CONSIDERATIONS IN DEMOGRAPHIC DATA COLLECTION

The ways in which we label people shapes how they see themselves. Evaluation, because it often asks for demographic information, can push someone into locating an individual within a social identity they would not choose for themselves. As with all evaluation design, we need to weight the risks and benefits of what we need to know about "who" is involved in TA (data collection and analysis), but also what others need to know (reporting) about "who" is involved.

For our purposes, demographic data includes data that socially locates an individual (i.e. race, gender, age, education, income, sex, religion, etc). Individual demographics may or may not be relevant depending on the evaluation questions asked. For example, if we want to know how important it is to have the TA provider share social identity with the recipient of TA we may need to collect that information. If we want to know if we have cut down our response time for the TA demographic data may not be needed.

Evaluation often uses demographic categories to help understand which groups participated in and benefited from TA. Categorizing groups has benefits. It helps make data collection and reporting quicker, shorter and easier. It also provides a layer of confidentiality or anonymity. However, categorizing also has risks.

As an example, people are often asked their marital status on an evaluation and the choice provided are often single, married, divorced, widowed, other. We may think this is a simple question, but to others this question may be tied up with other experiences and stigma. A divorced woman for example, may consider herself single after 20 years but feel compelled to identify as divorce. Another person may be partnered, but not married, and not able to honor this relationship because our categories did not create a safe space to view that relationship as "normal".

So, what can we do? There are several options for collecting demographic information should we decide it is necessary to understanding the full story behind our evaluation question.

- *Open-ended*: There are two ways to do open-ended demographic data collection. The first is to simply ask a question "*Tell us about yourself?*" This question provides a lot of space to learn about how some see themselves in the world and can expand our understanding of who we are working with and what is important to them to share.

  Alternatively, we can ask a series of open-ended questions around the categories we are interested in:

  o In order to get to know you better, please share any of the following information about yourself:

  ▪ Gender:

  ▪ Age:

  ▪ Faith Association:

Benefits of this approach allow us to talk about those identities most relevant to our evaluation question with some specificity but provide space for individuals to respond as they choose. It will be tempting to quantify or put in categories the responses you get, and you can where there are consistencies in terminology. However, unless it is clear two or more people mean the same thing in their response, categorizing is not possible.

- *Forced-Categorization*: Forced categorization, determining up front what labels you want to disaggregate the data on, can be an option and may be necessary under some circumstances. In this case, we need to do more than due diligence before determining categories. What we mean here is that we need to do some up-front data collection to determine which categories are most relevant and which terms within that category are least damaging. Because our understanding of the importance social identity is continuing to grow, acceptable categories are constantly changing. To determine categories, it is best to seek out information from the individuals themselves and co-create a set of categories together that are acceptable.

  Some funders do require demographic data based on a set of "approved labels". If there is an opportunity to educate your funder, now is the time to take it. If not, think about how you ask the question and be clear and transparent about why you are asking for this information in this way. It is best practice to provide a "prefer not to answer" option.

Whether or not to collect demographic data is a choice we make in our evaluation design. As a general practice, we recommend the following:

- ✓ Demographic information should only be asked if directly relevant to the evaluation question (i.e. we should not collect it "just in case")

- ✓ Demographic questions always be optional or have a "prefer not to answer" option

- ✓ Only the individual themselves can supply demographic information – this means we cannot answer for or change an individual's response to a question based on how we socially locate that individual

- ✓ Demographic data is only reported externally in aggregated form and only when necessary to tell the story

- ✓ We seek specific consent to share this information