



Taxonomy Governance Best Practices

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Why create a taxonomy? 6 value propositions

- ❖ Improve search
- ❖ Be responsive to target audiences
- ❖ Provide capability to measure results
- ❖ Mitigate risks
- ❖ Facilitate complete and consistent content tagging
- ❖ Enable taxonomy oversight, monitoring and improvement

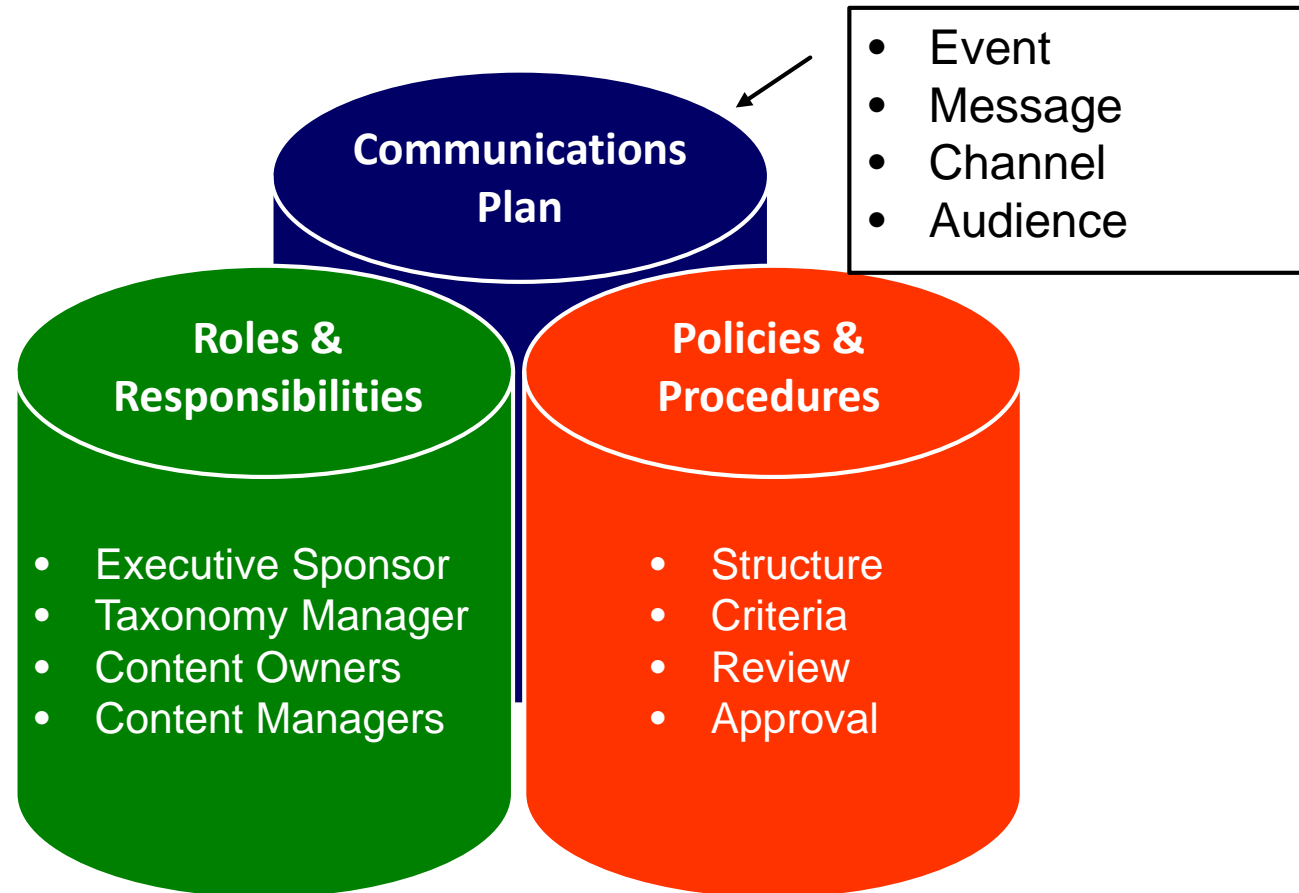
What is taxonomy governance

- ❖ Taxonomy governance is the set of roles, responsibilities, and processes that need to be put in place to guide the development and use of a taxonomy so that it will remain consistent and cohesive as it evolves over time.
- ❖ The governance team sets up and maintains the “rules of the road” for the taxonomy – they are not the “traffic cops” that enforce them.
- ❖ Governance artifacts are items such as process documents and editorial standard guides that are used in the governance processes.

Sustainability

- ❖ Initial efforts can quickly be degraded without effective governance.
 - New kinds of content
 - New, changed or retired people, organizations, locations, products and services, and other “things”
 - New points of view, relationships or activities
 - Lessons learned through experience by observing and analyzing taxonomy and content use metrics
- ❖ Over time, lack of oversight will result in an inappropriate assortment of poorly named categories that are ineffectively organized.
- ❖ Lack of coordination will result in inappropriate, or incorrectly tagged content.

3 pillars of taxonomy governance



Taxonomy governance overview

Pillars	Objectives
Roles & Responsibilities	<ul style="list-style-type: none">○ Decide what metadata fields should be required to tag content.○ Decide whether or not a controlled vocabulary is required for a metadata field, and what vocabulary should be used.○ Decide the source for a controlled vocabulary and how should it be validated.
Policies & Procedures	<ul style="list-style-type: none">○ Define the process to add, edit or delete metadata fields or controlled vocabulary terms.○ Define the editorial guidelines on how to form labels.
Communications	<ul style="list-style-type: none">○ Explain the process to request a change.○ Explain governance roles and responsibilities, including overall goals of the KO strategy, and decision-making process.○ Present the value of KO in a meaningful and concise manner.

Taxonomy team charter

- ❖ The taxonomy scope and overall taxonomy team responsibilities.
- ❖ The team's structure, and its members' roles & responsibilities.
- ❖ The objectives of the taxonomy team.
- ❖ The materials to be created and maintained by the taxonomy team.

Example: Enterprise taxonomy team charter

- ❖ The enterprise taxonomy team is responsible for maintenance of the enterprise taxonomy and other controlled items.
- ❖ To make decisions on changes to the enterprise taxonomy, they will consider the costs and benefits of the suggested change.
- ❖ In addition to maintaining the enterprise taxonomy, the team will:
 - Manage the relationship between the providers or source vocabularies and the consumers of the Taxonomy
 - Identify new opportunities for the use of the taxonomy across the enterprise in order to improve information management practices
 - Promote an awareness of, and use of, the taxonomy.
- ❖ The enterprise taxonomy team will maintain the following controlled items:
 - The enterprise taxonomy, a multi-faceted classification scheme
 - Associated taxonomy materials, such as a taxonomy editorial style guide, taxonomy training materials for content creators, indexers and programmers, the enterprise metadata standard, etc.
 - The rules and procedures of the Team are subject to review by the CIO Council (or commensurate executive body).

Example: Taxonomy team roles



Executive Sponsor

- ❖ Is the sponsor/approver/mediator
- ❖ Has political clout in order to shield team from flurries
- ❖ Approves resources, cost/benefit, and decides appropriate levels of effort
- ❖ Ensures that no changes affect the outside world without signoff
- ❖ Obtains needed resources if those in committee can't accomplish a particular task
- ❖ Is the final decision-maker resolving conflicts between projects that would impact Taxonomy

Example: Taxonomy team roles



Taxonomy Manager

- ❖ Generates proposed taxonomy changes (labels, synonyms, retagging, application changes) based on analysis of query logs, indexer feedback
- ❖ Updates Controlled Vocabularies in compliance with taxonomy governance procedures
- ❖ Provides change management control / compliance
- ❖ Maintains metadata standards definition and enforcement
- ❖ Collects metadata requirements
- ❖ Tags sample content with new taxonomy, assists others in updating training materials
- ❖ Is the main reviewer of taxonomies and the content tagged by them
- ❖ Creates business rules for automatic classification

Example: Taxonomy team roles



Content Owners

- ❖ Represent various business stakeholder areas
- ❖ Are responsible for determining what is appropriate content
- ❖ Determine access control, document provisioning and compliance with regulations
- ❖ Work with Taxonomy Manager to improve accuracy and usability of the vocabularies
- ❖ Are the prime resource on questions of scope, business objectives, target audiences, target web sites, etc. for their domain
- ❖ Are primary points of contact for taxonomy issues

Example: Taxonomy team roles



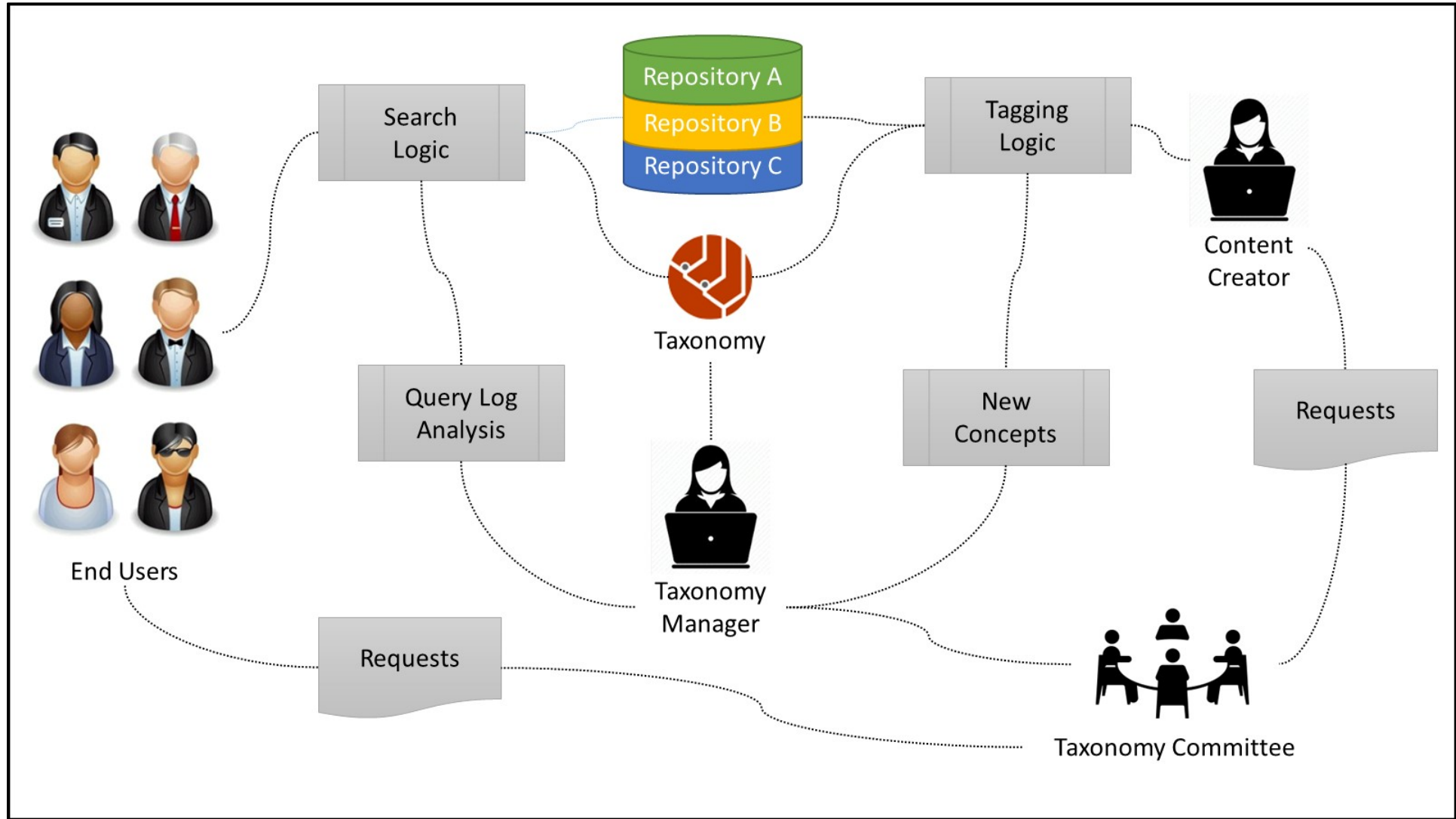
Content Managers

- ❖ Provide reality check on process change suggestions - estimates costs of changes in terms of editorial process changes, additional or reduced workload, etc.
- ❖ Generate proposed taxonomy changes based on needs of their domain/business unit
- ❖ Help to obtain data from their systems
- ❖ Implement or coordinate taxonomy changes in system – process changes, software changes, data tagging, etc.
- ❖ Communicate governance and standards to their systems and domains

Taxonomy management policies and procedures

- ❖ All primary actions related to editing the taxonomy should be driven by policies and procedures.
- ❖ To ensure sufficient review and communication prior to adding or editing a metadata field or controlled vocabulary entry, a change request should be submitted.
- ❖ All change requests should be logged and acknowledged by the Taxonomy Manager.
- ❖ An assessment of the benefits and impact of change requests should be completed and communicated quickly.

Policies and procedures: Taxonomy change request eco-system



Policies and procedures: Taxonomy changes and prioritization

Typical taxonomy change triggers

- ❖ New kinds of content
- ❖ New product lines and marketing efforts
- ❖ Qualitative review
- ❖ Quantitative review

5 ways to prioritize change requests

- ❖ Improving access
- ❖ Metadata effort
- ❖ Business impact
- ❖ Marketing impact
- ❖ User impact

Policies and procedures: Taxonomy basic change request process

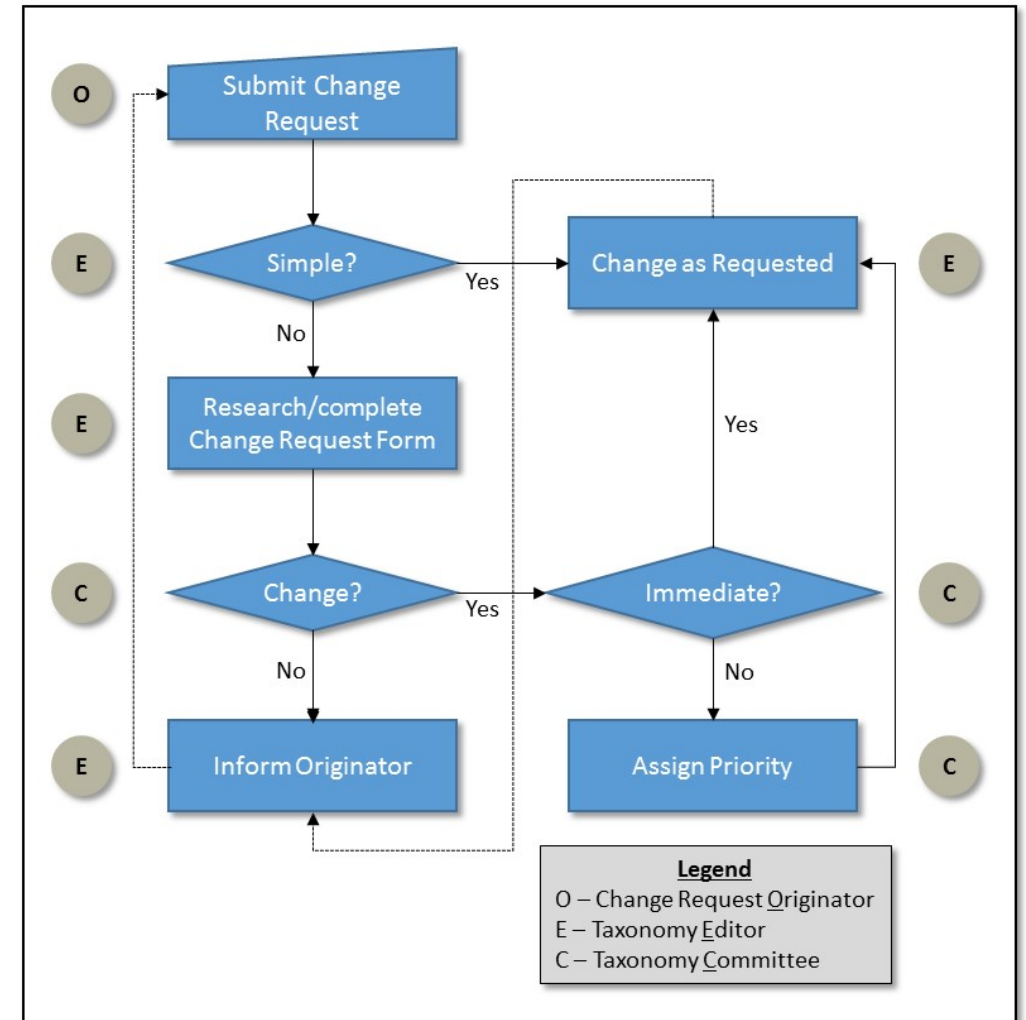
❖ Example: Change request form

New/changed concept/label: _____
Parent of new/changed concept/label: _____
Description of content to be placed in new concept/label, beyond those clearly identified in the name:

Change Assessment
Immediate: __
Priority: High __ Medium __ Low __
Reject: __

Rationale: _____

❖ ... But you also need a fast-track change process.

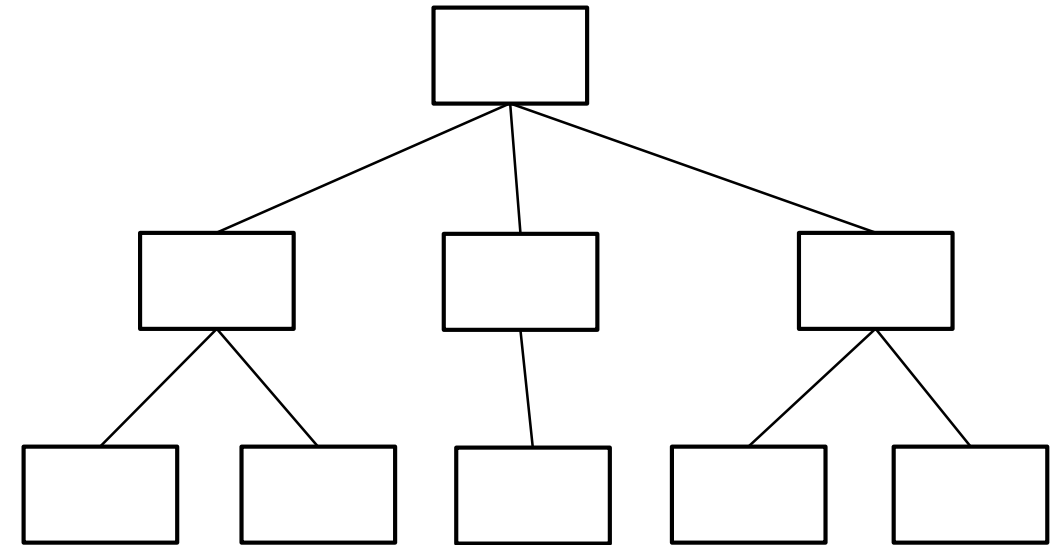


Example: Change request impact analysis

Change Request	Improving Access	Metadata Effort	Business Impact	Marketing Impact	User Impact	Priority Score
Add new Content Category: <i>Calculators</i>	1	1	2	2	2	1.6
Add new facet: <i>Programs</i>	3	1	2	2	1	1.8
Add new Managed Topic: <i>Financing</i>	1	1	2	2	3	1.8
Change Site Navigation: <i>A-Z Index</i>	3	3	2	3	1	2.4

Policies and procedures: 8 fundamental taxonomy changes

- ❖ Changing a term label
- ❖ Adding a new leaf term
- ❖ Inserting a new narrower term within a hierarchy
- ❖ Moving a term
- ❖ Splitting a concept
- ❖ Deleting a narrower term within a hierarchy
- ❖ Deleting a leaf term
- ❖ Merging concepts



Policies and procedures: 16 common taxonomy editorial rules

1. Label length
2. Capitalization
3. Ampersands
4. Abbreviations & Acronyms
5. Languages
6. Special characters
7. Serial commas
8. Spaces
9. Synonyms
10. Term order
11. Term ordering
12. Compound term labels
13. Non-hierarchical relationships
14. Scope notes
15. Content item count
16. Exceptions

Policies and procedures: 4 content tagging guidelines

- ❖ Choose the Topic that best characterizes the content overall.
- ❖ Use multiple Topics only when you can't choose a single one.
- ❖ Consider how content will be used.
- ❖ Add Tags when necessary to identify new or emergent concepts.

Communications plan elements



Taxonomy communications messages

- ❖ Explain the process to request a change.
- ❖ Explain the actions of the taxonomy team and associated roles, including overall goals, taxonomy and metadata strategy, and decision-making process
- ❖ Present the value of the taxonomy in a meaningful and concise manner

Taxonomy stakeholders and their information needs

Taxonomy Stakeholders	Information Needs
IT	Roadmap and action plan for planning, outreach and tracking of opportunities and projects. Public work area for sharing, communicating and visibility.
Content Sponsors	Presentations of the business case and functional requirements that sell the project to management and communicate it to other staff.
IT Implementers	Authoritative versions of the requirements and controlled vocabularies, as well as any taxonomy changes.
Other Staff	Natural understanding without being an expert.

Taxonomy communications channels

Information types	Description
Roadmap	A visual representation to illustrate the timing, criteria and ranking of related projects and activities.
Action Plan	A list of action items, owners and deadlines for immediate tasks related to a project.
Business Case	A discussion of the costs and benefits associated with building or changing an application.
Presentation	A high-level presentation that summarizes the details of fact finding, requirements, studies or other detailed activities associated with a project.
Functional Requirements	A detailed description of the business and use cases, and list and descriptions of functions that an application or project needs to support.
Technical Requirements	A detailed description of the metadata specification, data entry templates, workflows and presentation templates needed to implement an application.
Announcement	A press release or similar communication vehicle that informs staff or the public about an event such as the launch of a new application.
Website	A public work area for sharing and communicating project documents, and providing program visibility.

Taxonomy project lifecycle communication events

Events	Message Description	From	To	Channel
Project Sell	Costs and benefits.	Content Sponsor	Business Manager	Business Case
Kick-Off	Project overview.	Project Manager	Content Sponsors	Presentation
Requirements Definition	What taxonomy is supposed to do.	Business Analyst	Content Sponsors	Functional Requirements
Technical Architecture	How taxonomy will be implemented.	Systems Analyst	Application Developers	Technical Requirements
User Testing	Taxonomy usability.	Usability Analysts	Content Sponsors	Presentation
Launch	Announcement of taxonomy launch.	IT	Staff	Announcement
Training	Training on how to effectively use the taxonomy.	Trainers	Application Users	Presentation

Taxonomy communications benefits

- ❖ An increase in valuable feedback
- ❖ More complete change requests
- ❖ An evergreen and up-to-date taxonomy

Questions

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Taxonomy Governance Best Practices: Summary

- ❖ To remain relevant, taxonomies must be maintained. They must change to account for new kinds of materials being created over time, changes in the world or organization (new products, partners, etc.), and lessons learned through experience with earlier versions of the taxonomy. Learn the rationale and best practices for taxonomy governance processes based on the premise that a team should be established to oversee its maintenance. A sample framework for a taxonomy team is described, including a charter and suggested team roles.