

CUSTOMIZATION GUIDELINES

Because of its hierarchical structure, the Taxonomy can be customized to meet the needs of different communities. You can tailor the Taxonomy for your own use. Whole sections or levels of detail can be deactivated to make the Taxonomy work locally for you. You can vary what you choose to do section by section, and can change your mind if your needs change down the road or your customization needs tweaking here and there: It is not imperative to get it “exactly right” the first time around. The Taxonomy is used by many different types of organizations, all of which have different needs. Some hospitals use it to classify medical procedures patients need—hence what may appear to be the excruciating detail in the *Health Care* section. A lot of arts and entertainment terms have been added to the *Leisure Services* and *Arts and Culture* sections to meet the needs of tourist bureaus. The Taxonomy has to be comprehensive to meet varied the needs of all users, but no one organization is expected to use it all.

Customization Considerations: There are a number of things that you can consider to help you structure the Taxonomy to meet your community's needs. Your objective is to strike a balance between the level of indexing people want and need and what it is feasible for you to maintain. When you begin your conversion, go section by section through your file and convert one category at a time, e.g., food then shelter and so forth. Make your indexing decisions regarding each section, document your decisions for reference purposes, train your resource staff, complete work on the section and then train your I&R staff in how to search. Make sure to involve your I&R staff in the decision-making throughout. When you begin the conversion process with a specific segment of your file e.g., food:

1. Locate the section or sections of the Taxonomy that deals with the types of resources you wish to convert.
2. Determine if there are terms in the Taxonomy you can eliminate altogether. You may have no need for “Community Wide Storage Facilities” or terms in the “Food Production” section, for example. NOTE: For “eliminate”, read “deactivate”, if your system allows you to do it, not “delete”. Your ability to deactivate terms will depend on the capabilities of your software. Consider the following:
 - ✓ What types of resources are available in your community? If there are no resources in a particular category, you can probably eliminate Taxonomy terms in that area with a fairly high degree of confidence.
 - ✓ What are your inclusion criteria? There may be some types on services that you choose not to list even though they are available. Most I&R programs do not list private practitioners, for example. You can eliminate categories that are not covered by your criteria.
 - ✓ What types of resources are currently in your file? These should be your highest priority for further evaluation.
3. Determine the level of detail you wish to use in the remaining Taxonomy terms. Consider the following:
 - ✓ Begin with your current indexing system. Ask yourself what is working and what is creating problems for you. Where you are satisfied with the level of specificity in your current system, look for the comparable terms in the Taxonomy and use those. Where you are dissatisfied, look at the alternatives the Taxonomy offers.
 - ✓ How specific are your requests for service? To meet the needs of your I&R staff, you will want to index your resources using terms at the level your inquirers are using. Clients without food may not care whether they get a bag of groceries or a voucher for a market, but if your caller is an agency wanting to start a food pantry, the voucher program will not help. You need to look at what people are asking for and select your level of detail accordingly. If other people are using your information or you have database partners, you will need to evaluate their needs as well.
 - ✓ How specifically can you afford to index? Specific indexing is time consuming and requires that you know more about a resource than general indexing. It is very handy to know which food pantries have baby food, but it will take a lot of effort on your part to determine initially and you will have to continue to ask as you 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 you index, the more dependent you are on text to explain what an agency does and maintaining a lot of text is also very time consuming. If you index

very specifically, you can generally get away with briefer descriptions. Finding the right balance between what you need and what you can maintain is the trick. All else being equal, err on the side of indexing more specifically than you need. You can always search for services generally if you have indexed more specifically, but if you have indexed at a broad level, there is no way you can search more specifically.

- ✓ Establish your priorities. Is detailed indexing more important in some areas than others? Index those sections in detail from the beginning. You can index less important records at a higher level initially and then go back through at your leisure and re-index more specifically.
- 4. Look for legitimate shortcuts. You may want to “crosswalk” your classification structure to the Taxonomy and look for opportunities to do a machine conversion. A crosswalk takes a term from your 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 your scheme, a program can be written to re-index that aspect of your file (if it is computerized). If the relationship is more complex, you will need to make indexing decisions on an entry-by-entry basis.
- 5. Software: Your software is important in making the Taxonomy workable. If you are designing or purchasing software, evaluate how it allows you to search the Taxonomy to find the terms you need. You want to be able to use the features that used to be available in the book including the definitions, see also references, synonym searching and the word/phase searching. You also want the ability to deactivate terms in the Taxonomy you choose not to use in order to create more simplified displays of the Taxonomy for indexing and searching purposes. If you change your mind later, you can always reactivate the terms you need.
- 6. Changing the Taxonomy: As a licensed subscriber, can you change the Taxonomy, modify wording, add terms and use references, delete sections you do not want to use? The answer is “yes”, you are permitted to change the Taxonomy. Should you do it? Probably not, and certainly not without a lot of care. If you add a new term, for example, you must assign that term a code which will not be tracked by 211 LA County (previously INFO LINE of Los Angeles). There is always the possibility that the code will be used for another concept creating a conflict. It is also possible that 211 LA County will add the concept but place it in a different section of the Taxonomy. This creates another type of problem (duplicate terms). Again, if you want to add use references and see also references or modify definitions, you run another type of risk. If you are unable to flag those changes and download them before processing an update released by 211 LA County, your modifications will be lost. It is better for you to contact 211 LA County and ask for the new term to be added, the definition to be modified or the new use references or see also references created formally, in the master database. If you need a concept, it is likely that others do as well. All subscribers benefit from one person’s insight.

An additional caution about customization choices: the decisions you make for your agency may be very different than those made by others in the state or region if made in isolation. If you and your neighbors make radically different choices, you will have a difficult time if you ever choose to combine your databases for broader geographic coverage. The common language that the Taxonomy provides will be undermined, and you will be unable to make valid regional or statewide 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 valid.