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Excerpts from:

Collecting Demographic Data Literature Review:
Inclusive Practices and Considerations

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With the assistance of Forum Research

This document contains excerpts from a larger document; it summarizes the context and key findings on inclusive practices and considerations when collecting demographic data. Due to the length of the literature review, it has been condensed for the purposes of consultation.

Introduction and methods

The Canada Council for the Arts, through its Engage and Sustain program, aims "to encourage diversity in arts organizations that reflects their communities and informs their public engagement responsibilities". Engage and Sustain asks of its applicants that they commit to "reflecting – through artistic programming, organizational make-up and development of your publics – the diversity of your geographic community or region, particularly with regards to inclusion and engagement of Aboriginal peoples, culturally diverse groups, people who are Deaf or have disabilities, and Official language minority communities" (Canada Council, 2018). The Canada Council has collected and reported on statistics from individual artists that apply to its programs using a Voluntary Self ID Form (available through the Portal). That said, the Canada Council has never attempted to measure the diversity within the organizations that it supports. Thus, this pilot project is the first phase of implementing a new approach to demographic data collection.

One of the tools in the *Equity Policy* of the Canada Council involves "Tracking, measuring and monitoring funding to artists and arts organizations within various demographics in order to identify gaps, develop appropriate strategies and evaluate impacts".[1] Examples of priority demographic sectors noted in the *Equity Policy* include "Indigenous, culturally diverse/visible minority, Deaf and disabled, gender, Official Language Minorities and youth – under 35 years of age" (Canada Council, 2017).

The larger literature review from which this text was taken covered academic articles and non-academic work from Canada and other jurisdictions with experience in collecting similar demographic data: the United Kingdom, the United States, and Australia.

In the report *Analysis of Policies, Practices and Programs for Advancing Diversity, Equality and Inclusion*, the authors Dresser and Hodge make the helpful distinction: "Diversity and inclusion focus, respectively, on people and processes; equity is about impact... It is possible for an organization to be committed to diversity but not inclusion, or to diversity and inclusion without taking the larger step towards equity" (Dressel and Hodge, 2013). A thorough questionnaire would therefore include questions related to people, processes, and impact.

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[1] The Canada Council for the Arts glossary of equity-related terms defines culturally diverse as: "The Canada Council for the Arts uses "culturally diverse" to respectfully identify racialized groups that correspond to "visible minorities" under the *Employment Equity Act*. These are Canadians of African, Asian, Latin American, Middle Eastern and mixed racial heritages (mixed racial heritage includes one of the above groups), who have been historically disadvantaged as a group and may experience discrimination based on colour, culture and race."

In keeping with the goal of being as inclusive as possible, the research team has gathered a number of options regarding inclusive approaches to collecting demographic data on identity and how workplace experiences are impacted by the various ways in which people embody their identities in their work, art, and lives. These questions are located in the Appendix.

Findings from a previous literature review on demographic data

This report follows a separate review for the Canada Council that focussed on the "legal and ethical implications of collecting information on demographics and diversity from organizations receiving funding" (Bernhardt and Ratnayake, 2016). It provides a very useful starting point, with many broad-based insights related to the process of collecting demographic data from arts organizations.

The legal and ethical literature review noted that "data collection aimed at the advancement of equity should capture both the numerical presence of a diversity of characteristics within an organization and the experiences of those with marginalized characteristics" (Bernhardt and Ratnayake, 2016). This report follows the dual focus on "numerical presence" and "experiences" by reviewing a range of inclusive practices in gathering data on identity, diversity, categories of difference, as well as workplace experiences and inclusion.

A summary of particularly relevant findings from the previous literature review follows.

The legal and ethical literature review was organized into Canadian and international best practice sections. Some of their insights into national best practices included:

- "Pilot projects involving the participation of a group of willing organizations within an industry is a useful precursor to more widespread and industry-wide data collection implementation (as is the creation of a steering committee to be consulted and held accountable for all major decisions about the data -collection process).
- Engaging and securing the support from senior leadership and key stakeholders is critical to the success of demographic data collection.
- Anticipating and addressing various stakeholder concerns and questions about the project through developing communication/education strategy fosters trust and encourages participation.
- Systematic collection of demographic data (both quantitative and qualitative) from multiple sources is a basic yet essential step in identifying barriers to inclusion and integral to any diversity and equity strategy" (Bernhardt and Ratnayake, 2016).

Some of the insights into international best practices included:

- "High responses rates are primarily accomplished through tying survey completion to funding eligibility.
- While some organizations supplied demographic data based on employee information already available through Human Resource files (e.g., New York City Department of Cultural Affairs [DCLA]), this approach relies on the demographic data being collected by the institution, or more problematically by the organizations' assessment of employees' demographic characteristics. Alternatively, a survey approach (e.g., Arts Council England [ACE]) allows for the employees to self-identify or refrain from identification and is thereby preferable.
- Demographic data is widely acknowledged as a key metric of diversity, and this data is commonly further disaggregated by positions within an organizational structure.
- Early stage consultation and discussions around the value of diversity as it related to other organizational values is a key strategy for building institution or sector-wide buy-in" (Bernhardt and Ratnayake, 2016).

The authors' review of diversity and inclusion projects and surveys found that "few approaches ask for comment from marginalized groups about their experiences of barriers or sense of inclusion within arts organizations" (Bernhardt and Ratnayake, 2016).

Identity

Identity is an intensely personal, complex, and politicized concept. There is no single preferred way or uniformly "best practice" to ask people about the various aspects that make up their identity.

In a discussion paper for the Canadian Public Arts Funders, Mather et al. use the term "sustainable practices" instead of "best practices", noting that "We use the adjective 'sustainable; rather than 'best' - the latter which may be value-laden and not always accurate – to indicate practices that are tenable and might be developed through continued research and community engagement"(Mather et al., 2011). In this spirit, the authors of this report generally use the term "inclusive practices" as an acknowledgement that terminology is always changing, and promising practices need to be rooted in context.

A 2009 Ontario Human Rights Commission (OHRC) report on collecting demographic data noted the sensitivity of the task: "There are challenges in finding ways to best describe people. Terminology is fluid and what is considered appropriate will likely evolve over time" (OHRC, 2009). Similarly, a 2016 report from Purdue University on inclusive approaches to demographic data collection indicated that "Decisions about demographic data collection are highly situated and rarely have a single answer" (Fernandez et al., 2016).

A key goal when collecting data on demographics and identity is to be as inclusive and accessible as possible. In this literature review, the research team has gathered a variety of approaches and practices in collecting demographic data on identity, focussing on inclusive approaches to surveying employees about the diverse elements of their identities.

From the literature reviewed for this report, it is clear that self-identification is the preferred method for demographic data surveys. In a post on *Respectful Collection of Demographic Data*, Sarai Rosenberg points out that diverse communities "don't always agree on what is the best approach, but offering multiple-choice responses and widely-accepted language along with an option to multi-select and self-describe help reduce these concerns... Users feel dehumanized when they are forced to pick between discrete categories that don't fit them" (Rosenberg, 2017).

Ideally, it is important to survey for demographic information at all levels in the workplace, from volunteers and early career workers to executives and board members. The Los Angeles County Arts Commission (LACAC) Workforce Equity report found that staff in higher level positions were 61% white (compared to the 29% white share of the Los Angeles county population) (LACAC, 2017). This echoed similar findings in New York City (LACAC, 2017), and in England (ACE, 2016): there tends to be less diversity in higher paid positions.

In *Equality, Diversity and the Creative Case*, the Arts Council England provided demographic data on their own workplace, which serves as a reminder to lead by example (ACE, 2016).

Thinking about demographic differences: Existing categories

There are just four demographic categories that are federally protected under the Enjoyment Equity Act, but the Ontario Human Rights Commission covers 18 demographic categories. The Canada Council has four designated priority groups: culturally diverse; Deaf and disability; Indigenous; and Official Language Minority Communities (OLMC). The Canada Council has identified the first three groups as being historically underserved within their programs and has a requirement to provide positive measures to support OLMC due to the Official Languages Act.

A note about "othering"

Fernandez et al. define othering as "intentionally or unintentionally classifying a group as non-normative" (Fernandez et al., 2016). This often happens in research by way of providing dominant group demographics as the standard and providing "other – fill in the blank" options for underrepresented groups. By putting groups of people into an "other" box, by failing to consult with diverse groups, or by failing to test the questions based on multiple identities, researchers can inadvertently lead to the erasure of non-normative or marginalized identities.

Walking in someone else's shoes while designing and testing a survey is a good first (if incomplete) step. Researchers who belong to dominant groups (white, cisgender, heterosexual, etc.) can never fully know how to it feels to belong to a marginalized group and are never at risk of having their identities erased if their identities always represent the default in survey design.

A note about "intersectionality"

Intersectionality is an important approach to research that can help illuminate the experiences of underrepresented groups in the workplace and in society at large.

The Ontario Human Rights Commission defines intersectionality as "an approach [that] takes into account the historical, social and political context and recognizes the unique experience of the individual based on the intersection of all relevant grounds" (OHRC, "Intersectionality"). Intersectionality in research can be achieved both through the questions asked and data analysis (both qualitative and quantitative).

As Ashlee Christoffersen notes, "The fundamental benefit of adopting an intersectional approach to equality research… is that it provides an understanding of the issues that is closer to the lived experiences of the equality-seeking groups you are interested in, thus allowing you effective strategies to address them" (Christoffersen, 2016).

As such, the survey and reporting for this project should use an intersectional approach to collecting, analyzing and reporting demographic data.

Conclusion

A thorough literature review has produced many options regarding inclusive approaches to collecting demographic data on identity and workplace experiences. This review examined surveys that have collected demographic data within the arts, human resources, universities, and health care, covering academic articles and non-academic work from Canada, the United Kingdom, the United States, and Australia.

Following the Canada Council's *Equity Policy*, the full report examined six sensitive demographic areas where there are inclusive practice options from previous research efforts:

- Gender
- Indigenous people
- Racialized groups
- Sexual orientation
- Disability
- Linguistic diversity

In addition, the report examined two key workplace issues:

- Workplace belonging and inclusion
- Workplace discrimination

Some of the inclusive practices that should be considered include:

- Allowing respondents to self-identify and select all that apply in survey questions
- Recognizing that terminology is fluid and no wording may be perfect; terminology should be reviewed every few years to make sure it is still inclusive
- Taking care that questions about personal and complex topics like disability/ability, sexual orientation, gender etc., are not overly probing and intrusive
- Testing the survey to avoid "othering," or centering the experience of heterosexual, cisgender, and/or white people and further marginalizing non-normative identities
- Designing the survey with an intersectional approach to better capture the complexity of experience and identity
- Consulting with members of equity-seeking groups while designing the research/survey
- Including a lexicon of terms with the survey and/or the reports, and including an FAQ about privacy and other concerns
- Communicating the value of collecting demographic data to all employees, not just employees from equity-seeking groups
- Only asking about potentially triggering and traumatic incidences when there is a mandate to do so and a protocol in place to help respondents work through these incidences and feelings.

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