.g., court filing offices, guardians ad litem, release on own recognizance, public counsel. If you decide not to index these functions (choosing instead to pick up telephone numbers for the appropriate offices or to ignore the functions altogether), you should deactivate this whole section.
 4. The terms in the *Law Enforcement Agencies* section are facility type terms designating specific police agencies and should be used if you maintain information about these organizations in your community. The level two term *Law Enforcement Agencies* may provide enough detail that you can deactivate the lower level terms.
 5. *Crime Investigation* is an odd term because all police agencies do it. One I&R wanted it, so it was added. You may want deactivate it.
 6. The terms in the *Crime Prevention* section are very important, and most I&Rs will

to the locale selected by the user and only include terms appropriate to the selected locale.

use at least some of the lower level terms. Note that these services are not exclusively provided by police agencies. Some may be available through neighborhood groups, community agencies or insurance companies. This is where you find bullying prevention, sexual assault prevention, child abuse prevention, spouse/domestic partner abuse prevention, self defense training and neighborhood watch programs. The *Community Crime Prevention Programs* and *Crime Prevention Equipment* sections group some of these concepts under broader terms you can use rather than all of the specific ones. There is also a *General Crime Prevention Programs* term that can be used for programs with a broader scope.

7. The terms in the *Crime Reporting* section are also very important. Use them only for special tip lines or other reporting mechanisms, not for law enforcement offices that handle general crime reports as a part of their everyday activity.
8. If you want to index the 911 function, note that it is in the *Public Safety* (JR) section. (It was placed there rather than here because it is also the entry point to fire and rescue services including paramedics.)
9. Crime victim and crime witness services are a part of the *Law Enforcement Services* section. Important concepts here are *Confidential Address Protection Programs* and *Victim/Offender Mediation Programs*. *Crime Victim Accompaniment Services* in this section is clearly distinguished from general *Escort Programs* in the PH section. A *General Crime Victim Assistance* term has been added for organizations that provide a range of services for this population.
10. Most of the legal assistance modalities (terms in the FP section) are not intended to be used alone; rather, they were designed as modifiers for terms in the legal services section. If you are unable to link two terms together in your system, you may want to deactivate these (and all the other modalities) altogether.
11. You may find it particularly tempting to use the terms in the advocacy section (FP-0500) as standalone terms. If you are indexing advocacy services, you should first consider some of the more specific terms under *Legal Services* (e.g., the categories under *Benefits Assistance* and *School System Advocacy*). The area of law is more important than the modality when making a referral. If you are indexing an advocacy organization, look at the *Community Action/Social Advocacy Groups* (TD-1600) section under *Organizational/Community/International Services* (T). Available there are terms such as *Animal Rights Groups*, *Children's Rights Groups*, *Hunger/Poverty Action Groups* and *Political Action/Lobbying Groups*.
12. If you do choose to use one or more of the modality terms in isolation, make sure you do the same thing in all applicable situations. Always be consistent in your choice of terms.
13. Use the *General Legal Aid* term in the *Legal Services* section for organizations that handle cases across the legal spectrum but have no area of specialization. This may be handy for Legal Aid organizations unless they are limited to specific types of cases. In that event, you probably want to index the areas of law that are their focus.
14. The *Legal Services* section is where immigration/naturalization adjudication and

legal services can be found. There are separate sections for Canada and the U.S. *Lawyer Referral Services* is also located here.

15. The Bureau of Citizenship and Immigration Services in the U.S. (formerly known as INS)⁹ has special application centers which take fingerprints that immigrants wishing to apply for naturalization are required to provide. (Only these centers and law enforcement agencies registered with BCIS can take fingerprints for this purpose.) The term is located under a facility type section called *Immigration/Naturalization Adjudication Offices*. Use *CIS Application Support Centers* as a facility type term for the centers and *Citizenship and Immigration Services Fingerprinting* (FT-355.150) to designate the service. For registered law enforcement agencies, use the appropriate law enforcement agency term and *Citizenship and Immigration Services Fingerprinting*.
16. The *Legal Services* section also includes a detailed *Estate Planning Assistance* section that features services such as *Durable Power of Attorney for Health Care*, *Living Will Preparation Assistance*, *Life Care Planning*, and *Will Preparation Assistance*. These are very important concepts for I&Rs that work with older adults or people with disabilities. Comprehensive I&Rs not needing that level of detail may wish to deactivate all these terms except *Estate Planning Assistance* or may choose to skip these resources altogether and deactivate the entire section.
17. As mentioned in the review of the *Consumer Services* section, there is a relationship between legal services and consumer complaints. A good rule of thumb is to look there for consumer protection agencies, professional associations or licensing bodies and organizations that try to resolve problems without resorting to legal intervention but to look here for resources to explore when those options have failed and a legal remedy is required. There are some exceptions (e.g., tenant and landlord associations are in the *Legal Services* section with the rest of the terms related to landlord/tenant disputes) but the rule works for the most part. The *Consumer Law* term should help you to index agencies that assist with consumer issues in general rather than specializing in a particular area of law of interest to consumers. You need to read both sections carefully to understand where specific concepts are located.
18. There is also a relationship between some of the terms in the *Legal Services* section and other major sections in the Taxonomy, and some users may wonder why they are here rather than in those sections. Examples include *Benefits Assistance* (which is here rather than in the *Public Assistance Programs* section), *Environmental Law* (which is here rather than in the *Environment and Public Health/Safety* section), and *Labor and Employment Law* and *Labor Relations* (which are here rather than in the *Employment* section). These are essentially legal services for people who have exhausted the administrative appeals available to them from within the other systems. The terms are cross referenced to the major sections to which they relate

⁹ The terms in this section have been revised to reflect the restructuring of citizenship and immigration services under the federal Department of Homeland Security in the U.S.

via a “See also” reference.

Education Section (H)

Education is organized into four major sections:

- *Educational Institutions/Schools*
- *Educational Programs*
- *Educational Support Services*
- *Postsecondary Instructional Programs*

1. The *Educational Institutions/Schools* section represents the system of formal education from preschools through higher education institutions. The *Educational Programs* section includes terms that describe the programmatic focus of an institution or educational programs offered there (e.g., adult education, special education and vocational education). The *Educational Support Services* section includes terms for non-instructional services required by some students (e.g., educational testing, guidance and counseling, student disability services, student financial aid). The function of the fourth term, *Postsecondary Instructional Programs*, is described in detail below.
2. The *Educational Institutions/Schools* section contains facility type terms for schools that constitute the formal education system. Included are terms for alternative education facilities, Bureau of Indian Affairs schools, Aboriginal schools, early childhood education facilities, postsecondary institutions, private schools (K-12), public schools (K-12) and school districts (community college districts and local school districts, K-12). Terms for Boards of Education are also located here.
3. The configuration of schools and school districts varies from state to state, and even from school to school within the same city. We have tried to handle these differences by indicating the variations in grades (and age groups) covered by different types of schools (primary, elementary, middle school, high school).
4. The *Educational Programs* section focuses on community adult education and programs that are available for students in grades K-12. Included are terms for accent reduction classes, citizenship education, ESL classes, French as a second language (FSL) classes, graduation requirements programs, bilingual education, dropout programs, literacy instruction, remedial education, special education, teen parent/pregnant teen education programs and vocational education among others.
5. The *Educational Programs* section does not include terms related to leisure instruction. A large number of these terms are included in the Taxonomy but have been placed in the *Leisure Activities* (PL) section under *Recreation/Leisure/Arts Instruction* rather than here because, for the most part, they represent informal classes provided by recreation departments, senior centers and other similar organizations rather than programs that are offered by formal, degree-granting institutions. Individual courses available through the formal education system are not included in the Taxonomy because they are too numerous and varied to be useful.
6. The *Educational Programs* section also contains some facility type terms, including

terms for continuation high schools, gifted schools, nonpublic special schools, public special schools and various facilities that offer vocational education. They are located here rather than in the HD section because of the specialized nature of the educational programs they offer.

7. *College Admissions* and *College Housing* are examples of terms you may want to use to index specific offices within a college or university setting rather than a special set of services. They are part of the third major component of the *Education* section: *Educational Support Services*.
8. Educational testing is often a secondary service that is offered as a part of a larger program. Special education testing in a school context, for example, is usually the first step in evaluating a child for placement in a special setting. Unless you are indexing an office at the school, make sure that testing is available as a discrete service. Some agencies outside the school context may offer some types of testing as primary services. Career entrance examinations are also located here.
9. The *Test Preparation* section includes *ASVAB Military Test Preparation* (Armed Services Vocational Aptitude Battery), *Career Entrance Examination Preparation*, *Citizenship Test Preparation*, *Elementary/Secondary Achievement Test Preparation*, *TOEFL Test Preparation* (Test of English as a Foreign Language), and *French Language Proficiency Test Preparation* as well as preparation for various examinations related to college/university programs.
10. The *Postsecondary Instructional Programs* term was added to enable people to index and access major fields of study offered at a variety of levels by colleges and universities, professional schools, trade schools, technical schools and other postsecondary educational institutions. The original thought was to integrate terminology from the *Catalog of Instructional Programs (CIP)* developed by the U.S. Department of Education and create a large subset of terms here. Instead, we chose to greatly expand the *Occupations* component of *Target Populations* section of the Taxonomy. Terms from that section can be used not only to pinpoint the focus of a particular instructional program, but can also be combined with service terms in other areas, e.g., occupational licensing and job training programs.

Environment and Public Health/Safety Section (J)

The *Environment and Public Health/Safety* section of the Taxonomy covers a broad range of services including¹⁰:

- *Environmental Protection and Improvement*
- *Public Health*
- *Public Safety*

¹⁰ The *Municipal Services/Public Works* (JF) section was renamed Community Planning and Public Works and move to *Organizational/Community/International Services* as TE in the 12/10 Phase 2 restructuring. At the same time, the original name of the J section, *Environmental Quality*, was changed to *Environment and Public Health/Safety* to better designate its contents.

Many I&R services do not maintain environmental resources, so large sections of terms may be candidates for deactivation.

1. The *Environmental Protection and Improvement* section contains sets of terms for conservation programs, environmental beautification and pollution control.
2. The *Public Health* section contains terms for *Communicable Disease Control*, *Occupational Health and Safety*, *Public Health Information/Inspection/Remediation* and *Public Health Nursing*. Public health is distinguished from general health care in that it deals with “comprehensive efforts at the community level to prevent, control and eradicate disease” rather than focusing on the prevention, diagnosis and treatment of individual health problems. *AIDS/HIV Control* (a very broad community level program) is in this section, for example, while specific prevention services for people at risk for or who have AIDS (*AIDS/HIV Prevention Counseling*, *AIDS/HIV/STD Prevention Kits* and *Needle Exchange/Distribution Programs*) are in the *Health Supportive Services* (LH) section. A lot of important public health related terms are in this section including *Pest Control*, *Biohazards Cleanup*, *Mold Abatement*, *Mold Analysis*, *Radon Testing*, *Radon Mitigation* and *Toxic Waste Dump Cleanup*.
3. The *Public Safety* section contains terms for a number of concepts including *Emergency Rescue*, *Fire Services*, *911 Services*, *Safety Advisories*, *Safety Education Programs* and *Safety Equipment*. Some of the emergency rescue services are important in times of disaster, but are not considered core services appropriate for inclusion in the TH section if they are broadly available under other circumstances. *Fire Control/Extinction*, for example, is a key service during major wildfires, but it is equally important (and more frequently required) for house fires or other blazes affecting single structures. *Child Passenger Safety Seats* can be found in the latter category (*Safety Equipment*) as can a variety of devices that protect people from specific household hazards (*Scald Protection Devices*, *Smoke Alarms*, *Stove Safety Devices*). The *Safety Education Programs* section is quite extensive and should be useful if you maintain resources in this area.

Health Care Section (L)

The terminology in the *Health Care* section has been used by some hospitals and other health care programs to track procedures required by patients and is therefore extremely detailed. I&Rs need to make some basic decisions about how to handle health care resources and may wish to deactivate a lot of the most specific concepts. A related issue is that most I&Rs do not have medical expertise and need to be careful to avoid making referrals for services that are too specific. We can't do an assessment, for example, and conclude that an individual needs a particular type of medical test. In some cases, utilization of a physician's referral service may be preferable. Think this issue through carefully and be conservative.

Most hospitals provide the same medical procedures, making it unnecessary to list an extensive group of service terms as well as the facility type. In many cases, a lot of the

services are secondary (meaning they should not be indexed) because they are available only to patients of physicians with hospital privileges, generally by order of the doctor. The best course may be to focus on terms associated with key departments e.g., terms that can help to identify physician referral services, health screening programs, the hospital's emergency room, health education programs, the social work department and patient advocates. Additionally, you may want to select terminology that relates to services that make a particular facility unique (e.g., cancer services, geriatric services, pediatric services) and those that are available on a primary basis to anyone (e.g., health screenings, premarital blood tests, travel vaccinations).

That being said, *Health Care* has the following major sections:

- *Emergency Medical Care*
 - *General Medical Care*
 - *Health Screening/Diagnostic Services*
 - *Health Supportive Services*
 - *Human Reproduction*
 - *Inpatient Health Facilities*
 - *Medical Laboratories*
 - *Outpatient Health Facilities*
 - *Rehabilitation/Habilitative Services*
 - *Specialized Treatment*
 - *Specialty Medicine*
1. Remember that terms related to Medicaid are in the NL (*Public Assistance Programs*) section and those related to Medicare and other social health insurance programs are in the NS (*Social Insurance Programs*) section. Public health services are part of *Environment and Public Health/Safety* under JP.
 2. *Emergency Medical Care* contains terminology related to emergency medical transportation, emergency room care, intensive care, paramedic services, trauma centers (a facility type term) and trauma care (a service term). You may want to use several of these.
 3. Consider using the term *General Medical Care* (LE) as the service term for small clinics that will see anyone who comes in and will take care of a wide range of health problems. For community and public clinics that provide a limited range of services, you probably need to use both the facility type term from the *Outpatient Health Facilities* section (e.g., *Community Clinics* or *Public Clinics*) and the specific services they offer (usually things like TB testing and treatment, immunizations, well baby care, etc.).
 4. *Health Screening/Diagnostic Services* contains an extensive list of specific diagnostic tests (which you probably want to avoid) and a fairly comprehensive list of common screening procedures (which are likely very important). Note that all screenings may not be provided by hospitals or clinics; they may also be available at health fairs and in other venues.
 5. The *Health Supportive Services* section is also important. It has subsections on

Anatomical Gifts, Assistive Technology Equipment (for people with disabilities), *Health Education, Health Insurance/Dental Coverage, Health Insurance Information/Counseling, Home and Asset Protection, Medical Equipment/Supplies, Medical Expense Assistance, Patient/Family Support Services* and *Prescription Medication Services* among other things. *Health Care Referrals* and *Pharmacies* (a facility type term) are also here. Important concepts for programs that serve older adults and people with disabilities include *Aging and Disability Resource Centers*, a U.S. only term, *Long Term Care Coordination Centres* (LH-4500), a Canadian only terms and *Long Term Care Options Counseling* (LH-4600) which is active in both countries.

6. The *Patient/Family Support Services* section gathers terms previously scattered throughout the section that help patients and their families negotiate the health care system and cope with illness. Included are offices in hospitals or medical clinics that provide advocacy, social work services, or assistance related to admissions or billing; temporary housing for patients/families; mercy flights; morale boosting activities; and other similar services. *Wish Foundations*, previously located under PH, is also included here.
7. The *Human Reproduction* section contains terms relating to *Family Planning, Mother and Infant Care* (including delivery/childbirth and maternity homes) and *Sexuality/Reproductive Health Education*. Concepts that address becoming a good parent are found in a related *Parenting Education* (PH-6100) subsection of *Individual and Family Support* (P).
8. There are three facility type sections that you may choose to use to the exclusion of the more specific service terms: *Inpatient Health Facilities* (LL) for hospitals and nursing facilities, *Medical Laboratories* (LM), and *Outpatient Health Facilities* (LN) for local clinics. If you are tracking outpatient facilities that are Medicare Part B providers, note that there is a term to capture them. Remember that the only way you can create a comprehensive list of hospitals or clinics in your area is to index their records using terms from these sections.
9. The *Rehabilitation/Habilitative Services* (LR) section includes both traditional rehab services (*Physical Therapy, Occupational Therapy, Speech and Hearing, Therapeutic Exercise*) and services such as *Autism Therapy, Dog Guides, Braille Instruction* and *Centers for Independent Living* (a facility type term) that target people with specific types of disabilities. You may want to index services that are available through home health care and major clinics (e.g., speech and hearing clinics), while avoiding indexing these services in hospitals and smaller clinics. *Inpatient Rehabilitation* is a term that is available for dedicated rehabilitation hospitals or facilities with large inpatient rehabilitation units. A section on home and community-based day programs for people with developmental disabilities is also here.
10. The *Specialized Treatment* and *Specialty Medicine* sections need careful attention (and probably extensive deactivation, for it is here that much of the detail resides). You may want to use selected terms like *Alternative Medicine* (if your database

includes those kinds of programs), *Home Health Care*, *Hemodialysis*, *Hospice Care*, *Immunizations*, *Weight Management* and the like, but a lot of the other terms can probably be deactivated. The *Disease Specific Treatment* terms will also be very useful for specialized clinics.

11. The *Specialty Medicine* section has areas of medical practice such as *Biomedical Engineering*, *Military Medicine* and *Surgery* which you may not need. However *Dermatology*, *Dental Care*, *Eye Care* and *Pediatrics* are also here, so don't be too hasty.

Income Support and Employment Section (N)

This important section of the Taxonomy is divided into four subsections:

- *Employment*
- *Public Assistance Programs*
- *Social Insurance Programs*
- *Temporary Financial Assistance*

The *Employment* section has the following major subsections:

- *Employment Documentation/Verification*
- *Employment Preparation*
- *Job Development*
- *Job Finding Assistance*
- *Job Situations*
- *Training and Employment Programs*
- *Vocational Rehabilitation*
- *Volunteer Service Programs*

Comprehensive Job Assistance Centers, *Skills Exchanges/Cooperatives*, *Work Related Fee Payment Assistance* and *Workplace Evaluation/Modification* are also in this section.

1. In the employment preparation area, terminology is available for job training formats (e.g., *Apprenticeships*, *Classroom Training*, *On the Job Training*) as well as terms like *Job Retraining* and *Occupation Specific Skills Training* that indicate the intent of the training. Terms in the very detailed *Occupations* component of the target population section can be used as a means to further narrow the focus. Thus you can combine *Job Retraining* or *Occupation Specific Skills Training* with a training format term and an occupation to pinpoint the specific nature of a particular job training program: *Occupation Specific Job Training * On the Job Training * Automotive Service Technicians/Mechanics*. Sections on *Career Development* and *Prejob Guidance* together with individual terms such *Job Training Expense Assistance*, *Job Training Resource Lists*, *Layoff Preparation*, *Prevocational Training*, *Skills Exchanges/Cooperatives* and *Vocational Assessment* round out the section.
2. The *Job Finding Assistance* section has terms for support services that are important to people looking for work. Key concepts include *Job Information* (which has a number of subsets including *Job Banks*, *Job Fairs* and *Job Information Lines*),

Job Search/Placement (for organizations that actively seek to place people in jobs), *Resume Placement/Blasting Services* and *Work Registration* (for EDD programs in the U.S. that provide job listings for people collecting Unemployment benefits).

3. The *Job Situations* section groups day labor, independent contract work, seasonal labor and other applicable concepts under a relatively new term, *Alternative/Contingent Employment Situations*, and separates them from terms for civil service employment, employment abroad and summer employment. If you don't want to use the lower level concepts, you have a higher level option to use instead.
4. The *Training and Employment* (ND-6500) section includes private sector programs as well as government subsidized ones, and specialized programs for specific populations such as Aborigines, displaced workers, ex-offenders, immigrants/refugees and youth. Named publicly funded programs such as *Job Corp*, *Ticket to Work* and *WIA Programs* are located here. The outdated term name for sheltered employment has been updated to reflect current nomenclature (the newer one is *Disability Related Center Based Employment*) and the definition has been modified to describe the current focus of these programs.
5. The *Volunteer Service Programs* section contains terms for major federal programs that provide subsidies and/or expense reimbursement for those who serve as volunteers. Featured are AmeriCorps programs including AmeriCorps National Civilian Community Corps and the AmeriCorps VISTA program, Canada Corps, conservation service volunteer programs, Katimavik (a Canadian program), the Peace Corps and the three programs administered by Senior Corp: the Foster Grandparent Program, the RSVP Program and the Senior Companion Program. Volunteer programs relating specifically to disaster situations are located in a relatively new section titled *Disaster Related Volunteer Preparedness/Mobilization Programs* (TH-1700.1910). Included there are *Citizens Corp* programs, the *SKYWARN Program* in the United States and the *CANWARN Program* in Canada. There is a "See also" reference between the two volunteer service program sections.
6. The *Public Assistance Programs* (NL) section contains terminology for the public safety net programs funded by federal, state, provincial/territorial and local government entities e.g., *TANF*, *Medicaid* and *WIC* in the U.S. and the *Old Age Security Program* and *Spouse's Allowance* in Canada. Financial assistance provided by nonprofit organizations is also here in the N section under NT (if very general) or distributed to other sections of the Taxonomy according to the nature of the need addressed (if very specific, e.g., housing, medical care, transportation, utilities). Note that there are "see also" references that guide you to the service-specific temporary financial assistance terms that are located elsewhere.
7. The third major section contains terminology for "programs that have been established by law and are generally compulsory in nature which provide cash income on a regular basis or payments to meet a designated need for people who are entitled to benefits based on their own or their employer's contributions to the program or their service to the country." Included here are *Burial Benefits*, *Disability*

Insurance, Employment Insurance (a Canadian program), *Life Insurance, Retirement Benefits, Social Health Insurance, Survivors Insurance* and *Unemployment Insurance* concepts. Private health insurance terminology (e.g., for HMOs or Blue Cross type organizations) can be found under *Health Care*.

8. As noted above, the fourth section, NT, contains terms relating to *Temporary Financial Assistance* which is defined as follows: “Programs that provide assistance for people who are experiencing an unexpected financial crisis and have insufficient resources to obtain essential services or to meet expenses in situations where financial assistance related to their specific circumstance is unavailable.” Terms in this section were previously located under BR but in 2010, following a review by the AIRS Taxonomy Committee and input from the field, they were moved out of *Basic Needs* and relocated here under *Income Support and Employment*. People requiring this type of aid may also need money management services, which are listed in the *Consumer Services* (D) section under DM, or may qualify for any of a variety of longer term governmental financial assistance programs which are located in the *Public Assistance Programs* (NL) section.

Individual and Family Life Section (P)

Individual and Family Life is one of the most important sections in the Taxonomy. Like *Basic Needs*, it incorporates a range of services found in most classification systems. The focus of the section is on services that promote the personal, social and spiritual development of individuals and families. It contains most of the supportive services for which I&R workers frequently make referrals. Recreational/leisure services can also be found here as can services for pets and other domestic animals. And though arts-related classes are found in this section, services related to the arts appear under *Arts and Culture* (TA). The section has the following major components:

- *Death Certification/Burial Arrangements*
- *Domestic Animal Services*
- *Individual and Family Support Services*
- *Leisure Activities/Recreation*
- *Mutual Support*
- *Social Development and Enrichment*
- *Spiritual Enrichment*
- *Volunteer Development*
- *Volunteer Opportunities*

1. *Death Certification/Burial Arrangements* is the first section. These are services related to the technicalities that must be observed when an individual dies—getting a death certificate, arranging for a funeral and burial, making arrangements to dispose of the personal property of someone who has died. Most I&Rs will only use a few of these, e.g., *Burial/Cremation Expense Assistance* and *Funeral Societies*, and deactivate the rest. Related terms include *Death Related Records/Permits* (under *Records/Licenses/Permits*), *Death and Dying* (under *Personal Enrichment*),

Bereavement Support Groups (in the *Support Groups* section) and *Bereavement Counseling* (in the *Mental Health and Substance Use Disorder Services* area).

2. *Domestic Animal Services* (PD) was originally in the *Environment and Public Health/Safety* (previously *Environmental Quality*) section of the Taxonomy (JB), a placement that many found puzzling if not an outright mistake. It seemed to fit there because of the proximity to services for wildlife (under *Conservation*), but clearly its new home under *Individual and Family Life* makes more sense as many, if not most people consider their pets to be a part of their family. The section has four broad categories: *Animal Regulation*, *Pet Care Services*, *Protective Services for Animals* and *Veterinary Services*. If you don't want to use the lower level concepts, you have a small set of higher level alternatives.
3. The *Individual and Family Support Services* (PH) section contains services that support individuals within a family context (in some cases, preserving the integrity of the family unit). It includes a lot of familiar concepts (e.g., *Adoption Services*, *Adult Day Programs*, *Case/Care Management*, *Child Care Providers*, *Companionship*, *In Home Assistance* and *Protective Services*) and perhaps a few surprises. *Interpretation/Translation* services are here, as are *Emergency Alert* and *Street Outreach Programs*. It is an important section to read thoroughly as you will use most of the terms that are located here. Following the 2010 restructuring, the section also has a number of concepts that were moved from the TF section: *Cultural Transition Facilitation*, *Holiday Programs* and *Neighborhood Welcoming Services* among others.
4. Some users may expect to find Christmas and Thanksgiving baskets in the *Food* section under *Basic Needs* (B). Holiday programs are located here because their primary purpose is to make the holidays more enjoyable rather than to simply to feed people who are hungry.
5. The original *Mutual Support Groups* section used to be part of *Mental Health and Substance Use Disorder Services* but was moved to the *Individual and Family Support Services* area when a local group with subject expertise noted that the whole point of mutual support is that it is not a mental health service but rather an alternative to the "medical model". We discussed the request for relocation in a Taxonomy user's group meeting at one of the AIRS conferences and made the change. This is a good example of how the Taxonomy reflects what is going on in the field and how user input can generate important changes. Its importance was further elevated when the level 2 term *Mutual Support* (PN) was created and the three separate sections of terms relating to support groups were moved over as subsets. The word "Mutual" was dropped from the term names – "Support Groups" rather than "Mutual Support Groups", for example – (though retained in use references).
6. The *Support Groups* section has more than 70 level four and five terms to help you index these resources more specifically. You will still need to use target population terms to modify some of the concepts, e.g., *Health/Disability Related Support*

*Groups*¹¹ requires a specific disability or health condition term to pinpoint the each program's focus. There is also a section on support group meeting formats which allows you to specify if a group meets in person, by telephone or via the Internet and a clearinghouse term for gateway programs.

7. The *Family Based Services* (PH-2400) section is an example of how new trends in human services are reflected in the Taxonomy. Represented here are wrap-around services provided, in some cases, through multi-agency collaboratives that did not previously exist. Now this type of local collaboration is required by many funding sources as a condition for obtaining grants, and services that address the totality of needs in a family context are encouraged.
8. The PH section also includes some education terms: *Parenting Education* and the terms under *Personal Enrichment*. *Childbirth Education*, which is related to the concept of parenting, is in the *Health Care* (L) section under *Mother and Infant Care*.
9. *Placements for Children and Youth* (PH-6300) is where foster homes for children and youth with disabilities, foster homes for dependent children, group homes for children and youth with disabilities, group homes for dependent children and supervised living for older youth are located. Newer concepts in the section are *Therapeutic Foster Care* and *Therapeutic Group Homes*¹². *Placements for Children and Youth* is conveniently located next to the *Protective Services* section which contains additional services for some of these children. If you do not wish to index the operating facilities themselves, you have the option of choosing a term for a placement agency. They are found under *Family Support Recruitment/Referral* (PH-2400). Other terms in the latter section include *Babysitting Registries*, *Child Care Provider Referrals*, *Foster Parent/Family Recruitment*, *In Home Assistance Registries*, *Interpreter/Translator Registries* and *Respite Care Registries*.
10. The enormous *Leisure Activities* (PL) section contains a lot of terminology you will probably want to deactivate (e.g., *Eating Establishments*, *Leisure Accommodations*, *Nightlife*). However, the section has some important concepts you will want to retain, too (e.g., *Camps*).
11. The *Parks/Recreation Areas* (PL-6400) section has facility type terms worth using. It may take you a long time to index all the playgrounds, athletic fields, swimming pools and spectator sports facilities in your community, but once it is done, the information is very stable. The *Recreational Activities/Sports* (PL-7000) section contains terms for the activities (things you do as opposed to where you do them), and the *Recreational/Leisure/Arts Instruction* (PL-7400) section covers instruction in various activities. These are informal classes offered, for the most part, by recreation departments, senior centers and other community agencies. For formal, degree

¹¹ This term combines what used to be two separate concepts: *Disability Related Support Groups* and *Health Related Support Groups*. Users had difficulty distinguishing disabilities from health conditions and heartily endorsed the consolidation.

¹² These terms were added in August, 2006 and represent less restrictive treatment options for children and adolescents with emotional or behavioral problems than residential treatment centers or inpatient psychiatric treatment.

granting programs, use terms in the *Education* (H) section. For activities other than sports and games, look at the *Special Interest Clubs* (PS-8200) section.

12. The *Recreation Related Subsidies* section includes concepts for programs that pay fees associated with attending camp, participating in a sport or other recreational activity, gaining entrance to a park or other recreational venue, or getting art lessons, music lessons or instruction in other types of leisure pursuits.
13. The *Recreational Activities/Sports* section is very comprehensive. Definitions for specific sports generally encompass lessons in that sport, coaching services, informal opportunities to play a particular individual or team sport, and league play. Local sports clubs should be indexed using these terms. Higher levels of competition for each sport are represented in an expansive *Spectator Sports* (PL-8000) section. Sports federations and associations that support a particular sport should be indexed as *Amateur Athletic Associations* (TN-0500.0500). Read the definitions in each area to understand the distinctions.
14. The *Leisure Activities* section also includes fairly extensive subsections on *Sightseeing/Guided Tours* and *Special Events*. Unless you are covering tourist services, you may want to skip both sections. *Tickets/Reservations* (which includes programs that provide special events tickets to nonprofit organizations as well as outlets where people can purchase tickets) is also here.
15. One perhaps unexpected concept is also a part of the PL section: *Travel*. That section includes terms for organizations which help people to travel. There is also a related section, *Travelers Assistance* (BT-8750), which contains terms are for programs that help travelers who are in trouble or provide support services for commuters and other local residents who use the public transit system.
16. You may still find terms missing from all of the sections that PL comprises. They are, after all, areas where the possibilities for expansion are practically infinite. If you find that an important concept is missing, post a question asking whether others would find it useful for discussion on the Taxonomy Community section of the AIRS Networker. The Taxonomy editor keeps a close eye on postings and finds user comments very helpful.
17. Most of the concepts in the *Social Development and Enrichment* (PS) and *Spiritual Enrichment* (PV) sections are self-explanatory. In the former section, note that *Special Interest Clubs* (PS-8200) are for people who have an amateur interest in a particular area such as science or mathematics whereas *Occupational/Professional Associations* (TN) are for people who work in that area. Use *School Clubs* (HL-8100.7600) for clubs that are available at a child's school or a student's college or university. *Youth Development* concepts are also found here. The PV section contains a number of useful *Religious Activities* concepts as well as terms for places of worship. *Meditation* is found here under *Independent Religious Pursuits*, but *Yoga* has been moved to the *Physical Fitness* (PL-6600) section. This is a good example of how the connotation and setting for a particular type of service can change over time and how the Taxonomy responds once the new direction has become clear.
18. The *Volunteer Opportunities* (PX) section was developed in conjunction with the

Points of Light Foundation (www.pointsoflight.org/) and contains more than 250 specific terms. A related term, *Volunteer Development*, was once located in the *Organizational/Community Services* (TF) section, but moved to the P section as (PW) in 12/10. While now juxtaposed to one another, the two concepts are very different. The *Volunteer Opportunities* (PX) term is for organizations that use volunteers (a concept you may want to skip) whereas *Volunteer Development* (PW) is an infrastructure service which coordinates the training and placement of people who wish to volunteer. Organizations that provide technical assistance, training or other supportive services that help volunteer agencies develop their programs can be found in the *Volunteer Program Development/Implementation Assistance* section, a subset of *Organizational Development and Management Services* (TP).

Mental Health and Substance Use Disorder Services Section (R)

The *Mental Health and Substance Use Disorder Services* section of the Taxonomy is divided into the following subsections:

- *Counseling Approaches*
- *Counseling Settings*
- *Mental Health Care Facilities*
- *Mental Health Evaluation and Treatment*
- *Mental Health Support Services*
- *Substance Use Disorder Services*

This section of the Taxonomy is one of the best for illustrating the different types of Taxonomy terms and how they are meant to work together. It contains facility type terms, types of services, modalities and terms that relate to the orientation or philosophy of the organization.

1. The *Mental Health Care Facilities* section (RM) contains terms for all of the inpatient, outpatient and residential treatment facility types. They are used to index what an organization is. The *Mental Health Evaluation and Treatment* section (RP) contains specific types of mental health services and are used to index what each organization does. Terms in the *Counseling Settings* section (RF) are used to index how the services are delivered. The *Counseling Approaches* section (RD) has terms that can be used to describe the counseling orientation of the organization.
2. Terms in the *Counseling Approaches* (RD) section should be used very sparingly. Do not quiz each counseling organization for the orientation of its staff. A staff member may leave and the agency may lose his or her expertise. Use these terms for organizations that specialize in a particular approach (e.g., The Gestalt Institute) and deliberately hire staff who have been trained in the area.
3. Most of the terms in the *Counseling Settings* section (RF) are not meant to be used in isolation. They are intended as modalities to modify particular counseling topics. *Individual Counseling* and *Group Counseling* by themselves do not tell you very much, but coupled with *Bereavement Counseling*, *Marriage Counseling* or other counseling terms, they round out the picture. Even *Talklines/Warmlines* benefits

from a target term. *Family Counseling* may be the exception. If you are unable to link two terms in your system, you may want to deactivate most of the modalities altogether.

4. The *Mental Health Assessment and Treatment* section contains the following level 3 terms: *Counseling Services* (which has subset terms for general and specialized counseling services), *Crisis Intervention*, *Mental Health Evaluation*, *Psychiatric Services* and *Supportive Therapies*.
5. If you are indexing a general counseling agency that addresses any issues an individual may have, use the term that has been provided for that purpose—*General Counseling Services* (RP-1400.2500). Do not list all of the individual problems the general agency may address. Save the specific terms (like *Anger Management* or *Gambling Counseling/Treatment*) in the *Specialized Counseling Services* section (RP-1400.8000) for organizations that run special groups or other sessions on those topics and offer them on a regular basis over time. If you also use specific terms to index general counseling agencies, you will be unable to identify organizations that specialize in a particular area.
6. Terms in the *Crisis Intervention* section (RP-1500) are for people in acute emotional distress. Include are terms for crisis drop-in services, hotlines/helplines, residential treatment, involuntary psychiatric intervention and emergency room treatment among others.
7. The *Mental Health Evaluation* section (RP-5000) includes terms for programs that provide screening, diagnostic and treatment planning services for people who are experiencing acute or chronic psychiatric problems.
8. The *Supportive Therapies* section (RP-8000) contains terms such as *Art Therapy*, *Music Therapy* and *Recreation Therapy* that are occasionally stand-alone services (diagnostic tools or therapeutic interventions) but are more frequently adjuncts to other forms of treatment. Terms like *Pet Assisted Therapy* are also located here. Note that *Equestrian Therapy* (which involves handling, grooming and riding horses as a part of an experiential habilitation or therapy program in which the horse serves as a co-facilitator or co-therapist) is located [here](#) while a related service, *Hippotherapy* (which uses the multidimensional movement of the horse to improve neurological function and sensory processing in individuals who have movement dysfunction) is in the *Rehabilitation/Habilitative Services* (LH) section.
9. The *Psychiatric Services* section (RP-6400) contains terms for programs staffed by psychiatrists that specialize in the prevention, diagnosis and treatment of mental, emotional and behavior disorders. Included are terms for age related psychiatric programs (*Adult Psychiatry*, *Child/Adolescent Psychiatry*, *Geriatric Psychiatry*, *Infant and Early Childhood Mental Health*) as well as *General Psychiatry*, *Eating Disorders Treatment*, *Forensic Psychiatric Services* and other specialties.
10. Terms for programs that provide psychiatric services for individuals who have serious mental, emotional and behavioral disorders are gathered under *Special Psychiatric Programs* (RP-6400.8000), a sub-section of the above section. Included here are *Assertive Community Treatment*, *Home Based Mental Health Services*,

Programs for Offenders With Mental Disabilities, Psychiatric Case Management, Psychiatric Day Treatment, Psychiatric Medication Services and Psychiatric Rehabilitation.

11. The *Mental Health Support Services* section (RR) contains concepts for mental health information/education, early intervention and self-management programs as well as referral services and transitional services (e.g., halfway houses, after care services and resocialization).
12. The final section, *Substance Use Disorder Services*, is organized into eight subsections:
 - *Assessment for Substance Use Disorders*
 - *Detoxification*
 - *DUI Offender Programs*
 - *Minor in Possession Offender Programs*
 - *Substance Use Disorder Education/Prevention*
 - *Substance Use Disorder Treatment Programs*
 - *Supportive Substance Use Disorder Services*
 - *Transitional Residential Substance Use Disorder Services*

These groupings should make it easier for those who want to eliminate detail.

Substance Use Disorder Services was previously located in the *Health Care* section as LX until move to its present location in 2010 following much discussion. The fact that both the American Psychiatric Association (APA) and the Substance Abuse and Mental Health Services Administration (SAMHSA) agree that these two concepts belong together was a deciding factor. When the shift from “substance abuse” to “substance use disorders” was released by the APA, term names and definitions in the Taxonomy were modified accordingly in early 2016.

Organizational/Community/International Services Section (T)

The *Organizational/Community/International Services* section contains terminology for organizations that provide services which address the broad needs of the community and the people who reside there. The section was substantially modified during the 12/10 restructuring project and now includes a total of 16 subsets, many of which, in total or in part, were previously under the old Community Services (TF) section. It has the following major components:

- *Arts and Culture*
- *Community Economic Development and Finance*
- *Community Facilities/Centers*
- *Community Groups and Government/Administrative Offices*
- *Community Planning and Public Works*
- *Community Recognition*
- *Disaster Services*
- *Donor Services*
- *Information Services*
- *International Affairs*

- *Military Service*
 - *Occupational/Professional Associations*
 - *Organizational Development and Management Provision Options*
 - *Organizational Development and Management Services*
 - *Political Organization and Participation*
 - *Research*
1. The *Community Services* (TF) section was heavily restructured in 12/10 so we will discuss it first. It was targeted for revision because its name was so general that it was impossible to guess what its focus might be, but also because it contained a mixture of services, some of them very important, that had a tenuous relationship with one another at best. It had become a “catch all” and badly needed an overhaul. The name of the lead term was changed to *Community Recognition* and most of its subset terms were moved elsewhere, many to more prominent positions at higher levels within the Taxonomy’s hierarchy, quite a number of them right here under T. Important concepts that were moved include *Cultural Transition Facilitation* (to PH), *Facilities/Community Centers* (to TC), *Holiday Programs* (to PH), *Military Service* (to TM), *Office Equipment and Services* (to BM and TB), *Political Organization and Participation* (to TQ), *Public Officials Offices* (to TD), *Travelers Assistance* (to BT) and *Volunteer Development* (to PW). Other concepts were relocated individually. Terms that remain in TF include *Congratulatory Messages* and *Recognition Awards*, services that belong in community databases but have been left out of most taxonomies, and the section on *Flag Related Services*.
 2. The *Arts and Culture* (TA) section contains mostly facility type terms for the arts and humanities. These are very important if your agency is a source of information regarding art galleries, museums, theaters and the like in your community. If not, you may want to deactivate them. The section also includes *Historic Preservation* which encompasses art and film preservation as well as traditional historic structure preservation services. The related facility type term, *Historical Societies*, is also in this section.
 3. The *Community Economic Development and Finance* (TB) section contains terms that relate to services which help businesses become established and flourish. It is also where various concepts relating to redevelopment programs, tourism development and other infrastructure improvement services and the organizations that support them can be found. Major sections include: *Banking and Financial Services*, *Business Development*, *Business Support Organizations/Services*, *Housing Development*, *Redevelopment Programs*, *Special Focus Community Economic Development*, *Technology Transfer Programs* and *Tourism Development*. *Community Development Corporations*, *Community Development Financial Institutions* and *Local Currency Systems* are also found here.
 4. The TB section has been broadened to include the institutions that the financial sector comprises and the services they provide for businesses and the general public. The lead term is *Banking and Financial Services* and there are three subsections: *Financial Institutions* (a facility type term), *Financial Services* and

Funding. Terms in the first section include *Accounting Firms, Banks/Savings and Loans, Bill Payment Locations, Check Cashing Services, Credit Unions* and *Insurance Companies* among others. Important financial services terms include *Electronic Transfer Accounts, Health Savings Accounts, Individual Development Accounts, Matricula Accounts* and *State College Tuition Plans* in addition to more traditional financial services like *Checking/Savings Accounts, Credit Cards* and *Debit Cards*. The section on *Funding* includes terms that allow you to specify the purposes for which grant dollars provided by foundations and other funding organizations are designated and/or the types of activities organizations engage in to fund their programs (e.g., *Nonprofit Retail Stores*). All three of these sections were previously part of TF and moved here as part of the 12/10 restructuring process.

5. *Business Support Organizations/Services* is another subset of TB. It includes terms for copy centers, graphic design services, private mail services, temporary help agencies, video conferencing facilities and other support services for businesses. Most of the terms were previously located under TF (in the *Business Services* component of *Office Equipment and Services*), but several others are relatively new.
6. The *Community Facilities/Centers* (TC) section is the home for multipurpose centers and other terms that were previously located under *Facilities/Community Centers*, another concept previously found under TF. The various types of multipurpose centers are important. Terms are available for centers that focus on specific ethnic groups (a target term is required to identify the exact focus), gay/lesbian/bisexual/transsexual communities, seniors, women and youth as well as a more general term for neighborhood multipurpose centers. There is also a general term for drop in centers that may be useful if a specific term (e.g., *Homeless Drop In Centers, Mental Health Drop In Centers*) is not available.
7. The *Community Groups and Government/Administrative Offices* (TD) section (previously titled *Community Groups*) contains the largest number of facility type terms in the whole classification system. It has been expanded beyond community based organizations and includes terms for administrative/support services offices, charitable organizations, civic groups, community action/social advocacy groups, public officials offices and organizations that are responsible for planning and coordination activities.
8. If your software requires that every site of every agency be indexed, *Administrative Entities* (TD-0300) is a term that can be used to index headquarters of public and private organizations that plan, organize and control the activities of the organization but which provide no direct services to the public. It should be used to index administrative offices of local city and county departments if a facility type term is needed. A term from the *Topical Identifiers/Issues* (YZ) section can be used to delineate the type of services involved. The administrative office for the county department of education, for example, could be indexed using *Administrative Entities* and *Education Issues*. The term may also be used for very large private organizations that have administrative offices.
9. The *Administrative/Support Services Offices* section was moved to its current

location (TD-0350) from TF in 12/10. Terms included here can be used for offices that provide services related to budget and finance, contracts and procurement, facility management, fleet maintenance, human resources management, information technology management, marketing, planning and development, public relations and the like. These are internal functions rather than services of interest to the general public, but may be useful for people who do business or have other relationships with the organization.

10. *Categorical Program Administrative Units* (TD-1100) covers statewide, province/territory wide and regional organizations that are responsible for implementing programs that have legislative mandates (generally federal ones). Area Agencies on Aging, for example, are indexed using terms in this section as are state level 2-1-1 administrative organizations.
11. The *Charities/Foundations/Funding Organizations* (TD-1200) section contains facility type terms for public and private foundations, contracts and grants offices and other funding organizations. These terms describe what an organization is. Terms that describe the type of activities a foundation or other group may fund are located in the *Funding* (TB-0700.2200) section.
12. United Ways are federated giving programs and should be indexed using that term (TD-1200.1800).
13. *Voluntary Health Organizations* (TD-1200.6600-900) is another important term in this section. The term is located here rather than in the health care section because the most important service of VHOs is to raise money to fund medical research as well as treatment and support services for individuals with a particular disease or disability. Use it for offices of the American Cancer Society, the American Heart Association and other similar organizations. A target term from the *Disabilities and Health Conditions* (YF) section can be used to identify the organization's focus.
14. The *Community Action/Social Advocacy Groups* (TD-1600) section contains terminology for large advocacy organizations. This extensive section includes terms for *Criminal Justice/Legal System Reform Groups*, *Government Reform Groups*, *Government Watchdog Groups* and groups that address the needs of people who are homeless or need affordable housing in addition to all of the traditional advocacy groups. Suggestions for additional concepts are welcome. Specific advocacy services can be found in the *Legal Services* (FT) section. *Advocacy* as a legal assistance modality is found in the FP section together with a number of subset concepts.
15. *Planning/Coordinating/Advisory Groups*, the final term in the TD section, should be used for local commissions, advisory committees, government boards and other groups that provide advice and sometimes formal oversight for public and, in some cases, private sector organizations. It can also be used to index collaboratives, coalitions and other networked groups of agencies that provide services in cooperation with one another.
16. The terms in the *Community Planning and Public Works* (TE) section, previously *Municipal Services/Public Works* (JF), are extremely important for 311 programs and

I&R services tracking city and county services. The section includes concepts related to building and safety, land development, planning and zoning, public parking, street maintenance, traffic control, waste management and the like. *Graffiti Removal* is located here rather than under *Environmental Beautification* because it has more in common with environmental maintenance than general beautification. Not all local government services are here, however. Regulatory services such as licensing, certification and accreditation, for example, are in the *Consumer Services* (D) section, law enforcement services are in the *Criminal Justice and Legal Services* (F) section, and fire and rescue services are under *Public Safety* (JR).

17. *Disaster Services* (TH) is a major section that was developed in conjunction with the AIRS NERIN project.¹³ It should be of great value to I&R services that are sources of information when a disaster strikes locally. In addition to services that are unique to emergency situations (e.g., post disaster home checks), it includes disaster-specific terms for food and shelter assistance, medical services, counseling, assistance for animals and other core services that are provided in the response, relief and recovery phases of a particular incident. “See also” references are provided, where applicable, to the sections where the same types of services delivered under ordinary circumstances can be found. Note that there are also related terms in other sections of the Taxonomy. Examples include *Dehydrated Food* and *Meals Ready to Eat* in the *Food* section, *Critical Incident Stress Debriefing* in the *Mental Health and Substance Use Disorder Services* section and terms that are subsets of the *Disaster/Emergency Services Volunteer Opportunities* (PX-1900) and *Emergency Rescue* (JR-1800) sections. How do you know which services are located under TH and which are elsewhere? The rule is this: services that are provided exclusively (or, in some cases, primarily) in the context of a disaster are located here whereas those that are frequently available under other conditions as well as in disaster situations are located elsewhere. Critical incident stress debriefing, for example, is available to law enforcement officials who have responded to particularly heinous crimes and military personnel involved in war as well as to first responders. If you maintain a disaster database, read this section very carefully. You can use the Disaster Services Related Concepts search to identify related terms in other areas of the Taxonomy. There is also a printed copy of the Disaster Services section on the home page of the Taxonomy website as well as in the Library; and an official Disaster Services filter that can be accessed by clicking on the Filters tab.

18. *Donor Services* was moved in 2004 from the TF section (where it was a level 3 term) to a new section: TI. We received many requests for more levels of detail than the

¹³ 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.

previous location could accommodate. There is terminology for donation programs that accept specific types of clothing, household goods, leisure equipment/supplies, medical devices, office equipment, vehicles and the like. A companion section, *Material Goods* (BM), includes terms for programs that distribute many of these items. There is also a small section (TI-5000) titled *Material Goods Information/Matching Services* for programs that help people donate or exchange unwanted but still usable goods. The section does not include a term for monetary donations, despite requests for such. ALL organizations want monetary donations, both for themselves and for the agencies they support, so such a term would be too broadly applicable to be useful.

19. The *Information Services* (TJ) section contains terminology for Internet programs, information and referral programs, information lines (and related websites), libraries, library services, public awareness/education, service sector/industry statistics and other similar services. There are some facility type terms (e.g., libraries), but most are service terms. Important concepts in this area are *Accessibility Information*, *Charity Information*; *Electronic Communication Problems Reporting* and *Internet Information Resources* as well as the aforementioned I&R and libraries sections.
20. The terms in the *Electronic Information Resources* (TJ-1800) section are increasingly important. Subsets include *Online Connection Services*, *Public Internet Access Sites*, *Public WiFi Sites* and *Internet Information Resources* (which covers community Web portals, electronic mail providers, listservs, virtual marketplaces and websites, to name a few). A subsection on Web-based social media services (TJ-1800.3300-600) was added in 2009. Included are service terms related to blogging, music/audio downloading, personal Web page development and posting, photo sharing, social bookmarking, social networking and wikis, among others.
21. The definitions for the terms in the *Information Lines* (TJ-3200) section include organizations posting related information on the Internet as well as those that provide specific types of information by telephone. Consider using *Websites* as a modality modifier.
22. The *Public Awareness/Education* (TJ-6500) section is an area that requires indexing policies for consistent use. Restraint is definitely required or you will find yourself going overboard. Do you really want to pick up an organization's printed materials, speakers and other similar services? Under what conditions? Who will use the information? You may, for example, want to pick up printed materials on specific topics like tenant rights or how to choose a doctor, but avoid materials an organization prints about itself.¹⁴ All organizations produce publicity materials, so indexing them only obscures the valuable materials you may wish to find. Similar rules are needed for directories, mailing labels, speakers, workshops and other concepts in this section. Think carefully, too, about how you may want to use the fairly general

¹⁴ For more specific information about ancillary services, refer to *Indexing with the AIRS/INFO LINE Taxonomy of Human Services* by Margaret Bruni. It can be found in the Library section of the Taxonomy website, www.211taxonomy.org/publicfiles/view/indexing_with_the_taxonomy.pdf.

concept for outreach programs. *Subject Specific Public Awareness/Education* is a term that you can use for organizations that offer a wide variety of materials dealing with a particular topic. Use terms in the *Topical Identifiers/Issues* (YZ) section to make indexing of concepts in this section more specific. Rather than indexing a program that provides speakers on consumer issues merely as *Speakers/ Speakers Bureaus*, index it as *Speakers/Speakers Bureaus * Consumer Issues*.

23. The *International Affairs* (TL) section¹⁵ has terminology relating to services for people in other countries and domestic programs that address international issues. Level three terms include *Foreign Policy Planning/Implementation, International Development Programs, International Human Rights Programs, International Justice Programs, International Relief, International Understanding/Peace Programs* and *National Security Organizations*. If you maintain these types of resources, you have an integrated section in which to put them. An additional benefit is that other sections (e.g., *Courts, Community Action/Social Advocacy Groups, Disaster Services*) relate strictly to domestic services.
24. *Military Service* (TM) is another section that received greater prominence when it was moved in 12/10. If your organization serves military members and their families, there are a number of important concepts including *Armed Forces Emergency Services, Military Family Service/Support Centers, Military Transition Assistance Programs* and *Social Services for Military Personnel*.
25. The *Occupational/Professional Associations* (TN) section contains facility type terms that are very easy to understand and to use. Choose terms in this section to index what the organization is and choose appropriate service terms from other areas to identify primary functions, e.g., handling consumer complaints or making referrals to their members. Remember that *Occupational/Professional Associations* are for people who work in a particular area whereas *Special Interest Clubs* (PS-8200) are for people who have an amateur interest in a subject.
26. The *Organizational Development and Management* terms (TO and TP) sections contain a range of services that may be available to improve the operation of organizations.¹⁶ Although specifically developed for programs that provide services for organizations, some of the terms may also be used for programs that provide technical assistance and information for individuals. As in many of the other areas, the modalities—termed “provision options” in this section—(*Organizational Consultation/Technical Assistance, Organizational Development/Management Publications, Organizational Development/Management Research, Organizational Training Services, Outsourcing/Contracted Services*) are not meant to be used in isolation. Look at this section carefully. There are probably organizations in your community that offer useful services you may not have considered adding to your database or indexing. Local United Ways, for example, often provide support serv-

¹⁵ When the *International Affairs* section was created in 2001, all relevant terms from other parts of the Taxonomy were moved into it.

¹⁶ The original TP section (*Organizational Development*) underwent a major expansion in 2003.

ices such as workshops on board management for the nonprofits in their area. Nonprofit associations are also good resources.

27. *Political Organization and Participation* (TQ) is the last major section elevated to level 2 status after being moved from TF. The most important subsection is *Elections/Election Campaigns*, but you may also find terms in the *Legislation Information* section useful if you have organizations that provide copies of local statutes or other legislation.

28. After many years of citing the *Research* section as an example of an undeveloped section of the Taxonomy, the investigative work was finally completed in 2007 and a comprehensive and nicely structured set of terms was put into place. We did not give it high priority because most I&Rs do not make many referrals in this area, but we did eventually get a request for more specificity and, perhaps more importantly, a volunteer to review and comment on drafts of its structure. If you need a research concept, you will likely find one in the TR section that will be suitable.

Target Populations Section (Y)

The *Target Populations* terms relate to the people at whom services are aimed rather than the services they receive or the organizations that provide them.¹⁷ The subsections encompass, in varying levels of detail, concepts that include:

- *Agencies/Organizations as Recipients*
- *Age Groups*
- *Benefits Recipients*
- *Caregivers*
- *Citizenship*
- *Disabilities and Health Conditions*
- *Educational Status*
- *Ethnic Groups/National Origin*
- *Experiencers of Paranormal/Extraterrestrial Events*
- *Families and Individuals Needing Support*
- *Family Relationships*
- *Income/Employment Status*
- *Living Situation/Housing Status*
- *Military Personnel/Contractors*
- *Occupations*
- *Offenders*
- *Organizational/Practitioner Perspectives*
- *Religious Groups/Communities*
- *Sex/Gender*

¹⁷ A more in-depth consideration of the use of target populations is available in an article entitled *Indexing Using Target Population Terms in the AIRS/INFO LINE Taxonomy* by Diane Gatto Barrett and Cathleen Kelly. It is available on the Taxonomy website: www.211taxonomy.org/publicfiles/view/Indexing_Using_Target_Population_Terms.pdf.

- *Sexual Orientation/Gender Identity*
 - *Transients*
 - *Urban/Rural Location*
 - *Victims/Survivors*
 - *Volunteers*
 - *Topical Identifiers/Issues*
1. *Agencies/Organizations as Recipients* is a target term that is available for situations in which organizations rather than individuals are the intended recipients of a service. You may not use the term very often, but it will be essential in the few instances where it is required.
 2. The *Ethnic Groups/National Origin* section was completely revamped as a part of a 2005 “Canadianization” project during which all terms in the Taxonomy were evaluated for Canadian use and revisions were made, where appropriate. With help from Clive Jones, who conducted extensive research, terms names have been revised to reflect the ethnic community represented (e.g., *African Community*, *Asian Community*, *Caribbean Community*), and terms for individual communities are now more appropriately grouped. Information about the primary languages of different groups is included in definitions as well as more useful information about country location.
 3. The *Income Groups* section has been expanded to include employment status and is now titled *Income/Employment Status*. Subsets are available for income level and a person’s job situation. Services can now be linked to target terms for day laborers, part time workers, self employed individuals, displaced homemakers, displaced workers, laid off workers, retired people, union members and other specific groups.
 4. The *Living Situations/Housing Status* section allows you to identify people who are targets for service based on the type of housing/shelter in which they live, e.g., an apartment or condominium, a crisis or homeless shelter, a group home or foster home, subsidized housing, transitional housing or other settings.
 5. The *Occupations* section is organized into 24 different subsections. The terms can be used to make indexing for occupational licensing, postsecondary instructional programs and job training programs more specific, but also to pinpoint the target group focus of a particular service, e.g., *Agricultural Loans for Dairy Farmers*. Altogether, there are more than 600 terms in the section.
 6. While you may be tempted to overlook the *Organizational/Practitioner Perspectives* (YQ) section, its terms are very useful for identifying agencies that deliver services from a consumer-directed, faith-based, feminist, harm reduction, housing first, partisan political or trauma-informed perspective.
 7. The *Urban/Rural Location* (YW) section has terms identifying individuals living in various types of geographic settings.
 8. If you maintain information about volunteer opportunities that are located in the PX section, you may also need to use target terms in the *Volunteer* (YY) section. These terms allow you to specify the characteristics of volunteers being sought, e.g., their

age, the groups they represent (e.g., civic groups, employee groups, family groups), the time commitment they are willing to make (evening volunteers, weekend volunteers, one time only volunteers) and the general conditions under which they prefer to work (home based volunteers, behind the scenes volunteers, international volunteers).

9. The *Topical Identifiers/Issues* (YZ) section, has very general terminology (such as *Child Abuse Issues*, *Drug Use Disorder Issues*, *Older Adult/Aging Issues* and *Legal Issues*) that allow you to modify broad service concepts (like *Directory Production* or *Speakers/Speakers Bureaus*) that might otherwise be very vague. Terms in this section function more like keywords or subject headings in library cataloguing systems and have been enthusiastically welcomed by those who have requested them. These terms tell people what a service is about (a directory of resources related to death and dying, for example) and are not intended to be used to identify the individuals a service is for.
10. Overuse of *Target Population* terms can badly clutter databases and make searching more difficult rather than easier. Most agency services aren't targeted at any particular population; thus, they require no term from this section. Do not fall into the trap of trying to find a Y section term for every service!
11. Having said this, there are two ways to use these terms:
 - A. use a target term only when the target population is not clear; or
 - B. use the target term in every applicable instance once you have begun using it.

Example: It's obvious that AIDS treatment programs are for people who have AIDS, so the Y section term *AIDS* is not necessary to clarify the focus of such programs. However, a food pantry that targets people with AIDS does require the target term to be clear.

A policy decision is required for your agency. If you want to be able to search on the target term *AIDS* and retrieve all records for this population, you will need to use it in all cases (including those in which the targeting is implicit, like *AIDS Treatment*), even when redundant. Your other option is to only use the target term *AIDS* when the focus of program needs clarification. You need to make a decision regarding this issue and apply it consistently.

10. Some I&R organizations managing databases restrict use of target terms to special classes of services and provide an exhaustive list of approved service terms (and perhaps the qualifying target terms that can be selected to modify them). You could, for example, say that terms in the *Support Groups* section can be modified using specific health condition or disability terms only. This is another option.

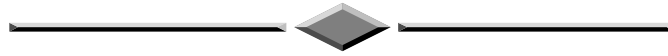
A Word About Local Customization

Customizing the Taxonomy by selecting the level of detail, Taxonomy sections, and specific terms you want to use (with the concomitant ability to deactivate the rest) is absolutely essential for managing an indexing vocabulary of more than 10,000 terms.

Recognize, however, that the decisions you make for your agency may be very different than those made in isolation by others in your state, province/territory or region. If you and your neighbors make radically different choices, you will have a difficult time if you ever choose to merge records from your databases. The “common language” that the Taxonomy provides will be undermined, and you will be unable to make valid regional, statewide or province/territory wide assessments of service availability and service gaps.

If a project like this is on the horizon in your area, you may want to discuss term selection decisions with others and make a common decision about how to proceed. You may find that having the ability to discuss your options with others in the same position may reveal issues you have not considered and make your eventual choices more useful.

Check out the Filters tool on the www.211taxonomy.org website which can be used to develop and maintain your customization. You can review customized sets created by other users and use one of them as a point of departure, or you can build your filter from scratch. A custom report function allows you to print an outline of your customized set or a full filtered set of terms with whatever information you choose (definition, see also references and use references). An article with plenty of screenshots describing how to use the tool is available in the library under the Resources tab.



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