Agenda

- Truths
- Guiding principles
- Solo exercises
- Next steps
Truths

- Inclusion isn’t just right—it’s smart
- I am not an “expert”
- This universe is constantly evolving
- Making mistakes is part of the work
YEAH, I READ ABOUT MALE PRIVILEGE ONCE
LET ME EXPLAIN IT TO YOU
Guiding Principles

- Do your research
- Ask on a need-to-know basis
- Aim for self-description
- Place survey toward the end
- Ask for feedback

- Explain why & how
- Make responses optional
- Allow for multiple selection
- Avoid bias in response order
Exercise #1:

Clarify your goals.
Think about:

1. What are the overarching goals of your program?

2. What demographic data do you need in order to meet those goals?
Lauren Howe, program administrator at Healthy Food for Denver’s Kids, noted that collecting **demographic data is necessary** so that they can **track and ensure that their investments are reaching the populations intended**.

Understanding the larger social context of food insecurity was key, to **confirm that the grants would go to the communities most disproportionately affected by the issues they seek to address**.

**SOURCE:** Peak Grantmaking
Example:

Accommodation Example 1: Accommodation Question With Open-Ended Response Option

We want to create an environment where all individuals can fully participate. What accommodations, if any, do you need to ensure the environment supports your abilities?

For example, an interpreter to sign as the keynote speaker addresses the audience.

☐ ______________

☐ Prefer not to answer

Do right now:

Write down any demographic data you consider necessary in order to meet your goals.

One

Two

Three

Four
Demographic Data

Data you may be interested in collecting in order to meet your goals could include:

- Gender identity
- Ethnicity identity
- Geographic location
- Age
- Education
- Sexual orientation
- Pronouns
- Religion
- Marital status
- Citizenship
- Race identity
- Ability status
- Income
- Employment status
- Language
Exercise #2:

Identify your requirements.
Think about:

1. On your list, which data is required?

2. On your list, is any data required in a specific format?
Example:

8. Is Person 1 of Hispanic, Latino, or Spanish origin?
- No, not of Hispanic, Latino, or Spanish origin
- Yes, Mexican, Mexican Am., Chicano
- Yes, Puerto Rican
- Yes, Cuban
- Yes, another Hispanic, Latino, or Spanish origin – Print, for example, Salvadoran, Dominican, Colombian, Guatemalan, Spaniard, Ecuadorian, etc.

9. What is Person 1’s race?
Mark one or more boxes AND print origins.
- White – Print, for example, German, Irish, English, Italian, Lebanese, Egyptian, etc.
- Black or African Am. – Print, for example, African American, Jamaican, Haitian, Nigerian, Ethiopian, Somali, etc.
- American Indian or Alaska Native – Print name or enrolled or principal tribe(s), for example, Navajo Nation, Blackfeet Tribe, Mayan, Aztec, Native Village of Barrow Inupiat, Traditional Government, Nome Eskimo Community, etc.
- Chinese
- Filipino
- Asian Indian
- Korean
- Japanese
- Native Hawaiian
- Samoan
- Chamorro
- Other Asian – Print, for example, Pakistani, Cantonese, Cambodian, Hmong, etc.
- Other Pacific Islander – Print, for example, Tongan, Fijian, Marshallese, etc.
- Some other race – Print race or origin.
**Do right now:**

Circle any data that’s required

*Star data that’s required in a specific format

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<td><strong>Four</strong></td>
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Exercise #3:

Explain your purpose.
Think about:

1. Why are you collecting the data?
2. How will you use and protect the data?
3. Do you need to ask for consent?
Example:

“This information is required by the Federal grant agency overseeing the Emergency Rental Assistance program. This information is for reporting purposes only and is not used in the review or decision making process. In fact, this information is hidden from reviewers.

SOURCE: Lake County Florida
Example:

What is Person 1's race?

Here, you marked one or more boxes AND printed origins: White; Black or African American; American Indian or Alaska Native; Chinese; Filipino; Asian Indian; Vietnamese; Korean; Japanese; other Asian; Native Hawaiian; Samoan; Chamorro; other Pacific Islander; some other race. See more about how this question should have been answered ...

Why we ask this question: This enables us to create statistics about race and to analyze other statistics within racial groups. This data helps federal agencies monitor compliance with anti-discrimination provisions, such as those in the Voting Rights Act and the Civil Rights Act.

SOURCE: 2020 United States Census
Example:

Example 1: Statement about consent in a survey introduction
By completing this survey, you agree that you have read and understood the purpose of the survey and voluntarily agree to participate.

Example 2: Provision of consent by the respondent
Selecting “Agree” below indicates that you have read the information above and voluntarily agree to participate in this survey. If you do not wish to participate in this survey, please decline participation by selecting “Disagree.”

☐ Agree
☐ Disagree

Example 3: Provision of consent and assurance of confidentiality
Hello! Thank you for taking the time to participate in ABC Survey. The purpose of this survey is to....

Please note that participation is voluntary and all answers and comments you provide will remain 100% confidential. No one from our program team will have access to your responses, only [external evaluator name] will have access to the data, and we will safely secure the data. We will only report the data beyond the external evaluator in the aggregate. If you have any questions before participating or need special accommodations to participate, please contact us at xyzemail@consultant.org

Before you begin the survey, please select an answer to the below questions to provide electronic consent.

1. Have you read the above information?
   ☐ Yes
   ☐ No

2. Do you voluntarily agree to participate in this survey?
   ☐ Yes
   ☐ No

Do right now:

Write out a one to two sentence explanation of why you are collecting the data and how it will be used and protected.

We’re asking this because...
Exercise #4:

Balance your **priorities**.
Think about:

1. What is your capacity to analyze this data?

2. How much burden can be shifted to your team?

3. To what degree can you allow self-description?
Templates
Template Options

1. Self-describe

2. Allows for self-describe

3. May or may not allow for self-describe
Pros and cons

**Option 1: Self-describe**
*Template Inspiration*
- 1A: Submittable
- 1B: PFund Foundation

**PROS**
- Most inclusive
- May encourage participation

**CONS**
- Biggest burden on reporting
- May not be feasible for a high volume of applicants

**Option 2: Option to self-describe**
*Template Inspiration*
- 2A: Harvard ORARC
- 2B: Schusterman Foundation
- 2C: SPACE on Ryder Farm

**PROS**
- Very inclusive
- Much of the data will be easily reportable
- Easiest reporting

**CONS**
- Less inclusive (e.g., risk of “other”izing, order bias)
- Some reporting burden

**Option 3: May or may not allow self-describe**
*Template Inspiration*
- 3A: U.S. Census

**PROS**
- Most inclusive
- May encourage participation

**CONS**
- Biggest burden on reporting
- May not be feasible for a high volume of applicants

- Least inclusive (e.g., risk of “other”izing, order bias)
- Some reporting burden

- Potentially least inclusive
- Could lead to inaccurate or partially accurate data
- May lower participation or completion
Do right now:

Write down the option (1, 2 or 3) or specific template you think is the best fit for your program.

Option 2 (SPACE template)
Next steps

- Homework
- Making a mistake
- Resources
- Attendee survey