

211: Advancing the Provincial Consolidated System Information Resources Working Group Minutes, July 14, 2005

Present: Christine Berry (Information Oakville), Ross Cooling (Community Connection, Collingwood), Barb McLachlan (Information Windsor), Julie Giesbrecht (Information Niagara), Ian Kellogg (Findhelp Information Services), John Allec (Findhelp Information Services)
Guest: Clive Jones (Clive Jones Consulting)

1. Minutes of June 23rd meeting

Minutes accepted as distributed.

2. Agency/Service/Site data model

A third and final forum on this issue. The following advantages and disadvantages to converting to this system have been identified so far:

Advantages:

- **Refined searching**, only giving users the specific information they request. This is particularly the case for I&R counselors, but also for specialized portals.
- **Centralized maintenance** of much more data than is currently done.
- **De-siloing organization records** (eg solving concerns about Record Type).
- **Alignment with how data is handled by most AIRS and 211 centres**, enhancing common data standards and development.

Disadvantages:

- Limitations on how **multiple administrative layers** can be represented – the Inform Ontario model allows for up to 5 levels of “branches of branches of branches”, while the inherent structure of the agency/service/site model only allows for two levels (the main organization level, and then a sub-level for either specific services or specific sites).
- Although there are many cases where repetition of data is done away with, the fragmentation of information creates new situations where **data must be manually repeated** (eligibility and application data, for example, and updating documentation).
- Generally a much **higher level of complexity** in updating.
- Some chronic **ambiguity as to where certain types of data is best placed** (whether in the agency, service or site clumps).
- Updating information in a “record” necessarily involves going through **several screens**, rather than the straightforward one-page-per-record system we currently have. This is true for both editors and for agencies submitting updates. At least one problem with this is people not being aware they must submit multiple pages one after the other, and end up only submitting the first page.
- Additional **complexity in importing/exporting** shared records. Despite a massive effort in the States to create common XML coding to facilitate data sharing among different softwares, they have apparently not gotten it to work in practice yet.
- **Complexity, expense and effort of transition** -- cost of software redevelopment, re-editing, re-training.

Unclear:

- There are no known examples of such softwares that are **bilingual**. It would seem that trying to combine the complexities of a bilingual database with the complexities of the agency/service/site model would be very complex indeed!

Clive has been working on a couple of projects in the States where he's created records in the Refer software. The enhanced searching is certainly an important advantage, though perhaps encouraging centres to subdivide organizations into more program records would meet the same goal, along with continuing to enhance our existing softwares to make maintenance of duplicate information easier.

Regarding organization levels, most centres get around much of the problem by squeezing 2 or 3 organization levels into the main field, not too different from what is commonly done in Ontario ("Salvation Army. Services for Seniors").

He confirmed that importing/exporting among different softwares using the relational model is immensely complicated and hasn't been very successful so far. It is also a challenge for editors to manipulate the several convoluted pages and tables involved with updating a single "record", and people often have to print out a dozen or two pages in hard copy and work from those to make sure all the relational connections are appropriately made.

Similar challenges seem to face agencies providing updates using this sort of system, especially when submitting information on a new organization from scratch.

Ian pointed out that the Inventory of Programs and Services is actually more or less going in the opposite direction, leaving behind (at our suggestion) its old system of "deliverer" records relationally connected with "program/service" records, for records provided by InformOntario members.

Consensus that it seems we are already using more or less the best available database structure for our purposes.

John went over those guidelines we'd set up for ourselves for recommendations that might apply in this case:

- *Does the recommendation fit in with AIRS Standards?* Clive confirmed that the standards do not deal with database structures as a whole, only for their component parts and the need to assure appropriate data sharing can take place.
- *Can it be readily accommodated by both CIOC and non-CIOC users, and for importing and exporting?* Not an issue as it's what we're doing now.
- *Would it be scaleable and/or adaptable for a 211 system across Canada if necessary?* There is no reason the InformOntario model could not be adapted across Canada if necessary (in fact I&R centres in Kelowna, BC and Saint John, NB are using the CIOC software and therefore the IO data model). Although Calgary and Edmonton use the agency/service/site model, their softwares apparently differ in major ways, and as far as we know no other Canadian centres have adopted the model.

The final guideline on recommendations is to appropriately consult the wider Ontario I&R community. John will draft a communication for the IC/IO and CIOC discussion boards, with as much context as necessary.

3. Taxonomy update

Clive asked for more volunteers to work with Kate and CIOC on the initial planning to incorporate the AIRS Taxonomy into CIOC, probably at the end of August. Barb, Ross and John will participate.

4. Naming authority

The 1988 Name Authority is now available for reference, thanks to Barb via a copy Windsor got from Community Connection. Also, Christine has unearthed the federal government's interpretation of the AACR 2 rules for corporate bodies, from which the original InformOntario rules originated -- <http://www.collectionscanada.ca/6/18/s18-215-e.html>.

5. Data elements and style – ORG1 in ALLCAPS

The historic and current InformOntario standard is that Organization Name (ORG1) should be in ALL CAPS. Many centres have moved away from this to upper/lower case (Waterloo, Collingwood, London and Toronto for example), and the InformOntario Accreditation & Standards Committee had accepted this alternative in principle a couple of years ago. People are generally discouraged from using ALL CAPS on the Internet (to avoid seeming to “scream”), and data in upper/lower case can very easily be converted to ALL CAPS for particular uses, whereas the reverse is definitely not the case.

From their experience with setting up one-time transform rules, Ross and Ian could provide assistance to centres needing to convert from ALL CAPS. Kate could probably provide a quick estimate on how much of her time would be involved for her to take care of this for CIOC members, and it may not be very much. As Julie pointed out, though, someone needs to figure out who would be paying for such work resulting from any changes we're making to existing standards.

We also need guidelines for consistency in what words not to capitalize (“and”, “of”, etc) – perhaps Canadian Style has something.

6. Data elements and style – new “bulletin” field

There are currently two fields in the IO model for non-data “notes” to database users. The “Internal Memo” is typically used by researchers and editors, while the “Comments” field is typically used by centres for internal bulletins to staff providing I&R – although Toronto uses it for bulletins to the public (“Closed for renovations until September 30th”); other centres do not currently have public bulletins.

Consensus that since there are three distinct potential targets for such notes, there should be three clearly distinct fields (i.e. that a “public notice” field should be added), particularly for efficient data sharing and telephone cross-coverage.

Most group members are generally satisfied with the existing names for the current two fields “Comments” and “Internal Memo” especially as that is what people are used to. John disagrees and finds the names vague and confusing, especially with a third field to be added, and feels strongly that it would be unsatisfactory to have field names that are not self-explanatory when they could be, and require users to go to explanatory descriptions to figure out the differences.

Some suggestions were “Public Comments”, “Public Alert”, “Database Memo”, “I&R Memo” “I&R Comments”. We should resolve in time for the next CIOC release in the fall; again there were concerns about the costs such changes would involve and where the necessary funds would come from.

7. Data elements and style – record type

Barb has developed a draft document on definitions for this resulting from work Windsor’s done lately along the lines of discussions this group has had earlier, particularly around coding “branches” vs “programs”.

This brought up the larger question of how we should recommend organizing listings for agencies that straddle all or much of the province (for example Canadian Mental Health Association). It became clear that it’s not unusual for some centres to do the following for their local service:

ORG1: Canadian Mental Health Association
ORG2: Niagara Branch

even though there is not a separate record that is just:

ORG1: Canadian Mental Health Association

This is very unlike the practice in Toronto, where the first example would be forbidden unless there is a separate record such as the second example. In the same situation as above, Findhelp would list:

ORG1: Canadian Mental Health Association. Toronto Branch

However the first style would seem to better accommodate meshing all our records together, and make fitting a provincial office record imported from another CIC with a local CIC’s own record for its local office very easy. We will explore that further, especially seeing what happens shortly when province-wide data is loaded into the newest version of CIOC for the first time.

One issue this brings up is that where there are both national and provincial levels of interest, does that mean the “city” level would need to be pushed down to the 3rd level? E.g.:

ORG1: Can Red Cross Society
ORG2: Ontario Division
ORG3: Halton Branch

We will hold on to Barb’s document while Ian proceeds with investigations along these lines.

8. Inclusion/Exclusion Policy

Christine stressed that this will be needed sooner rather than later. Decision to make this the main focus of our next meeting.

9. Next meeting

Wednesday, August 3rd, 10:30 am