

211: Advancing the Provincial Consolidated System Information Resources Working Group Minutes, September 27, 2005

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

Guest: Lesley Russell (Community Information Service Hamilton-Wentworth)

1. Minutes of September 14th meeting

Minutes accepted as distributed. The group's first three recommendations have been approved by the Steering Committee, though with a request that appropriate timelines be incorporated. Ross will get a decision on the recommendations from the InformOntario board at their next meeting.

2. Taxonomy update

The CIOC/Taxonomy group has had an initial meeting, and Kate Lambacher is going ahead with designing how the Taxonomy could be incorporated into the CIOC software (although there is as yet no funding for work beyond that).

The going thinking is that a move to the Taxonomy by Ontario I&R centres should not occur until there is at least a starter version of a French version of the Taxonomy available, due to the increased importance of French data in various projects. One idea being considered, to maintain momentum and provide a showcase for the work so far, is to have Toronto move early to Taxonomy indexing for its local website (while continuing to maintain basic Thesaurus indexing for the sake of province-wide data projects).

Deb Woods will be a guest at our next meeting to share how the project as a whole is progressing.

3. Terms of Use/Inclusion Policy

The shared Terms of Use for 211 Ontario web sites are with a lawyer who is suggesting many changes especially regarding ownership protection, but the parts relating to database inclusion and priorities have remained intact. John will distribute the most recent draft version to the group.

4. Area Served

Note: "Boundaries" is the name used for the prose text describing exactly a service's catchment area; that is the information typically displayed to the public. "Area Served" (or "Areas Served" which is possibly clearer), is the rough, coded version of that information that is used for database searching. CIOC provides a table of community names and regions for its users to select from, which may be recommended by this group as the 211 standard.

Questions around Area Served data have become a priority recently, both with CIOC trying to resolve how vague or undefined boundaries should be represented, and with area searching to

be a key part of the new Inventory of Programs and Services application being developed for the Local Training Boards of Ontario.

Besides the thousands of values available from the communities table, CIOC currently allows three non-standard options for Area Served – “Not known”, “Not limited” and “(blank)”. A service in a record with a blank Area Served is considered to “serve nowhere” and is ignored in Area searches (so this practice should of course be avoided). “Not known” or “Not limited” records, on the other hand, are considered to “serve everywhere”, and will show up in *all* Area searches.

The IPS portal, to be publicly launched November 2nd, is the first 211 Ontario project that will be relying extensively on Area Served data as the key part of its functionality. Ian feels that generally people are choosing values (eg “Ontario” and “Canada”) that are too broad to be useful in the portal. He would like to encourage data sharing partners to make coding decisions on a more realistic and practical basis, based on what is optimal for data sharing projects.

This would admittedly mean sometimes a great discrepancy between the information listed in Boundaries – which the consensus is should be as generous as is needed to accommodate the listed organization’s preference – and the coding chosen to represent that. This should not be an issue for the listed organization unless it is allowed to see both types of information, which is typically not the practice.

For example an abortion clinic in Burlington might insist that the public Boundaries listed for it be “Ontario” (and perhaps every other abortion clinic in Ontario might request the same). But rather than represent that in Area Served with the value “Ontario”, it would be much more useful for data sharing to choose a more realistic and practical value such as “Halton Region”.

John brought up what seems to be a parallel with eligibility information, whereby many services have two levels of possible clientele -- the broadest possible definition of who is allowed to access the service, while the other is a specific group of people the service is “targetting” (e.g. “Open to all, with focus on Spanish-speaking communities”). Often it is only the latter, more specific group that is represented in indexing/coding.

Lesley pointed out that even professional database users seem to prefer by far to use Location data to pinpoint the services they’re interested in, and use of Area Served is relatively rare. Clients are typically searching for services that are nearby, for example because getting to a service is often an issue. She therefore thinks that most I&R centres would be willing to make Area Served decisions based on whatever guidelines are considered optimal for shared collections.

Ian will draft a proposal to run by this group first, and then distribute it for feedback among data partners next week.

Communities table

CIOC will eventually be deciding on an overall strategy weighing whether it is preferable to have all values added by all members added to the master table (no matter how granular), or whether the master table should only drill down to a certain level and that any values added at a deeper level remain only as local values. Ian offered to help out with developing the

communities table as needed, and Ross, Julie and Ian will be part of the CIOC Enhancements group.

5. Organization Names

Legal vs common name

The question of whether organizations should be listed according to their registered legal name (the classic InformOntario standard) or by the name they commonly use (for example on their stationery and websites) will need to be resolved to assure consistency in data sharing. The increased public visibility of I&R databases has resulted in some centres moving to listing the name most familiar to the public.

A poll of those on the call revealed about a 50/50 split in practice, although all allow some flexibility on this point -- including, for example, adding a well-known acronym at the end of a formal name, as in “Affiliated Services for Children and Youth (ASCY)” in Hamilton.

Businesses are sometimes legally numbered corporations, and CIOC recently added a “Legal Name” field to the software specifically for this. It is part of default searching (as are Alternate Names and Former Names), so a search for either legal name or common name will locate the same records. Julie suggested that perhaps CIOC members could even have an option to display “Legal Name” as the organization name if that is their preference.

John will bring forward a recommendation for further discussion.

Name authority

It seems that the new version of this document should include:

- General guidelines for selecting how an organization should be listed (with examples)
- Specific listings (probably several dozen) of the verified and approved names of organizations that have sites throughout all or much of Ontario (the Red Cross, for example).
- General guidelines for how government bodies and programs should be listed (with examples for all levels of government)
- Tentatively, no specific listings for government ministry names, etc, if links to federal and provincial web sites conveniently listing these can be offered instead.

Barb has pointed out that (although very few people have ever seen it!), the Name Authority is an existing InformOntario standard and would have to be officially rescinded if we wanted to merge it in with a general data manual. The consensus at this point, though, is that it would be useful to maintain as a separate document.

Government listings

Consensus that everyone prefers and is generally fine with the common practice of usually omitting “City of”, “Regional Municipality of”, “Province of” etc when listing levels of government, e.g.

ORG1: Brampton. Works and Transportation Department

Note that this does acceptance of listing two government levels in one field. One major anomaly, though, are records for the main administration offices for a level of government, typically listed with a comma as in:

ORG1: Toronto, City of

Agreement that for simplicity and consistency, this exception should be avoided and a version with a period and in the same format be used (e.g. “Toronto. City Hall” or “Collingwood. Municipal Office”).

Process for name changes

For the sake of consistency, some process seems required to confirm and communicate name changes for those organizations that cover more than one I&R centre area (for example the Canadian Red Cross Society, which has apparently changed its name to “Canadian Red Cross”).

The going suggestion is that the person coordinating provincial data sharing initiatives (i.e. Ian Kellogg at Findhelp) is best placed to be responsible for processing such changes. Once a system has been approved by and communicated to all involved, it might run something like this:

- Ian would be alerted about any news about such a name change, and forwarded any helpful documentation.
- Ian would have further verification done as necessary by Findhelp editors.
- Ian would pass the recommendation and research by a small group representing InformOntario, say at least two other members of the Accreditation & Standards Committee.
- Ian would communicate approved decisions to all data partners/InformOntario members, with a deadline for implementation as appropriate for data sharing requirements.

Perhaps a separate database or bulletin board would be useful for this, or existing tools – along with an online Name Authority – may do the trick.

6. Data/field elements

Christine, Barb and John will connect early next week to start developing a sample template for what a new guide might look like, based on the discussions so far.

7. Next meeting

Wednesday, October 12th, 10:30 a.m.