

Taxonomy

A taxonomy is a system for organizing content according to shared characteristics. A faceted taxonomy is a particular kind of taxonomy that consists of a series of separate but related vocabularies that are used for describing different entities in the domain. Each facet represents a discrete aspect of the content which is of importance to the business. The facets for this taxonomy are: content type, region-country, mechanism, subject, and target population. There is one tab per facet in this workbook. A facet can be comprised of one or many taxonomy nodes, or branches, which are groupings of one or many terms that appear in the hierarchy. For example, in this taxonomy, health and environment are two Level 1 preferred terms of the subject facet that represent nodes because Level 2 preferred terms are grouped beneath them in the hierarchy.

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

[Client] public website

[Client] Portal (selected areas)

Controlled Vocabulary Lists

Search Term Logs

Analysis of card sort exercise data. Card sort exercises were conducted online as well as in-person at the [Client] offices in Durham, NC and Washington DC, July-August, 2012. There were a total of 58 participants from a variety of business units within [Client Company] 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 Connections
- Global Health, Population and Nutrition (GHPN)
- Information Technology Applications Department
- Asia Pacific Regional Office (APRO)
- Africa Regional Office (AFRO)

Column Definitions:

Preferred Terms. A subset of all terms that are accepted as the official, enterprise-wide terms to describe items and ideas. Terms can potentially be placed in one of four levels. Lower terms inherit the properties of higher terms.

Equivalent Terms. All other terms used in the enterprise, including synonyms (also known as "nonpreferred terms").

Related Terms. Terms that are associated with the preferred term, but do not have a direct one-to-one correlation with the preferred term.

Scope Notes. A definition for a term in a taxonomy. In addition to defining the term and distinguishing between terms with overlapping meanings in natural language, a scope note may also provide guidance on term usage, such as under what circumstances the term should be used for tagging, and when a different term should be used.

Comments. These include general notes, or any remarks relating to the taxonomy term.

Open Issues. Notations of any potential problems in term usage that require resolution or input.

Facet: Approach

Definition: A specific mechanism ("line of work") that is the conduit for [Client] activities as it relates to a particular project or program.

Preferred Terms	Level 2	Level 3	Equivalent Terms	Related Terms	Scope Note	Comments	Open Issues
capacity building				economic strengthening	Process whereby the capabilities of governments, organizations, or networks are strengthened to respond to health and development challenges. [Definition from Award Search term list.]		
	community development institutional strengthening technical assistance			NGO strengthening	Capacity building, but for community not institutions or individuals		
					Capacity building for individuals.		
behavioral communication				behavior change communications, BCC	Communication techniques to explicitly alter health behavior or development outcomes. [Definition inspired by Award Search list definitions.]		
	communication campaigns social change design						
cultural exchanges	social marketing				Use of commercial marketing techniques to develop, implement, and evaluate programs designed to influence social norms. [Definition from Award Search term list.]		
	fellowships international exchanges						
disease prevention & treatment							
	diagnosis & testing				Detection of a disease, medical, or psychological disorder.	May overlap with health-related subjects.	
drugs & devices		voluntary counseling & testing	VCT				
	clinical trial monitoring drug development drug safety laboratory sciences medical device development site identification						
health service delivery	community based distribution						
	counseling				Professional assistance and guidance of the individual in resolving personal, social or psychological problems and difficulties. [Definition from Award Search term list.]		
	service integration				An explicitly strategy to integrate multiple topics/strategies (e.g. primary care & HIV).		
information systems							
	data management data modeling education management information systems geographic information systems health management information systems		GIS HMIS	data management & monitoring	Development, execution, and supervision of policies and practices that control, protect, deliver, and enhance the value of data and information assets. [Definition from Award Search term list.]		
	statistics				A mathematical science to pertaining to the collection, analysis, interpretation or explanation, and presentation of data. [Definition from Award Search term list.]		
instruction							
	curriculum development e-learning educational programming			youth programming	Includes creation of materials for curriculum.	Use 'curriculum materials development' instead? "Curriculum" is considered more policy focused - and can be a sensitive term.	
	training				Interpersonal activities specifically designed to raise awareness or knowledge. [Definition from Award Search term list.]		
knowledge management							
media	documentary film public relations social media web design			information dissemination			
monitoring & evaluation							
	assessment evaluation	impact evaluation process evaluation	outcome evaluation	program monitoring, M&E, monitoring & evaluation formative assessment			
	monitoring						
program & financial management							
	grants management program design				Use when [Client] acts as an intermediary (contract prime) between funder and grantee.	May need to make this definition more specific if placement of term is kept.	
	program financing program management			program delivery		Would health care financing be adequately covered by health (subject) + financing?	
policy analysis & development		performance improvement					
regulatory							
	good clinical laboratory practices		GCLP				
	good clinical practices good manufacturing practices		GMP				
	product development quality assurance quality improvement		QA QI			Missing term noted by [staff member]. Should consult with her regarding placement.	
research							
	health research	applied research					
		behavioral surveillance biostatistics clinical research clinical trials					
		epidemiology			Public health research on the patterns of health and illness and associated factors at the population level. [Definition from Award Search term list.]		
		health services research	HSR	health economics research		Health services research (HSR) examines how people get access to health care practitioners and health care services, how much care costs, and what happens to patients as a result of this care.	
	research to practice scientific writing social science research		implementation science, operations research	evidence based medicine, research utilization	Encompasses all aspects of research relevant to the scientific study of methods to promote the uptake of research findings into routine settings in clinical, community and policy contexts. [Definition from Award Search term list.]		
technology							
	ICT for development mobile technologies		information & communication technology for development, IT for development, information technology for development				

Candidate Terms

audits
funding opportunities
graphic design
programmatic research

Identified as a missing term by Aida Cancel. If included in taxonomy, term will need specific definition and disambiguation.
Identified as a missing term by agallupblack@fhi360.org. If included in taxonomy, term will need specific definition and disambiguation.

Facet: Content Type

Definition: Provides values with which to identify 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.

Note: This facet should be considered an initial draft. It has not been vetted with stakeholders, or validated through card sorting exercises.

Preferred Terms	Level 2	Level 3	Equivalent Terms	Related Terms	Scope Note	Comments	Open Issues
after action reviews			AAR	lessons learned			
conference materials	conference poster conference presentation meeting proceedings packet			conference reports	Use for materials generated by [Client], not materials collected from other sources.		
corporate annual report evaluations							
	assessment reports end of project formative project mid-term summative surveillance & assessment		end-of-project				This term may be too generic (even if it was placed within 'evaluations'). Comments during card sorting indicated that many people had a wide variety of ideas of what this term meant to them. Qualifier of <i>reports</i> needed here as <i>assessment</i> is also in the Approach facet.
forms							Definition? Definition? Term may not be properly placed.
internal policies & procedures	operation manuals policy manual entries				Use in reference to specific [Client] policies.		Label was based on verbiage on [Client] Now.
journal articles manuals & guides	handbooks posters toolkits teaching materials			training materials			Term may be too broad. Placement may not be appropriate.
monographs	externally published [Client] as publisher			books			Could use label of 'official publications'.
newsletters	internal project newsletters				Use for newsletters produced for a specific project. Use for documents related to a specific project or program.		
project reports	annual project close-out quarterly technical consultant trip workplans			lessons learned			Placement? Is this term more of a report or else? Project start-up - appropriate placement?
research reports	best practices case studies technical briefs white papers		good practices				Category label may need revision. Appropriate placement given category label? Definition?
press releases proposals				media advisories			Unclear as to the difference between a press release and media advisory.
	expression of interest concept paper capability statements						
promotional materials	brochures fact sheets flyers						
templates							
websites					Use when website is a specific product as part of a contract requirement.		

Candidate Terms

- analysis (country, competitor)
- blog entries
- dashboard
- course ([Client] Learns)
- framework
- model
- staff profile

Source: KS User Online Submission Device. Needs further definition/disambiguation.
Source: KS User Online Submission Device. Needs further definition/disambiguation.

Facet:Region-Country

Definition: Indicates geographic area which is the focus of a specific [Client] project or program.

NOTE: Potential confusion with Data Warehouse country list (finance). Decision on "gold source" for country list will need to be made, or mapping created between data warehouse list and this facet list.

Regional groupings based on USAID website (<http://www.usaid.gov/where-we-work>). Last viewed 7/13/12. Pakistan and Afghanistan placed in regions based on USAID Thesaurus placement.

Preferred Terms	Level 2	Level 3	Equivalent Terms	Related Terms	Scope Note	Comments	Open Issues
global							
Africa							
	Angola						
	Benin						
	Burundi						
	Democratic Republic of the Congo						
	Djibouti						
	Ethiopia						
	Ghana						
	Guinea						
	Kenya						
	Liberia						
	Madagascar						
	Malawi						
	Mali						
	Mozambique						
	Namibia						
	Nigeria						
	Rwanda						
	Senegal						
	Sierra Leone						
	Somalia						
	South Africa						
	South Sudan						
	Sudan						
	Tanzania						
	Uganda						
	Zambia						
	Zimbabwe						
Asia							
	Bangladesh						
	Burma						
	Cambodia						
	China						
	India						
	Indonesia						
	Kazakhstan						
	Kyrgyz Republic						
	Laos						
	Mongolia						
	Nepal						
	Pacific Islands						
	Pakistan						
	Philippines						
	Sri Lanka						
	Tajikistan						
	Thailand						
	Timor Leste						
	Turkmenistan						
	Uzbekistan						
	Vietnam						
Europe & Eurasia							
	Albania						
	Armenia						
	Azerbaijan						
	Belarus						
	Bosnia						
	Cyprus						
	Georgia						
	Kosovo						
	Macedonia						
	Moldova						
	Russia						
	Serbia						
	Ukraine						
Latin America and the Caribbean							
	Barbados						
	Bolivia						
	Brazil						
	Colombia						
	Cuba						
	Dominican Republic						
	Ecuador						
	El Salvador						
	Guatemala						
	Guyana						
	Haiti						
	Honduras						
	Jamaica						
	Mexico						
	Nicaragua						
	Panama						
	Paraguay						
	Peru						
Middle East							
	Afghanistan						
	Egypt						
	Iraq						
	Jordan						
	Lebanon						
	Libya						
	Morocco						
	Tunisia						
	West Bank and Gaza						
	Yemen						
United States				domestic		It is not recommended that United States be further split into regions, as different funders use widely different regional distinctions.	

Facet:Subject

Definition: Topical focus of content. Identifies general subject matter of content.

Preferred Terms	Level 2	Level 3	Level 4	Equivalent Terms	Related Terms	Scope Note	Comments	Open Issues
behavior	behavior change			behavioral change				
	sexual substance use			substance abuse	risky behaviors			
health	care & support							
	diseases	palliative care						
		home based care						
		infectious diseases		communicable				
			herpes virus					
			HIV	human immunodeficiency virus	substance use			
			human papillomavirus	HPV				
			influenza					
			malaria					
			sexually transmitted infectio	STI				
			tuberculosis					
		neglected tropical diseases		NTDs				
		non-infectious diseases		non-communicable, NCD	chronic			
			asthma					
			cancer					
			cardiovascular disease	CVD				
			diabetes					
	drug therapies & procedures							
		antiretroviral therapy	ART	ARV				
		drug adherence						
		microbicides						
		male circumcision						
		opportunistic infections management		OI management				
		pre-exposure prophylaxis						
		preventing mother to child transmission		preventing mother to child transmission of HIV, PMTCT				
		vaccines			immunizations			
	health systems							
		commodity supply chain logistics			supply-chain management			
		drug pipeline security						
		community health systems			community based distribution, CBA2I, community based access 2 injectibles			
		health systems strengthening						
						Use in reference to concussions, domestic violence, occupational safety & health, traffic safety, fire preventions, poison control, etc.		
	Injury prevention							
	maternal & child health							
		birth spacing						
		breastfeeding						
		child survival						
		family planning						
			contraceptive methods	contraception	barrier methods, hormonal methods, natural family planning			
			contraceptive method adherence		unmet need, unmet contraceptive need			
		infant health						
		malnutrition						
		post abortion care						
		pregnancy			safe deliveries			
		pre-natal care						
		reproductive health			obstetric care			
	mental health							
	nutrition							
		micronutrients						
	obesity							
	tobacco cessation				smoking cessation			
	research ethics							
	water & sanitation							
		hygiene			personal hygiene			
civil society								Potentially could be labeled "civil society & governance."
	anti-corruption							
	conflict resolution							
		conflict prevention						
		conflict management		conflict mitigation				
		peace building						
	civil society strengthening							
		civic engagement						
		civil society networks						
	democracy							
	governance							
	human rights							
	human trafficking							
	legislative strengthening							
	municipal development							
economic development					economics			
	economic strengthening & livelihoods				asset building, income generation, wealth generation		Income generation was a test term.	
	employment generation			job creation				
	enterprise development			business development				Get further validation on term from subject matter experts.
		small enterprise						
		microenterprise						
	entrepreneurship							
	privatization							
	market development				business environments			
	financial sector development					Includes policy to micro level.		
education								Entire node should be validated by subject matter experts before wide release.
	education management							
	education policy							
	international education			global education				
		basic education						
		education financing						
		education reform			school reform, school improvement			
		formal education						
		girls' education						
		literacy		reading literacy				
		non-formal education		alternative education				
		peer education						
		preschool support						
		vocational education		vocational & technical education				Terms will need further validation for usage, placement.
	teacher professional development							
	US education				domestic education			
		adult education & training			adult continuing education, adult basic education			
		college & career readiness						
		early care & education		early childhood care & education	early child development			
		primary education						
		secondary & higher education			high school, post secondary education			
		special education		education of students with disabilities				
		technical education			career & technical education			Terms will need further validation for usage, placement.
		workforce development			corporate training			
environment & natural resources			worker literacy	literacy for new workers				
	agriculture				land use practices, food security			
	biodiversity							
	climate change							
	energy efficiency							
	environmental sustainability							
	food security				agriculture			
	natural resource management				forestry, conservation		Conservation was added by RS post card sort.	
	water & sanitation systems							
gender								
	gender equality							
	gender-based violence			GBV	sexual based violence, domestic violence			
	women's empowerment				gender equity			
youth development					youth programming, youth engagement	If there as a specific focus of youth development, select additional subject term (e.g. youth development + peace building)		
	youth leadership							

Candidate Terms

- aging
 - child labor
 - child welfare
 - constituency relations
 - dengue
 - early intervention
 - education data
 - energy
 - ecotourism, tourism
 - electoral conflict
 - emergency humanitarian assistance
 - green technology
 - health disparities
 - health workforce development
 - hepatitis
 - juvenile justice
 - oral rehydration
 - prevention of teasing and bullying (US education)
 - productive aging
 - rotavirus
 - school leadership
 - sustainable livelihoods
 - voting rights
- If included in taxonomy, will need further definition and disambiguation.
- If included in taxonomy, will need further definition and disambiguation. May be confused with EMIS in Approach.
- If energy, as a broader term is included in the taxonomy, may need to rethink placement.

Facet: Target Population

Definition: Specific group that receives services (or goods) as part of an [Client] project or program.

Preferred Terms	Level 2	Level 3	Level 4	Equivalent Terms	Related Terms	Scope Note	Comments	Open Issues
business & economic populations					private sector, workforce		Missing groups identified as "business sector", "economic groups".	
	employees							Placement of term may be problematic. Terms needs control, so as to differentiate from content that refers to employment at FHI.
	fishermen							
	farmers			agriculturalists	smallholder farmers			
	financial service providers							
	migrant workers							
	small enterprises				microenterprises			
civil society populations	civil society organizations			CSO				
	community based organizations			CBO				
	community leaders							
	faith-based organizations			FBO	religious groups			
	non-governmental organizations			NGO				
community as geography	peri-urban			periurban				
	rural							
	urban							
disabled				people with disabilities				
displaced populations	internally displaced people							
	refugees							
educators & students	adult learners							
	mentors							
	parents							
	teachers							
	school administrators							
	school counselors							
	students				out of school youth			
		exchange						
		primary						
		secondary			middle school			
		post-secondary						
gender as population	men				male			
	transgender							
	women				female			
government sector	policy makers			state sector	public sector			
	government officials				ministry officials			
health populations	armed forces			military, uniformed services	Use for military, police, or non uniformed personnel.			
	general population							
	health care providers	traditional healers			health care personnel			
	men who have sex with men		MSM					
	patients							
	people living with HIV		PLHIV	PLWHA, people living with AIDS				
	pregnant women							
	prisoners							
	sexually active							
	sex workers							
	substance users				Use for alcohol users, drug users, injecting drug users			
		injecting drug users	IDUs					
	trial participants			test participants				
	truckers							
households	low income							
	food insecure							
US minority populations								
youth & children	boys							
	children							
	children and youth with special health care needs			CYSHCN	disabilities			
	girls							
	infants							
	orphans and vulnerable children			OVC				
	youth							
		out of school youth						

Candidate Terms

aging populations
 cooperatives
 English language learners
 former combatants
 mental/psychologically impaired

most at risk population (MARP)
 non-dominant language speakers
 non-English speakers

Recommend not using this category, as no great agreement as to what constitutes "at risk". If must include, include at Level 1. Usage note to indicate that if MARP is selected, tagger must select at least one other population group.
 Sufficient content to support term? Suggested by staff member.
 Sufficient content to support term? Suggested by staff member.

Change Log

Use this page to record changes made to the [Client] Taxonomy.

Facet	Node	Change Type*	Detail	Date	Administrator

* Change Types Include:

- Addition
- Deletion
- Label Change
- Move
- Structural Change
- Scope Note Change