

[Client] Taxonomy Project

Card Sorting: Summary Report

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Introduction

This document provides an overview and high level data analysis card sorting exercises conducted as part of the [Client] Taxonomy Project. These exercises were used to discover patterns in how employees classify information. Participants were asked to take a series of terms, group them into logical categories and then label each category. This revealed not only how people mentally categorize terms, but also what labels they used for those categories.

The overall purpose of these exercises was to collect data that will inform the creation of terms, term groupings and associated facets for the [Client] taxonomy. A secondary objective was to engage [Client] stakeholders in direct support of the taxonomy project as an early step in socializing the future use of taxonomy and metadata within the organization.

Azzard Consulting used an online tool to facilitate this test for international participants and to collect data for all exercises. The resulting data will inform the refinement of terms labels and categories that comprise the [Client] enterprise taxonomy.

Initial Taxonomy Development

Before the card sorting exercises were conducted, an initial taxonomy was developed. The taxonomy focused on [Client]'s focus areas in human development. In addition, there needed to be sufficient content (or body of work) to support creation of a particular term. Any terms related to general corporate operations were considered out of scope.

Taxonomy terms and their placement were created based on analysis of:

- [Client] public website
- Selected areas of [Client] Now
- Search Term Logs
- Controlled Vocabulary Lists
 - Taleo Fields/Values
 - Global Skills Matrix
 - Global Finance and Administration System (GFAS) – Concentration
 - Award Search (Enterprise Taxonomy)
 - KS User Online Submission Device
 - Integrated Watch List Categories for Proposal Database

During the initial taxonomy construction, terms were placed in the following facets (or aspects) that represent [Client]'s work:

- *Target Population:* The intended recipient or audience of a particular project or program.
- *Approach:* The particular conduit for [Client] project activities or “line of work.” This is also often referred to as the “mechanism” or “strategy.” [It should be noted that this facet was originally

labeled *Mechanism*. However, the label *Approach* resonated with users more effectively than *Mechanism*. The label *Approach* will be used throughout this document.]

- *Subject*: The technical topic area or sector.
- *Content Type*: Identifies the nature of content, based on its purpose or presence of specific information, e.g. checklist. It should be distinguished from content format, e.g., PowerPoint presentation (ppt) or delivery method e.g., website.
- *Region-Country*: Indicates geographic area which is the focus of a specific [Client] project or program.

It was determined that terms in Target Population, Approach and Subject facets should be part of the card sort exercises, as these terms will have the most impact within the overall taxonomy.

Card Sorting

Participants

Card sort exercise participants were recruited by Margie Shiels and David Wolfe of Knowledge Services. There were a total of 58 participants representing a variety of [Client] business units including:

- Health Services Research
- Communications
- Cost and Pricing
- Research to Practice
- Human Resources
- Operations (COO)
- Knowledge Services
- Regulatory Affairs and Quality Assurance (RAQA)
- Business Solutions
- Education
- Global Portfolio Management (GPM)
- Civil Society and Peacebuilding Department (CSPD)
- Gender
- Social, Environmental and Economic Development Group
- Strategic Planning and Analysis
- Global Health, Population and Nutrition (GHPN)
- Information Technology Applications Department
- Asia Pacific Regional Office (APRO)
- Africa Regional Office (AFRO)
- Global Connections

Card Sort Exercise Process

Moderated exercises were held in person at the [Client] Washington, DC and Durham, NC offices in July and August, 2012. Participants took part in the moderated exercises as teams or individuals. Staff members who could not take part in the in-person exercises, including those from international offices, completed an unmoderated exercise via an online application (OptimalSort).

Each participant was asked to group terms from one of the following areas (facets) that describe the work of [Client]:

- Target Population: The intended recipient or audience.
- Approach: How [Client] conducts the work or delivers the service(s).
- Subject: The topic area or sector.

Within each exercise, terms were displayed in random order. After an initial introduction to the project, participants were given the following instructions for the exercise:

- Sort the cards into groups of cards that, to you [and your teammates], belong together.
- Once your team has created these groups to its satisfaction, label each group.
- Sort the cards as yourself – not as a stand-in for an [Client] customer or funder.
- There is no right or wrong way to group the cards.
- It is OK to have a group comprised of one card.
- There is no limit to the number of card groups.
- If you or your team has cards that don't fit into a group, then leave them out.

After the card sort, participants were asked (either verbally or online) questions about the card sort, including:

- Where there any major concepts missing?
- Did you find any of the term labels problematic or confusing?
- Any other comments?

If sufficient time during the in-person sort, the moderator would probe further on responses to the above questions, as well as ask additional questions such as:

- What was your rationale for grouping your cards?
- Were you happy with the overall result?

Comments for in-person card sorts were captured in an Excel spreadsheet (provided separately). Those comments entered by online participants are also available in Excel. All data captured will be provided to project contacts at the conclusion of the project.

After the in-person exercises were completed and the online surveys were closed to participants, the data was reviewed for validity. For a valid response a participant (as individual or team) must have:

- sorted at least 80% of the items
- named 80% of the categories
- not put every item into one category
- not put every item into its own category

The final number of valid responses is listed in the table below:

Sort	Valid Responses
Target Population	14
Mechanism	18
Subject	20

Card Sort Terms

A total of 124 terms or phrases were used for the sort exercise. Terms were chosen based on analysis of current [Client] term lists, external website content, select internal website content and input from stakeholder interviews. A full list of terms used the card sort exercises is available in Appendix A.

It should be noted that not all terms match precisely what is in the taxonomy. This is because the taxonomy terminology is contextual, and the items in this exercise are not. For example, a term like *community health* has no particular meaning without context, but *community health systems* is a sort-able term.

There are a number of reasons why these terms were selected in favor of others:

- Some terms belong in such obvious categories that testing would prove unhelpful; we focused on terms that require exercise participants apply their knowledge and perform an interpretation of the term's meaning and context.
- Some terms are so ambiguous out of context that they cannot be categorized at all -- or, if rewritten, become too easy. We focused on terms that were specific enough to categorize without the context of the hierarchy, but were general enough that there was some question as to where they belonged.
- Some terms cannot be neatly categorized in the context of the other terms provided, possibly creating confusion for the exercise participant and confounding the results. We chose only those terms that, when sorted, comprise a smaller number of groupings containing three or more items each.

Definitions & Document Conventions

Definitions

Specific analytical tools were used to review the data. These tools are defined below.

Similarity Matrix: This shows how many participants agree with each pair combination of items. For each possible pairing of two items in the survey, a count is provided at the corresponding point in the matrix. The count describes how many times the two items were placed in the same category by participants. A sample portion of a similarity matrix:

							men who have sex with men (MSM)
14							injecting drug users (IDUs)
13	13						substance users
12	12	11					sex workers
8	8	9	10				truckers
4	4	5	6	9			armed forces
10	10	11	8	7	5		prisoners

Participant-Centric Analysis: This shows the three top most acceptable grouping submissions in a specific grouping exercise, as tested against all other participant groupings.

Document Conventions

Test terms and category labels are listed in italics to aid in readability. If the concept, not term or category, is being discussed – then a normal font is used.

When practical, partial or entire screenshots of similarity matrices were provided. The full raw data and associated matrices will be provided so they may be further examined.