



# PROPOSAL KIT SAMPLE

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# Taxonomy

<< Taxonomy is the hierarchical structuring of information. It is commonly used to classify living organisms, things and concepts. The example below is based on a records management taxonomy; however, you can replace the line items with anything related to your situation. >>

<< The classification of all documents and records using a controlled vocabulary allows the organization to organize content more accurately and consistently as well as to provide benefits for searching content and developing electronic records management systems. The main reasons for classifying and developing this taxonomy are to:

1. Provide users an outline for organizing records and documents that are created or received in the course of business operations.
2. Provide a consistent method for locating documents that are created or received.
3. Support the development for a Records Management Program and the implementation of records management policies by creating a user guide to facilitate mapping records management actions to categories in the taxonomy. >>

The classification is created from the inventory worksheets and is to be used as a public facing document and supplement to the File Plan. This is the taxonomy for recordkeeping that maps to the File Plan's retention schedule. Successful business taxonomy must be designed for intuitive contribution of documents to records repositories, the ability for users to participate in in-place records management, and standardized searching by the end-user.

## **Classification Structure of <<Company>>: Level 1 (Function)**

1. Administration
2. Asset and Facility Management
3. Financial Management
4. Human Resources Management
5. Information Management
6. Legal Records
7. Professional Services
8. Sales and Marketing Management

## **Classification Structure of**

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