



Data collection guide for the cultural sector

Equity, Diversity, and Inclusion

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Context of the guide

In the wake of the Black Lives Matter protests, arts and culture organizations want to learn more about the socio-demographics that characterize their clientele. In order to improve accessibility and content of their services, these organizations would, in particular, like to understand whether their clients self-identify as members of a designated group such as a members of visible minorities, persons with disabilities, or members of the LGBTQIA2+ community.

In order to equip cultural organizations, Synapse C offers this guide to equity, diversity, and inclusion (EDI). This will allow you to develop a voluntary declaration from for your audience in the form of a short questionnaire that will be used to collect data on the specific identity markers of your clients. Through this guide, you will learn how to collect relevant data for your organization, write appropriate questions related to self-identification, and know when it is appropriate to send your questionnaire to clients. The questionnaire we propose can be inserted into a larger, information-gathering form like, for example, when a member of your audience purchases you product, or in a qualitative survey.

Given the rapid evolution of EDI practices and standards, the information contained herein is currently valid but may be subject to change in the coming years. This guide should, therefore, be used as a starting point for each organization. In fact, it makes no claim to be exhaustive or of legal value.

This guide is divided into three parts which correspond to the steps that need to be undertaken in the creation of an EDI data collection form.

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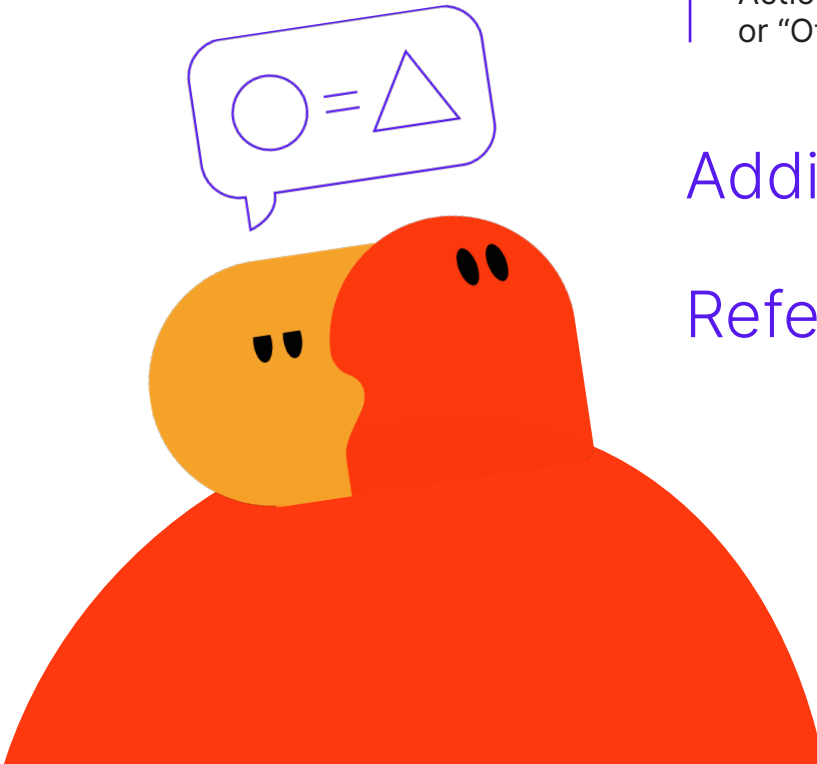
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1. Undertake a Data Collection Process

Before creating a voluntary reporting form, it is your first responsibility to plan for this data collection. More specifically, you need to explain how this data will be processed and analyzed and elaborate on the best practices in this area.

Action 1.1: Ask yourself the right questions

What is the purpose of the collection? It is important to choose what questions to ask and to accept that the data collection is only partial. Moreover, one must always keep in mind that the data collection can only be partial.

Here are some sample questions to guide you through the process:

How will the data be used?

Do we know what best practices will be put in place that would allow for the information on EDI drawn from the collection to be useful? For example, is there advantageous pricing for certain visible minorities or special accommodations for persons with disabilities?

Is this being done for exploratory purposes? If so, how will the results be communicated?

Action 1.2: Communicate and organize internally

Be transparent and explicit about your data collection goals within the organization.

Designate only a maximum of one or two employees who will have access to EDI data to ensure the confidentiality of personal information¹.

Test the form with internal employees before sending it out, if possible.

Action 1.3: Learn about and be inspired by other similar practices

Are there similar initiatives with other institutions in Québec and Canada?

What are the up-to-date EDI standard and practices in my field?²

Action 1.4: Fulfill ethics obligations

A voluntary statement of declaration as well as a confidentiality policy must be present at the beginning of the form in order to obtain free and informed consent. A statement of declaration might look like this:

Please note that our self-identification guide is to be completed on a voluntary basis and that you can identify with more than one designated group. The information provided remains strictly confidential and will be used for statistical purposes. In order to protect the identity of the individuals concerned, self-reporting information is always presented in aggregate form. However, if you do not wish to self-identify or prefer not to provide the information requested in this form, you can choose the “I prefer not to answer” option for some or all of the questions.

Inspired by an employee application form, it must be completed on a voluntary basis. Respondents self-identify and consent to share their information with the organization.

¹ Within the organization collecting the information, it is best to keep the number of employees who will interact with EDI data to a minimum (one or two people at most). In addition, before beginning any data analysis, it is important to adopt good privacy practices such as data anonymization to ensure that the same data is only used for the purposes initially intended.

² It may be useful to stay up to date with EDI specialists, whether in the media and/or in organizations working in the field of EDI, since best practices are constantly evolving and adapting to the needs of minority groups. In the “References” section of this guide, there are links to relevant resources in this regard.

³ Before collecting personal information that identifies the respondent, it is necessary to make available a policy that ensures the confidentiality of this information and to announce at the introduction of the form that this policy is available online and to provide a corresponding link. A privacy policy template is available on the Synapse C website.

2. Establish the Strategy with the Help of the Form

Once the voluntary declaration form is ready, when is the optimal time to send the form and how can we integrate it into a larger survey?

Action 2.1: Choose when to send the form

	Before the Event	After the Event
Examples	Purchase of service Creation of customer account	Satisfaction survey Follow-up in a newsletter
Advantages	Obtaining EDI data before the event makes it possible to anticipate the makeup of the clientele and to plan adjustments accordingly (for example, through targeted communication actions).	Collecting EDI information after the event helps ensure that those affected have actually benefited from the service. It is, therefore, possible to draw a more accurate portrait of the clientele.
Inconveniences	Before the event, it is impossible to be sure that the respondents will actually benefit from the service or if they accurately represent the clientele.	The participation rate for a post-event survey tends to be lower.

Action 2.2: Choose the location of the form within a larger survey

	At the beginning of the survey	At the end of the suvery
Advantages	Respondents are solicited when they are most attentive, which ensures a higher response rate for the self-identification form.	By placing the EDI form at the end, we prioritize the transaction, which makes everything more fluid for customers.
Inconveniences	Answering an EDI questionnaire can make the process cumbersome and discourage the purchase of the product/creation of a customer account, etc.	After completing the required information, customers may decide to complete the transaction without completing the voluntary declaration form. The participation rate may, therefore, be lower.

3. Contents of the Form

Action 3.1: Introduction of Form

For the sake of transparency, it is important to state explicitly and efficiently what the collected data will be used for, with the help of a short paragraph as an introduction. If you do not know the concrete steps your organization will take as a result of collecting EDI data, you can simply announce that you want to obtain a more accurate portrait of your audiences in order to improve your EDI practices. Since it is too early to commit, it is best to avoid specifics so as not to create unattainable expectations. That being said, being clear about your intentions may encourage clients to complete the form.

Action 3.2: Choose the appropriate vocabulary

Legal definitions	Common definitions
Visible minority	Racialized person
Disabled person	Person with disability
Non-binary person	LGBTQIA2+

Advantages

In an institutional context, it is suggested that the legal definition be used in order to be able to protect against possible forms of discrimination.

Inconveniences

Members of minority groups may not identify with legal categories due to lack of representation. In addition, the term "disabled person" is sometimes criticized for extending only a part of a person's reality to include their whole being.

Common definition

If you are working in a community or activist organization, it is important to let members of minorities define themselves. For example, in certain neighbourhoods of Montréal, visible minorities are actually the "visible majority."

Some less familiar terms may be difficult for some people to understand.

Action 3.3: Choose the level of detail according to the desired objective

Depending on the survey objectives, it is possible to modulate the vocabulary with more or less detail. In this regard, drop-down menus can be very useful, especially to increase the response rate. Thus, depending on the degree of granularity desired, a drop-down menu can be added suggesting designated groups. For example, when it comes to different ethnic groups, it is possible to include options such as "Southeast Asia," "East Asia," "South Asia." Indigenous peoples can also be grouped or broken down into categories such as "First Nations," "Métis," and "Inuit." Finally, in order to increase our accessibility, we can also include different types of disabilities such as motor, hearing, language, and mental health disabilities.

Action 3.4: Always leave a response choice of «I prefer not to answer» or «None of the above, I identify as [...]»

Since this is a voluntary form, it is important to include an "I prefer not to answer" field. This choice of response from your clients can also be valuable information for your organization. Indeed, the refusal to share this sensitive information may be a sign that certain parts of the form need to be changed or that people with an identity marker do not seek specific accommodation for this particular event. Also, the categories "Mixed origins" or "Other" are always useful for people who do not identify with homogeneous categories. Respondents have the option of not responding to this section and the fields are optional in the purchase form.

Additional Suggestions

1st Suggestion: Avoid lesser known definitions

It is best to avoid using definitions that are not widely recognized or difficult to understand so as not to create confusion that would discourage respondents from completing the form.

2nd Suggestion: Include reference at the bottom of the page

If you decide to include definitions, it is best to put them at the bottom of the page or in an info-bubble/tool-tip. Otherwise, these additional explanations may make the form cumbersome and affect its response rate.

3rd Suggestion: Order of questions

Since the field of EDI is evolving, there is no consensus on what order the questions should appear in terms of minority groups. It depends on the needs of the organization. However, the voluntary disclosure and confidentiality policies must always be present at the beginning of the questionnaire.

4th Suggestion: Number of questions

It is important that the form is concise in order to avoid a low response rate. If your organization wants to know more, additional questions can be part of a satisfaction survey after the event or via a newsletter. In addition, if you want to know the mother tongue or languages spoken fluently by your audience, places of birth, or legal statuses, you should always mention the reasons for more exhaustive data collection. Finally, we must avoid asking questions that will neither be useful for the analysis or are not in line with best EDI practices.

5th Suggestion: Sufficient response rate

There is no solution to a low sample due to a low response rate. In this case, a possible interpretation would read: "Based on the information gathered, we can state that at least X% of the people who answered our form are Asian."

The EDI Guide was developed by the Synapse C team, with the advice of Mariloue Daudier, EDI Advisor at IVADO.



Some EDI resources:

Canadian Center for Diversity and Inclusion
<https://ccdi.ca/accueil/>

Commission des droits de la personne et des droits de la jeunesse
<https://www.cdpdj.gc.ca/fr/Pages/default.aspx>

Diversité Artistique Montréal
<https://www.diversiteartistique.org/wp-content/uploads/2019/10/politique-inclusion-et-equite-dam-electronique.pdf>

Québec Interuniversity Network
<https://rqedi.com/>

Examples of self-declaration forms:

Short format - University of Ottawa
https://recherche.uottawa.ca/sites/recherche.uottawa.ca/files/uo_self_id_crc_fr.pdf

Long format - Canada Research Chairs
https://www.chairs-chaires.gc.ca/forms-formulaires/self_identification_preview-fra.pdf

Learn more about minority groups (women, Indigenous peoples, persons with disabilities, visible minorities).

Public Service Commission of Canada
<https://www.canada.ca/en/public-service-commission/services/appointment-framework/employment-equity-diversity/employment-equity-groups.html>

Organizations can refer to the current standard used by Statistics Canada in the census and in the wording of the Employment Equity Act.
<https://www23.statcan.gc.ca/imdb/p3Var.pl?Function=DEC&Id=45152>

