

MARCH 2024

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Case studies of social
service innovations

The *Be Yourself, See Yourself* Pilot Project:

Challenges, Lessons and Implications from Collecting Social Identity Data



WORKING WITH
COMMUNITIES IN
PEEL, TORONTO &
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Land Acknowledgement

It is with profound respect that United Way Greater Toronto acknowledges that we operate on the traditional territory and gathering place of many Indigenous nations including the Wendat, the Anishnaabeg and the Haudenosaunee. Today, it is home to many urban Indigenous peoples, including the Inuit, Métis and First Nations peoples.

We recognize that the Greater Toronto Area is covered by several treaties including Treaty 13 signed with the Mississaugas of the Credit First Nation and the Williams Treaties signed by seven First Nations including the Chippewas of Beausoleil, Georgina Island and Rama, and the Mississaugas of Alderville, Curve Lake, Hiawatha and Scugog Island.

We recognize the rights of Indigenous communities and acknowledge the ancestral and unceded territories of the Inuit, Métis and First Nations peoples across Turtle Island. We honour the teachings of Indigenous peoples with respect to the land we each call home and our responsibilities to the land and one another. We are committed to improving our relations with Indigenous peoples and acting on our responsibilities in Truth and Reconciliation and the United Nations Declaration on the Rights of Indigenous Peoples.

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As the largest non-government funder of community services in the GTA, United Way Greater Toronto reinforces a crucial community safety net to support people living in poverty. United Way's network of agencies and initiatives in neighbourhoods across Peel, Toronto and York Region works to ensure that everyone has access to the programs and services they need to thrive. Mobilizing community support, United Way's work is rooted in ground-breaking research, strategic leadership, local advocacy and cross-sectoral partnerships committed to building a more equitable region and lasting solutions to the GTA's greatest challenges.

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PhiLab

CANADIAN PHILANTHROPY
PARTNERSHIP
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The Canadian Philanthropy Partnership Research Network / Réseau canadien de recherche partenariale sur la philanthropie (PhiLab) is a Canadian research network on philanthropy. The network is divided into several regional hubs across the country. The network's headquarters are located in Montreal, on the Université du Québec à Montréal (UQAM) campus. Philab Ontario is a hub located at Nipissing University.

The project started in 2014 as part of two SSHRC partnership development projects on "Canadian Grantmaking Foundations". From its beginning, the Network has been a place for research, information exchange and mobilization of Canadian foundations' knowledge. Research conducted in partnership allows for the co-production of new knowledge dedicated to a diversity of actors: government representatives, university researchers, representatives of the philanthropic sector and their affiliate organizations or partners.

The Network brings together researchers, decision-makers and members of the philanthropic community from around the world in order to share information, resources, and ideas.

philab.uqam.ca



Message from Daniele

In United Way Greater Toronto's 67 years of working with community, we've seen the critical importance of targeted programming and solutions to address inequities and effectively serve the GTA's diverse communities. We've also seen that in order to advance this, community agencies need accurate information on who they serve.

Understanding social identity markers like gender, race, ethnicity, Indigenous identity, sexual orientation and immigration status, and how they interact with each other and our environment to shape our experiences, challenges and needs, is critical. We know a one-size-fits-all approach to serving community cannot effectively meet the range of need we see in the GTA, nor can it leverage the unique strengths and solutions different communities bring to the challenges and opportunities in front of them. We also know we must work proactively to dismantle the systemic barriers and inequities that prevent so many of our neighbours from living the lives they deserve.

In early 2020, United Way, in partnership with the City of Toronto, Community Funding Unit and the Toronto Central Local Health Integration Network, launched the Data for Equity pilot project exploring the collection of standardized socio-demographic information with 11 funded agencies. The pilot launched before we knew how much the COVID-19 pandemic would make our existing inequities tragically clear.

We saw through data heatmaps that the GTA neighbourhoods hit hardest by COVID-19 were those already disproportionately affected by structural inequities. We also saw the difference that tailoring solutions to specific communities makes – from vaccine ambassadors who share your language and cultural practices to supports that take into account the unique challenges you face at home, or in the absence of a place to call home.

We profiled several of these tailored solutions, and the practical lessons they have to offer, in "Collaboration, Cooperation, Co-Creation: Case Studies of Social Service Innovations During COVID-19," a five-part case study series released in 2022 in partnership with the Canadian Philanthropy Partnership Research Network (PhiLab). Now, we're pleased to build on these learnings from the pandemic with new insights and directions to deepen the community sector's ability to plan accurately and intentionally around the people it serves.

Our newest case study shares learnings generated through the experiences and expertise of participants in the second phase of the Data for Equity pilot, *Be Yourself, See Yourself*, implemented in 2022. The community service sector's unwavering commitment to advancing equity during a time of crisis has carved a critical path toward lasting change.

Our pandemic heroes included agencies, their staff and partners, who recognized that COVID-19 was a reason to deepen, not side line, efforts to improve the collection and use of social identity data. This work remains paramount—even and especially amid the many challenges our region is grappling with today—and this report shares learnings to equip ourselves and our community sector partners in carrying it forward.

Daniele Zanotti
President & CEO
United Way Greater Toronto

The *Be Yourself, See Yourself* Pilot Project: Challenges, Lessons and Implications from Collecting Social Identity Data (SID)



Social Identity Data refers to information related to how individuals or groups self-identify or categorize themselves in terms of social identifiers such as age, sex at birth, gender identity, Indigenous identity, place of birth, race, sexual orientation, and language.



Data Equity is about making choices with data that prioritize the people and communities that we are trying to prioritize in our services and programs.

beyourselfseeyourself.ca



Good Practices for SID Collection, Analysis and Use:

- Utilize SID as a tool to promote equity.
- Approach SID collection with cultural humility.
- Establish transparent communication and trust.
- Prioritize sustained investments in training and infrastructure.
- Acknowledge the historical harms of data and apply a data equity lens to avoid reinforcing them.



Implications for the Future:

- Build a collective vision for SID.
- Recognize and mitigate power imbalances.
- Develop a comprehensive data strategy.
- Chart a plan to strengthen and sustain agency capacity.
- Integrate service users into the SID lifecycle.
- Undertake future research and knowledge mobilization activities.



The Benefits of SID Collection, Analysis and Use:

Challenges assumptions about service user identities.

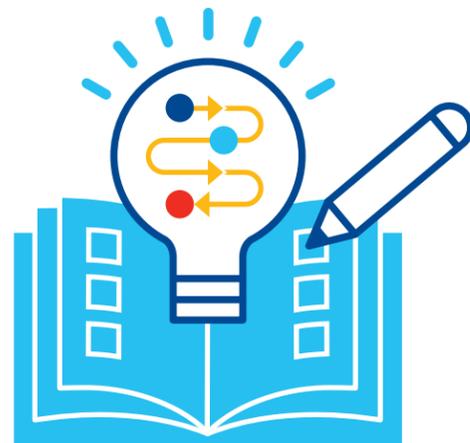
Highlights gaps and disparities in access to social and community services.

Guides program design and delivery to enhance cultural relevance and meet the unique challenges of service users and communities.

Informs development of anti-oppressive and anti-racist strategies.

Lessons Learned:

- The collection, analysis and use of SID can be a powerful equity strategy.
- Service user perspectives are central to effective SID planning and implementation.
- Collaboration and trust-building among funders, agencies and service users is critical.
- SID 'maturity' varies across the sector and sustained investments in training and capacity building are required.
- More experimentation and learning are needed to steer sector-wide SID practice.
- While SID has tremendous potential for good, it comes with several risks.



The *Be Yourself, See Yourself* Pilot Project: Challenges, Lessons and Implications from Collecting Social Identity Data

Introduction

SOCIAL IDENTITY DATA (SID) refers to information related to how individuals or groups self-identify or categorize themselves in terms of social identifiers such as age, sex at birth, gender identity, Indigenous identity, place of birth, race, sexual orientation, and language.

Collecting social identity data (SID) and disaggregated data analysis is an area of increasing interest in the social and community services sector. United Way Greater Toronto (United Way) is committed to evidence-based philanthropy and community impact. We have been at the forefront of this exploration, collaborating with funding partners and agencies within our network over the past decade to expand our understanding of the benefits and feasibility of collecting SID within the social and community services sector. Since 2020, United Way has been engaged in a pilot project focused on building collective learning and capacity around SID. Alongside our role as a funder, network convenor and capacity builder, we have been harvesting learnings from this work to better understand the promise of SID and how it informs delivery of effective, targeted services across the social and community services sector. With little written about SID collection, analysis and use from this perspective, this case study offers sector-specific insights to inform future practice.

The bulk of the literature exploring SID collection and use originates in the healthcare sector. This case study adds to learnings from the healthcare context insights and perspectives on SID usage in the community services sector. It profiles the experiences of community service agencies, funders and service users connected to the *Be Yourself, See Yourself* SID collection pilot project.

While there is much for social and community services to learn from healthcare, the contexts are distinct. The goal of this case study is twofold: i) to share the experiences, challenges and learnings of the different partners involved in the *Be Yourself, See Yourself* pilot project and ii) to highlight key learnings and future considerations to support sector-wide systems improvements connected to SID practices across the social and community services sector.

From this sector-wide perspective, one overarching benefit of SID collection and analysis is the ability to understand, at the individual service user level, who is—and who is not—accessing services and supports. Knowing who is over- and under-represented, compared against local demographics and understanding of need, highlights service gaps and disparities and can strengthen equity in program design and delivery when such disparities are addressed. SID can be used to inform program design and ensure programs are appropriately tailored to those using the services.

A tangible and high-profile example of the insights gleaned from SID data emerged during the COVID-19 pandemic, when Toronto Public Health collected, analyzed and summarized SID data, specifically ethno-racial identity, income and household size, on COVID-19 cases. The data revealed disproportionately higher infection rates for racialized and low-income persons across the City.¹

¹ Amberber, N., Iveniuk, J., & McKenzie, K. (2021). Inequities over time in COVID-19 infection and COVID-19-related hospitalizations/deaths. Wellesley Institute. <https://www.wellesleyinstitute.com/wp-content/uploads/2021/07/Inequities-over-time-in-COVID19-infection-and-related-hospitalizations-and-deaths.pdf>



Further disparities were revealed in the City's rollout of vaccines, where infection hotspot locations were not prioritized for vaccine access early on.² SID was used to inform mitigation strategies, including a more tailored approach that saw increased resources to community-led vaccination efforts in hotspot locations home to racialized and low-income individuals.³

Yet, despite the potential benefits of SID collection and analysis, primary data collection is fraught with challenges and potential risks that must be weighed against potential benefits. The literature points to both ethical and technical challenges of SID collection and analysis, and offers several strategies to enhance implementation. Pulling from academic articles and grey literature (i.e., government and agency reports), **figure 1** provides a high-level snapshot of findings from a rapid literature review on the topic.⁴ Note that the literature review and corresponding visual are not comprehensive and may not capture all possible benefits, challenges and strategies encountered through SID collection and analysis.

² Mundo Ortiz, A. I., & Nasri, B. (2023). Socio-demographic determinants of COVID-19 vaccine uptake in Ontario: Exploring differences across the Health Region model. medRxiv, 2023-08. <https://doi.org/10.1101/2023.08.04.23293662>

³ Guay, M., Maquiling, A., Chen, R., Lavergne, V., Baysac, D.-J., Kokaua, J., Dufour, C., Dubé, E., MacDonald, S. E., & Gilbert, N. L. (2022). Sociodemographic disparities in COVID-19 vaccine uptake and vaccination intent in Canada. Health Reports, 82-003-X. <https://www.doi.org/10.25318/82-003-x202201200004-eng>; Amberber, N., Iveniuk, J., & McKenzie, K. (2021). Inequities over time in COVID-19 infection and COVID-19-related hospitalizations/deaths. Wellesley Institute. <https://www.wellesleyinstitute.com/wp-content/uploads/2021/07/Inequities-over-time-in-COVID19-infection-and-related-hospitalizations-and-deaths.pdf>

⁴ Please see the appendix for a list of all academic articles and grey literature reports included in our scan.



Figure 1. Benefits, challenges and strategic considerations for SID collection, analysis, and use.

Methodology

This case study features the experiences and challenges of social and community service agencies, service users and funders who participated in the second phase of the Data for Equity Pilot: *Be Yourself, See Yourself* throughout 2022.^{9,10} Building from a much smaller pilot implemented in 2020, *Be Yourself, See Yourself* sought to build capacity for SID collection across a range of partners within Toronto’s social and community services sector.

This case study draws on 11 semi-structured interviews conducted online between August and September 2023 with 13 participants. Each interview lasted 45 to 60 minutes. Participants included two service users, staff from four participating agencies, representatives from the pilot’s three funders and two project consultants contracted to lead the capacity-building and evaluation components of the pilot project. The four agencies were chosen through discussion with the project coordinator and project consultants. While interviewees do not represent all the agencies and partners who participated in the pilot, they provide a cross-sectional perspective of the pilot project.

One limitation of this work is the lack of engagement with agencies led by and serving Indigenous peoples, Black peoples and structurally disadvantaged populations. Outreach and engagement activities are built into the report’s dissemination and knowledge mobilization plans.

We thank all interviewees for making time to share their experiences and make this report possible.

⁹ Ferrer, C., Mendis-Millard, S., & Krause, H. (2022). Report on capacity building activities of the *Be Yourself, See Yourself* Pilot Project 2.0. Findhelp | 211. <https://beyourselfseeyourself.ca/wp-content/uploads/2023/07/Be-Yourself-See-Yourself-Capacity-Building-Report-January-2023-4.pdf>

¹⁰ D&D Inclusion Consulting. (2023). Final evaluation report (Evaluation Report 2021/2022 - 02) from the *Be Yourself, See Yourself* pilot. Findhelp | 211. <https://beyourselfseeyourself.ca/wp-content/uploads/2023/07/BYSY-Project-Final-Evaluation-Report-February-2023.pdf>

About the Interviewees

Agencies⁵:

Findhelp | 211 is a charitable, not-for-profit agency that connects people to support when and how they need it through 24/7 multilingual navigating, crisis response, specialty helplines, online searches and a comprehensive database of human and social services.

Leveraging their experience and learnings as a participating agency in the inaugural Data for Equity pilot, Findhelp | 211 assumed the project management and coordinator role for *Be Yourself, See Yourself*, responsible for all elements of project design, management and delivery. Findhelp | 211 will continue to coordinate project activities connected to the third iteration of the pilot, scheduled for implementation in 2024.

The **Jane/Finch Centre (JFC)** is a multi-service, community based organization delivering poverty reduction, resident engagement, capacity building and anti-oppression initiatives in Toronto's Jane and Finch community. JFC is governed by a resident-led Board of Directors, and prioritizes collaborations with residents, community leaders and various partners.

For *Be Yourself, See Yourself*, JFC collected SID from youth participating in their Youth Violence Prevention Project–Fallstaff Youth Social drop-in program tailored to youth from Toronto's designated Neighbourhood Improvement Areas and/or revitalization sites.

Malvern Family Resource Centre (MFRC) is a multi-service social service agency that has been serving Toronto's Scarborough North and Scarborough Rouge Park ridings for the past 38 years. With a rich history rooted in community, the agency has experienced consistent growth, adapting to the evolving needs of the communities it serves.

For the pilot, MFRC integrated SID collection using the *Be Yourself, See Yourself* survey tool into existing intake processes for various drop-in and social programs tailored to seniors, youth, newcomers and refugees, children and women, as well as food justice programs.

The Neighbourhood Group Community Services (TNG)

is a social service agency in Toronto serving over 40,000 low-income individuals and families across 30 locations annually. With more than 1,000 staff and 600 volunteers, TNG provides free programs and services addressing poverty, homelessness, unemployment, mental health, social isolation, substance abuse and integrating newcomers.

For *Be Yourself, See Yourself*, TNG piloted SID collection in their Youth Job Connection program, a two-week program designed to support youth with finding and retaining employment. TNG staff administered the SID survey tool across seven Youth Job Connection program cohorts in 2022-2023. SID was collected from service users during the program's second week.

Funders:

The **City of Toronto, Community Funding Unit** sits within the Social Development, Finance and Administration Division (SDFA) at the City of Toronto, which drives transformative change to achieve stronger, safer and more resilient communities and neighbourhoods. SDFA leads the City of Toronto's equity and inclusion strategies. The Community Funding Unit provides long- and short-term funding for not-for-profit, grassroots and resident-led groups to design and lead community-based projects that provide social services and encourage resident engagement and leadership development.

The Community Funding Unit has been engaged in the Data for Equity/*Be Yourself, See Yourself* pilot project since inception in 2020, as both funder and advisor.

⁵All four agencies interviewed for this case study are United Way anchor agencies. United Way funds a network of anchor agencies that receive flexible and multiyear funding intended to build strong, responsive, sustainable and effective organizations.



The **Ontario Trillium Foundation (OTF)** is an agency of the Government of Ontario and one of Canada’s leading granting foundations. Its mission is to build healthy and vibrant communities throughout Ontario by investing in community-based initiatives and strengthening the impact of Ontario’s non-profit sector.

Given OTF’s role as a funder and its growing interest in enhancing sector-wide data capacity, OTF participated in *Be Yourself, See Yourself* as a funder and member of the advisory group.

United Way Greater Toronto is the largest non-government funder of community services in the Greater Toronto Area (GTA). United Way has been engaged in the Data for Equity/*Be Yourself, See Yourself* pilot project since inception in 2020 as a funder and advisory group member. Building internal and community sector-wide capacity for efficient and ethical SID collection and analysis connects to United Way’s Reconciliation and Equity Action Plan commitment to support equitable outcomes in community by identifying and addressing service needs and gaps.⁶

This case study is a contribution to the collective efforts and shared learning journey of all partners engaged in the data for equity pilot projects.

Project Consultants:

D&D Inclusion Consulting is an equity, diversity and inclusion (EDI) consulting firm that conducts program evaluations, EDI audits, training and advisory services. It works with organizations across various sectors and industries. D&D Inclusion Consulting led a developmental evaluation of the *Be Yourself, See Yourself* pilot project focused on gathering insights on challenges and successes and identifying areas for improvement.

We All Count is a project for equity in data science. We All Count led the capacity building components of the *Be Yourself, See Yourself* pilot, providing training and technical support to participating social service agencies.

⁶ United Way Greater Toronto. (2019, September 18). Our Vision for Reconciliation & Equity. Retrieved from <https://www.unitedwaygt.org/about-us/our-mission-and-values/reconciliation/#:~:text=Our%20vision%20for%20reconciliation%20%26%20equity,ensure%20their%20wellbeing%20and%20prosperity>

About *Be Yourself, See Yourself*

Funded jointly by the City of Toronto, United Way and OTF, and championed and led by social and community service agencies, *Be Yourself, See Yourself's* primary objective was to understand and begin to address challenges and barriers to SID collection across the community and social services sector in Toronto. Whereas the first iteration of the pilot (implemented in 2020) was driven and led by funders, *Be Yourself, See Yourself* (implemented in 2022) was reconceptualized as an agency driven initiative.

To create distance between funders and agencies and truly place the pilot in the hands of community agencies, Findhelp | 211 was funded to lead all project management and implementation activities, including coordination and convening of partners. Under their guidance, 53 agencies were engaged in pilot activities across three cohorts.⁷ Agencies attended three virtual capacity building sessions to enhance their SID collection knowledge and capabilities, and had access to informal coaching sessions and resources, including a slightly modified City of Toronto SID collection survey tool.⁸ The tool was made available to all agencies and translated into 15 languages based on the communities served by participating agencies. With exception of the survey tool, all capacity building training activities, tools and resources were presented and prepared by We All Count.

A 12-member advisory group comprised of funders and community agency staff with subject matter expertise in SID collection convened quarterly to provide guidance on the pilot's direction and share reflections to support collective learning and advocacy for more comprehensive SID capacity across the community services sector. While advisory members provided recommendations, as the project coordinator and manager, Findhelp | 211 was accountable for all project decisions.

The advisory heard about and discussed issues identified by consultants and participating agencies through the pilot, including challenges with project recruitment, emerging barriers to participation and concerns with the data collection survey tool, among others.

Of note, the advisory named and discussed tensions with underlying power dynamics (between funders and agencies and agencies and service users) and deliberated data equity as a central theme.

“As funders coming together to initiate this work, we recognize there’s a power dynamic around us enforcing a certain kind of data collection on organizations for our own decision-making purposes. Organizations recognize the need to report to funders but they’re very clear about the power dynamic that is at play. They are asking themselves, ‘What is this data being collected for and how does it best serve our learning needs versus the needs of a funder. And how are funders going to be using this data?’ As funders we need to meaningfully address these questions. We are doing this learning in this partnership” (project funder).



DATA EQUITY is about making choices with data that prioritize the people and communities that we are trying to prioritize in our services and programs.

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⁷ 43 agencies were active pilot participants while an additional 10 audited the training sessions.

⁸ The survey tool is not included in this report because it is undergoing further refinement in response to agency experiences and feedback.

The tension between standardization and the need for flexibility in SID collection and reporting was a recurring area of discussion at the advisory table. On the one hand, standardization offers a streamlined, uniform methodology and fosters consistency in terminology, data management and analysis. This uniformity can offer a clear and consistent framework for data collection and reporting and support sector-level analysis. On the other hand, standardization runs the risk of generating distress or trauma connected to personal experiences. If all questions are asked to all people, there is no room to consider how individuals may be negatively affected by the questions being asked.

A flexible approach empowers agencies to place individuals at the centre and gather data that won't cause harm to participants. Moreover, flexibility allows agencies to determine which data is most relevant and crucial for their context, while also respecting capacity constraints.

All partners recognize the need for balance and appreciate that a strictly standardized approach might reinforce uneven power dynamics and colonial structures between funders and agencies. Funders are weighing benefits of both approaches as they seek to understand patterns and gaps to address structural inequities in service access.

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“Some team members feel we [funding organization] should be more directive; others feel we should be more flexible. And although we're taking the flexible route at this point, it is something for us to consider. Can we be a bit more directive, as the funder, and by being more directive, we emphasize the importance of SID and how it can influence change in the sector?” (project funder).

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All three funders engaged in the pilot are hyper-aware of existing tensions and open to exploring a truly collaborative approach. As a group, they seek to nudge change within the sector, moving agencies toward SID collection and analysis as a practice to further enhance the effectiveness and equity of service delivery. Funders are learning alongside agencies that building sector-wide capacity for SID is a long process that requires flexibility and patience.

Advisory members agreed that a funder-driven model would run counter to the kinds of systems improvements the *Be Yourself, See Yourself* pilot was aiming to address. Without sufficient training and capacity building around data collection and analysis practices and systems, any funder requirements for SID reporting run the risk of perpetuating existing systems constraints, such as limited access to technology, inadequate data management tools and limited data analytics capacity. Furthermore, funder requirements for SID might place additional and significant administrative burdens on agencies, which may further disadvantage small, Indigenous-led, Black-led and other equity-led agencies. Beyond foreseeable issues of poor data capture and data quality, such a scenario might also jeopardize agency relationships with their service users and further exacerbate power imbalances and mistrust of funders. Acknowledging these complexities, *Be Yourself, See Yourself* focused on collaborative skill building and collective learning over data reporting. Advisory members and project partners are shifting their mindsets and developing a more nuanced understanding of the intricacies involved and the need for a supported and flexible approach to SID collection that contributes to systems improvements rather than perpetuate existing data capacity challenges within the sector.

A capacity building report and a developmental evaluation report were completed by the project's two contracted consultants. The capacity building report outlines the key activities of the pilot and identifies six recommendations for future consideration.⁹ The evaluation report identified key learnings and areas of improvement.¹⁰ Both reports reveal the need for enhanced capacity building and collaboration among all parties involved in the pilot and in data collection activities more broadly across the community and social services sector.

⁹Ferrer, C., Mendis-Millard, S., & Krause, H. (2022). Report on capacity building activities of the *Be Yourself, See Yourself* Pilot Project 2.0. Findhelp | 211. <https://beyourselfseeyourself.ca/wp-content/uploads/2023/07/Be-Yourself-See-Yourself-Capacity-Building-Report-January-2023-4.pdf>.

¹⁰D&D Inclusion Consulting. (2023). Final evaluation report (Evaluation Report 2021/2022 - 02) from the *Be Yourself See Yourself* pilot. Findhelp | 211. <https://beyourselfseeyourself.ca/wp-content/uploads/2023/07/BYSY-Project-Final-Evaluation-Report-February-2023.pdf>

SID Capacity Building: Data Collection and Analysis

The *Be Yourself, See Yourself* pilot validated observational data revealing a large spectrum of data maturity across the sector. Whereas some organizations have advanced data analytics systems and capacity to leverage data for decision making, others have quite limited data-related capabilities. Based on data from 45 surveyed participating agencies, only 41% had a paid staff role responsible for data collection and analysis.¹¹ The larger the agency size and revenue, the more likely they were to have this expertise on staff.¹² Almost half (48%) of agencies surveyed indicated having a dedicated process to collect data but no further details were provided to assess the effectiveness of existing processes.¹³

***Be Yourself, See Yourself* workshops and materials provided agencies a mix of information and training on ethical and technical elements of SID, all guided by a data equity lens.**

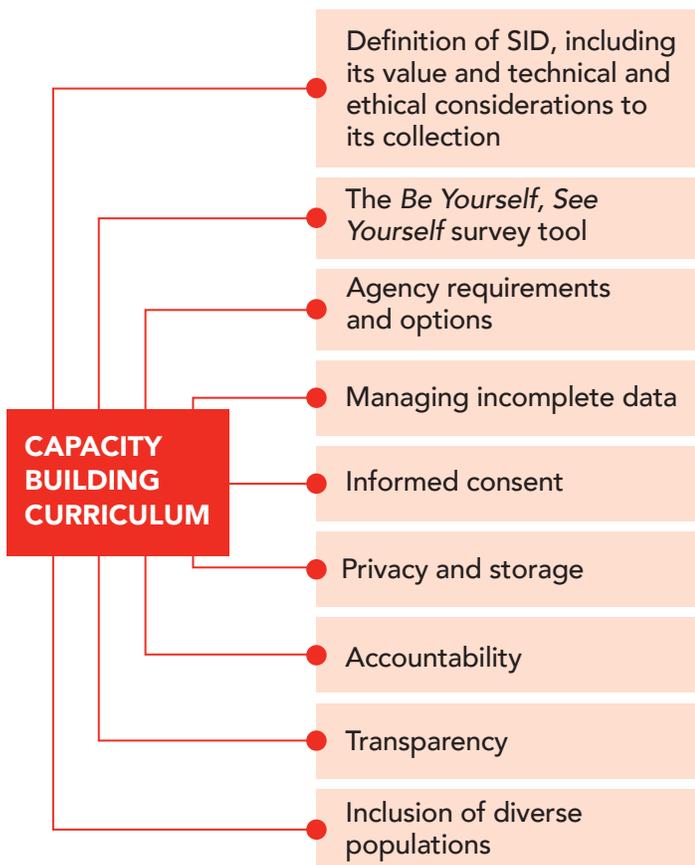


Figure 2. Capacity building curriculum.

Collecting SID is not merely a logistical or technical endeavour but an exercise in human interaction and trust. As part of the pilot, to enhance transparency, the survey tool was adapted to include modifiable preamble text explaining why the data was being collected and outlining processes to ensure privacy and confidentiality. The text clarified the voluntary nature of the survey and explicitly requested consent from participants. Additional text was added before specific questions explaining what that specific data point would help agencies understand and respond to.

Interviewees—both agency staff and service users—emphasized informed consent as part of the survey process. Despite concerns around misuse or misinterpretation of data, service users acknowledged that clarity of communications around the use of data increased trust with agency/agency staff and decreased their reservations to participate.

¹¹ D&D Inclusion Consulting. (2023). Final evaluation report (Evaluation Report 2021/2022 - 02) from the *Be Yourself See Yourself* pilot. Findhelp | 211. <https://beyourselfseeyourself.ca/wp-content/uploads/2023/07/BYSY-Project-Final-Evaluation-Report-February-2023.pdf>

¹² D&D Inclusion Consulting. (2023). Final evaluation report (Evaluation Report 2021/2022 - 02) from the *Be Yourself See Yourself* pilot. Findhelp | 211. <https://beyourselfseeyourself.ca/wp-content/uploads/2023/07/BYSY-Project-Final-Evaluation-Report-February-2023.pdf>

¹³ D&D Inclusion Consulting. (2023). Final evaluation report (Evaluation Report 2021/2022 - 02) from the *Be Yourself See Yourself* pilot. Findhelp | 211. <https://beyourselfseeyourself.ca/wp-content/uploads/2023/07/BYSY-Project-Final-Evaluation-Report-February-2023.pdf>

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“First, I think the most important piece is explaining to individuals that this is very important data and it’s private to you, right? Whether you share it or not, it’s completely an individual choice, and you should never feel bad about the choices you make on that. You know, sometimes those are very personal details. And they are helpful. And if you want to, give it anonymously in a separate space... You want to give individuals as many different options as possible, and really reiterate that process. So, that makes it a relationship-building process. But [it’s] not just like, here’s a form, fill it out, but tying those pieces in the community because I think what you guys are doing or what you’re doing here in the team is really important. So explaining why these things are important is good” (service user).

.....

Collecting SID is not just about the framing and the questions asked but also the environment in which data is collected. The choice of data collection methods can determine the quality and quantity of responses. As several agencies experienced during the pilot, even the most meticulously planned data collection plans can encounter unforeseen challenges, affecting response rates and data completeness.

Whereas the Jane/Finch Centre (JFC) and Malvern Family Resource Centre (MFRC) embedded SID collection into existing program intake processes, The Neighbourhood Group (TNG) chose instead to distribute the SID surveys mid-way through a two-week program to allow time for initial trust-building between program staff and participants.



JFC staff asked **83** youth to provide their SID, of which 35 consented to share their data (42%), 20 denied and 28 did not respond to the request.

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MFRC staff asked **753** service users to provide their SID during the pilot; 262 service users provided data (35%).

.....



For **TNG**, out of **69** youth asked, 66 provided their SID (96%), two denied and one did not respond to the request.

While TNG’s approach might signal the importance of trust building with service users, the higher response rate does not necessarily indicate that its SID collection approach was better than the other two agencies’. Various factors, such as the differing demographics of service users, the nature of the programs, or even the timing of the survey distribution in relation to other program activities, impact response rates. Attributing the higher response rate solely to the timing and approach of survey distribution by TNG might overlook these other influential variables. Further research is required before any such conclusions can be drawn.

In fact, deeper analysis reveals that data quality was lacking in the TNG surveys. Several service users left entire sections of the survey blank, leading to issues with data completeness. TNG staff speculated that their paper-based format could be to blame and expressed interest in piloting a digital survey format. While a digital format might mitigate data completeness issues by marking critical questions mandatory and requiring a response before moving to the next question, this approach can create frustration and lead to survey abandonment, decreasing response and consent rates and increasing non-response bias.¹⁴

¹⁴ Canadian Institute for Health Information. (2022). Guidance on the use of standards for race-based and Indigenous identity data collection and health reporting in Canada. <https://www.cihi.ca/sites/default/files/document/guidance-and-standards-for-race-based-and-indigenous-identity-data-en.pdf>

JFC tested a hybrid methodology, providing the option for a paper-based survey or a digital survey via a QR code. They had greater uptake with the paper-based method, potentially because it required service users to fill out the form in person.

JFC and TNG encountered challenges specific to youth engagement in SID collection, noting youth could not or did not want to answer certain questions, especially those related to family income. It is conceivable youth do not know their family's income and/or feel like they may not be in a position to disclose those details.

A key pillar of data governance is utilizing the data collected for its intended purpose. In other words, once SID has been collected, analysis must follow. The pilot identified challenges with data analysis capacity (expertise and resourcing) across the sector, from both a funder and an agency perspective. Where agency staff may lack the skills to analyze the data collected or be too far removed from agency leadership and strategy to influence decision-making around program design, funders also acknowledged a gap in their capacity to process, identify and analyze large datasets in a manner that would directly inform funding decisions and strategic planning.

Service users, for their part, expressed an interest in seeing the results of data analysis and suggested agencies share the results back with community as good practice. Service users acknowledged that while some agencies might share some research and evaluation results with community, they tend to do so in a manner that does not fully resonate with community, often using inaccessible and jargon-heavy language. They suggest instead events, infographics and other more engaging and understandable formats to convey the findings, and ideally actions flowing from the SID analysis.

From research to action

The SID journey is ultimately about equity, prioritizing people and communities, and accountability, ensuring services are culturally centered and reflective of community needs.

Through the pilot, MFRC identified a deep linguistic diversity among its clientele. With this data insight, MFRC hired bilingual staff and interpreters in the identified languages, translated program materials and resources, and began delivering some programs in languages other than English.

Similarly, after collecting and analyzing SID, the JFC gained a more nuanced understanding of the diversity of youth attending their programs. The data revealed a predominantly Caribbean background among their Youth Violence Prevention Project attendees, highlighting service gaps for youth from other backgrounds. Acknowledging potential intergroup dynamics keeping youth of African descent away, the agency launched separate programs tailored to youth of African and Caribbean descent. More youth of African descent have since started to attend the program.

Lessons Learned

At its root, the collection, analysis and use of SID is an equity strategy

Collecting and analyzing SID can promote equity in social and community service delivery by challenging pre-existing assumptions about client bases, inviting a more nuanced understanding of service user identities and bringing to light disparities or gaps in service delivery and access. This data can be a learning tool, used to help agencies make more informed, evidence-based decisions to shape interventions, enhance cultural relevance and sensitivity, and improve program design and delivery.

Service user perspectives are central to effective SID planning and implementation

Notwithstanding funder and agency capacity, policies, practices and processes, the effectiveness of SID as a data equity tool within the social and community services sector rests with service users themselves. If service users do not perceive value in SID collection, are not comfortable providing their own SID or believe the risks are greater than any potential benefits, they have the power to withhold consent. Structurally disadvantaged communities, and Black and Indigenous communities in particular, have lived experiences of deceptive and unethical data practices, where data has been misused for surveillance, to portray inaccurate representations of need and to justify inequitable program and policy decisions.¹⁵ That communities are not prepared to disclose their personal SID reveals a lack of trust in organizations and institutions and makes agency readiness and capacity fruitless on its own.



¹⁵ Rossiter, J., & Ndekezi, T. (2021). Confronting racism with data: Why Canada needs disaggregated race-based data. Edmonton Social Planning Council. https://edmontonsocialplanning.ca/wp-content/uploads/2020/11/Race-Based-Data_ESPCFeatureReport_Feb2021.pdf

Collaboration and trust-building among funders, agencies and service users is critical

Funder-agency and agency-service user power dynamics are real. A collaborative approach that recognizes and attempts to mitigate these dynamics, where possible, can support long-term culture change within the sector to enable the benefits of SID while addressing risks and discomfort. At the heart of SID-based collaboration is collective development and agreement on the shared purpose and value of SID collection. Relationship and trust-building with community is a critical first step. Offering a clear explanation of why SID is being collected and how it will be used, and following up with service users to share data findings and programmatic outcomes can all reinforce the sector's commitment to earning community trust around SID collection.

Recognizing that SID 'maturity' varies across the sector, sustained investments in training and capacity building are required

The *Be Yourself, See Yourself* pilot revealed varying levels of data maturity across the sector, among both agencies and funders. To ensure staff approach SID collection purposefully and centered in data equity principles, training is needed not only in technical elements but also in cultural sensitivity, trauma-informed data collection and data privacy, among other topics.¹⁶ Agencies and funders alike require additional investments in their backend systems to ensure proper data governance, including processes for proper storage, protection and destruction of data.

More experimentation and learning are needed to steer sector-wide SID practice

As more agencies begin to add SID collection and analysis into their existing data processes and systems, the sector will continue learning and identifying good practices for SID. We do not yet have a comprehensive understanding of when and how to collect SID sector-wide and if SID can provide systems-level insights and implications beyond informing more equitable program access and design.

While SID has tremendous potential for good, it comes with several risks

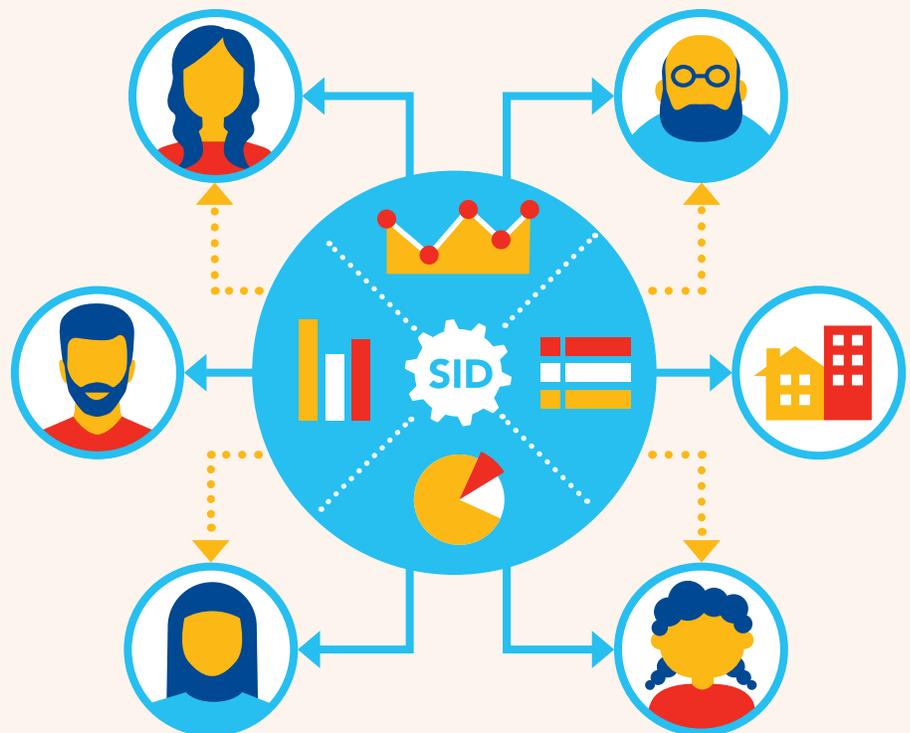
Agencies, service users and funders have all voiced concerns about the potential for objectification and misinterpretation of SID, which can inadvertently perpetuate systemic bias and discrimination and lead to decisions that either worsen existing disparities or create new ones. There are emotional and psychological considerations to bear in mind as well: SID might inadvertently evoke traumas, mainly if respondents are prompted to reflect on distressing experiences or identities. Trauma-informed data collection methods can mitigate this risk.¹⁷

¹⁶ Futures Without Violence. (2023). Trauma informed and ethical data collection. Promising Futures. <https://promising.futureswithoutviolence.org/trauma-informed-and-ethical-data-collection/>

¹⁷ Futures Without Violence. (2023). Trauma informed and ethical data collection. Promising Futures. <https://promising.futureswithoutviolence.org/trauma-informed-and-ethical-data-collection/>

Good Practices for SID Collection, Analysis and Use

- Utilize SID as a tool to promote equity in service delivery, ensuring that data-driven insights lead to tailored and culturally relevant interventions that address the unique and evolving needs of diverse communities.
- Approach SID collection with cultural humility, adopting trauma-informed methods and ensuring the process respects and safeguards respondents' emotional and psychological well-being.
- Establish transparent communication and trust among funders, agencies and service users, recognizing and mitigating inherent power dynamics, where possible; collectively identify shared goals and value proposition for SID to enhance funder, agency and community capacity and readiness for SID collection and analysis.
- Prioritize sustained investments in training and infrastructure for SID collection and analysis, ensuring agencies and funders are equipped with necessary expertise in cultural sensitivity, data analytics, and data governance and privacy standards.
- Acknowledge historical harms of data and apply a data equity lens to avoid reinforcing systemic biases or stereotypes.



Implications for the Future

- Build a collective vision for SID with agencies, service users and funders centered on equity, human rights and community engagement
- Recognize and mitigate power imbalances, wherever possible, between funders and agencies and between agencies and service users
- Develop a comprehensive data strategy that fits SID within broader organizational priorities, policies, processes and systems
- Chart a plan to strengthen and sustain agency capacity for analysis and use of SID
- Integrate service users into the SID lifecycle, from planning and implementation to reporting back on findings and impacts
- Undertake future research and knowledge mobilization activities to address key unanswered questions about the optimal conditions for SID collection and how best to leverage SID to drive system-level decisions around investments and service design



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Appendix: Literature Review Sources

A rapid literature review of seven research articles and one organizational report from the healthcare sector and five organizational reports focused on social and community services was undertaken to inform this case study. Two of the seven research articles were published in Canada; the rest are from the United States and the United Kingdom. Four organizational reports were published by Canadian national or municipal governments or government agencies; one was published by a not-for-profit agency.

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This case study is part of a series exploring social service innovations:

**Audzhe Mino NeseWINong Clinic (Place of Healthy Breathing):
Advancing Indigenous health and data equity**

 <https://uwgta.org/advancing-indigenous-health-and-data-equity>

**Cedar Centre’s STAIR Group’s virtual program transition:
Balancing impact with client safety, privacy, security and cost**

 <https://uwgta.org/balancing-impact-with-safety-privacy-security-cost>

**Etobicoke recovery site for people experiencing homelessness:
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**Apna Health and community health ambassadors in Peel Region:
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**What’s Up Walk-In Clinics’ strengthened network model:
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