



## Towards a pan Canadian, bilingual Taxonomy for 211

### What are Canadian experts saying about this Taxonomy?

"Awesome breadth and depth and a rigorous methodology"

**Deane Zeeman, Lead, Catalytic Initiative, Library and Archives Canada**

"The taxonomy is a well-structured and rich controlled vocabulary for human services." **Dr. Ali Shiri, School of Library and Information Studies,**

**University of Alberta**

"The most complete, almost encyclopedic taxonomy I've encountered covering a subject domain. It shows how a well developed taxonomy can enable learning and guide searchers to unforeseen, yet highly relevant topics."

**Linda Farmer, MLS, information consultant, Second Knowledge Solutions**

"I think the strengths of the 211 Taxonomy are its broad scope, its ease of use (easy to navigate through it and search it), and most importantly, the years of hard work that have gone into compiling it and keeping it current. I do believe that the Taxonomy would enhance open access to government as navigating through it is very intuitive and straight forward." **Andrew Lefrancq, Metadata Analyst, Ministry of Government Services, Government of Ontario.**

### What is 211?

211 is the 3 digit number assigned by regulatory bodies in both the US (1999) and Canada (2001) to enhance citizen access to information on a wide variety of community services. As of late 2005, 211 call centres serve approximately 45% of the US population and 15% of the Canadian population. See [www.211.ca](http://www.211.ca) and [www.211.org](http://www.211.org) for more information.

### What are InformCanada and AIRS?

InformCanada is the national association of information and referral (I&R) providers and a partner with United Way of Canada--Centraide Canada in 211 development and roll out. InformCanada coordinates joint activities of its members, represents I&R at the national level, and articulates standards for professional service delivery. The Alliance of Information and Referral Systems (AIRS) is the 900 member professional association of information and referral providers in the United States and Canada. AIRS is a partner with United Way of America in the development and delivery of 211 in the US and has developed

professional standards for the field, many of which have been adapted by InformCanada to the Canadian environment. AIRS Accreditation for agencies and Certification for individual I&R specialists both on the phone and managing databases are requirements of 211 in both the US and Canada.

### **How is United Way involved?**

United Way of Canada--Centraide Canada is a founding national partner in 211 with InformCanada. United Way supports 211 national governance bodies, initiates fund development efforts and secured the pro bono services of Deloitte in completing the Canadian 211 cost benefit analysis. United Way owns the logo and trademarks associated with 211 and has a role on the 211 Licensing Panel. Local United Ways are key supporters of 211 through funding and convening stakeholder planning groups.

### **What is information and referral?**

Information and referral is the practice of bringing people and services together. While there are many government, some corporate and some nonprofit agencies with other mandates that also provide I&R, there are also organizations that focus solely on I&R. These organizations may be either comprehensive I&Rs (i.e. they provide information and referrals for anyone on the broad range of community services) or specialized I&Rs (i.e. they target services for people with disabilities, the military, older adults).

### **What is a Taxonomy?**

"In a human service context, a taxonomy is a classification system that allows you to index and access community resources based on the services they provide and the target populations they serve, if any. It provides a structure for your information and it tells people what is in your information system and how to find it." (from 211 LA County web site [www.211taxonomy.org](http://www.211taxonomy.org) )

### **Why did InformCanada choose this Taxonomy?**

After nearly a year of study, the InformCanada Board accepted in March 2004 the recommendation of its classification task force to pursue funding to create a pan Canadian bilingual taxonomy based on the AIRS/INFO LINE Taxonomy of Human Services. Major benefits of this classification system are

- a firm structure or architecture for the overall system but with flexible development rules that allow for growth and changes in the service delivery system. A rich network of linkages between preferred terms and their synonyms allows for local terms to be used in searching when appropriate
- detailed and descriptive definitions for each term, developed in consultation with subject area experts. This reduces confusion in indexing and accessing

- services, allows for very precise searches, and increases accuracy in describing duplication or gaps in service for social planning purposes
- compliance with the ISO standards for development of a monolingual thesaurus (classification system) and anticipated compliance with the ISO standards for a bilingual thesaurus once the French language version is undertaken
  - 8300 terms cover a wide range of community services, making this system appropriate for comprehensive or specialized use, and providing a common language to bridge the gaps between service delivery silos
  - the hierarchical structure facilitates data sharing among agencies and statistical comparison since referral statistics can be "rolled up" to a higher level term for easy comparison
  - previous Canadian users in Edmonton and Calgary had positive experience with adapting the Taxonomy to their use
  - the [www.211taxonomy.org](http://www.211taxonomy.org) web site and the Taxonomy listserv provide substantial support to users through training materials, peer support and access to the US Taxonomy editor, updates on changes, downloadable files.

### **What is the AIRS/INFO LINE Taxonomy of Human Services?**

The AIRS/INFO LINE Taxonomy is a product of 23 years of work in the nonprofit information and referral sector in North America, championed by INFO LINE of Los Angeles (now 211 LA County). It is a classification system that is primarily focused on indexing services that will help connect people in a practical way to the services that they need (e.g. shelter, child care, home health care, emergency food, vocational counselling), regardless of who offers that service (e.g. government at any level, the nonprofit or in some cases the for profit sector).

This taxonomy has approximately 8300 separate terms, all of which are defined and given a unique alpha numeric code. Each preferred term may have one or several synonyms that are linked to it, offering a flexible but solid structure. The taxonomy is divided into 11 categories (e.g. basic needs, environmental quality, health care, criminal and legal services, and a separate category for target populations for whom the services are intended). Each of these categories descends like the roots of a tree into 5 levels from broad to narrower terms:

Code B Basic Needs (1<sup>st</sup> level)  
 Code BH Housing/Shelter (2<sup>nd</sup> level)  
 Code BH-180 Emergency Shelter (3<sup>rd</sup> level)  
 Code BH-180.850 Homeless Shelter (4<sup>th</sup> level)  
 Code BH-180.850-10 Bad Weather Shelters (5<sup>th</sup> level)

## How is the Taxonomy being Canadianized?

Phase one of the Taxonomy project was funded by the Ontario Trillium Foundation via 211 Ontario. From March to December 2005, the English language "starter" Taxonomy was developed by a team that included the US Editor, the Canadian English language Editor, an Editorial Group and National Review Group. Other deliverables from this first phase include: preliminary work to create an interface in the software used by most Ontario I&R organizations (Community Information Online Consortium or CIOC), an agreement between InformCanada and 211 LA County, contacts and work plan for the French language version, a business plan and initial contacts established for the remaining work. It is anticipated the remaining components of development and implementation will take 2-3 years at a cost of \$1.8 million, most of which will support local I&R organizations in the conversion process.

## How will the Taxonomy be maintained?

Once the English and French versions of the Canadian Taxonomy are in place, there will be a need for part time editorial work in both languages to maintain the system and adequately reflect the changing world of human services. It is anticipated editorial and administrative work will total \$80,000 per year with support coming from subscriptions, special projects, and donation of in kind editorial support.

## How can I find out more?

For further information or to arrange for a teleconference demonstration of the Taxonomy, contact Deborah Woods, [deborahwoods@rogers.com](mailto:deborahwoods@rogers.com) or (705) 721-0736.

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National partners in 211

