

Public Legal Education & Information Working Group

PLEI Taxonomy Project Document

Version 2.2

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Revision History

Date	Version	Description	Author
February 20, 2006	1.0	First draft	Drew Jackson
March 20, 2006	2.0	Second draft, featuring revisions to taxonomy from user testing	Drew Jackson
March 21, 2006	2.1	Revisions to taxonomy from project team, new recommendations for portal development added, Appendix 2 (Guide to Applying the Taxonomy) added	Drew Jackson
March 31, 2006	2.2	Revision to terms under format facet of taxonomy	Drew Jackson

1. Introduction

The Public Legal Education and Information Working Group has committed to developing a *taxonomy*, a tool that can further the Working Group's aims to maximize access to and use of PLEI resources, and to identify programming gaps among member organizations. The taxonomy will enable a coordinated, structured approach to describing PLEI resources from PLEI Working Group organizations. This document details the development of the PLEI taxonomy, and includes:

- A description of the **users** of PLEI resources offered by PLEI Working Group organizations, highlighting the **needs** of those users.
- The **mission and objectives** of the PLEI taxonomy.
- The **guiding principles** of the taxonomy.
- The **PLEI taxonomy**, broken into several facets or dimensions, each with a set of terms.
- Recommendations relating to the taxonomy for the development of a **PLEI portal**.

2. Context

The Public Legal Education and Information Working Group, made up of eleven organizations¹ in British Columbia that provide public legal education and information, aims to maximize access to and use of PLEI, and to identify any programming gaps among member organizations. One of the strategies the PLEI Working Group is pursuing to achieve these goals is to develop a portal website. A portal website will enable users to access PLEI offerings from all member organizations, and to do so via a consistent user experience.

For the PLEI Working Group, a complementary strategy to developing a portal website is the development of a taxonomy to describe PLEI resources. A taxonomy is a structured way of classifying a set of resources. By developing a structured way of classifying PLEI resources, using a common vocabulary, the PLEI Working Group can appreciably enhance the effectiveness of its portal website, and derive other significant benefits as well:

- A taxonomy will help users access PLEI resources through the portal: many best-of-breed websites and portals supplement free text searching with a browse feature based on a taxonomy of terms, allowing users additional paths to locate what they're looking for.

¹ The eleven organizations that make up the PLEI Working Group are the British Columbia Courthouse Library Society, the BC Branch of the Canadian Bar Association, The Law Centre, Law Courts Education Society, The Law Foundation of BC, Legal Services Society, Ministry of Attorney General, Ministry of Public Safety and Solicitor General, The People's Law School, Simon Fraser University Centre for Education, Law and Society, and the UBC Law Students Legal Advice Program.

- A taxonomy will also help identify gaps in PLEI programming: when a common vocabulary and classification scheme is applied to offerings from the various member organizations of the PLEI Working Group, gaps in PLEI programming to specific groups or on specific topics will start to become apparent.
- PLEI Working Group organizations can also use the taxonomy to describe their PLEI offerings in other contexts, in their own print materials, on their own websites, and so on, which could save effort for member organizations and provide yet more consistency in the user experience for users of PLEI offerings.

3. Project Methodology

The project to develop the PLEI taxonomy featured these steps:

- **Project team formed.** The PLEI taxonomy project team was assembled, drawing members from four PLEI Working Group organizations.
- **User groups defined.** The project team defined the user groups that are being served by the offerings that will be described with the PLEI taxonomy. Working from a clear understanding of the user groups and their needs would better position the project team to develop a structure and terminology that speaks to those user groups.
- **Inventory of terms and taxonomies in use by PLEIWG organizations.** The project team reviewed and created an inventory of classification systems and terms in use at PLEI Working Group organizations. Among the systems that were reviewed were LawLink, Electronic Law Library, the CALICO database at Legal Services Society, and the PLEI Resource Catalogue, as well as organizational schemes and terms used on websites of PLEI Working Group organizations
- **Review of taxonomies in use elsewhere.** The project team reviewed and critiqued CLEONet.ca, an online clearinghouse for community legal education and information in Ontario, and Multilingolegal.ca, a BC website for community workers and newcomers to find legal information in their own languages. Both sites feature well-developed taxonomies.
- **Review of search terms used for PLEI searches.** Search terms users have input on LawLink and Electronic Law Library were reviewed, to learn more about the terminology users are choosing to express their searches.
- **First draft of taxonomy developed.** A first draft of the taxonomy was developed and circulated to team members for critiquing/refining.
- **Assessment of 25 PLEI offerings.** A selection of 25 PLEI offerings from member organizations were analyzed to identify what terminology was being used in the offerings themselves, and to test out the validity of the terms in the first draft.
- **Revision stage.** The project team refined the terminology used in the taxonomy, selecting preferred terms, developing scope notes, and identifying entry terms (terms that lead users and those applying the taxonomy to the preferred terms).

- **User testing stage.** A set of scenarios were developed. User testers were presented with variations in terminology and asked what terms they would look under to find resources for each scenario.
- **Revision stage.** The terminology in the taxonomy was refined based on the results of the user testing.

4. User Needs Analysis

There are three major user groups of the PLEI offerings that the taxonomy will be used to describe: the general public (which comprises many subgroups), intermediaries, and educators.

4.1. Public (Including Several Subgroups)

Who comprises: Members of the public who are interacting with the legal system. There are many subgroups of users in this group: low income people, aboriginal people, people with disabilities, people who speak languages other than English, women, youth, seniors, self-represented litigants, new immigrants & refugees, people in rural communities, and so on. Each of these subgroups has unique needs and characteristics, but one defining characteristic of these subgroups that sets them apart from the other two major groups of users (intermediaries and educators) is that they are interacting directly on their own behalf with the legal system.

Common tasks: Looking for information or education to be informed about legal rights and topics. Seeking to complete a task on a "need to know" basis, such as fill out a form. Looking for information or education to learn about how the legal system works. Looking for legal advice. Looking for organizations/intermediaries that will help them; looking for referrals. Doing legal research. Representing themselves in a legal matter. Students trying to do an assignment.

PLEIWG organizations serving: LSS, Law Courts Education Society, Courthouse Library (as an intermediary), Peoples Law School, CBABC, UBC LSLAP, Law Centre, Law Foundation (as a funder), Ministry of Attorney General, Ministry of Public Safety and Solicitor General.

4.2. Intermediaries

Who comprises: Organizations and agencies that provide information and support to members of the public in their interactions with the legal system. Includes community legal workers, advocates, Aboriginal centres, government agencies, court workers, public librarians, and courthouse librarians.

Common tasks: Producing or distributing PLEI materials or education. Assisting people in finding PLEI materials or education. Advocating on behalf of others in their interactions with the legal system. Providing counseling. Providing mediation or conflict resolution services. Doing research. Providing advice.

PLEIWG organizations serving: LSS, Law Foundation (as a funder).

4.3. Educators

Who comprises: Teachers and educators who provide education on the legal system and legal topics to members of the public.

Common tasks: Developing educational material. Delivering courses, workshops or training. Developing lesson plans. Developing packages that support a course or workshop. Locating lesson plans and educational material to use.

PLEIWG organizations serving: Law Courts Education Society, SFU CELS, Law Foundation (as a funder).

4.4. Other Users

There are other categories of users with distinct needs, including victims of crime, people charged with a crime, prisoners, and witnesses.

5. Mission and Objectives

5.1. Mission Statement

The mission of the PLEI taxonomy is:

To serve as a tool that can be used by PLEI Working Group organizations and others to improve access to legal education and information offerings aimed at the public, intermediaries, and educators in British Columbia.

By providing a common structure and vocabulary to describe PLEI offerings, the PLEI taxonomy can also improve coordination between PLEI Working Group organizations.

5.2. Objectives

There are four main objectives that the PLEI taxonomy is aimed at achieving:

1. **To help users locate and access PLEI offerings:** By providing a consistent and clear classification structure and terminology, the taxonomy will help end users in locating PLEI offerings from member organizations.
 - o The taxonomy will provide a high-level map of offerings available from PLEI Working Group organizations.
 - o The taxonomy will provide categories for seamless browsing across offerings from the different PLEI Working Group organizations.
 - o The categories will support and increase the precision of keyword searching of offerings from PLEI Working Group organizations.
2. **To help identify gaps in PLEI programming:** Using a common vocabulary and classification structure to describe offerings across PLEI Working Group organizations

will help expose gaps in PLEI offerings from member organizations to specific target groups, for specific topics, and so on.

3. **To improve coordination among PLEI Working Group organizations:** Using a common vocabulary and classification structure to describe their PLEI offerings in a range of contexts will help PLEI Working Group organizations coordinate their activities and programming to a greater extent.
4. **To save effort by PLEI Working Group organizations:** By using the taxonomy to describe their PLEI offerings in a range of contexts, PLEI Working Group organizations could save time and effort in not having to develop and maintain their own classification schemes.

6. PLEI Taxonomy Guiding Principles

The following principles guided the development of the PLEI taxonomy.

6.1. Definition of PLEI Offering

The PLEI taxonomy is designed to describe PLEI offerings. Public legal education is any activity that allows individuals or groups of individuals to understand and use the law. Public legal information is legal content provided so that the intended user can understand the legal context of the particular situation.² A PLEI offering, then, can be summarized as:

A **PLEI offering** is any activity or content that allows the user to understand and use the law or understand the legal context of a situation.

6.2. Scope of Offerings Taxonomy Can Be Used to Describe

The PLEI taxonomy is designed to describe PLEI offerings of all types, including print, online, and audiovisual materials, as well as courses, workshops, and services. The taxonomy is designed to describe offerings from PLEI Working Group organizations and organizations funded by PLEI Working Group organizations. However, it has been designed with the idea that it will expand over time, potentially to be used to describe a wider range of PLEI offerings from sources beyond the PLEI Working Group. Certain terms, for example, are flagged as terms that can be added over time once the volume of material covered expands.

6.3. Facets

The PLEI taxonomy is made up of seven facets, which describe different aspects or dimensions of PLEI offerings:

² Pat Pitsula, "Review of the Role of Public Legal Education in the Delivery of Justice Services", Ministry of Attorney General, 2002, p. 8, available at <<http://www.ag.gov.bc.ca/public/PLE-Review.pdf>>.

- **Topic facet:** includes terms that are used to describe what the PLEI offering is **about** (the subject matter of the offering).
- **Audience facet:** includes terms to describe any audience the offering is **aimed at or designed for**.
- **Format facet:** includes terms to describe the **format or packaging** of the offering in a way that lets the user know how they can access it.
- **What Do You Want to Do facet:** includes terms to describe what the user is **trying to accomplish** in accessing PLEI offerings.
- **Region facet:** Includes terms that indicate the area of the province that the offering is **available in** (it does not indicate jurisdiction).
- **Language facet:** Includes the **languages** the offering is available in.
- **Provider facet:** Includes the organizations **producing** or making available the offering.

6.4. Literary and User Warrant

The PLEI taxonomy draws from both literary and user warrant. That is, in developing the taxonomy, equal weight was given to (1) the terminology and structure present in PLEI offerings and existing vocabularies for PLEI offerings (that is, literary warrant), and (2) the terms used in searches by users of PLEI websites and the terms preferred by users in user testing (user warrant). For a summary of the key findings from the user testing of the taxonomy, see Appendix 1: User Testing the Taxonomy.

6.5. Plain Language

The taxonomy attempts to use plain language wherever possible. An overriding goal was to use terms that are intuitive to end users. In situations where a term is used that has shades of legal jargon (for example, because of the predominance of that term in the literature), efforts have been taken to include a plain language **entry term** (a term that leads the user to the preferred term).

6.6. Ease of Use

The taxonomy has been designed to be as easy to use as possible, yet still provide sufficient depth and flexibility to support the diversity of offerings that exists.

6.7. Maintenance Requirements

The taxonomy was designed mindful of the modest resources that PLEI Working Group organizations have available to maintain and apply the taxonomy. Entry terms were developed to guide those applying the taxonomy to the preferred term. Scope notes were developed to clarify the meaning of terms. A guide for PLEI Working Group organizations on applying the taxonomy is attached as Appendix 2: Guide to Applying the Taxonomy.

6.8. Design for Online

The taxonomy was designed with a view to being used online, potentially to describe resources on a PLEI portal site. Examples of decisions that flowed out of designing the taxonomy for online use include:

- Terms used in the taxonomy are ones designed to stand on their own, with a minimum of context. That is, a user on the web can arrive on a page within a site from anywhere (a search over Google, a link sent by email, etc.), and is often lacking the full context that would inform them that they are looking at a set of legal terms aimed at the public. As a result, the word "Law" is included in a term where the term would have a good chance of being misconstrued without the term "Law". For example, the term "Family" would have a good chance of meaning something other than legal material (as compared to the term "Family Law").
- Punctuation that can cause problems with electronic systems was avoided – for example, ampersands (&) were avoided, and instead the word "and" was spelled out when used as part of a term.

6.9. Entry Terms

Some thesaurus-like elements were incorporated into the taxonomy, to help make it as useful as possible. For example, a rich **entry term vocabulary** helps users to find the terms they need. An entry term is a non-preferred term that leads users to the preferred term. In selecting entry terms, consideration was given to terms that users would be likely to try. As there are a number of entry terms in the taxonomy, a version of the taxonomy that includes only preferred terms is attached as Appendix 3, for ease of reference.

6.10. Scope Notes

To aid users and those applying the taxonomy in identifying the preferred terms, scope notes are included for many terms, providing a definition and offering up terms or concepts that are included within that term.

7. PLEI Taxonomy

Note: The PLEI taxonomy includes seven facets, each with a set of **preferred terms**. The taxonomy includes **scope notes** (indicated by SN, and providing a definition of the preferred term or concepts that are included within that term), **entry terms** (indicated by USE, and leading the user to the preferred term), **narrower terms** (indicated by NT, and representing subtopics under a preferred term), and **related terms** (indicated by RT, and leading the user from a preferred term to related concepts). See Appendix 3 for a version of the taxonomy that includes only preferred terms.

Topic Facet

Note: The Topic facet describes what a PLEI offering is *about*, the subject matter of the offering.

Aboriginal Law

SN Includes Status Indian & band membership, restorative justice, Aboriginal claims, reserve lands, housing on and off reserve, wills for residents on reserve lands

Abuse (Family) USE **Family Violence**

Adoption USE **Family Law – Adoption**

ADR USE **Mediation and Dispute Resolution**

Alternate Dispute Resolution USE **Mediation and Dispute Resolution**

Automobiles USE **Motor Vehicles**

Bankruptcy USE **Consumer and Debt**

Benefits USE **Pensions and Benefits**

Business Law

SN Includes incorporating a company, forming a partnership, starting a small business, patents, industrial designs, trademarks, copyright

Car Accidents (Injuries) USE **Personal Injury**

Car Accidents (Liability) USE **Motor Vehicles**

Child Apprehension USE **Family Law – Child Protection**

Child Protection USE **Family Law – Child Protection**

Child Removal USE **Family Law – Child Protection**

Children and the Law

SN Includes age of majority, child's rights, parental discipline, leaving home

RT **Family Law – Child Protection**

Condominiums USE **Housing and Tenancy**

Consumer and Debt

SN Includes consumer protection, collection agencies, bankruptcy, student loans, credit cards, contracts

Courts USE **Legal System and Courts**

Credit and Debt USE **Consumer and Debt**

Criminal Law

SN Includes victims' rights, rights of the accused, prisoners' rights, young people in trouble with the law

Disabilities (Benefits) USE **Pensions and Benefits**

Disabilities (Work) USE **Employment Law**

Discrimination USE **Human Rights**

Divorce USE **Family Law – Divorce and Separation**

Employment Law

SN Includes employment insurance, rights at work, termination, employment standards, workers' compensation, disabilities and the workplace

RT **Human Rights**

Employment Insurance USE **Employment Law**

Employment Standards USE **Employment Law**

Family Law

NT **Adoption**

NT **Child Protection**

NT **Custody and Access**

NT **Divorce and Separation**

NT **Marriage and Common-law Relationships**

NT **Property**

SN Includes pensions, division of property

NT **Support**

SN Includes child support and spousal support

RT **Children and the Law**

RT **Family Violence**

Family Violence

SN Includes peace bonds, restraining orders, abusive relationships, relationship violence, harassment

RT **Family Law**

First Nations USE **Aboriginal Law**

Foreclosures USE **Housing and Tenancy**

Harassment (Family) USE **Family Violence**

Harassment (Work) USE **Human Rights**

Housing and Tenancy

SN Includes sale of land, buying or selling a home, condominiums, mortgages, foreclosures, tenants' rights, landlord's rights, eviction, rent increases

Human Rights

SN Includes discrimination, harassment, Charter of Rights

Immigration, Refugee and Citizenship

SN Includes refugee claims, applications for permanent residence, sponsorship, detention, Canadian citizenship, temporary visas, removal from Canada

Justice System USE **Legal System and Courts**

Landlord and Tenant USE **Housing and Tenancy**

Legal Help

NT **Counselling and Support Groups**

NT **Legal Aid**

NT **Legal Clinics and Advocates**

NT **Legal Advice**

RT **Legal Research**

RT **Mediation and Dispute Resolution**

Legal Research

SN Includes legal research services and research resources such as guides

RT **Legal Help**

Legal System and Courts

SN Includes information on the legal system, the courts, and legal processes

NT **Small Claims Court**

RT **Legal Help**

Maintenance USE **Family Law – Support**

Mediation and Dispute Resolution

SN Includes arbitration, collaborative family law, alternate dispute resolution

Medical and Health Law

SN Includes patients' rights, HIV/AIDS, mental health, long-term care, medical coverage

Mortgages USE **Housing and Tenancy**

Motor Vehicles

SN Includes automobile claims and offences (but not personal injuries resulting from automobiles), includes traffic tickets

RT **Personal Injury**

Pensions and Benefits

SN Includes Canada Pension Plan (CPP), Child Tax Benefit, disability benefits, senior's benefits, Old Age Security, veteran's benefits, student aid

RT **Welfare**

Personal Injury

SN Includes injuries resulting from automobiles, dog bites, medical malpractice, libel & slander, tort (slip & fall)

RT **Motor Vehicles**

Power of Attorney USE **Wills, Trusts and Estates**

Probate an Estate USE **Wills, Trusts and Estates**

Real Estate Law USE **Housing and Tenancy**

Refugees USE **Immigration, Refugee and Citizenship**

Representation Agreement USE **Wills, Trusts and Estates**

Residential Tenancy USE **Housing and Tenancy**

Restraining Orders USE **Family Violence**

Sale of Land USE **Housing and Tenancy**

Separation USE **Family Law – Divorce and Separation**

Social Assistance USE **Welfare**

Small Claims Court USE **Legal System and Courts – Small Claims Court**

Tenants' Rights USE **Housing and Tenancy**

Volunteers and the Law

SN The law applying to volunteer activities

Welfare

SN Includes applying for welfare, welfare appeals

RT **Pensions and Benefits**

Wills, Estates and Trusts

SN Includes drafting a will, living wills, adult guardianship, committeeship, power of attorney, representation agreements, probating a will

Work **USE Employment Law**

Workers' Compensation **USE Employment Law**

Terms that are extra terms, for when the scope of material expands:

Environmental Law

SN Includes safe water, environments that are free of toxic substances, air pollution, food contaminants

Education Law

SN Includes suspensions, expulsions, children with special needs, eligibility for school registration

School Law **USE Education Law**

Audience Facet

Note: The Audience facet is used to describe where an offering is *aimed at or designed for* a particular audience. For example, a booklet may be *about* the court system (and therefore falling within the topic Legal System and Courts), but designed *for* youth, in that it is written at a level and presented in such a way that youth were the intended users of the booklet. An offering may also be aimed at a particular audience because of the nature of the legal issues covered. For example, a workshop may be about legal issues of interest to seniors, such as drafting a will and planning your estate. In such a case, the topic of the offering is Wills, Estates and Trusts, and the audience is Seniors. A default setting for audience is All Members of the Public, which is intended for situations where an offering has wide applicability across all members of the public.

Aboriginal People

Advocates and Intermediaries

SN Includes advocates, librarians, community workers, court workers, multicultural support groups

Children and Youth

RT **Students**

Community Workers USE **Advocates and Intermediaries**

Educators

SN Includes teachers, community educators

RT **Students**

First Nations People USE **Aboriginal People**

Gays, Lesbians, Bisexuals and Transgendered

Immigrants and Newcomers

Intermediaries USE **Advocates and Intermediaries**

Parents or Guardians

People Going to Court

SN Includes self-represented litigants, witnesses, and jurors

People with Disabilities

Self-represented Litigants USE **People Going to Court**

Seniors

Students

SN Includes students from elementary school through to college/university

RT Children and Youth

Teachers USE **Educators**

Victims of Crime

Witnesses USE **People Going to Court**

Women

Youth USE **Children and Youth**

Format Facet

Note: The Format facet is aimed at describing the packaging of the offering in a way that lets the user know how they can access it. This facet is designed so as to allow a short list of top-level terms to be easily scanned by an end user, and then to provide a further level of detail to convey more precisely what format a particular offering is available in. The top-level terms are: Learning, Multimedia, Online, and Print. For offerings that are services, there will be no format indicated; instead, the topic headings will convey that the offering is a service, through the subtopics under Legal Help (see the recommendation in §8.5 for further discussion of this point).

Learning

- NT **Course** [SN: instructor-led learning event]
- NT **Training** [SN: learning that features formalized learning outcomes, typically skills-based or hands-on]
- NT **Workshop** [SN: learning event featuring some form of interaction or collaborative element]

Multimedia

- NT **Audio**
- NT **CD-ROM**
- NT **Video** [SN: includes DVD, VHS]

Online

- NT **Form** [SN: document that you fill out online]
- NT **PDF** [SN: document of any length or type in Adobe Acrobat Portable Document Format]
- NT **Self-help Guide** [SN: material in online format that provides help on a specific task or tasks]
- NT **Web Page** [SN: one or more web pages, but short of a full website]
- NT **Website** [SN: a complete, standalone website]

Pamphlet USE **Print - Brochure**

Print

- NT **Book/Manual** [SN: written work with a spine]
- NT **Booklet** [SN: more than 10 pages long, without a spine, typically saddle-stitched (stapled twice at the centre fold)]
- NT **Brochure** [SN: a single piece of paper, folded, with columns and text on both sides]
- NT **Fact Sheet** [SN: between 1 and 10 pages long, typically part of a series]
- NT **Self-help Guide** [SN: material in print format that provides help on a specific task or tasks]

Self-help Guide USE **Print – Self-help Guide** *or* **Online – Self-help Guide**

What Do You Want to Do Facet

Note: The What Do You Want to Do facet is aimed at describing what the user is trying to accomplish in accessing PLEI materials.

Do a School Assignment

Prepare Educational Materials

SN Includes finding or developing lesson plans, curriculum packages

Find Information About the Law

SN Includes learning about legal rights, how to understand and use the law

Find Information About the Court System

SN Includes learning about legal system and courts

Find Out About Courses, Workshops, or Training

Prepare Forms or Documents

Prepare for Going to Court

SN Includes representing self in a legal matter, being a witness, or dealing with a criminal charge

Talk With Someone About a Legal Problem

SN Includes seeking support or advice

Region Facet

Note: The Region facet indicates the area of the province that the offering is available in; it does not indicate jurisdiction. If an offering is in a format that can be accessed from anywhere in the province (for example, online, or a book), then the appropriate Region term will be "All British Columbia". If the end user has to travel somewhere to access the offering, then the appropriate Region term(s) would be those regions where the user would have to travel to.

All British Columbia

SN An offering that is in a physical format that can be accessed from anywhere (online, a book, etc.) would be said to be available throughout the province

Vancouver and Lower Mainland

Victoria and Vancouver Island

Thompson Okanagan

Kootenay Rockies

Cariboo Chilcotin Coast

Northern British Columbia

Language Facet

Note: The Language facet indicates the language(s) that the offering is available in. This list is the beginning of an authority list of languages.

Arabic

Chinese

English

Farsi USE Persian

French

Hindi

Korean

Persian UF Farsi

Punjabi

Russian

Spanish

Vietnamese

Provider Facet

Note: The Provider facet indicates the organization producing or making available the PLEI offering. This list is the beginning of an authority list of providers.

BC Courthouse Library Society

Canadian Bar Association, BC Branch

The Law Centre

Law Courts Education Society

The Law Foundation of British Columbia

Legal Services Society

Ministry of Attorney General

Ministry of Public Safety and Solicitor General

People's Law School

Simon Fraser University Centre for Education, Law and Society (CELS)

UBC Law Students' Legal Advice Program (LSLAP)

8. Recommendations for Portal Development

In developing the taxonomy, the project team encountered issues that relate to the development of a PLEI portal.

8.1. Use of Thesaurus Elements in Portal

The thesaurus elements in the taxonomy include the use of entry terms to lead to preferred terms and scope notes to provide definitions. In using the taxonomy on a PLEI portal, there are several options as to how to use the thesaurus elements.

- **Option 1: Do not include thesaurus elements in the portal.** That is, do not include entry terms or scope notes in what the end user sees on the portal, or even behind the scenes on the portal. The thesaurus elements can still be helpful for those applying the taxonomy, but would not impact the end user experience.
- **Option 2: Use thesaurus elements behind the scenes to facilitate searching.** The entry terms are not displayed to users browsing the categories and terms, but are used behind the scenes to lead searchers to the preferred terms in the taxonomy, or even directly to the results that include the relevant preferred terms.
- **Option 3: Expose thesaurus elements to end users in browsing and searching.** The entry terms can be displayed to end users browsing the categories and terms, much as on the Electronic Law Library (<http://www.bcpl.gov.bc.ca/ell/>).

Recommendation: At a minimum, use the thesaurus elements behind the scenes to facilitate searching. It would be too overwhelming for end users to be presented with all the entry terms immediately on arriving at the portal. But perhaps there could be an option that would allow a user to opt to see the entry terms (by clicking on a link such as "Don't see what you're looking for here? Expand the terms to see more.") Include the scope notes in some similar way, such as by allowing a user to click an icon to see more information on a term.

8.2. Integrate Search and Browse

The taxonomy will be most effective if it is well integrated with the search on the PLEI portal. If users can type in search terms and as part of their results list get feedback on how those terms relate to browseable categories, that feedback will allow them to drill into categories immediately and also give them a better idea of the vocabulary used on the site so they can refine their search terms.

Recommendation: Consider integrating the taxonomy with the search results so that the results feature a link to any matching categories from the taxonomy, as in the figure below.

Search

restraining order

You may want to look at these categories:

Topic: [Family Violence](#)

Audience: [Victims of Crime](#)

Search results feature a link to any matching categories from the taxonomy.

Searched for **restraining order**. Results 1-10 of about 378.

[What are the differences between a peace bond and a ...](#)

What are the differences between a peace bond and a **restraining order**? Where to get one.

www.ag.gov.bc.ca/family-ustice/options/safety/difference_peace_restrain.htm

[Legal Information for Battered Women fact sheet 4: Peace ...](#)

Talk about this with transition house staff or a victim support worker. What is a **restraining order**? A **restraining order** is a piece of paper prepared by a judge ...

www.familylaw.lss.bc.ca/pdf-lss/lifbw-4pbroan.pdf

etc.

etc.

8.3. Relative Prominence of Various Facets

In the user testing of the taxonomy, the most common way for testers to start searching for material was based on the topic. Secondary but also important were user goal and audience. That distinction was more evident for intermediaries than for members of the public, who were more evenly split between topic, audience, and user goal. Format was not a main entry point at all, but rather a way for testers to refine what they were looking for once they had established the topic, user goal and/or audience.

Recommendation: On the PLEI portal, it would make sense to place priority on supporting users in accessing offerings by topic, with audience and user goal (as well as language) also being supported, though perhaps less prominently. The remaining facets (format, region, and provider) would be important ways to refine searches for many users, but not primary entry points.

8.4. Handling of Services

The Format facet is aimed at describing the packaging of an offering in a way that lets the user know how they can access it. This facet includes top-level terms for Learning, Multimedia, Online, and Print. For offerings that are services, there will be no format indicated, as it is awkward to describe a service as having a format. Instead, the topic headings will convey that the offering is a service, through the use of the subtopics under Legal Help.

Recommendation: The subtopics under Legal Help could be presented in a distinct way from the balance of the browseable categories in the taxonomy, so as to set off services from the rest of the offerings on the portal. A similar approach could in fact be taken with the learning

offerings, which are similarly somewhat distinct in character from the balance of offerings on the portal.

Topic

Aboriginal Law
Business Law
Children and the Law
 etc.

Family Violence
Housing and Tenancy
Human Rights
 etc.

Looking for Legal Help?
Counselling and Support Groups
Legal Aid
Legal Clinics and Advocates
Legal Advice

8.5. Where No Offerings Exist in a Category

Recommendation: If there are no offerings in a category, that category should not display as a label on the PLEI portal.

8.6. Level of Granularity to Which Material Is Described

There are various levels to which a PLEI offering can be described. In the case of a book, for example, the object being described can be the book as a whole or individual chapters. The *LSLAP Manual* is an example of a book that could be described or catalogued on a PLEI portal as a whole book or as individual chapters. Similarly, in the case of a web resource, the object being described can be a single web page or a cluster of related pages. The CBA Dial-a-Law scripts are an example, in that they can be catalogued on a PLEI portal as single scripts or as clusters of scripts by topic.

Recommendation: To cluster objects together where they are being described using the same set of terms. For example, the cluster of Dial-a-Law scripts on Housing would be described by the same Topic terms, Audience terms, Format terms, and so on, so would be clustered together as one object on the PLEI portal.

9. Taxonomy Application and Maintenance

The taxonomy was designed mindful of the modest resources that PLEI Working Group organizations have available to apply and maintain the taxonomy. A guide for PLEI Working Group organizations on applying the taxonomy is attached as Appendix 2: Guide to Applying the Taxonomy.

It is recommended that the taxonomy be entrusted to a person or committee drawn from PLEI Working Group organizations to oversee its maintenance. It is recommended that the taxonomy be reviewed by the PLEI Working Group annually to ensure that it is still meeting the needs of the Working Group organizations.

Appendix 1: User Testing the Taxonomy

The development of the PLEI Taxonomy included a user testing phase. The testing featured a set of scenarios presented to testers. The scenarios involved a legal problem or issue for which the tester was trying to locate information or help. The testers were presented with various options of where to look, and asked which term they would be the most likely to look under and why, as well as whether they would be more likely to look under terms *not* listed.

The user testing was done with five intermediaries and five members of the public. The intermediaries were:

Kim Shelley	Legal Information Outreach Worker	Legal Services Society
Diane Crossley	Librarian	Ministry of Attorney General
Janet Tomkins	Librarian	Vancouver Public Library
Saroj Ludhera	Multicultural Program Coordinator	Peoples Law School
Shashi Assanand (and 10 staff)	Multicultural Support Worker	Vancouver & Lower Mainland Multicultural Family Support Services Society

An example scenario:

You are involved in a divorce proceeding. You are handling your case on your own, and you need to prepare the documents to start the proceeding. Can you point out which term you would be most likely to look under (if you had to make a choice from the terms below)?

Topic	Audience
Children and the Law	Advocates and Intermediaries
Family Law	General Public
Family Violence	People Going to Court
Format	User Goal
Online	Find Information About the Law
Print	Prepare Forms or Documents
Service	Represent Self in Legal Matter
Workshop/Course	

Key results:

The user testing revealed these key points of feedback:

- Intermediaries were most likely to start looking based on the legal topic; secondary entry points for intermediaries were by user goal and audience. Members of the public were more evenly split between topic, audience, and user goal.
- Those testers that connected with the User Goal facet connected very strongly with it. There were two members of the public who preferred looking by user goal for every scenario.


Several testers commented that they didn't understand the term User Goal; recommend that it be changed to "What Do You Want to Do?", or "What is Your Goal?"

- Testers often wanted to see more specific terms than were presented. For example, in a scenario involving challenging a traffic ticket, several testers wanted to see the term Traffic Ticket (rather than the broader terms Automobiles or Motor Vehicles). In a scenario involving whether an exotic pet would be allowed in a condo, testers wanted to see the term Animals or Pets (rather than the broader term Housing and Tenancy).
- Specific points of feedback on terms:
 - The term Welfare was preferred to Social Assistance, and it should be its own term and not included within Pensions and Benefits.
 - The term People Going to Court was preferred to Self-Represented Litigants – no members of the public had heard this term; intermediaries knew it, but thought it was unlikely that very many members of the public knew the term.
 - Keep the term Family Violence, and keep it distinct from Family Law.
 - The term Personal Injury was preferred for car accident injuries.
 - Housing and Tenancy was preferred to Real Estate or Landlord and Tenant.
 - Mediation and Dispute Resolution was preferred to Alternative Dispute Resolution, particularly by members of the public (most of whom had no idea what ADR meant).
 - The term Services confused testers under the Format facet. Personal Assistance was suggested as an alternative.
 - Seniors was a preferred term under Audience over Seniors and the Law under Topic.
 - Child Protection was preferred as a subtopic under Family Law by the majority of testers, rather than as a term on its own.
 - Immigrants and Newcomers should be separate terms: feedback from intermediaries working with multicultural groups.

Appendix 2: Guide to Applying the Taxonomy

This guide is intended to be used by PLEI Working Group organizations in applying the PLEI Taxonomy.

Description of a PLEI Offering

Title	Parents' Rights, Kids' Rights: A Parent's Guide to Child Protection Law in BC	
Description	This booklet, for parents, guardians, family members, and advocates, explains what can happen if the BC Ministry of Children and Family Development has concerns about a child's safety and well-being or is planning to remove a child from the family home. It also provides detailed information about developing agreements with the ministry, what happens in court during child protection hearings, and what family members and advocates can do if they have concerns about a child's foster care or a complaint about a social worker.	
URL	http://www.lss.bc.ca/pubs_bySubject/children.asp	
Topic	Family Law - Child Protection	Topic describes what the PLEI offering is <i>about</i> , the subject matter of the offering
Audience	Parents or Guardians Advocates and Intermediaries	Audience is who the offering is <i>aimed at</i> or <i>designed for</i>
What Do You Want To Do	Find Out About the Law	What Do You Want to Do describes what the user is trying to accomplish in accessing PLEI materials
Format	Print - Booklet	38 pages
Language	English French	Language indicates the language(s) that the offering is available in
Region	All British Columbia	Region indicates the area of the province that the offering is available in
Provider	Legal Services Society	Provider indicates the organization producing or making available the PLEI offering

Introduction

The PLEI taxonomy is a tool that you can use to describe a PLEI offering to make it easier to find and use. The taxonomy includes seven **facets**, which are different dimensions of an

offering, such as its topic, audience, format, and so on. Each facet has a set of **preferred terms**, which you will select from to describe a PLEI offering.

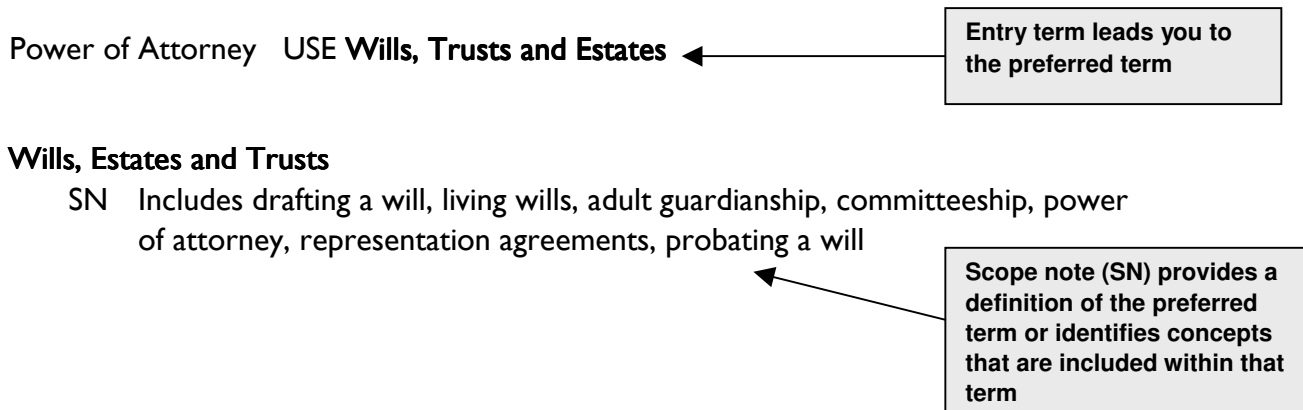
What is a PLEI Offering?

A PLEI offering is any activity or content that allows the user to understand and use the law or understand the legal context of a situation. A PLEI offering can be a resource like a print book or web page or video, a course or workshop, or a service like a community support group or legal clinic.

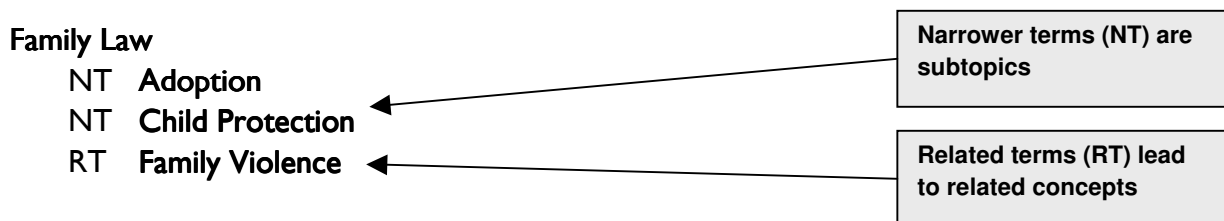
There are various levels to which a PLEI offering can be described. In the case of a book, for example, the object being described can be the book as a whole or individual chapters. Similarly, in the case of a web resource, the object being described can be a single web page or a cluster of related pages or a whole web site. In deciding the object to describe using the taxonomy, the test should be: if the terms you select from the taxonomy for multiple objects would be different, you should be splitting the object into multiple descriptions; if the terms you select for multiple objects would be the same, you should be doing one description.

Topic Facet

You can select one or more topics for an offering, which describe what the PLEI offering is *about* (the subject matter of the offering). To help lead you to the preferred term for the topic, the taxonomy includes **scope notes** (indicated by SN), which provide a definition of the preferred term or identifies concepts that are included within that term, and **entry terms** (indicated by USE), which lead you to the preferred term.



The taxonomy includes selected **narrower terms** (indicated by NT), which represent subtopics under a preferred term, and **related terms** (indicated by RT), which lead you from a preferred term to related concepts.



Audience Facet

The Audience facet is used to describe where an offering is *aimed at* or *designed for* a particular audience. For example, a booklet may be about the court system (and therefore falling within the topic Legal System and Courts), but designed for youth, in that it is written at a level and presented in such a way that youth were the intended users of the booklet. An offering may also be aimed at a particular audience because of the nature of the legal issues covered. For example, a workshop may be about legal issues of interest to seniors, such as drafting a will and planning your estate. In such a case, the topic of the offering is Wills, Estates and Trusts, and the audience is Seniors.

A default setting for audience is All Members of the Public, which is intended for situations where an offering has wide applicability across all members of the public. It is optional to include an audience term.

Format Facet

The Format facet is aimed at describing the packaging of the offering in a way that lets the user know how they can access it. This facet is designed so as to allow a short list of top-level terms to be easily scanned by an end user, and then to provide a further level of detail to convey more precisely what format a particular offering is available in. The top-level terms are: Learning, Multimedia, Online, and Print.

For offerings that are services, there will be no format indicated; instead, the topic headings will convey that the offering is a service, through the subtopics under Legal Help.

What Do You Want to Do Facet

The What Do You Want to Do facet is aimed at describing what the user is trying to accomplish in accessing PLEI materials. It is optional to include a term in this facet. The broadest category, Find Information About the Law, may be an option if no other term applies.

Region Facet

The Region facet includes terms that indicate the area of the province that the offering is *available in* (it does not indicate jurisdiction). If an offering is in a format that can be accessed from anywhere in the province (for example, online, or a book), then the appropriate Region term will be "All British Columbia". If the end user has to travel somewhere to access the offering, then the appropriate Region term(s) would be those regions where the user would have to travel to. More than one region term can be used.

Language Facet

The language facet includes the languages the offering is available in. More than one language term can be used.

Provider Facet

The Provider facet includes the organizations producing or making available the PLEI offering. More than one provider can be used.

Appendix 3: PLEI Taxonomy (Preferred Terms Only)

This version of the PLEI Taxonomy includes only preferred terms. See §7 for a version of the taxonomy that includes scope notes, entry terms, and related terms.

Topic Facet

Aboriginal Law

Business Law

Children and the Law

Consumer and Debt

Criminal Law

Employment Law

Family Law

Adoption

Child Protection

Custody and Access

Divorce and Separation

Marriage and Common-law Relationships

Property

Support

Subtopics under **Family Law**

Family Violence

Housing and Tenancy

Human Rights

Immigration, Refugee and Citizenship

Legal Help

Counselling and Support Groups

Legal Aid

Legal Clinics and Advocates

Legal Advice

Legal Research

Legal System and Courts

Small Claims Court

Mediation and Dispute Resolution

Medical and Health Law

Motor Vehicles

Pensions and Benefits

Personal Injury

Volunteers and the Law

Welfare

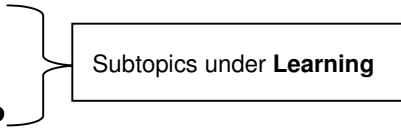
Wills, Estates and Trusts

Audience Facet

- Aboriginal People
- Advocates and Intermediaries
- Children and Youth
- Educators
- Gays, Lesbians, Bisexuals and Transgendered
- Immigrants and Newcomers
- Parents or Guardians
- People Going to Court
- People with Disabilities
- Seniors
- Students
- Victims of Crime
- Women

Format Facet

- Learning
 - Course
 - Training
 - Workshop
- Multimedia
 - Audio
 - CD-ROM
 - Video
- Online
 - Form
 - PDF
 - Self-help Guide
 - Web Page
 - Website
- Print
 - Book/Manual
 - Booklet
 - Brochure
 - Fact Sheet
 - Self-help Guide



A diagram consisting of a right-facing curly bracket on the left side of a rectangular box. The bracket groups the items 'Course', 'Training', and 'Workshop' from the 'Learning' category. The box contains the text 'Subtopics under Learning'.

What Do You Want to Do

- Do a School Assignment**
- Prepare Educational Materials**
- Find Information About the Law**
- Find Information About the Court System**
- Find Out About Courses, Workshops, or Training**
- Prepare Forms or Documents**
- Prepare for Going to Court**
- Talk With Someone About a Legal Problem**

Region Facet

- All British Columbia**
- Vancouver and Lower Mainland**
- Victoria and Vancouver Island**
- Thompson Okanagan**
- Kootenay Rockies**
- Cariboo Chilcotin Coast**
- Northern British Columbia**

Language Facet

- Arabic**
- Chinese**
- English**
- French**
- Hindi**
- Korean**
- Persian**
- Punjabi**
- Russian**
- Spanish**
- Vietnamese**

Provider Facet

BC Courthouse Library Society
Canadian Bar Association, BC Branch
The Law Centre
Law Courts Education Society
The Law Foundation of British Columbia
Legal Services Society
Ministry of Attorney General
Ministry of Public Safety and Solicitor General
People's Law School
Simon Fraser University Centre for Education, Law and Society (CELS)
UBC Law Students' Legal Advice Program (LSLAP)