

## **Indexing with the AIRS/INFO LINE Taxonomy of Human Services**

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*The INFO LINE Taxonomy of Human Services has been endorsed by AIRS as the national standard for indexing human service resource files. This article is intended to: familiarize users with some of the Taxonomy's design features; introduce users to several principles of indexing with the Taxonomy; and help users to understand and make the decisions that are necessary to customize the Taxonomy for the unique needs of their organization.*

Part of the mission of the Alliance of Information and Referral Systems (AIRS) is to set standards for the provision of information and referral services by member agencies and to identify and promote the tools that I&Rs need to meet those standards. One of the standards set by AIRS encourages I&R providers to adopt a common classification scheme for indexing their resource files. A common classification scheme facilitates the exchange of data between I&R providers and enables I&Rs to pool statistical information on the service needs and gaps in their community.

The classification scheme identified by AIRS as the national standard is A Taxonomy of Human Services: A Conceptual Framework with Standardized Terminology and

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<sup>1</sup> Revised and expanded from an earlier version published in volume 17 (1995). (Edited 3/15/04, MGB)

Definitions for the Field (commonly known as the INFO LINE Taxonomy or the AIRS/INFO LINE Taxonomy). The INFO LINE Taxonomy was selected as the national standard for several reasons:

1. The Taxonomy is an excellent indexing tool:
  - Its structure is comprehensive in scope and has a logical and exclusive niche for every concept;
  - It incorporates terminology that is accepted in the human service field;
  - It is compatible with the way services are actually delivered;
  - The language and structure are simple;
  - Terms are clearly defined and cross-referenced; and
  - Its structure is flexible to permit change and growth.
2. Ongoing development of the Taxonomy—a crucial activity and a substantial investment—is supported by its developer, the Information and Referral Federation of Los Angeles County (commonly known as INFO LINE of L.A.)
3. The Taxonomy can be customized by users to meet the needs of their own agencies.

The purposes of this article are to: familiarize users with some of the Taxonomy's design features; introduce users to several principles of indexing with the Taxonomy; and help users to understand and make the decisions that are necessary to customize the Taxonomy for the unique needs of their organization.

## **DESIGN**

The third edition of the Taxonomy contains more than 4,300 human service terms, each with a concise definition. In the main section (the Classified Display), terms are grouped together into 10 broad service categories and an eleventh target group section. Each category is organized hierarchically into five tiers that move from the general to the specific. Unique term codes reflect the placement of terms within the hierarchy and the relationship between term concepts (e.g., Job Banks and Job Fairs are more specific forms of Job Information). “See also” references direct users from terms in one section of the hierarchy to related terms in another section:

Level 1	N	<b>Income Security</b>
Level 2	ND	<b>Employment</b> ( <i>See also Retirement Counseling</i> )
Level 3	ND-160	<b>Employee Certification</b> ( <i>See also Alien Registration</i> )
Level 4	ND-160.180	<b>Exemplary Rehabilitation Certification</b>
Level 4	ND-160.200	<b>Fidelity Bonding Services</b>
Level 5	ND-160.200-80	<b>Special Bonding Services</b> ( <i>See also Ex-Offender Services</i> )
Level 4	ND-160.950	<b>Work Permits</b> ( <i>See also Records/Licenses/Permits</i> )
Level 5	ND-160.950-30	<b>Home Work Permits</b>
Level 5	ND-160.950-95	<b>Youth Work Permits</b>
Level 3	ND-180	<b>Employment Acquisition</b> ( <i>See also Military Recruitment Offices</i> )
Level 4	ND-180.050	<b>Auditions</b>
Level 4	ND-180.350	<b>Job Information</b> ( <i>See also Specialized Info &amp; Referral</i> )
Level 5	ND-180.350-35	<b>Job Banks</b>
Level 5	ND-180.350-36	<b>Job Fairs</b>
Level 5	ND-180.350-37	<b>Job Lines</b> ( <i>See also Information Lines</i> )
Level 4	ND-180.360	<b>Job Search/Placement</b>
Level 4	ND-180.950	<b>Work Registration</b> ( <i>See also Unemployment Insurance</i> )

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A second section (the Alphabetical Display) arranges the terms from the hierarchy alphabetically and incorporates "use" references pointing from synonyms for valid terms to the terms themselves.

**Employee Certification (ND-160)**  
**Employee Certification of Noncitizens**  
*use Alien Registration (FT-360.050)*  
**Employee Fraud TIP Lines (FN-170.200)**  
**Employment (ND)**  
**Employment Abroad (ND-360.190)**  
**Employment Acquisition (ND-180)**  
**Employment Agency Complaints (DD-150.320)**  
**Employment Assessment**  
*use Vocational Assessment (ND-200.150-90)*  
**Employment Counseling**  
*use Career Counseling (ND-200.150-16)*

A third section (the Permuted Display) alphabetizes multi-word terms by each key word in the term, thus enabling the user to identify a desired term by any key word within it:

**Employment Transition Counseling**  
**Fair Employment Practices**  
**Part-Time Employment**  
**Public Employment and Training Programs**  
**Sheltered Employment**  
**Summer Employment**

### ***Advantages of the Hierarchical Design***

The Taxonomy's hierarchical design permits indexers to use or ignore whole areas of service based on their agency's individual needs. Within an area, the hierarchy allows indexers to choose a term that is at the level of detail that is most appropriate for their needs. For example, a comprehensive I&R program which covers a broad range of services in limited detail may choose to index in many sections of the hierarchy using higher level (or more

general) terms. A specialized I&R program which covers a narrower range of services in greater detail may choose to omit whole sections of the hierarchy and index other areas using lower level (or more specific) terms.

By selecting their indexing terms from the Taxonomy, I&R providers can be confident that they are using the terminology and definitions that are recognized and endorsed by the I&R field. By working within the framework of the hierarchy, users maintain the relationship between concepts that is necessary to compare data across I&Rs. Thus, users achieve the objectives of a standard classification scheme while still having the flexibility to define the scope and detail which is appropriate for indexing their individual file.

### ***Types of Terms***

Another important design feature of the Taxonomy relates to the types of terms that it incorporates. While called A Taxonomy of Human Services, not all terms in it are service terms. Rather, the Taxonomy encompasses different types of terms that are intended to be used differently. The different types of terms can be classified into several broad groups:

1. **Service Terms** describe specific activities that organizations undertake on behalf of clients. Terms may be broad (Food, Employment) or narrow (Food Pantries, Soup Kitchens, Job Training, Work Permits).
2. **Facility Type Terms** describe what an organization is as opposed to what it does. These terms (such as Libraries, Hospitals, Senior Centers, and Occupational/Professional Associations) permit users to index the general character of an

organization rather than the specific activities it engages in.

Facility Type Terms work as indexing elements because certain services are automatically associated with a particular facility type. When a user knows that an agency is a *Professional Association*, he or she can usually assume that it offers information on its field, referral to members, and assistance in resolving some types of complaints. A facility type term is not available for every kind of organization. But when one is, that term can sometimes be used alone to adequately capture most of what an organization does. (If, however, the organization offers an important service which is not typical for its type, such as a professional association that offers a scholarship program, then only service indexing will accurately reflect that activity.)

3. **Target Population Terms** refer to the group of people at which a particular service is aimed. Target populations are grouped by characteristics such as age, gender, ethnicity, and disability. Target terms are intended to be used in conjunction with service or facility type terms to restrict the service or facility type. The facility type term *Social Events/Clubs* is pretty broad, but by combining it with a target group, such as *Single Parents* or *Older Adults*, the focus is sharpened considerably.
4. **Program Terms** provide direct access to widely known governmental programs, such as *WIC*, *Head Start*, *Peace Corps*, and *Medicare*. Many of these programs involve a package of individual services that the I&R can index or simply include in the record's textual description.

5. **Modality Terms** reflect the way in which a service is delivered. Like target terms, modalities are intended to be used in conjunction with service terms to modify the service. For example, legal service terms include Landlord/Tenant Assistance, Discrimination Assistance, and Alimony Assistance. These terms may be combined with various legal assistance modalities, such as Advocacy, Mediation, or Legal Representation, to make important distinctions between the way in which the specific legal aid is being provided.

Thus, through the hierarchy and the types of terms, the Taxonomy is designed to give users an important degree of flexibility in deciding how to index their resource file. It is also designed to allow users to vary the way they index from one area of their file to another. Options range from very general indexing using facility type or program terms, through service indexing at different levels of the hierarchy, to very specific indexing achieved by combining facility type, program, or service terms with modalities and/or target groups.

If indexing is to be consistent, however, I&Rs need to carefully develop, document, and enforce their own institutional policies for using the Taxonomy. To help users in this process, the next section of this paper reviews some basic principles of indexing that should be observed when setting indexing policies.

### ***BASIC PRINCIPLES OF INDEXING***

Several basic principles should be observed when indexing using the AIRS/INFO LINE Taxonomy of Human Services. Many of these points are also valid when indexing with other classification schemes.

## 1. Accurate Indexing

Accuracy is one of the most important and difficult objectives to achieve when indexing. An indexer must be able to find and assign the "right" term or terms to agency records. But accurate indexing requires more than just a talented, well-trained resource staff—it requires a good classification scheme.

The AIRS/INFO LINE Taxonomy promotes accurate indexing by providing a specific term for virtually every human service concept and ensuring that terms at the same level in the hierarchy do not overlap in their meaning or scope. The detail of the terms and their definitions leave little room for misunderstanding on the part of the indexer. The grouping of terms into a hierarchical arrangement and the cross references that refer to related terms in other areas of the hierarchy help the indexer to identify the "right" term or terms from the great number which may be available on a particular subject. When used properly, the Taxonomy all but guarantees accurate indexing. The most significant variable is simply the degree to which the indexer understands the Taxonomy's design and uses it to its full advantage.

*Double Indexing:* While the Taxonomy's hierarchy and extensive references work to direct indexers to the "right" term, these features also create their own set of indexing issues. One very common issue is that of redundant or "double" indexing. Having accurately indexed a program under Job Banks, resource specialists often want to assign the broader terms Job Information and Employment Acquisition. Or, though they found the "right" term, they believe their end-users may not, so they tend to also index under related terms in other parts of the hierarchy (such as



Specialized Information and Referral in the previous example).

One major problem with double indexing is that, because it is so subjective, it is hard to do consistently. When indexing a Job Bank, one indexer may choose to add the term Job Information, while another may choose to add Job Information and Specialized Information and Referral.

Double indexing also creates long, fuzzy lists of resources under each indexing category, forcing end-users to scan records that are not appropriate for their specific need. This lack of consistency and focus creates a feeling among end-users that indexing is loose and thus not very reliable. And when end-users feel indexing is not reliable, they tend to spend a lot of time scanning their files in other ways so that they don't miss something important. For example, end-users may never be confident that a clear distinction was made between the two closely related terms Job Information (ND-180.350) and Specialized Information and Referral (TJ-300.800). As a result, they would check both categories when searching for organizations that direct people to employment opportunities.<sup>2</sup>

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<sup>2</sup> Double indexing is not only messy and confusing to the end-user, it defeats a sophisticated design feature of the Taxonomy. Taxonomy term codes (which reflect the organization of terms from the general to the specific) form a structure that allow I&R software applications to aggregate data. I&Rs can index services using lower level, more detailed terms, and rely on their computer to give end-users the option of searching under those terms or broader terms within the hierarchy. This is a cleaner way of providing end-users with the searching options that are the goal of the double-indexer.

Double indexing also presents an inaccurate picture of service availability within a community. People consulting the index to a file might believe there are 30 Child Care Centers in the community when, in fact, there are only 27; the 3 others provide Child Care Resource and Referral but were indexed under the Child Care Centers heading because the indexer thought they might be overlooked otherwise.

Given the vast number and detail of Taxonomy terms, the general rule for accurate indexing is:

- Choose the most specific term available<sup>3</sup> which completely and fully describes the aspect of the agency that is being indexed. Resist the urge to double index under higher level terms in the hierarchy or related (but less appropriate terms) in other areas of the hierarchy. Trust that the end-user will also use the Taxonomy in such a way that they, too, will find the most appropriate term.

## 2. Consistent Indexing

Once an indexing term has been used, it must be used throughout the file wherever it fits. Consistent indexing ensures that end-users always get all of the resources that are associated with a particular term. For example, when indexing using the facility type term Voluntary Health Organizations (VHO's), an indexer may logically decide that she does not need to use the service term Disease/Disability

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<sup>3</sup> The concept of "availability" is key to this general rule. As a policy decision, an I&R may choose not to use certain terms in the Taxonomy. These terms then become "unavailable" for indexing. Indexers should choose the most specific term that their I&R has decided to make available as an indexing element in their file. The next section of this paper reviews some of the issues that should be considered when removing terms from the Taxonomy.

Information. Most users would assume that a VHO provides this service, so the added access point to the record is probably not necessary. But if another agency in the file which is *not* a VHO also provides disease/disability information, users will need the specific service term to gain access to that record. And once the term Disease/Disability Information has been used for one record, it must be used for all records to which it applies, in this case, including the VHO's. The logic is simple—when users look at a list of the organizations that provide Disease/Disability Information, the list should be complete.

*Consistent Indexing within a Hierarchy:* Terms that have been used to index a file should be used consistently throughout the file, even in those records where it would be accurate to generalize to a broader level. Consider the branch of the Taxonomy that covers housing payment assistance:

B	BASIC SUBSISTENCE
BR	Temporary Financial Aid
BR-300	Housing Payment Assistance
BR-300.500	Mortgage Assistance
BR-300.700	Rent Assistance
BR-300.725	Rental Deposit Assistance

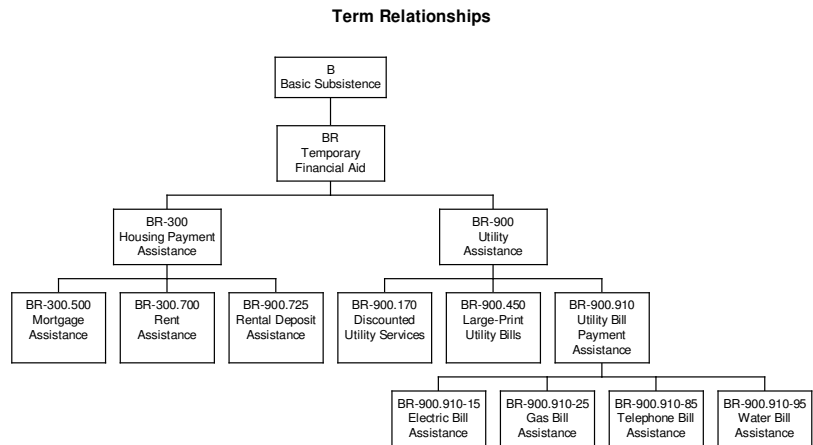
Imagine that one agency provides only rent assistance (and is indexed accordingly), while a second assists with mortgages, rent, and rental deposits. If an I&R were to index the latter agency under the term Housing Payment Assistance rather than under the three more specific terms beneath it (justifying the decision by the fact that the term Housing Payment Assistance completely and fully describes the lower level services), searching the file under Rent Assistance would retrieve only the former program

and not the latter. The only way to capture both programs under the specific term of `Rent Assistance` is to index both at that level. In other words:

- If an agency provides all of the lower level services which fall under a broader category and if any of those service terms have been used elsewhere in the file, index the agency to all of the specific lower level terms rather than generalizing to the broader level.

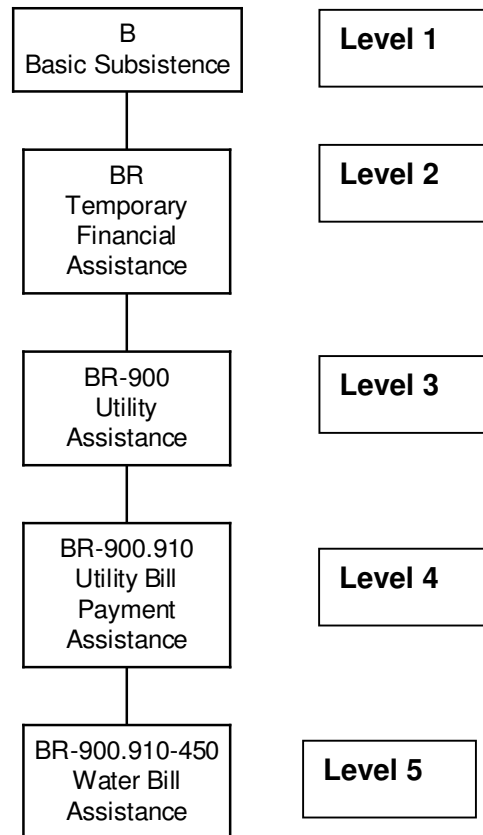
This example illustrates that, because terms in a hierarchical system are related, every indexing decision that is made affects the availability of other terms in that section of the hierarchy. Once a decision is made to index with a particular term, all of the other terms on that branch are off limits, with the broader terms being off limits not just for that branch but for all of the other branches that they are a part of.

To understand this point, indexers must be able to recognize the relationship between terms within the hierarchy, including the concept of a “branch”. The following type of display often makes it easier to see these relationships:



If you look at the codes, you can see that threads run from the Level 1 term, through each of the Level 2, 3, and 4 terms, to the Level 5 terms. Each thread is one branch. For example, the following is the branch ending in Water Bill Assistance:

## Taxonomy Branch



If an indexer chooses to index at the Utility Bill Payment Assistance level, all of the lower level terms that are on that branch (Electric Bill Assistance, Gas Bill Assistance, Telephone Bill Assistance, and Water Bill Assistance) are off limits for indexing. If the indexer comes across another agency that provides a specific form of utility bill payment assistance (such as gas bill assistance) the

indexer must go back up the branch to Utility Bill Payment Assistance to index it. Again, the reason is to ensure that the end-user will always get all of the services associated with a particular term.

For the same reason, the broader terms on that branch (Utility Assistance, Temporary Financial Aid, and Basic Subsistence) are also off limits. And, since these terms are shared with other branches, the indexing options available on those branches are also affected. For example, if the term Utility Bill Payment Assistance is used, the other utility assistance terms at that level (Discounted Utility Services and Large Print Utility Bills) are also available for use. However, the first term that can be used in the housing payment assistance section is Housing Payment Assistance. The indexer may choose to index using more specific terms under Housing Payment Assistance but is not free to use the higher level terms that are also part of the Utility Bill Payment Assistance branch.

*Documenting Indexing Decisions to Promote Consistent Indexing:* If indexing is to be consistent, I&Rs need to carefully document their indexing decisions. One of the easiest ways to do this is to mark (in pencil) on a current outline of the Taxonomy the terms that have been used and those that are available/unavailable for use because of that decision.<sup>4</sup> Using the previous example, the outline would look like this:

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<sup>4</sup> Some I&R software applications permit database managers to flag specific terms as either available or unavailable for use.

- B—BASIC SUBSISTENCE
- BR—Temporary Financial Aid
- ! BR-050 Assistive Technology Purchase Assist.
- BR-300 Housing Payment Assistance
- BR-300.500 Mortgage Assistance
- BR-300.700 Rent Assistance
- BR-300.725 Rental Deposit Assistance
- BR-500 Medical Expense Assistance
- BR-500.170 Dental Bill Assistance
- BR-500.500 Medical Bill Assistance
- BR-500.650 Prescription Expense Assistance
- ! BR-550 Moving Expense Assistance
- BR-640 Personal Loans
- BR-640.330 Interest-Free Loans
- BR-640.450 Low-Interest Loans
- ! BR-650 Purchase of Services
- BR-850 Transportation Money
- BR-850.050 Air Fare
- BR-850.100 Bus Fare/Gas Money
- BR-850.150 Car Payment Assistance
- BR-850.700 Return to Point of Origin
- ! BR-890 Undesignated Temporary Financial Aid
- BR-900—Utility Assistance
- ! BR-900.170 Discounted Utility Services
- ! BR-900.450 Large Print Utility Bills
- ! BR-900.900 Utility Bill Disconnect Notification
- \* BR-900.910 Utility Bill Payment Assistance
- BR-900.910-18—Electric Bill Assistance
- BR-900.910-25—Gas Bill Assistance
- BR-900.910-30—Heating Fuel Assistance
- BR-900.910-85—Telephone Bill Assistance
- BR-900.910-95—Water Bill Assistance

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\* Used Term  
 Unavailable for use because of the decision to use  
**Utility Bill Payment Assistance (BR-900.910)**  
 ! Available for use as a result of the decision to  
 use **Utility Bill Payment Assistance (BR-900.910)**



The reason why the terms for codes B, BR, BR-900, and BR-900.910-18 through BR-900.910-95 are unavailable (crossed out) is obvious—they are unavailable because they are in the same branch as the BR-900.910 term which is used to index this concept. The decision to index this concept at the Level 4 term makes the Level 1, Level 2, Level 3, and Level 5 terms in the same branch permanently unavailable.

Less obvious is why the terms for codes BR-050, BR-550, BR-650, BR-890, BR-900.170, BR-900.450, and BR-900.900 are now flagged (with an !) as available for use. The reason is that each of these terms is the *only term in its respective branch beneath the BR term*. The decision to use the BR-900.910 term to index the **Utility Bill Payment Assistance** concept automatically makes these terms available for use.

Finally, the same logic explains why nothing is flagged as either available or unavailable in the BR-300 through BR-300.725 branch. Because this is a multi-tier section of the hierarchy (consisting of one Level 3 term and three Level 4 terms), the indexer is free to decide whether to use *either* the Level 3 term (BR-300) *or* one or more of the Level 4 terms beneath it.

*Indexing at More than One Level in a Branch:* There are rare occasions when indexing at more than one level within a branch seems impossible to avoid because a complete breakdown of concepts is not available at a specific level. Consider the following section from the Third Edition of the Taxonomy:

Level 4	BH-300.355	<b>Home Rehab/Repair</b>
Level 5	BH-300.355-35	<b>Home Rehab/Repair Grants</b>

If an I&R chose to index its grant programs using the **specific term Home Rehabilitation/Repair Grants**, it would face a dilemma when it came time to

index programs that provide any other form of home rehabilitation/repair assistance. With no other indexing options available at Level 5, the I&R would be inclined to use the broader term of *Home Rehabilitation/Repair*. But the scope of the Level 4 and Level 5 terms overlap, and to index with them both would be confusing for end-users. The appropriate decision would be to index all programs under the higher level term *Home Rehabilitation/Repair* or to contact INFO LINE to request that additional terms be created at the lower level. Following a request from Detroit Public Library, which wanted to index at the most specific level in this area of the *Taxonomy*, INFO LINE added the term *Home Rehabilitation/Repair Services*:

Level 4 BH-300.355 **Home Rehab/Repair**  
 Level 5 BH-300.355-35 **Home Rehab/Repair Grants**  
 Level 5 BH-300.355-39 **Home Rehab/Repair Services**

The new term eliminated the need for indexing at more than one level on this branch.

There are also some instances in which the scope of terms at different levels on a branch do not overlap in a way that would be confusing to end-users if all of them were used. For example, indexing with all three of the following terms would be acceptable because, despite the organization of the hierarchy, all three terms represent separate non-dependent concepts:

Level 4 BH-830.300 **Housing Authorities**  
 Level 5 BH-830.300-30 **Housing Projects**  
 Level 5 BH-830.300-80 **Section 8 Housing**

### 3. Primary vs Secondary Services

It's not always easy to distinguish which of an agency's services should be indexed. One important distinction is between *primary services* and *secondary*

*services*. Primary services are those entry-point services that a person can receive without already being involved with the agency in some way. Secondary services, in contrast, are only available to people who are already receiving another service from the agency.

Suppose a job training program offers day care for the children of participants while they are in class. Which term(s) should be used to index the program—*Job Training* or *Child Care* or both? The answer is that only *Job Training* should be used. While the program does offer child care, that service is restricted to individuals who are participating in training. Child care is a secondary service. If a person were looking for child care, a referral worker would never refer them to the job training program to get it. (The indexer may choose, however, to include information about child care in the textual description of the job training program. Secondary services would be an important consideration when evaluating different training options.)

#### **4. Ancillary Services**

Not every service an agency provides is worth indexing. Some primary services are simply less important than others. The indexer must decide which services deserve the time and effort it takes to gather relevant information, prepare a written description, and index, and which are not. Some examples of ancillary services which don't have to be indexed include: newsletters; speakers; services which have incredibly long waiting lists; and services which are provided so infrequently, to such a limited extent (or to such a narrow target group) that they would rarely be used by referral staff.

## 5. Phantom Services

Even worse, not all of the services that some agencies claim to provide are really available. In their enthusiasm to serve the public, some agencies tend to exaggerate what they actually do. Questions about staffing levels, budget allocations, and case loads can usually help distinguish between real services (which need to be indexed) and these phantom services (which should not).

## 6. Indirect Services

An additional distinction should be drawn between services that are provided directly by the agency and those which facilitate the delivery of a service by another agency. United Ways (UW) typically provide funding for and referral to a broad range of community services, such as recreation, counseling, and health care. The United Way should be indexed under terms which reflect what the UW actually does—

Information and Referral and Program Development Funding. The recreation, counseling and health care services should be indexed to the agencies that actually provide those services.

## **CUSTOMIZING THE TAXONOMY**

Once an I&R's staff has become familiar with the Taxonomy and general indexing principles, they must then begin the process of customizing the system to meet their own needs. The objective is to strike a balance between the level of indexing people want and need and what is feasible for the I&R program to maintain. Most users of the Taxonomy will choose to use only a small percentage of the terms that are available to them, and the combination of terms they select will be unique to their organization.

The examples on the following pages present the full version of one section of the Taxonomy and two ways in which it could be customized.

**Full FOOD Section of Taxonomy:**

- B           **BASIC SUBSISTENCE**
- BD           **Food**
- BD-150       **Communal Food Storage Facilities**
- BD-180       **Emergency Food**
- BD-180.100    **Brown Bag Programs**
- BD-180.200    **Food Pantries**
- BD-180.200-20   **Food Lines**
- BD-180.200-62   **Occasional Emergency Food Assist**
- BD-180.200-64   **Ongoing Emergency Food Assistance**
- BD-180.225    **Food Vouchers**
- BD-180.250    **Gov't Surplus Food Dist. Sites**
- BD-180.800    **Sack Lunches/Dinners**
- BD-180.820    **Specialty Food**
- BD-180.820-18   **Drinking Water**
- BD-180.820-20   **Supplements**
- BD-180.820-25   **Formula/Baby Food**
- BD-200       **Food Banks**
- BD-220       **Food Gleaning Programs**
- BD-240       **Food Outlets**
- BD-240.200     **Farm Trails**
- BD-240.225     **Farmers Markets**
- BD-240.250     **Food Co-Ops**
- BD-240.500     **Mini Markets**
- BD-240.900     **U-Pick Programs**
- BD-260       **Food Production**
- BD-260.050     **Agricultural Assistance**
- BD-260.050-33   **Irrigation Services**
- BD-260.050-35   **Home Gardening Assistance**
- BD-260.150     **Community Gardening**
- BD-260.450     **Livestock Breeding/Development/Mgt.**
- BD-260.700     **Rent-A-Tree**
- BD-500       **Meals**
- BD-500.145     **Child Care Food Programs**
- BD-500.150     **Congregate Meals**
- BD-500.350     **Home Delivered Meals**
- BD-500.450     **Low-Cost Meals**
- BD-500.500     **Meal Vouchers**
- BD-500.510     **Milk Programs**
- BD-500.520     **Mobile Canteens**
- BD-500.800     **School Breakfasts**
- BD-500.820     **School Lunches**
- BD-500.830     **Soup Kitchens**
- BD-500.850     **Summer Food Service Programs**

In contrast, a senior I&R might adopt only those terms that are relevant to programs that seniors would be interested in:

BD-180.100	<b>Brown Bag Programs</b>
BD-180.820-20	<b>Food Supplements</b>
BD-240.500	<b>Mini-Markets</b>
BD-500.150	<b>Congregate Meals</b>
BD-500.350	<b>Home-Delivered Meals</b>
BD-500.450	<b>Low-Cost Meals</b>

And a comprehensive I&R service whose file covers a broad range of human services but only goes into limited detail in the area of food might adopt yet a different subset of terms:

BD-180.200	<b>Food Pantries</b>
BD-180.225	<b>Food Vouchers</b>
BD-180.250	<b>Gov't Surplus Food Distribution Sites</b>
BD-200	<b>Food Banks</b>
BD-500.150	<b>Congregate Meals</b>
BD-500.350	<b>Home-Delivered Meals</b>

*Customizing/Converting to the Taxonomy*: One good way of customizing the AIRS/INFO LINE Taxonomy is to go section by section through the resource file and convert one subject category at a time. Make indexing decisions regarding each section, document the decisions for reference purposes, train resource staff, complete work on the section, and then train the referral staff in how to search it. Make sure to involve the referral staff in the decision making throughout.

When beginning the customization/conversion process, start with a specific segment of the file:

1. Locate the section or sections of the Taxonomy that deal with the types of resources which are to be converted.

2. Determine if there are terms in the Taxonomy that can be eliminated altogether. Consider the following:
  - What types of resources are available in the community? If there are no resources in a particular category, Taxonomy terms in that area can be eliminated with a fairly high degree of confidence.
  - What are the inclusion criteria for the file? There may be some types of services that will not be listed even though they are available. For example, most I&R programs do not list private practitioners. Categories that are not covered by your criteria can be eliminated.
  - What types of resources are currently in the file? These should be given highest priority for further evaluation.
3. Determine the level of detail that is appropriate for the remaining Taxonomy terms. Begin with the file's current indexing system and consider what works and what creates problems. Where the level of specificity in the current system is satisfactory, look for the comparable terms in the Taxonomy and use those. Consider the following points:
  - How specific are service requests you receive from your clients? To meet the needs of referral staff, it is usually preferable to index resources using terms at the level callers use. If other people (such as database partners) are using the file, their needs should be considered as well.
  - What is the skill level of staff? I&Rs with inexperienced or volunteer referral staff may appreciate the greater access afforded by more detailed indexing, while I&Rs with referral workers who are fairly



familiar with the services in their community may find broader indexing adequate.

- How specifically can staff afford to index? Specific indexing is time consuming and requires more knowledge about a resource than does general indexing. While it's very handy to know which food pantries have baby food, determining this will take a lot of effort initially, and staff will have to continue to ask as they update because a pantry might not think to tell if it has added baby food to its stores. On the other hand, the more broadly a service is indexed, the more dependent the user is on text to explain what the agency does, and maintaining a lot of text is also very time consuming. When indexing very specifically, staff can generally get away with briefer descriptions. Finding the right balance between what is needed and what can be maintained is the trick.

All else being equal, err on the side of indexing more specifically than is needed. With current computer technology, it is usually possible to search for services generally if they have been indexed more specifically. But when services have been indexed at a broader level, it is not possible to search more specifically.

- Consider the volatility of the information maintained. Recreation centers change the classes they offer with abandon but do not often redo their facilities. If an I&R wants to spend the time and energy to index all of the swimming pools and baseball diamonds in a community, they will probably only have to do it once. If the I&R were to index all of the specific types of classes, however, they may have a problem keeping up with the changes.

- Establish priorities. Is detailed indexing more important in some areas than in others? Priority areas should be indexed in detail from the beginning. Less important records can be indexed at a higher level initially and reindexed more specifically later.
4. Look for legitimate shortcuts. An I&R with an automated resource file may be able to crosswalk their structure to the Taxonomy and look for opportunities to do a machine conversion. (A crosswalk takes a term from the current system and lists the possible Taxonomy terms that might be equivalents. If there is only one term in the Taxonomy that fits a term in the current scheme, a program can be written to reindex that aspect of the file. If the relationship is more complex, indexing decisions will need to be made on an entry-by-entry basis.)

### **KEEPING YOUR TAXONOMY CURRENT**

One of the strengths of the AIRS/INFO LINE Taxonomy is that it is continuously under development. Working with numerous consultants, Georgia Sales, INFO LINE's Resource Director, regularly adds new terms and references in order to make it a more useful tool. The downside of this is that an agency's copy of the Taxonomy is continuously out-of-date. For information on updating your copy, see Georgia's article "Taxonomy Supplements: How to Keep the AIRS/INFO LINE Taxonomy Updated for your Resource File" that has been posted on the AIRS Website: <http://www.airs.org/library/taxupd2.html>.<sup>5</sup>

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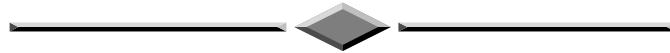
<sup>5</sup> Editor's note—Originally published in v. 20 (1998) of this journal.

## CONCLUSION

Indexing is both a difficult and time-consuming task. Staff need to be given training and time to develop the skills they require to do their jobs. They also need to be provided with appropriate tools.

The AIRS/INFO LINE Taxonomy of Human Services is one such tool. It provides a flexible framework within which I&R providers can develop a set of indexing terms which is appropriate for their own files. Although customizing the Taxonomy involves a significant amount of work, the agency will ultimately find that their investment was worth their time and effort.

For information on ordering the AIRS/INFO LINE Taxonomy of Human Services, see p. 199 of this volume or visit the INFO LINE Website at [www.infoline-la.org](http://www.infoline-la.org). Because AIRS co-publishes the volume, AIRS members are entitled to a discount on the price.



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