BE YOURSELF
SEE YOURSELF
Recommendations from the Project

Over 50 social sector agencies across the GTA participated in learning and testing ways to collect demographic and social identity for equity.

Building Pathways to Successful Data Collection for GTA Social Service Agencies

Clear, Accessible Reason for Data Collection

A publicly available, non-technical purpose for the collection of sensitive data is essential for successfully building trust and buy-in across agencies, funders, and people whose data we might ask for. Data and data collection cannot be equitable if there is no clear statement of why the data is being collected or how it will be used.

Transparency Around Power Dynamics

Everyone involved must have an understanding of who gets to decide what is collected, how it is used, and what accountability is in place if the data is misused or breached.

Involvement Not Objectification or Tokenism

Collecting data on specific groups for data collection can be beneficial, but it can also be harmful, objectifying, or extractive. Create ways for the data collection to involve and empower the people we are hoping to learn about.

Clarity and Flexibility in Data Collection

A flexible timeline that emphasizes building and maintaining trust is essential. Many communities are justifiably concerned about the extraction of data and the potential for data weaponization. A great deal of trust-building needs to take place prior to and during the implementation of data collection or the agencies risk losing the valuable relationships they have invested in with the communities.

Provide Concrete Support for Dedicated Staff

Agencies need resources to hire and train staff with data competencies. The unique data needs of the social sector require nuanced understanding of privacy laws, ethical governance, and equitable data use.

Fund Improved Technology for Complex Needs

Collecting, storing, and analyzing data for equity comes with complex technology needs. Technology to accomplish data equity must consider accessibility, user experience, safety,
and robustness.

Report on Capacity Building Activities of the Be Yourself, See Yourself Pilot Project 2.0 (2022)

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Table of Contents

1. Introduction

Prepared by We All Count (WAC), this report outlines the Be Yourself, See Yourself (BYSY) Pilot 2.0 project from the recruitment phase to recommendations that include lessons learned from implementation.

This report is divided into five main categories. First, an overview of participating agencies will be provided, outlining the recruitment process, Cohort divisions, the diversity of participants, and barriers to participation, among other topics. Next, an overview of how the survey tool was developed and a glimpse into WAC's Capacity Building Activities will be discussed. Finally, we will share recommendations on data equity in general and feedback received from agencies and share the specific survey tool we developed for BYSY.

2. Overview of Participating Agencies

Fifty-three agencies and organizations across the Greater Toronto Area (GTA) participated in the Data Equity Pilot 2.0 project, named Be Yourself, See Yourself by WAC, which Findhelp | 211 Central hired to provide data collection capacity-building. Agencies were identified through e-introductions and grouped into three cohorts after agreeing to participate: Cohort 1, Cohort 2, and Cohort 3. Cohort divisions were based on differing recruitment strategies outlined in the following section (2.2.
Cohort Recruitment). All participating agencies served and followed a similar onboarding strategy.

2.1. Agency Identification

Agencies were identified for recruitment solely through personal e-introductions with support from the City of Toronto Social Development, Finance & Administration - Community Funding Unit staff. City staff initially connected with agencies of interest, pitching BYSY and its benefits to their contacts, and followed up with an introduction between their agency contacts and the WAC team. This two-fold introduction system leveraging City staff's broad reach and network proved to be a consistently effective recruitment strategy throughout the 2022 recruitment cycle.

2.2. Cohort Recruitment

As mentioned, three Cohorts were created to participate in the WAC BYSY Project: Cohort 1, Cohort 2, and Cohort 3. All three Cohorts were composed of agencies and organizations from the city of Toronto and GTA, but the recruitment process and tactics differed slightly between groups.

Additionally, each Cohort had a different start date for BYSY capacity-building activities. The rationale for staggering cohort recruitment was to allow for smaller group size and support as a rolling acceptance model allowed for more manageable agency support throughout the year. There were a handful of agencies that wanted to participate in the project but did not have the resources or capacity to commit to actually collecting data within the pilot time period. These agencies were allowed to attend the training without an expectation of data collection. These agencies were called "auditing" agencies.

2.2.1. Cohort 1

Cohort 1 consisted of 11 agencies. Most Cohort 1 agencies were introduced to WAC via City of Toronto staff that manage the Youth Violence Prevention Program. The remaining agencies were recruited through the personal networks of WAC staff.

Table 1. Referral Methods for Cohort 1.

Referral Method	**Number of Agencies**
City of Toronto referral	11
TOTAL	11

2.2.2. Cohort 2

Cohort 2 also consisted of 11 agencies that committed to the project, one of which participated as an auditing agency. Cohort 2 agencies can be further divided based on three categories of recruitment: 1) Agencies who were originally recruited for Cohort 1 but deferred their starting date to the second cohort; 2) Agencies who were recruited by a WAC staff contact; and 3) Agencies who expressed interest after attending and/or learning about the Sector Socialization Event that took place on April 26th, 2022. Most agencies from Cohort 2 were recruited through the Sector Socialization Event, sponsored by United Way Greater Toronto when a link to an Expression of Interest Form was provided to the 178 people who registered for the event.

While recruiting for Cohort 2, 2 main channels helped facilitate recruitment: the BYSY website contact form and an online BYSY Expression of Interest Form, which was embedded in the website and easily shared by email and social media. Interested agencies could sign up to receive more information through these two channels and recommend other agency connections they believed would be interested.

Table 2. Referral Methods for Cohort 2.

Referral Method	**Number of Agencies**
Expression of Interest Form	7 (6 agencies + 1 audit agency)
Findhelp | 211 Central	1
WAC Staff	4
Total	11 + 1 auditing agency

2.2.3. Cohort 3

Cohort 3 consisted of 22 participating agencies and nine auditing agencies. The majority of Cohort 3 agencies were recruited using targeted promotions, which included targeted Facebook ads prioritizing the "Findhelp | 211 Central" network and the United Way Greater Toronto community through their newsletter. Ontario Trillium Foundation also promoted BYSY through its newsletter and social media channels. Multiple participants in Cohort 3 were referred to BYSY by Cohort 2 participants or were deferred participants from Cohort 1 or 2 recruitment.

Table 3. Referral Methods for Cohort 3.

Referral Method	**Number of Agencies**
Expression of Interest Form	16 (10 agencies + 6 audit agencies)
BYSY Advisory Committee	1
WAC Staff	7 (6 agencies + 1 audit agency)
Agency Referral	2
Independent Referral	2
April 26th WAC Event	1
Found BYSY On Their Own	1
TOTAL	30

2.3. The Recruitment Process

Once interested agencies were identified through a referral or the online Expression of Interest Form, the BYSY recruitment process began. WAC team members followed up with interested applicants via an initial outreach email that included a description of BYSY and how it benefits agencies and an invitation to book a virtual meeting to discuss project details.

In the first virtual meeting about BYSY, agencies were provided with an overview of the project. Agencies were also asked to share information about their experience with data and data usage (their "data journey"), describe why they were interested in BYSY, and what their goals for involvement were. The BYSY Commitment Letter (Appendix A) was also shared at this time, detailing what was being asked of participating agencies, outlining timelines, and describing what Findhelp | 211 Central and WAC would provide.

After the initial meeting, agencies were asked to confirm whether they were interested in moving forward. If they did want to continue with BYSY, personalized Commitment Letters were sent and signed by both WAC and Findhelp | 211 Central. Agencies were asked to sign their Commitment Letters and return them before the BYSY Orientation session, although some flexibility with due dates was granted for extenuating circumstances.

2.4. Unsuccessful Recruitment

Not all outreach efforts for this iteration of BYSY were successful. Some agencies either have not responded to repeated emails or stopped responding after initial recruitment contact was made. These agencies were not followed up with further and, as a result, were not included in the project.

2.5. Cohort Start Dates

After finishing the recruitment process and returning Commitment Letters (see Section 2.5), both Cohorts 1 and 2 were officially onboarded to the BYSY Project, starting on the day of their Orientation sessions.

Cohort 3 was onboarded on a "rolling basis," with start dates ranging from late June to September 8th. Agencies from Cohort 3 were given access to training materials (including session recordings from Cohort 2), resources developed by WAC, and open coaching sessions. This flexible onboarding/start process was created to allow agencies to engage at their own pace given that the summer is a very busy time for many, with Annual General Meetings in June and summer programs to develop and deliver. Cohort 3 had a shorter time frame to finish all stages of the project than Cohorts 1 and 2, so a more forgiving onboarding process was integral for project completion.

2.6. Agency Reach

All participating agencies served people in the city of Toronto or the GTA. Participating agencies served differing geographical areas, with some operating solely within the city of Toronto, some operating across multiple GTA communities, and some working outside the city of Toronto boundary but still within the GTA.

Because of the limited geographic focus of the project, agencies from outside of the GTA that expressed interest (including Waterloo and Guelph, among others) were excluded. Agencies and other organizations that did not meet the not-for-profit criteria were also excluded.

Table X. Number of participating and auditing agencies from Toronto and the Greater Toronto Area.

Agency Location	**Number of Agencies**
Toronto	51
Greater Toronto Area (Oshawa, Mississauga)	2
TOTAL	53

2.7. Barriers to Participation

2.7.1. Capacity Challenges

Multiple agencies expressed interest in BYSY during the recruitment phase but could not commit to full participation. These agencies attributed capacity challenges as barriers to participation, particularly in the following four areas:

1) An increased agency workload based on the complexity of needs and/or issues that the people they serve are facing (which has been exacerbated by the pandemic).
2) Organizational changes/stressors.
3) Limited paid staff to participate/support participants.
4) Other internal priorities.

Several agencies committed to BYSY and attended both the Orientation and Capacity Building Sessions, but ultimately dropped out of the project largely, it seems, due to the reasons outlined above.

2.8. Representation and Diversity of Agencies

A wide range of agencies participated in BYSY, with WAC prioritizing representative and inclusive agencies in recruitment as much as possible. Most of the 53 participating agencies were either community- or neighbourhood-based, and/or served newcomers, immigrants, racialized and ethnic communities, and/or provided Early Childhood Education or Children and Youth Programs.

Other participating agencies provided arts programming, faith-based programming, food security services, training and employment, mental health services, women's and/or gender-based programming and support, education, and language/nationality-based services and programs.

BYSY did not secure any agencies that primarily focused on Indigenous peoples, only one that primarily focused on the LGBTQ2S+ community, and only a few provided services to senior citizens. This was partly due to the lack of a data collection survey tool responsive to these community's concerns.

2.8.1. Existing Data Systems

Another barrier preventing agencies from participating in BYSY was the prevalence of existing data collection and reporting systems. Agencies that already had sophisticated methods of data collection and/or robust reporting systems and requirements in place would not have benefited from BYSY as much as agencies that had little to no data experience. As a result, several agencies with a strong sense of data collection and entrenched reporting requirements were not drawn to or included in the project.

2.8.2. Complex Priorities and Needs

Resource strain and complex competing priorities and needs acted as massive barriers to the participation of many organizations. Front-facing community-serving agencies experienced a surge of complex needs during the COVID-19 pandemic, putting strain on resources and staff capacity, and shifting the focus of and need for agency funding and support. For example, several agencies spoke about a critical need for wrap-around service funding rather than a data-specific project.

Other agencies cited the stress of complicated caseloads and workloads on an already under-resourced not-for-profit sector as a barrier to participation. These organizations shared that multi-year core operational funds (rather than a data-focused project) would be essential to serving more community members in a strained sector.

2.8.3. Participation Through Auditing

Agencies that wished to participate but could not commit to implementing the BYSY survey within the project time frame were able to participate as auditing agencies. There were five main reasons agencies opted to participate through auditing:

1) The agency already launched their annual survey and launching a second BYSY survey was not aligned with their overall strategy.
2) The agency already participated in the City of Toronto's Data for Equity Pilot (targeting organizations in Early Childhood Programming).
3) The agency could not initiate any changes to its data collection methods because they are a branch of a national agency with a set data strategy and demographic questions.
4) The agency is volunteer-run and has no internal capacity to participate beyond receiving training.
5) The agency's Executive Director is new to their role and is still in the process of understanding what level of participation they can commit to.

2.9. Current State of Data Collection Competency of Agencies

There is a wide variety of maturity in data collection competency across agencies in the GTA. Of course, this is normal and will always be the case. Each agency has a different mission, and some missions need more complex data collection and analysis, while others only need simple data tools.

The biggest concern in relation to data equity and data collection is to build a pathway for each agency to reach its ideal level of maturity in data collection competency. Some agencies wish to have more skills and competencies to collect and use data to fulfill their mission. The resources needed to support agencies like this to achieve their goals include solid, practical training on both the ethical and technical aspects of data collection, technical resources to allow for the collection of data responsibly and ethically, and the human resources to collect data from communities in a way that builds connection and trust.

Further information can be found in the evaluation report by D&D Inclusion Consulting.

3. Overview of Survey Tool Development

The implementation of a data collection survey tool varied from the initial plans made during the inception of the BYSY (Pilot 2.0). A draft survey tool was user tested during the Data for Equity Pilot 1.0. Extensive feedback was gathered, and suggestions were made.

The original plan for BYSY (Pilot 2.0) was for these suggestions, along with additional suggestions from data equity experts, to be incorporated into the data collection survey tool and for a new data collection survey tool to be implemented and tested by agencies during the BYSY (Pilot 2.0). However, no improved tool was implemented during BYSY (Pilot 2.0) due to the unwillingness of the City of Toronto to allow any changes or incorporation of feedback to the Pilot 1.0 tool. When the Advisory Board and the agencies themselves expressed a need for changes, it was permitted for the BYSY (Pilot 2.0) tool to include new short introductions or explanatory preambles to some of the questions.

The final survey tool implemented in the BYSY project was created during the Data for Equity Pilot 1.0 project phase with some new explanatory preambles.

4. Topics Covered in Capacity-Building Activities, Tools and Resources

WAC created several Capacity Building Activities, Tools and Resources to support participating agencies in what might be their first time working with data. People also had access to a BYSY online discussion forum created for this project, but the uptake was low; people preferred connecting via email and live virtual sessions.

The main capacity-building activities were **three live virtual sessions and optional drop-in, informal coaching sessions**. The three sessions - Orientation, Capacity-Building, Analysis - ran for 2 hours and included time for agencies to introduce themselves, review the background and purpose of BYSY, teach concepts, breakout room discussions and time for questions. The coaching sessions were open to anyone from agencies that had been onboarded and attended the Capacity-Building session. These were times for agencies to share where they were at and what they were working on, ask questions, share examples of what worked for them, and discuss issues.

Agencies were asked to fill out a **Training Customization Survey** (Appendix B) before the Capacity Building Session to help the WAC team understand the current state of data collection and management of organizations. Questions asked about the following:

- **People** (the expertise for, receptivity and commitment to, and roles and responsibilities for collecting and using data among leadership and staff)
- **Processes** (the interactions among people and guidelines to ensure that data are shared widely and that processes / workflows are in place to produce information that the agency can use)
- **Data Management** (how information is stored, organized, retrieved, and analyzed, and how information that is critical to the agency becomes transparent with procedures)

Agencies could use this survey as an additional tool to assess their 'readiness' to collect and store data. They can also use it after the BYSY project to reflect on what they have put in place and what they could still work on going forward.

The main capacity-building tool, the "**Getting Started Workbook**," was crafted to guide agencies and agency staff through the planning steps of data collection and storage. Agency staff were encouraged to use the Workbook to facilitate internal discussions. In the Workbook, users are guided step by step through the decisions they need to make, with factors to consider and examples, and asked to document their answers as written statements that, combined with a data privacy policy, form a comprehensive Data Collection Plan.

Practical resources WAC provided for the BYSY project included:

1. **role-playing scenarios** for people to practice with, designed to increase the comfort level of agency staff in talking about why they are collecting demographic data, how it will be used, and how privacy will be protected so that they get used to talking about data collection and asking for consent;
2. **a guide on how to handle different and difficult situations** when asking people to share information about their social identity; and,
3. **a guide to privacy laws and best practices** relevant to the GTA context.

Together, these Capacity Building Activities, Tools and Resources addressed the following topics, ideas, and questions in their content:

- What is social identity data?
    - Why it might be useful to collect social identity data
    - The responsibility of collecting social identity data
    - Technical aspects of collecting social identity data
    - Ethical aspects of collecting social identity data
- The BYSY survey tool
- What agencies were required to do for BYSY vs what was optional
- How to deal with incomplete data or people not adhering to the survey instructions (e.g., to select only one option)
- Informed consent, and implications for different ages
- Privacy and storage
- Accountability
- Transparency
- Inclusion of diverse populations and how to make the survey relevant and understandable to them

5. Recommendations for Moving Forward with Data Equity (General)

Despite the BYSY project continuing to December 2022, the WAC staff and BYSY project team have crafted several recommendations for moving forward with data equity outside this project. Our six recommendations for moving forward with data equity are as follows:

1) Clearer Reasoning for Data Collection
2) Increased Transparency Around Power Dynamics (Who gets to decide what?)
3) Involvement, Not Objectification or Tokenism
4) Consider the Project's Questions
5) Clarity and Flexibility in Data Collection
6) Prioritization of Non-Governmental Secure Funding Systems

Each of these recommendations are explained below.

5.1. Clearer Reasoning for Data Collection

The WAC team recommends that organizations, agencies, and/or individuals work towards sharing clearer and more transparent reasoning for social identity data collection. We found that any data collection efforts must be accompanied by:

- A clear, specific reason that the data is being collected
- A transparent set of questions that the data is being used to answer
- A concrete, written, and publicly accessible privacy statement
- Meaningful mechanisms of accountability if/when privacy agreements are breached

5.2. Increased Transparency Around Power Dynamics (Who gets to decide what?)

Power dynamics are often (and inevitably) at play during data collection. To achieve greater data equity, the WAC team recommends that organizations, agencies, and/or individuals provide more clarity and transparency around power dynamics.

This recommendation could look varied in practice. For example, power dynamic transparency might look like sharing information about organizational hierarchy and identifying the decision maker for data collection and reporting (e.g., who decides on questions asked and categories offered, and how and to whom data is shared). It might also look like offering different and completely anonymous ways for participants to provide feedback on the data collection tool and modes and process, along with a clear outline of how and when feedback will be incorporated into future projects.

5.3. Involvement, Not Objectification or Tokenism

Marginalized groups are often the target of research and data collection efforts by various organizations, agencies, and/or individuals. However, the benefit of data collection for said marginalized groups is often less clear or, in some cases, non-existent.

Focusing on specific groups for data collection can be beneficial, but it can also be harmful, soliciting feelings of objectification or tokenism (among others). The WAC team strongly recommends that target groups be empowered to be involved in research in different ways that suit them rather than be objectified as "subjects." Instead, how can our data collection efforts involve and empower the people we hope to learn about?

One way to reprioritize involvement over objectification is to start with the "why." Data and data collection cannot be equitable if there is no clear statement of why the data is being collected or how it will be used.

5.4. Consider the Project's Questions

Similar to our "Involve, Don't Objectify" recommendation, the WAC team also recommends considering your project's questions at every step of the data collection process. Losing sight of the "why" can not only cause discomfort to the people and/or groups you are collecting data on, but it can distance you from the intended purpose of your study. Conflicting purposes or competing concepts skew your research questions and, as a result, the research itself.

Moreover, data collection is based on trust. By losing sight of your project's questions and perhaps extending beyond the scope of your project's questions, you can dissipate any trust you have already built with your research team or target audience. Focus instead on what you need, where that information will go, and for what purpose(s).

5.5. Clarity and Flexibility in Data Collection

Expectations are essential in data collection, especially when relying on agencies and/or other people to share and collect data on your behalf. The WAC team suggests being clear and direct in your data collection, sharing why you are collecting data, what it is for, and how it will be used.

Many of the agencies involved in the BYSY (Pilot 2.0) project repeatedly expressed a need for introducing sensitive data collection activities to be implemented on a flexible timeline emphasizing building and maintaining trust. Many communities are justifiably concerned about the extraction of data and the potential for data weaponization. A great deal of trust-building needs to occur before and during the implementation of data collection, or the agencies risk losing the valuable relationships they have invested in with the communities.

There can often be a disconnect between what an agency or funder wants to know and what the results can be used for in a meaningful way - with attention to what meaningful means to the people providing their data. By creating clear goals and distinct procedures, you can avoid confusion and ensure data is used for ethical, meaningful purposes.

Flexibility is also important in research. However, it is important to ensure you have clearly defined parameters within which you can be flexible. Establishing clear boundaries can help you be flexible when necessary without losing sight of your overall intent. For example, you can clearly define what is required and why while still identifying what is optional and providing alternatives for questions asked and the categories offered.

Consider if an agency primarily serves people of one to three ethnicities, with three main languages. If a participant speaks an additional language, may they provide that choice in a drop-down? Is there another way to indicate this information? Where are participants allowed to skew from what is expected? Flexibility and clarity are key.

5.6. Prioritization of Non-Governmental Secure Funding Systems

The WAC team's final recommendation is simple: organizations, agencies, and/or individuals should provide funding and guidance for secure systems to store data in a privacy-protected manner independent of government systems. Government systems include the Canada Revenue Agency or Ontario Works, for example.

6. Recommendations on the Survey Tool

6.1. Recommendations on Data Collection Mechanics

While crafting procedures for BYSY and after hearing from agencies throughout the year about what would facilitate demographic data collection, the WAC team developed several recommendations on data collection mechanics. These recommendations could serve future iterations of BYSY and are also applicable to projects outside the scope of BYSY and WAC.

The WAC team's recommendations for data collection mechanics are as follows; the goal is for **data collected with an eye toward equity to be funded, designed, collected, analyzed and stored in a process that prioritizes equity.**

Organizations and agencies should:

1. Provide guidance on accessibility options for data collection, updated regularly.
2. Create and provide templates that can be modified for paper and online surveys in different languages, with several format/platform options for each version.
3. Provide translation services for demographic survey tools.
4. Create and provide templates for data entry (e.g., in Excel, with an example and formulas to calculate mean, median and mode already included to easily replicate, for instance).
5. Provide funding and guidance for privacy-protected data storage.
6. Work with those who serve children and youth to provide guides and resources for asking questions for those populations and the consent process for different age groups.
7. Consider providing guidance on how people can opt out or change their answers after completing a survey. This would require strict written policies and processes for handling how answers are tied to a person's contact information.

6.2. Recommendations on Introduction to the Tool

When introducing the data collection tool to participating agencies, the WAC team noticed that agencies had preferences for certain explanations and descriptions. As a result, we have developed four recommendations when introducing agencies/participants to a data collection tool.

- Describe why the question is important.
  - Agencies participating in BYSY appreciated when the WAC team described and justified why each question was important to the project.
- Discuss privacy and confidentiality.
  - Both respondents and agencies expressed concerns about privacy and confidentiality, explicitly asking what will be done with the data and how the agency ensures its safety.
  - These explanations are essential to reassure participants about what will be done with their answers and equip agencies with the information needed to answer these questions in the future.
- Introduce the tool through a trauma-informed lens.
  - Considering the trauma that marginalized groups experience both generationally and day-to-day can enable agencies to approach data collection with thought, intention, sensitivity, and inclusion at the forefront.
  - This involves thinking through when to introduce the tool and who introduces it. For example, agencies found that they needed to be patient in building trust and relationships with people, especially vulnerable populations, before asking them social identity questions. It works well when staff with a good rapport with someone does the asking.
- Use real data/case studies as examples.
  - A recurring theme is concern from both agencies and participants about demographic data (why it's being collected, and how it will be used), especially considering the experience of marginalized and/or excluded groups.
  - By using case studies linking demographic questions to the results that they inform, agencies can not only understand the benefit of certain demographic questions but can also relay this information to participants.

6.3. Recommendations on Specific Questions

We will preface this section with a note that we cannot make specific recommendations on the single best way to ask questions or provide categories for all data collection initiatives. Every project has specific, individualized questions and seeks to measure different data. However, based on feedback from both individuals and agencies throughout the BYSY project process, we have synthesized several recommendations for general categories of questions, including language, gender and sexuality, and others.

6.3.1. Age

Working with youth/young people was identified as an area where data collection can improve. Of primary concern was young people's possible hesitancy to provide information when caregivers may have access to their answers. Specifically, this concern was brought up with respect to gender or sexual identity. Giving youth autonomy to answer questions on their own (according to ethical standards, of course) ensures privacy, safety, and accuracy of answers.

Additionally, it was recommended that proxy questions might be helpful when collecting data from youth. For example, youth may not know their exact household income. However, asking questions like "How many caregivers do you have?" and "What do they do for a living?" may appear easier for the participant while still giving data to analyze.

6.3.2. Disability/Accessibility

Agencies and individuals suggested that questions focused on disability and accessibility need to be expanded to account for different types of disability and how that disability is determined. For example, to be considered as someone that has a disability, can you self-identify, or do you need to be receiving Ontario Disability Support Program Payments? Questions regarding disability should be clear and broad enough that all individuals can find themselves in the answers provided or provide an alternate answer if needed.

6.3.3. Gender/Sexuality

In terms of gender and/or sexuality questions, agencies and individuals offered a wide range of recommendations for improvement.

First, when listing gender and sexual identities as options to choose from, consider whether you are operating through an exclusively Western framework. Will newcomers understand the options or see themselves in the answers? Will non-Western individuals feel excluded? Working through an inclusive lens enables as many individuals as possible to identify themselves from the choices listed.

Second, provide simple explanations of gender and sexual identities. Participants may not know the term LGBTQ2S+; perhaps they only recognize the words "gay" or "straight." Glossary-like terms are helpful for individuals to understand the question they are being asked.

Finally, consultation is critical. Take the term "Two-Spirit," for example. Agencies may feel they are being inclusive by including Indigenous gender identity. However, not all Indigenous individuals identify with the term Two-Spirit; some may identify as "Indigiqueer" or other more specific language. Consider consulting appropriate groups to ensure all terminology and identities are represented without assumption or guesswork.

When working with questions surrounding gender and/or sexuality, consider that respondents may feel uncomfortable answering for any number of reasons. Approach these types of questions with sensitivity, kindness, inclusivity, and input from the LGBTQ2S+ community.

6.3.4. Immigration Status

Agencies and individuals provided two main recommendations when it comes to questions regarding immigration status.

First, when asking citizenship questions, provide guidance on what different statuses mean. There may be confusion around terminology, so ensure you are as clear and direct as possible.

Second, consider that many of the immigration status categories we are familiar with are likely specific to North America. Individuals who have moved to North America may not identify with the categories or terms used in North America and, as a result, cannot answer the questions.

Using inclusive phrasing with definitions, where possible, is recommended for these types of questions.

6.3.5. Language

Collecting data about spoken language is common in many questionnaires and surveys. However, there are ways to improve these sorts of questions to appeal to a wider audience and include more individuals.

First, consider language preference versus language ability. When asking "What language do you speak at home?" it is unclear whether you are asking what language(s) the individual is *capable* of speaking, or which language they *prefer* to speak. These questions could benefit from clearer or more specific wording. For example, "What language(s) do you prefer to receive written communication in?" not only provides insight into why the data is being collected (i.e., to provide services in the specific languages), but it is also more clearly related to preference versus ability.

Agencies and individuals also suggested expanding and specifying languages. For example, Japanese was identified as a language specifically excluded from language options in the BYSY survey tool. Additionally, separating languages that are conflated has also been suggested as beneficial. The example provided to us was separating "Tagalog " and "Filipino" as languages. This reflects "Filipino" as the language name, while de-centering Tagalog.

6.3.6. Race

When examining race-based questions, agencies and individuals provided many suggestions to improve these questions.

First, clarity is needed in these types of questions. Racial, national, regional, ethnic, and political categories are often conflated. Take the questionnaire option of "Arab, Middle Eastern, or West Asian," for example. "Arab" refers to an ethnicity, "Middle Eastern" refers to politics, and "West Asian" is regional, yet they are in the same answer. This is not only confusing to respondents but also simply incorrect.

Second, it was suggested to further consider racial and ethnic diversity within single categories. For example, using the term "Latinx" to refer to all members of the Latin community (versus Latina or Latino) may not resonate with all individuals. Including options for terminology or further dividing categories into more individualized sections would be beneficial here.

Finally, expanding the breadth of options for race/ethnicity was highly recommended. Central Asian identifiers, including Kazakh, Tajik, and Uzbek, were identified as often being excluded, alongside Polynesian/Pacific Islander, and Bangladeshi. These types of questions benefit from flexibility in the types of answers and options to fill in answers that were not included.

6.3.7. General

General recommendations were also provided, especially in survey design. The most notable suggestion was alphabetizing answers/categories. For example, a BYSY participant noticed that options for race-based categories were listed alphabetically, but options for gender and sexuality were not. This may convey negative hierarchical connotations, so consistent alphabetization with a short explanation of how the data is organized is helpful.

Other suggestions included allowing people to "Select All That Apply" to provide a more holistic and accurate picture of how people identify themselves and rephrasing questions in ways that make sense across different languages.

7. Conclusion

We believe that the BYSY project has provided a great opportunity for agencies to explore data collection, data management, and data equity. Due to the barriers to participation mentioned in Section 2.7, many social sector agencies did not have the opportunity to examine how data is collected and used in their organizations. However, through the development of the BYSY pilot, 53 agencies gained invaluable experience in data collection and data equity. We strongly recommend considering how to align the next pilot with the equity goals of the funders and agencies in the pilot's design and the tool's design, and not just in the type of data being collected. We are confident that this approach will empower all funders, levels of government, and social sector agencies to achieve and measure their equity goals effectively.

Be Yourself, See Yourself
Agency Participation & Commitment Letter

We, as _____________________________(Agency name), agree to participate in the Be Yourself, See Yourself data collection pilot project for the period of _________(today's date) to December 2022. We understand there are various activities and roles needed in order to actively participate, to be fully engaged and to optimize on this capacity building initiative. By participating, we as a community service organization / agency / grassroots group commit to ensuring the following terms and conditions are set in place throughout the course of this initiative:

PEOPLE

- Nominate one or two team members to be the leads on the project.
- Have the leads and appropriate staff attend all three half-day virtual training workshops.
- Engage with peers and the We All Count team in an online capacity building support space to get support as you use the tool.
- Remain active in the project during your cohort's period of engagement, collecting pilot data through December 2022.
- Participate in a series of process evaluation sessions led by D&D Inclusion Consulting to share learnings on barriers, challenges, successes and opportunities in collecting social identity data.

PROCESS & DATA MANAGEMENT

- Commit to collecting pilot data from your direct or indirect service users with the survey tool, in a form that is best suited to your agency.
- Only collect pilot project data in a respectful, anti-oppressive way. This includes no indirect collection of social identity data for this pilot.
- Ensure that participation in the data collection pilot will not affect individuals' access to service or agency access to funding.
- Be the data holders of the data you collect in this pilot and store your data securely to safeguard participant personal information and privacy. *(We will help you learn how to do this as part of the project.)*
- Store all pilot project data in a privacy-protected manner in accordance with all applicable laws and regulations. *(We will help you learn how to do this as part of the project.)*
- Not combine or link record level data from the pilot project with any other dataset without written consent from data contributors. *(We will help you learn how to do this as part of the project.)*
- Only report pilot data in an aggregated manner. Pilot data may not be analyzed at an individual record level.

___________ (Please initial) **We also acknowledge that this initiative has many stakeholders and we are clear on their roles and responsibilities, as follows:**

As the lead host organization of the project, FindHelp|211 Central commits to:

- Provide the data collection tool in English and 13 other languages.
- Host a website that promotes the initiative to the public, and gives participants access to the data collection tool and to a platform for agency learning and discussion.
- Host and facilitate a stakeholder Data Equity Advisory Committee that ensures sector level communication on data equity best practices, data integrity, and transparency is being shared among community partners and funders.
- Only collect pilot project data in a respectful, anti-oppressive way. This includes no indirect collection of social identity data for this pilot.
- Ensure that participation in the data collection pilot will not affect individuals' access to service or agency access to funding.
- Not combine or link record level data from the pilot project with any other dataset without written consent from data contributors.

As the capacity building partner in the project, We All Count commits to:

- Provide three half-day virtual training workshops.
- Provide content for the aforementioned online space specifically as it relates to capacity building materials and support where agencies can get ongoing assistance throughout the pilot.
- Provide agencies with internal communications materials and training to make sure they understand why agencies are collecting data, what data will be collected, and how it will be stored and used by the agency and Be Yourself, See Yourself project funders.
- Only collect pilot project data in a respectful, anti-oppressive way. This includes no indirect collection of social identity data for this pilot.
- Ensure that participation in the data collection pilot will not affect individuals' access to service or agency access to funding.
- Not combine or link record level data from the pilot project with any other dataset without written consent from data contributors.

Community service agency / organization: Newcomer Women's Services Toronto

Primary contact(s) for the project (name, position):
Primary contact email address(es):

____

Signature, Date:
Name:

FindHelp:

Primary contact for the project (name, position): Mythri Vijendran, Manager of Equity Initiatives
Primary contact email address: mvijendran@findhelp.ca

____

Signature Date:
Kosal Ky, Director of Strategic Partnerships

We All Count:

Primary contact(s) for the project (name, position): Sharmalene Mendis-Millard and Carla Ferrer
Primary contact email address(es): sharmalene@weallcount.com and carla@weallcount.com

____

Signature Date: July 6 2022
Heather Krause, CEO and Founder

A Data Equity Project hosted by Findhelp | 211 Central Region and funded by City of Toronto, Ontario Trillium Foundation and United Way Greater Toronto

Training Customization Survey

This survey was originally used to understand how to group each agency together during the Capacity Building Session. You may use it again as a tool to assess your progress after your participation in BYSY. Remember to base your answers in observable and current practices and activities rather than hopes and goals.

About your organization:

1. What is the name of your agency?

2. Primary contact at your agency for the Be Yourself, See Yourself project
   2a. Name:
   2b. Position:
   2c. Email address:

3. **People**

- The expertise for, receptivity and commitment to, and roles and responsibilities for collecting and using data among leadership and staff. Again, we're asking these questions to design a capacity building curriculum not to "grade" or "judge" your agency.

All of these are a 5+1 point scale from Strongly Agree to Strongly Disagree,Not Sure

Statement	**1 Strongly Agree**	**2 Agree**	**3 Disagree**	**4 Strongly Disagree**	**5 Not Sure**
3a. We have at least one person who collects data from service users / clients					
3b. There is at least one person whose primary job at our agency is to manage and/or analyze data					
3c. Our agency has an IT person who can support a new data collection and storage project					
3d. We understand the (generally interchangeable) terms demographic data, socioeconomic,sociodemographic, or social identity data					
3e. Our agency is knowledgeable on how to collect sociodemographic data					
3f. Our agency is knowledgeable on how to use sociodemographic data to inform policy and program design					

4. **Processes**

- The interactions among people and guidelines to ensure that data are shared widely and that processes / workflows are in place to produce information that the agency can use.

All of these are a 5+1 point scale from Always, Often, Sometimes, Rarely, Never,Not Sure

Statement	**1 Always**	**2 Often**	**3 Sometimes**	**4 Rarely**	**5 Never**	**6 Not Sure**
4a. Our agency collects data about attendance at / access to programs or services						
4b. Our agency collects data about client satisfaction or feedback						
4c. Our agency collects data about demographics(such as gender, age, etc) from people who use our services or programs						
4d. If yes to above, do the sociodemographic data you collect stay connected to the person's name or any kind of identification number?						
4e. We make decisions based on data.						
4f. Front line staff use data to understand your agency's programs or services						
4g. Leadership uses data to make decisions						
4h. Our agency submits a report to at least one funder that includes quantitative data summaries						

4i. Does your agency have an equity, diversity and inclusion strategy/policy/framework? **YES** **NO**

5. Data Management

- How information is stored, organized, retrieved, and analyzed, and how information that is critical to the agency becomes transparent with procedures

All of these are a 6+1 point scale from No Implementation; Under Discussion; Marginal Implementation; Partial Implementation; Full Implementation; Not Sure

Statement	**1 Full Implementation**	**2 Partial Implementation**	**3 Marginal Implementation**	**4 Under Discussion**	**5 No Implementation**	**6 Not Sure**
5a. Our agency has a digital way of collecting data						
5b. Our agency collects data on paper						
5c. Our agency transfers its paper data collection into a digital format						
5d. Our agency has a written policy and procedure guide on how to store and organize the data we have						

6. Does your agency have in place policies/directives/procedures on how to collect and use sociodemographic data? **YES** **NO**

BE YOURSELF
SEE YOURSELF

Social Identity Data Collection for Data Equity in the Greater Toronto Area

A Pilot Project (2.0)

Getting Started Workbook 2022

From Capacity Building Partner [We All Count]

Table of Contents

Welcome!

We are so glad you're joining us on the project to explore how and why to collect social identity data in the Greater Toronto community and social services sector.

This workbook will help you get started thinking about the decisions and materials your agency will need to maximize your benefits from your involvement.

The We All Count team is providing **Capacity Building** for the **Be Yourself, See Yourself** project, which involves:

- An **Orientation Session**
- A **Capacity Building Session**
- **Open Coaching Sessions**
- Ongoing interactive support and opportunities to connect with other agencies via the **Resource & Discussion Forum at BeYourselfSeeYourself.ca**

In this Getting Started workbook, we map out the basic decisions and steps your agency can take to prepare to collect social identity data. We use it in the training sessions and in supporting you in the forum and coaching sessions.

Feel free to reach out to either Carla Ferrer (carla@weallcount.com) or Sharmalene Mendis-Millard (sharmalene@weallcount.com) if you have questions or would like support.

To collect social identity data (also known as demographic or socioeconomic data), your agency will need two types of elements: Technical Elements and Ethical Elements.

Technical Elements include

- A data privacy policy
- A method of collecting data that works for the people you serve
- A method of storing data that aligns with privacy needs and regulations
- A common understanding across your agency of why you are collecting this data and what you are doing with it

Ethical Elements include

- An accessible, easy to understand way to tell your communities why you're collecting this data
- An accessible way to tell your communities exactly what will happen to their data
- An accountability structure linked to what happens with the data

Your Journey Map

Steps & Checklists of Key Decisions & Written Information You Will Need

Your journey map: *What joining Be Yourself, See Yourself means for you*

Step 1: Commit to participating in the project (sign the Commitment Letter)

Step 2: Attend the Orientation Session (or review the recording)

Step 3: Complete the [Training Customization Survey]

Step 4: Set up your profile in the online resource and discussion space. You can use that space for support throughout the project.

Step 5: Start conversations around the following decisions internally. Decide:

1. why you want to collect data
2. how you want to collect the data
3. how you will use this data
4. who you want to collect data from in this pilot – and why
5. how often you want to collect this data as part of the pilot
6. who in your agency will collect data
7. who in your agency will have access to the raw data
8. where in your agency you will store the raw data
9. how long the raw data will be stored

Step 6: Attend the Capacity Building Workshop (or review the recording)

Step 7: Finalize decisions in Step 5 internally

Step 8: Create a data collection plan that includes decisions and policies.

Write a sentence or two about:

10. your agency's purpose in collecting this data *(Decision 1)*
11. how the data will be used *(Decision 3)*
12. who will have access to the data *(Decisions 6 & 7)*
13. how the data will be stored and for how long *(Decisions 8 &9)*

14. Write a data privacy policy (or update your existing one)

Step 9: Go through the data collection plan with your We All Count liaison

Step 10: Practice the data collection plan with your team

Step 11: Start collecting data

Here is the **checklist of key decisions** your agency needs to make to set up an equitable and ethical data collection process. *You don't need to make these decisions in this order.*

Decide

1. why you want to collect data
2. how you want to collect the data
3. how you will use this data
4. who you want to collect data from – and why
5. how often you want to collect this data
6. who in your agency will collect data
7. who in your agency will have access to the raw data
8. where in your agency you will store the raw data
9. how long the raw data will be stored

Here is the **checklist of written information** you'll need:

Write a sentence or two about

10. your agency's purpose in collecting this data *(Decision 1)*
11. how the data will be used *(Decision 3)*
12. who will have access to the data *(Decisions 6 & 7)*
13. how the data will be stored and for how long *(Decisions 8 &9)*

14. Write a data privacy policy (or update your existing one)

Let's get into the details

Decisions to Make

Options & Factors to Consider

#1 Decide <u>why</u> you want to collect the data

Options include a mixture of:

- To understand who is accessing your services/programs
- To assess whether your agency is meeting its goals
- To build a case for funding or re-funding

Factors that will help you make this decision include but are not limited to:

- How your agency makes decisions
- What information will be most useful to you, your team(s) and leadership
- What information will be most useful to other stakeholders (e.g., partner agencies)
- What information is required by your funders

Your notes here:

#2 Decide <u>how</u> you want to collect the data

Options include a mixture of:

- On paper
- An online survey
- Using a tablet or phone at point of service
- Additional collection mechanism (describe)

Factors that will help you make this decision include but are not limited to:

- Do you already collect data in a way that works for you and the people you serve?
- What is the format of your main interactions with the people you serve?
- What will be most effective for your staff who will collect the data?
- What will work best for the people whose data you collect?

Your notes here:

#3 Decide <u>how</u> you will use this data

Options include a mixture of:

- o For practice in collecting this data, after which you will discard
- o For internal agency use at an aggregate level
- o For sharing grouped / aggregate data with
    - o other agencies
    - o funders
    - o the public
- o Additional uses (describe)

Factors that will help you make this decision include but are not limited to:

- What information will be most useful to you and your team(s)
- What information is required by your funders
- What level of IT and privacy capacity you currently have
- Your research needs

Your notes here:

#4 Decide who you want to collect data from in this pilot – and why

Options include a mixture of:

- o We will collect data from all our clients or service users
- o We will collect data from one particular group or program
- o We would like information about several groups (describe)

Factors that will help you make this decision include but are not limited to:

- How many people your agency serves
- What resources your agency has for data collection
- How important comprehensive social identity data is to your agency's work
- What your collective action project needs are (when partnering with other agencies)
- Funder requirements

Your notes here:

#5 Decide how often you want to collect data as part of this Be Yourself, See Yourself pilot project

Options include a mixture of:

- o We will collect it one time as a trial (for example, during a single week or month)
- o We will collect it on a regular basis (for example, one week a month for six months, or one month a year each year)
- o We will collect it on an ongoing basis
- o A different rhythm of collection (describe)

Factors that will help you make this decision include but are not limited to:

- Your agency's resources
- Your team's comfort with collecting this type of data
- The regular rhythm of the programs and services you offer
- What would provide you with the most useful information, and for what purpose?

Your notes here:

#6 Decide who in your agency will collect data

Options include a mixture of:

- o Front line workers
- o Data collection specialists
- o Intake personnel
- o Case workers
- o Program officers
- o Other team members from your agency (describe)

Factors that will help you make this decision include but are not limited to:

- What makes the most sense to your team
- The level of comfort and training of various team members
- The types of programs and services you offer
- What your data is being used for
- The needs and desires of the people you serve

Your notes here:

#7 Decide who in your agency will have access to the raw data

Options include a mixture of:

- ○ Front line workers
- ○ Data collection specialists
- ○ Intake personnel
- ○ Senior Management
- ○ Research Team
- ○ Additional team members or roles (describe)

Factors that will help you make this decision include but are not limited to:

- What level of data literacy you want to grow in your team
- Your agency's level of technical proficiency
- The information your agency needs

Your notes here:

#8 Decide where in your agency you will store the raw data

Options include a mixture of:

- o We will not store raw data at all after it is collected
- o We will store the raw data on paper in a privacy-protected file cabinet (describe how privacy will be protected)
- o We will store the raw data digitally in a privacy-protected folder or database cabinet (describe how privacy will be protected
- o Additional storage options (describe)

Factors that will help you make this decision include but are not limited to:

- How and when you're collecting your data
- Your agency's privacy policies
- Your agency's resources and staff capacities

Your notes here:

#9 Decide how long your agency will store the raw data

Options include:

- Less than 1 year
- 5 years
- 100 years

Factors that will help you make this decision include but are not limited to:

- Your agency's privacy-protected data storage capacity
- Your process for handing off responsibility for the data from one staff to another as staffing changes
- Funder requirements
- What standard you are aligning with (e.g., academic)

Your notes here:

Written Information

Summarize the decisions you've made about data

Great work! Now all you need to do is write out a sentence or two summarizing each of the decisions your agency has landed on.

Here is the checklist of written statements you'll need

10. Write a sentence or two about your agency's purpose in collecting this data

11. Write a sentence or two on how the data will be used

12. Write a sentence or two on how the data will be stored and for how long

13. Write a sentence or two about who will have access to the data

14. Write a data privacy policy (or update your existing one)

Data Collection Plan

Putting it all together & adding more details

Data Collection Plan Template (20 of

DATA BASICS

Identify the purpose of collecting this social identity data

Being clear about your purpose will help gain trust from the people you are collecting data from

Decisions 1 & 3

Written statements 10 & 11

COLLECTING THE DATA

When will you collect data?

Define the data collection period and appropriate timeframes.

Decision 5

Who is going to collect the data?

Identify the person(s) who will collect the data.

Decision 6

What is the source for data collection?

What is the sample or population that you will be collecting data from?

Decision 4

What is the method for data collection?

What is the method for data collection? *Will you use an in-person survey, online survey, phone interviews, intake interviews, etc. - or a combination?*

Decision 2

What is your plan for conducting the data collection?

Include here the step-by-step process and script for use during data collection

Informed by all of the above

Write / draw out Data Collection Workflows for different scenarios (see Examples pages 22 - 26)

Write out your script based on the survey tool introduction and scenarios shared in the capacity building workshop and online resource and discussion forum

Data Collection Plan Template (21 of

RECORDING THE DATA

Where will the responses be recorded?
Have you created a data collection sheet/template?

Part of Your Data Collection Workflow (see Examples)

Where will the declines be recorded?
Have you created a data collection sheet/template? Will it include space for notes about why someone declined if they shared their reasons?

Part of Your Data Collection Workflow (see Examples)

Where will the data be stored and for how long?
Data must be safely stored in line with your privacy policy and regulations

Decisions 8 & 9
Written statement 12
Privacy policy (14)

USING THE DATA

How will raw data be shared?
Who will have access to the raw data? A Data Use Agreement might be required.

Includes Decisions 3 & 7
Written statement 13
Privacy policy (14)

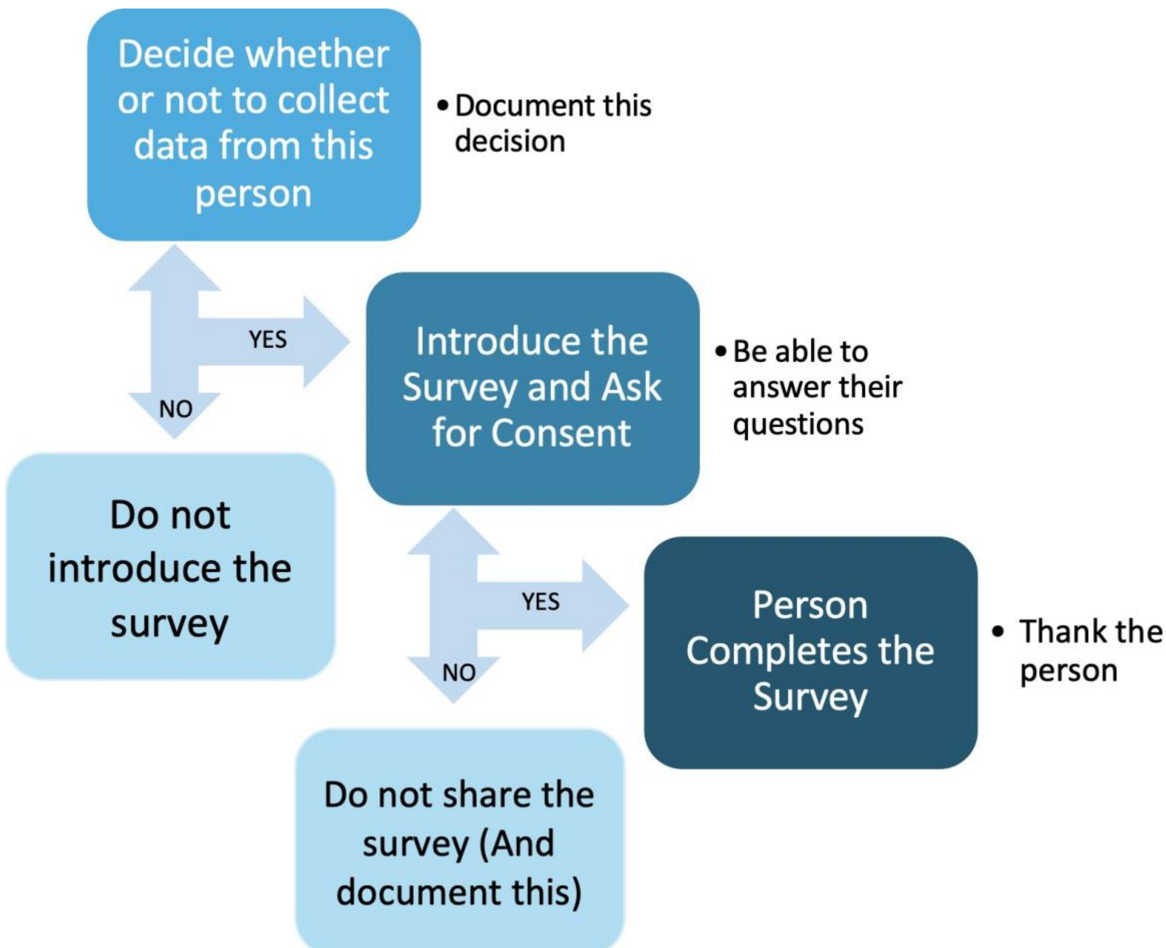
How will grouped (aggregate) data be shared?
Who will have access to the grouped (aggregate) data? Who will receive results?

Includes Decisions 3 & 7
Written statement 13
Privacy policy (14)

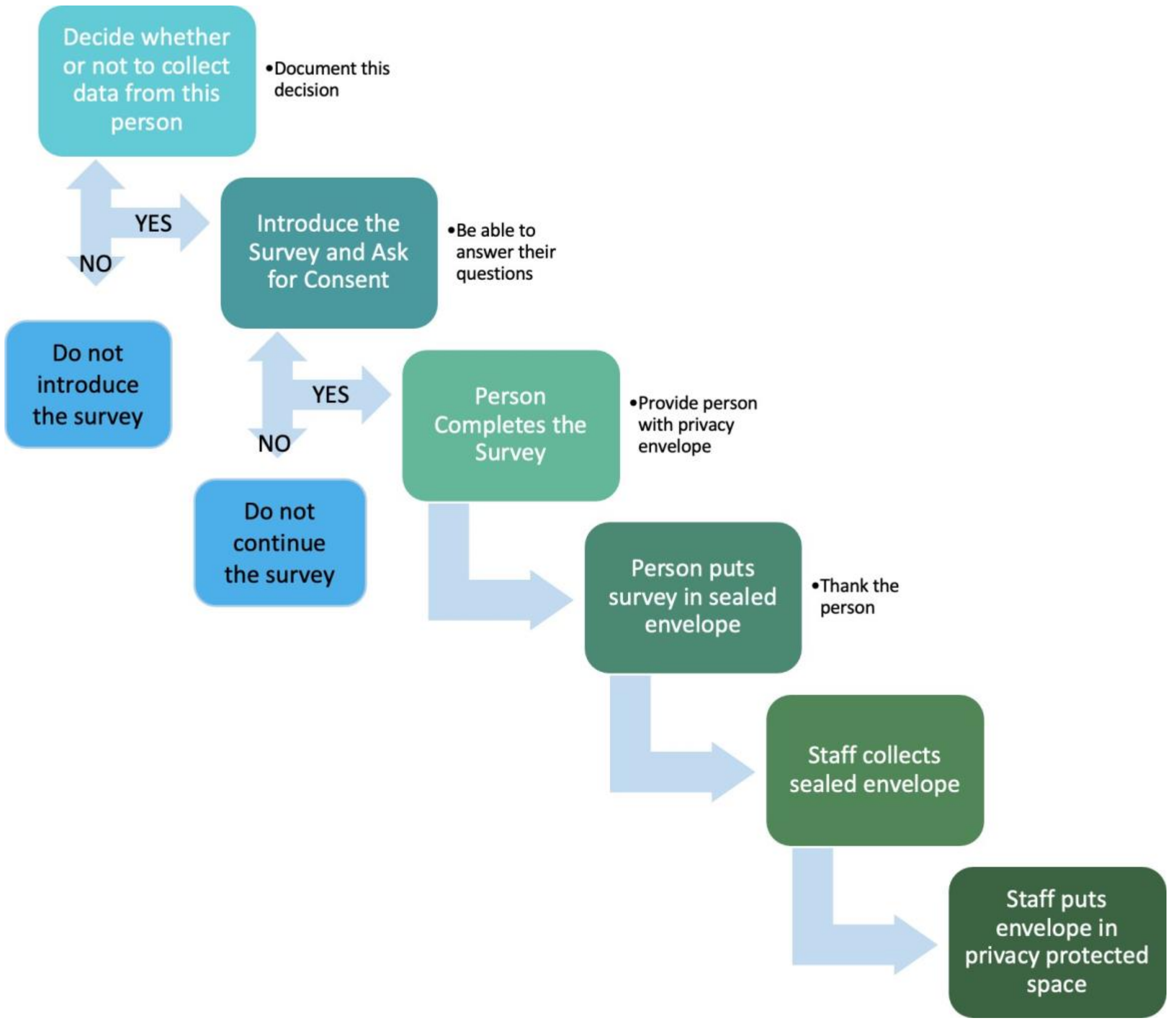
Data Collection Workflow Examples

Think through logistics for your situation(s) step by step

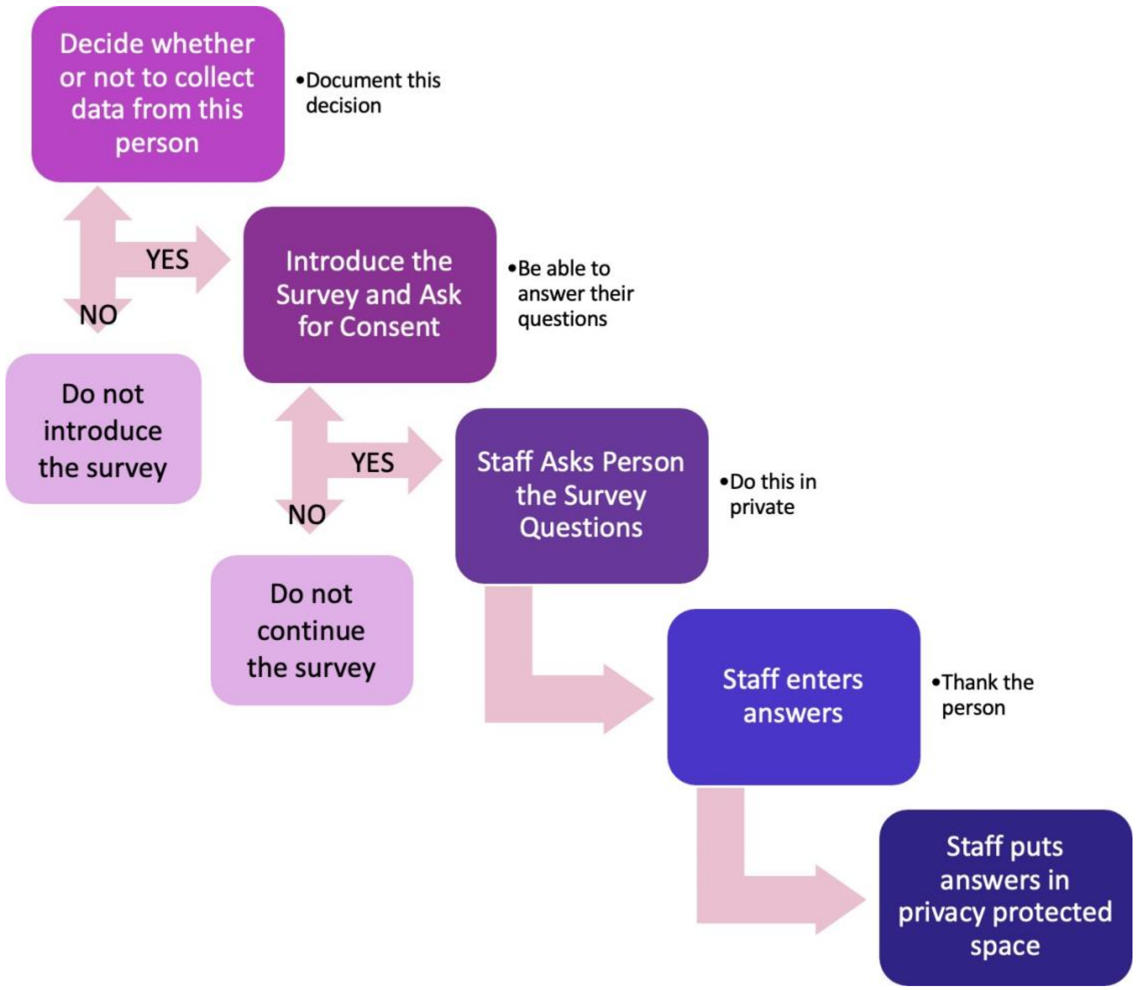
Data Collection Workflow Example 1: A person fills out an **online** survey themselves



Data Collection Workflow Example 2: A person fills out a **paper** survey themselves



Data Collection Workflow Example 3: An agency staff person gives people a **paper** survey



PURPOSE OF BE YOURSELF, SEE YOURSELF: Learn what it would take to have a standardized way to collect data across the Greater Toronto social sector

Workbook

This is where to start. The workbook will help you understand the important decisions you and your team need to make in preparation for collecting social identity data for this pilot project. The workbook also includes a template for your final data collection plan.

- PDF
- Word Doc

Survey tool

This is the survey tool that our project is testing out. This tool will provide you with the questions to ask, the categories for response and how to talk to the people you're collecting data from. Of course, you are not required to use this entire tool but you have made a commitment to testing at least a few of these survey questions as part of this project. Keep track of your thoughts on this tool, especially what does not work and how you would change it, as you can provide feedback.

- English PDF
- Folder of language translations in PDF
- Folder of language translations in Word Doc
    - **A note on MS Word documents:** please be advised that you may experience formatting issues when working with languages that use other characters. Therefore it may be best to instead work with the PDF formats of the translations.

Session Recordings (please note: all videos are for internal use only)

It's not mandatory to watch these videos. You may have already attended these sessions live. We are sharing these videos in case you want to watch them again or share them internally with members of your team who could not attend.

- Cohort 1 Orientation Session
- Cohort 1 Capacity Building Session

- Cohort 2 Orientation Session
- Cohort 2 Capacity Building Session

- Cohort 3 Orientation Session
- Cohort 3 Capacity Building Session

- (All Cohorts) Data Analysis for Equity Session

Practice Scenarios
Try role playing with these practice data collection scenarios

Here is a link for a guide to dealing with difficult situations,

Privacy Requirements
When you collect data, particularly sensitive data such as what we are collecting in this project, it is essential that you have a strong privacy practice.
Here is a link to a document that can help you set up your data collection and storage process in a way that aligns with your privacy requirements.

Additional video content from April 26th workshop (please note: all videos are for internal use for project participants only)
These are the recordings from a public event designed to talk about the importance of how and why we collect data. It's not mandatory to watch these videos, but they may be helpful in describing to your team why we're collecting data in the way we are.

- Panelist of individuals with intersecting identities sharing their lived experiences of having their data collected
- Presentation from the Children and Youth Planning Table of Waterloo Region on their experience implementing a survey, incentivizing participation and organizing sensemaking sessions with the respondents

Frequently Asked Questions
Any further questions you may have may be answered in our Frequently Asked Questions document.