

# Submittable

Best Practices for Collecting Demographic  
Data Workshop

# 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:



**What are the overarching goals of your program?**



**What demographic data do you need in order to meet those goals?**

# Example:



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.



# 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

**SOURCE:** “More than Numbers: A Guide toward Diversity, Equity, and Inclusion in Demographic Data Collection,” Charles and Lynn Schusterman Family Foundation

# 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:



On your list, which data is required?



On your list, is any data required in a specific format?



# Do right now:

Circle any data that's required

\*Star data that's required in a specific format

*One*

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*Two*

---

\*

*Three*

---

\*

*Four*

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\*

## **Exercise #3:**

**Explain your purpose.**



# Think about:



**Why are you collecting the data?**



**How will you use and protect the data?**



**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

A screenshot of a web application interface for grant management. At the top, there are navigation elements: a back arrow, 'Back to list', a page indicator '< 49 of 82 >', and two buttons: 'In-Progress' (highlighted in blue) and 'Research'. Below this is a filter bar with four categories: 'ROUND TWO' (orange), 'HIGH PRIORITY' (teal), 'FIRST TIME' (yellow), and 'ENVIRONMENT' (blue). The main content area shows 'Initial form: Relief Grant' with a submission date of '01/20/2021'. Below this is a dropdown menu showing 'Community Arts Center' with a checkmark icon and a submission date of '01/20/2021'. Underneath is an 'Additional Form' section with a dropdown menu showing 'Q2 Quarterly Impact Report' with an envelope icon and a submission date of '04/20/2021'. At the bottom, there are four input fields: 'Race', 'Gender', 'Sexuality', and 'Disability status', each with a greyed-out text input area.

# Example:

**What are your pronouns? (Select all that apply) <sup>?</sup>**

|   |   |
|---|---|
| <input type="checkbox"/> He/His/His                     | <input type="checkbox"/> Ze/Hir/Hirs          |
| <input type="checkbox"/> She/Her/Hers                   | <input type="checkbox"/> Ze/Zir/Zirs          |
| <input type="checkbox"/> They/Them/Theirs               | <input type="checkbox"/> Prefer not to answer |
| <input type="checkbox"/> Prefer to self-describe: _____ |   |

<sup>?</sup> We include pronouns on name tags for our events.

**SOURCE:** “More than Numbers: A Guide toward Diversity, Equity, and Inclusion in Demographic Data Collection,” Charles and Lynn Schusterman Family Foundation

# Example:

A screenshot of the 2020 US Census form, specifically the 'Person 1' section. The form is titled 'Person 1' and contains various demographic questions. The 'Race' question is highlighted in blue. The question asks 'What is Person 1's race?' and provides a list of options with checkboxes. The options are: 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, and some other race. The 'some other race' option is selected, and the text 'some other race' is printed in the field next to it.

## 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.

# 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

**SOURCE:** “More than Numbers: A Guide toward Diversity, Equity, and Inclusion in Demographic Data Collection,” Charles and Lynn Schusterman Family Foundation

# 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...*

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## **Exercise #4:**

**Balance your priorities.**

# Think about:



What is your capacity to analyze this data?



How much burden can be shifted to your team?



To what degree can you allow self-description?



# Templates

# Template Options



Self-describe



Allows for self-describe



May or may not allow  
for self describe

# Pros and cons

## Option 1: Self-describe

*Template Inspiration*

- 1A: [Submittable](#)
- 1B: [PFund Foundation](#)

## Option 2: Option to self-describe

*Template Inspiration*

- 2A: [Harvard ORARC](#)
- 2B: [Schusterman Foundation](#)
- 2C: [SPACE on Ryder Farm](#)

## Option 3: May or may not allow self-describe

*Template Inspiration*

- 3A: [U.S. Census](#)

## PROS

- Most inclusive
- May encourage participation
- Very inclusive
- Much of the data will be easily reportable
- Easiest reporting
- Compliance with any requirements (important for program continuance)

## CONS

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

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# Next steps

- Homework
- Making a mistake
- Resources
- Attendee survey

**Submittable** 

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