Opportunities in Freelance Taxonomy Work

By Heather Hedden

Heather Hedden is a renowned taxonomy expert, author of the book *The Accidental Taxonomist*, instructor of a taxonomy course at Simmons College, founder and past-chair of the Taxonomies & Controlled Vocabularies SIG of ASI, past New England chapter president, and frequent conference presenter. After working for several years as a taxonomy consultant and occasional back-of-the-book indexer, Heather returned to her previous position as senior vocabulary editor at Cengage Learning.

Yesterday (November 21) I received a referral call from the "Director of Innovation" at the *Chronicle for Higher Education***, who was looking for a contract taxonomist for a month-long project to develop taxonomies for a new faculty professional networking site called Vitae.** I would have loved to do it, but now I have full-time work. I referred it to a taxonomy consultant I know, but he was busy at this time. This would be a perfect job for a freelance indexer who is also a freelance taxonomist.

What are taxonomies?

The term taxonomy has come to take on a much broader meaning and usage than Linnaean hierarchical classification of organisms (kingdom, phylum, class, order, family, genus, and species). A taxonomy is for naming and classification in any subject area. Yet naming and classification is not an end, but rather a means to make information easier to find. The term taxonomy is now most widely used in the fields of information and knowledge management (including indexing), where it refers to certain kinds of controlled vocabularies which are used to index/tag/categorize content (documents, records, images, multimedia, etc.).

A **controlled vocabulary** is an authoritative, restricted list of terms (words or phrases), each for a single unambiguous concept, which is used to manage information by use in indexing, tagging, and categorizing so as to facilitate accurate and comprehensive retrieval. Typically, there are synonyms or nonpreferred terms pointing to the preferred terms. There are various kinds of controlled vocabularies, depending on the structure. If there are standardized relationships between preferred terms, such as broader/narrower and associative, in addition to the nonpreferred terms, then the controlled vocabulary is considered a **thesaurus**. A **taxonomy**, on the other hand, is a kind of controlled vocabulary consisting of preferred terms, all of which are connected in a hierarchy. Related term relationships and nonpreferred terms may be optional, whereas a dominant hierarchical structure is a defining feature.

The term "taxonomy" has become quite popular in business applications, so that it is sometimes used interchangeably with "controlled vocabulary" and may be used to refer to any kind of controlled vocabulary.

Where are taxonomies or controlled vocabularies used?

Controlled vocabularies, especially thesauri, have been used by periodical publishers, reference book publishers, and reference content database publishers for decades to ensure consistent indexing of articles by multiple indexers over time. As new trends and terminology arise and new content sources are added, the controlled vocabularies need to be continually updated. In addition, newer user interfaces have called for browsable taxonomy structures to display for end-users.

Large companies, government agencies, nonprofit organizations, etc. with growing amounts of digital documents and new systems to manage their internal content (intranets, content management systems, document management systems, etc.) have developed customized internal controlled vocabularies to index their content. As more kinds of content (such as image and media files) and more content in general gets digitized, the greater the need for controlled vocabularies to index them. As smaller companies grow larger, they also find the need for better content management. These controlled vocabularies are often of the taxonomy type, if employees will browse for topics in a system's user interface.

Companies which publish content or sell products on the Web are more recent adopters of taxonomies to help customers, subscribers,

or potential customers find what they are looking for. e-commerce taxonomies have become common, and their faceted structure is increasingly recognizable among the general public. New product categories and website redesigns require updates to such taxonomies.

Companies needing to sort through "big data" are turning to controlled vocabularies. Data can include millions of emails, chat logs, and social media posts This may be for legal or customer research purposes.

Finally, innovative companies with web services or applications are also developing taxonomies. These include buyer-seller auction sites, professional networking sites, portals of freelancers or artists, photo or video managing sites, vendors of online courses, etc.

What are the trends in freelance taxonomy work?

While large companies and organizations may have a taxonomist on staff, most don't have enough on-going taxonomy maintenance work to justify a permanent position. A taxonomy design or re-design is a limited term project, typically lasting a few months, that is best served by a freelancer or contractor. Staff resources can then maintain the taxonomy over time.

The trend these days is for large organizations and publishers who already have a taxonomy to call on freelancers for an occasional taxonomy review and redesign, especially when migrating from one content management system to a new and better system, and there is a lot of system migra-

tion these days. Meanwhile, the development of new taxonomies, mostly from scratch, is happening in smaller organizations with growing content or in start-ups with innovative content-publishing or content-linking ideas.

After some decrease during the height of the recession in 2008, the number of projects and consultants involved in taxonomies seems to be steadily growing. Registrants for Taxonomy Boot Camp, the premier conference in the field, went up from 76 in 2013 to 152 in 2014, according to Thomas Hogan, CEO of Information Today, Inc., the conference owner. Relative numbers of Google searches on "taxonomies" have also increased or remained steady from fall of 2008 to fall of 2014. (http://www.google.com/trends/explore#q=taxonomies)

Practical Taxonomy Creation

"**Practical Taxonomy Creation**" is an all-new three-part ASI Online Learning Short Course, taught by Heather Hedden, starting in January 2015.

This is a terrific offering for indexers wanting to expand their skill set and create a wider vista for work. Where are taxonomies and controlled vocabularies needed? Periodical and database indexing and large, multi-volume back-of-the-book indexing projects use controlled vocabularies. The need for taxonomies is especially growing in publishing, in marketing, in large corporate or government document or content management systems, image and multimedia collections, all kinds of websites, e-commerce, user experience (UX) design, and to support the software development process.

Registrants may attend the live one-hour sessions on Wednesdays, January 14, 21, and 28, at 1 p.m. EST, 12 p.m. CST, 11 a.m. MST, and 10 a.m. PST—which will include the opportunity to ask questions following the presentation—or they may access the recordings later at their convenience. In either case, registrants may access the recordings "on demand" for unlimited repeat viewings following the initial presentations.

Session 1. Taxonomy types for different applications
- Definitions and examples of different kinds of controlled vocabularies and taxonomies
- Features of term relationships, nonpreferred terms, and structures
- Suitability of different types and features for different situations or applications
- Best practices for creating relationships between terms

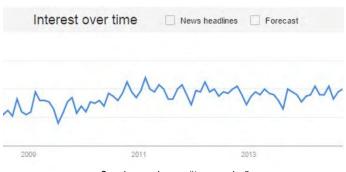## Session 2. Gathering terms for a taxonomy
- Concepts vs. terms
- Creating nonpreferred (variant) terms
- Sources for terms (people, content, search logs, external sources)
- Organizing terms in a spreadsheet

Session 3. Thesaurus management software use
- Overview of software types
- Practical use of MultiTes software with walk-through of various actions (free demo access is available)
- Taxonomy maintenance and editorial policy development.

"Practical Taxonomy Creation" is aimed at beginners or others seeking practical training. Whether you are new to taxonomies or are familiar with taxonomies in theory but have minimal experience, this course is for you.

The course fee is $199 for members of ASI and affiliated indexing societies and $249 for non-members. After January 28 the price for the on-demand course will go up to $249 for members and $299 for nonmembers. Registration is via the ASI website.

Google searches on "taxonomies"

How can indexers turn their skills into those of taxonomists?

Indexers already have many of the skills needed for taxonomy/thesaurus creation, which aside from various soft skills, such as attention to detail, include:

- Analyzing content for what the significant concepts are
- Figuring out what to call the concepts and what alternative names/entry terms would be
- Determining how much detail is relevant
- Structuring terms/entries
- Determining when related terms/entries of interest should be pointed out

Most indexers are already set up as freelancers/independent contractors and can easily vary the types of projects they have from indexing only to a combination of indexing and taxonomy work. I have done that on a freelance basis for several years. Besides the appeal of the variety, taxonomy work also pays more than indexing, even when subcontracting.

Freelancers have the option of working directly for clients, especially if the scope of the project is limited, or subcontracting to consultants/small consulting firms that specialize in taxonomy work. Subcontracting is the logical choice when first starting out in the business. Many larger projects are of the size to involve two or three people part-time. Subcontracting also offers the opportunity to obtain feedback and some informal mentoring.

What remains is for indexers to have some instruction in taxonomy creation, whether through my book (*The Accidental Taxonomist*), conference workshops, continuing education courses, such as the one I teach through Simmons College, or the newest ASI 3-part webinar short-course called "Practical Taxonomy Creation," that I will be teaching in January and is described in the sidebar. ●

ASI 2015 Conference
THE STATE OF THE ART
Seattle, Washington
April 30–May 1

The state of the art of indexing and the publishing world is in constant flux, and keeping up with the evolution of the field requires lifelong learning. The primary source for information and education about indexing is the American Society for Indexing (ASI). At our annual conferences we present sessions on the best and most up-to-date advances in indexing as an information organization and retrieval resource. In 2015 we will host the conference at Motif Seattle in the heart of Seattle, Washington, just five minutes from Pike Place Market.

For more information, go to
http://www.asindexing.org/conference-2015/