

Data for Change

Capacity building learning series

“Survey design for everyone:
Collecting participant data”

Presented by:



Data for Change



In Partnership With:



Supported by:



Project Objective

To test SID collection with more service-users to better understand how to **best support agencies** in:

- a) collecting socio-demographic data
- b) using the data to advance better outcomes for equity-deserving communities
- c) socializing the collection methodology & use of tools across the community social services sector

Data for Change Project Model

→ Knowledge Mobilization Hub

- Project Logistics
- Partner Convening
- Host Knowledge Mobilization Online Hub

→ Capacity Building Sessions

- Facilitate capacity building sessions to support agencies with data collection & responsible usage

→ Community of Practice & Partnership Table

- Partnership Table support & participate in project implementation
- Community of Practice features a panelist discussion & peer support network for agencies

→ Capacity Building Sessions

- Facilitate capacity building sessions to support agencies with data collection & responsible usage





STAGE ONE: PLAN & BUILD

April: Organizational Readiness



May: Planning for Data Collection



May: CoP



STAGE THREE: ANALYSIS & INTERPRET

August: Trauma Informed Practice



September: User-centered analysis



September: CoP



STAGE TWO: COLLECT & STORE

June: Org. Change Management



July: Data collection tools and systems



July: CoP



STAGE FOUR: SHARE & USE

October: Uses of Data



November: Learning for improvement



December: CoP



All sessions will virtually be recorded and later uploaded to the knowledge hub website

Reminder: Self-Care & Wellbeing

 **We're doing hard work, together — be kind to yourself as we go.**

Your Wellbeing Matters

As we move through these workshops, remember:

- **Pace yourself** — there's no rush
- **Step away when needed** — breaks are encouraged
- **Practice self-care** — whatever that looks like for you
- **You're not alone** — we're in this together

Everything is Recorded

All sessions are recorded so you can:

- **Pause and return later**
- **Catch up on what you missed**
- **Engage when you're ready**


Data for Change Knowledge Hub

[Dataforchange.ca](https://dataforchange.ca) is a shared digital hub for resources and connections on Social Identity Data collection in the community social services sector.

On The Hub You'll Find:

- ✓ **To register for upcoming workshops!**
- ✓ Video recordings and downloadable resources from past capacity building workshops
- ✓ Practical tools to support equity and systems change
- ✓ Sign Up sheet to stay connected on all things Data for Change

Register for upcoming workshops here: [Capacity Building – Data for Change](#)



LogicalOutcomes is based in Toronto, on the traditional territory of many nations including the Mississaugas of the Credit, the Anishnabeg, the Chippewa, the Haudenosaunee, and the Wendat peoples. Toronto is now home to many diverse First Nations, Inuit and Métis peoples.

As people who live and work in this place, we acknowledge our responsibility to respect and uphold the treaties that govern this land. These include Treaty 13, signed with the Mississaugas of the Credit First Nation. We also recognize the enduring relevance of the 'Dish with One Spoon' wampum agreement, a treaty between Indigenous nations in the Great Lakes region that binds the peoples who inhabit this land to share it well and protect it.



We're a Canadian nonprofit with a mission to build evaluation and learning capacity.

We offer:

- Research and evaluation services
- Monitoring, evaluation and learning systems
- Evaluation coaching and capacity building
- AI solutions for non-profits

What we'll cover today:

1. Our goals for the workshop
2. What is a survey and when should you use one?
3. Anatomy of a survey
4. Choosing outcomes and process measures
5. Socio-demographic measures
6. Break out room discussion – big questions, successes and challenges in SID collection
7. Selecting a survey platform
8. Helpful resources



1. Our goal:

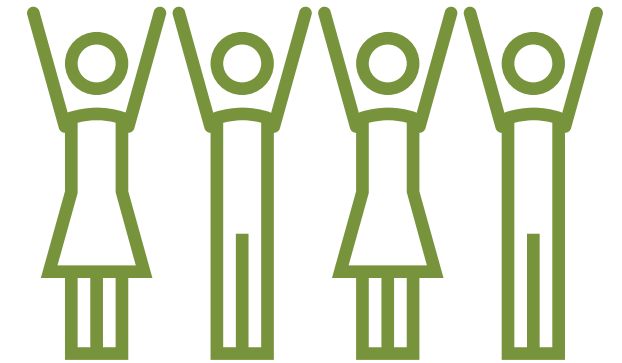


To support nonprofits to collect participant data in a way that's equitable, pragmatic and secure.

Principles for equitable data practice

Each stage of the data life cycle provides an opportunity to pursue an equitable, community-centered approach to data, by:

- Maximizing participant benefits and minimizing risks
- Ensuring respect for people and communities
- Promoting justice by minimizing burden for data subjects and frontline staff



2. What is a survey?

A survey is a process of asking questions that are answered by a *sample of a defined group of people* to get *numbers* that you can *use to make decisions*.



SID collection via survey vs. intake form

	Survey	Intake form
Timing	During, after, or separate from service delivery	At time of service or registration
Data collected	Data about process (participant experience, suggestions for improvement), outcomes, participant identity/socio-demographics	Necessary demographic and contact information for service provision
Rationale for SID	Understand experiences and outcomes of different population groups	Assess equity in service reach and delivery, accommodation needs, and cultural safety
Frequency	Can be repeated multiple times	One-time or updated periodically
Sample	Option to reduce burden by asking just some people to answer	Total population (although SID questions should be optional)
Considerations	Keep essential questions only; respect participant time; consider incentives; use other methods	Keep essential questions only; allow updates rather than re-collection
Data use	Program evaluation and improvement, program planning, advocacy, reporting	Direct service provision, program planning, reporting

When should you use a survey?

Too often, people reach for a survey before taking the time to clarify the larger questions they want to ask.



The first step in any data project is to **clarify the big question that you want to answer**. This is your research question.

Once you've clarified this question, you can consider which methods are best suited to answering it.

Testing research questions

A good research question gathers information that is needed to make a decision.

You should be able to frame the question this way:

We need to ask _____(people who you want to answer)_____,
the question _____,
so that we (or someone else) can decide_____.

Common research questions

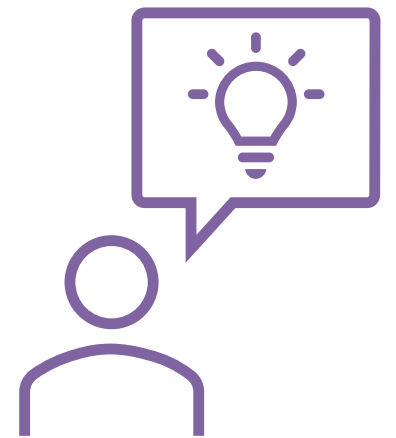
In nonprofit program evaluation, we typically pursue big questions like:

1. Who does the program serve? Is the program reaching its intended population?
2. What goals do people bring to the program? To what extent are people achieving these goals?
3. How might we improve the program's design and/or delivery, to better support participants to achieve their goals?

So... should we run a survey?

Which methods would you use to answer these questions?

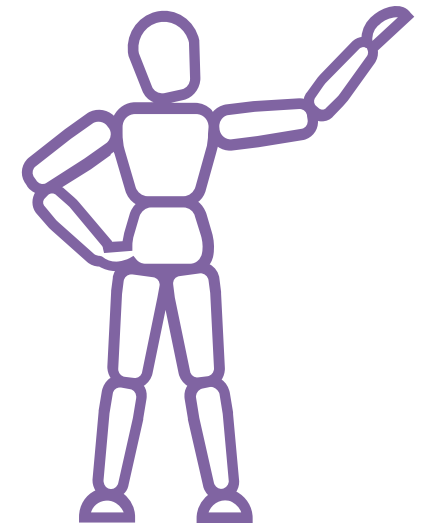
1. Who does the program serve? Is the program reaching its intended population?
2. What goals do people bring to the program? To what extent are people achieving these goals?
3. How might we improve the program's design and/or delivery, to better support participants to achieve their goals?



3. Anatomy of a survey

Surveys should be short, and questions organized in a logical flow.

1. Informed consent
2. General questions that are easier to answer
3. Harder questions that require more effort
4. Socio-demographic questions
5. Submission and post-submission page



Data collection begins with consent

Every survey begins with an informed consent process, clearly explaining:

- Why the data are being collected and how they'll be used
- What is expected of the respondent
- What risks the respondent might face
- Who will have access to the data
- The respondent's right to decline participation
- The respondent's right to stop participating at any time
- Who to contact for more information, or to withdraw consent



Thank you for filling out this survey! Your answers will help Afri-Can FoodBasket and Black Health Alliance to understand and improve the impact of our Food as Medicine program.

Before you take this survey, you should know:

- You do not have to take this survey – it is voluntary.
- The survey should take just 10-15 minutes to complete.
- By taking this survey, you agree to share your survey answers with:
 - Afri-Can FoodBasket
 - Black Health Alliance
 - LogicalOutcomes (the organization that is helping us to evaluate our program)
 - A research team from Toronto Metropolitan University and Dalhousie University, who will use the information to learn about food insecurity among Black Canadians in Toronto.
- This survey is meant to be anonymous and confidential. We will not ask for your name.
- The survey asks about things like your age, your health, and your background. Although we won't ask your name, someone who works at Afri-Can FoodBasket might be able to guess who you are from your answers. Feel free to skip any questions you don't want to answer.
- There is a chance that anonymous quote(s) from your response will be shared in public-facing documents or reports.

If you have any questions about this survey, please contact [REDACTED] at mobeng@blackhealthalliance.ca

Would you like to continue to the survey?

? Choose one of the following answers

- ☐ Yes - I want to go to the survey
- ☐ No - I do not want to fill in the survey

Next

General tips for user-centred survey design

Minimize risk and burden; treat respondents with respect.

- Try to minimize survey-taking time. Aim for 5 min or less.
- Use language that is clear, direct and neutral. Grade 8 reading level or lower.
- Choose measures that are strengths-based and positively worded.
- Use help text to define any uncommon words or acronyms.
- Provide language options that are relevant to the people you serve.

General tips for user-centred survey design

- Respondents should only see questions that are relevant to them. Use skip logic to streamline their experience.
- Avoid mandatory questions. Include “prefer not to say”.
- Remind respondents that socio-demographics are optional.
- Include a write-in option, like “prefer to self-identify: _____”.
- Make good use of the post-submission page.
- Refine draft measures with community.
- Do pilot testing (on mobile and in every language) and continue gather feedback to improve over time.
- Be alert to barriers and work to remove them.

4. Choosing outcome and process measures

Writing good survey questions is not easy. Whenever possible, select standard measures.

- **Outcomes measures** should be short, positively-worded, and strengths-based. Good sources include:
 - Statistics Canada instruments, like the [Canadian Community Health Survey \(CCHS\)](#)
 - Indicator frameworks like the [Quality of Life Framework for Canada](#) or the [Positive Mental Health Surveillance Indicator Framework](#)
 - Specialized tools developed by researchers and validated for use in program evaluation, like the [Child and Youth Resilience Measure \(CYRM\)](#)

Infosheet: Quality of Life Framework for Canada

Central indicators

- ★ Life satisfaction
- ★ Sense of meaning and purpose
- ★ Future outlook

Prosperity

- Income and growth**
- ★ Household income
 - Gross domestic product (GDP) per capita
 - Productivity
 - Access to high-speed Internet
 - Household wealth
 - Investment in in-house research and development
 - General government net financial liabilities-to-gross domestic product (GDP) ratio
 - Firm dynamism
- Employment and job quality**
- ★ Employment
 - Labour underutilization
 - Wages
 - Job security and gig work
 - Job satisfaction
- Skills and opportunity**
- ★ Youth not in employment, education or training (NEET)
 - Early learning and child care
 - Child skills
 - Adolescent skills

- Adult skills
Postsecondary attainment
- Economic security and deprivation**
- ★ Core housing need
 - ★ Acceptable housing
 - ★ Poverty
 - Protection from income shocks
 - ★ Making ends meet
 - Homelessness
 - Food insecurity

Good Governance

- Safety and security**
- Victimization
 - Crime Severity Index
 - ★ Perceptions of neighbourhood safety after dark
 - Childhood maltreatment
 - Household emergency preparedness
- Democracy and institutions**
- ★ Confidence in institutions
 - Voter turnout
 - Representation in senior leadership positions
 - Canada's place in the world
 - Misinformation
 - Trust in media
 - Indigenous self-determination
- Justice and human rights**
- ★ Discrimination and unfair treatment
 - Cyberbullying

- Confidence in access to fair and equal justice (civil)
- Confidence in access to fair and equal justice (criminal)
- Resolution of serious legal problems
- Incarceration rate

Health

- Healthy people**
- Health-adjusted life expectancy
 - ★ Perceived mental health
 - ★ Perceived health



- Physical activity
- Functional health status
- Children vulnerable in early development
- Fruit and vegetable consumption
- Healthy eating environments

Healthy care systems

- Timely access to primary care provider
- Unmet needs for health care
- Unmet needs for mental health care
- Long-term care (access and quality)
- Access to supplementary health insurance
- Unmet needs for home care
- Cost-related non-adherence to prescription medication

Society

- Culture and identity**
- Sense of pride in Canada
 - Sense of belonging to Canada
 - Shared values
 - Indigenous languages
 - Knowledge of official languages
 - Participation in cultural or religious practices, recreation or sport
- Social cohesion and connections**
- ★ Sense of belonging to local community
 - ★ Someone to count on
 - ★ Trust in others
 - Volunteering
 - Satisfaction with personal relationships

- Loneliness
- Accessible environments

- Time use**
- Time use
 - ★ Satisfaction with time use

Environment

Environment and people

- ★ Air quality
- ★ Drinking water
- Climate change adaptation
- Natural disasters and emergencies
- Satisfaction with local environment
- Active living environments
- Access to public transit

Ecological integrity and environmental stewardship

- ★ Greenhouse gas emissions
- ★ Conserved areas
- Canadian species index
- Water quality in Canadian rivers
- Natural capital
- Waste management
- Marine and coastal ecosystems

★ **Headline indicators: intended to provide a high-level assessment of overall quality of life in Canada.**



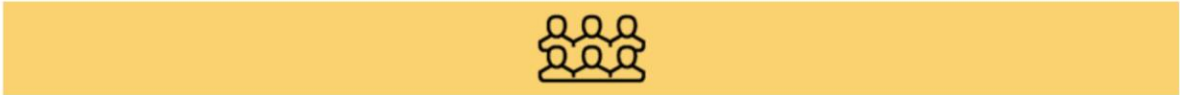
The Fairness and Inclusion lens is intended to inform policy and program development, leading to greater equity and equality, by assessing the distribution of outcomes for different populations in Canada.



The Sustainability and Resilience lens promotes long-term thinking by considering the trajectory of indicators in order to identify risks, build resilience and ensure that policy choices are contributing to a higher quality of life not only now but in the years ahead.

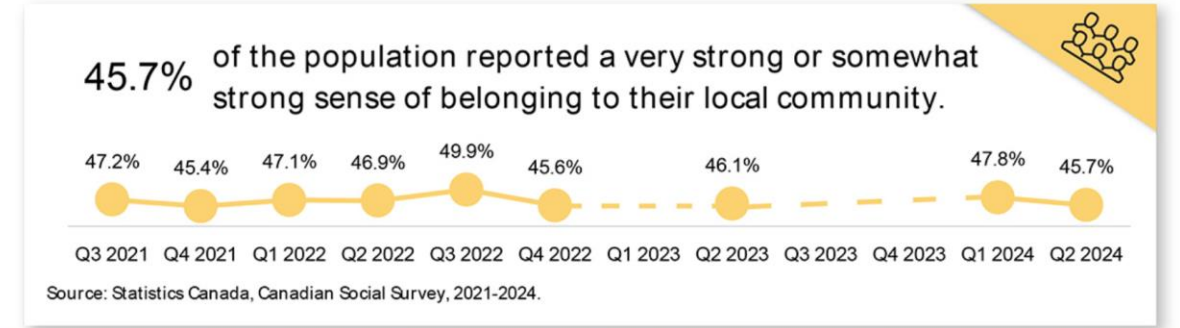
Sense of belonging to local community

Quality of life domains
Central indicators
Prosperity
Health
Society
Environment
Good governance



Domain	Society
Subdomain	Social cohesion and connections
Indicator	Sense of belonging to local community

Note: This indicator is a headline indicator. Headline indicators are intended to provide a high-level assessment of overall quality of life in Canada.



► [Description - Sense of belonging to local community data snapshot](#)

Definition

Proportion of the population by strength of sense of belonging to their local community.

Measurement

This indicator is measured in multiple Statistics Canada surveys including the [Canadian Social Survey \(CSS\)](#), the [Survey Series on People and their Communities \(SSPC\)](#), the [General Social Survey \(GSS\) - Social Identity, Canadian Community Health Survey \(CCHS\)](#), the [Canadian Housing Survey \(CHS\)](#) and the [General Social Survey \(GSS\) - Canadians' Safety \(Victimization\)](#). Exact questionnaire wording may vary slightly between sources.

For example, in the Canadian Social Survey (CSS), survey respondents are asked:

How would you describe your sense of belonging to your local community?

- Very strong
- Somewhat strong
- Somewhat weak
- Very weak
- No opinion

- **Process measures** should be short, clear, and provide an opportunity for meaningful feedback and input:

Q. We want to understand what it's like taking part in this program. How true are each of these statements:

I am made to feel welcome

I am treated with respect

I get help when I need it

People help each other

Q. How has taking part in this program changed things for you?

Q. How can we improve our program or services?

5. Socio-demographic measures

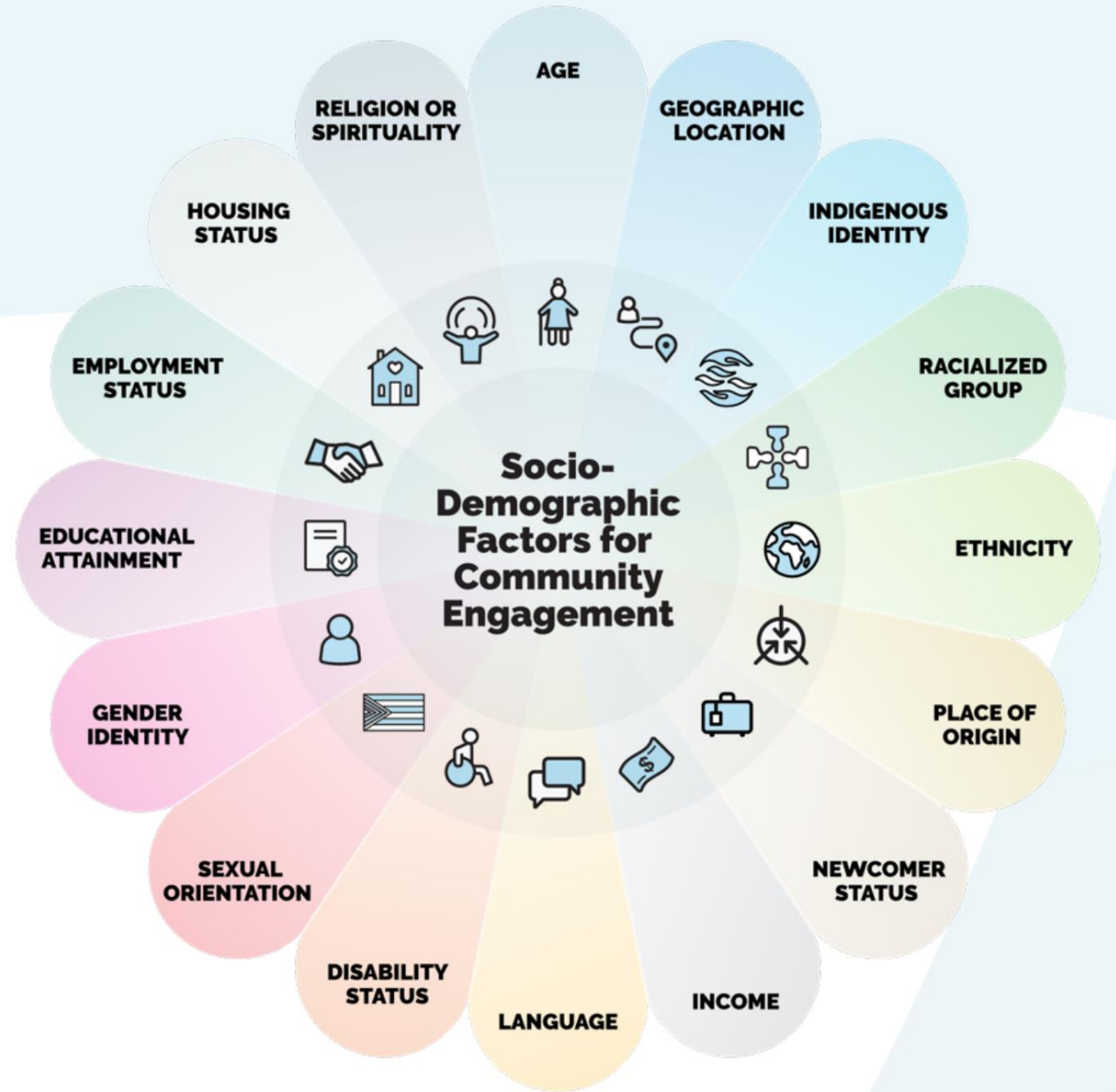
Social identity measures are hard to do well!

- Identity categories are socially constructed. This means that they're changeable and shift from context-to-context.
- But we hold our identities closely and feel strongly about them. They are an intimate part of who we are. They're a site of discrimination and harm, but also community building and advocacy. And their implications are very real and material.
- It's not easy to capture shifting, complex, politically-charged information in a way that's clear, concise, and conducive to use.

Choosing Socio-demographic measures

1. Go back to your research question. Why do you need to collect this information? How will it contribute to decision making?
2. Look for measures produced by StatCan, research collaboratives and working groups.
3. When refining categories, weigh the desire for many categories against the burden of a long survey question.
4. Consider how you'll report the data. Can you fit all those categories in a bar chart? How will you deal with small numbers, which produce less statistical certainty?

Probing all these factors takes a lot of time! Prioritize those that are needed to make a decision.



Asking about race: Statistics Canada

(from 2021 Census of Population)

This question collects information in accordance with the Employment Equity Act and its Regulations and Guidelines to support programs that promote equal opportunity for everyone to share in the social, cultural, and economic life of Canada.

Is this person:

- ☐ White
- ☐ South Asian (e.g., East Indian, Pakistani, Sri Lankan)
- ☐ Chinese
- ☐ Black
- ☐ Filipino
- ☐ Arab
- ☐ Latin American
- ☐ Southeast Asian (e.g., Vietnamese, Cambodian, Laotian, Thai)
- ☐ West Asian (e.g., Iranian, Afghan)
- ☐ Korean
- ☐ Japanese
- ☐ Other group — specify: _____

Note: Prior question asks a) if the person is First Nations, Métis or Inuk (Inuit); b) [if yes] multi-select question asking which of the three groups; c) [if no] this question is shown.

Asking about race: Statistics Canada

(from 2021 Census of Population)

This question collects information in accordance with the Employment Equity Act and its Regulations and Guidelines to support programs that promote equal opportunity for everyone to share in the social, cultural, and economic life of Canada.

Is this person:

- ☐ White
- ☐ South Asian (e.g., East Indian, Pakistani, Sri Lankan)
- ☐ Chinese
- ☐ Black
- ☐ Filipino
- ☐ Arab
- ☐ Latin American
- ☐ Southeast Asian (e.g., Vietnamese, Cambodian, Laotian, Thai)
- ☐ West Asian (e.g., Iranian, Afghan)
- ☐ Korean
- ☐ Japanese
- ☐ Other group — specify: _____



Included in the population group “visible minority”

Categories are “based on the visible minority groups identified by the *Employment Equity Technical Reference Papers*, published by Employment and Immigration Canada in 1987, and used for federal employment equity programs.”

Asking about race: City of Toronto

People often describe themselves by their race or racial background. For example, some people consider themselves "Black", "White" or "East Asian".

We recognize this list of racial or ethnic identifiers may not exactly match how you would describe yourself. Keeping that in mind, which of the following best describes the racial or ethnic community that you belong to?

Which race category best describes you? Please select only one.

- Arab, Middle Eastern or West Asian (examples: Afghan, Armenian, Iranian, Lebanese, Persian, Turkish)
- Black (examples: Afro-Caribbean, African, Afro-Canadian)
- East Asian (examples: Chinese, Japanese, Korean)
- First Nations (examples: status, non-status, treaty or non-treaty, Inuit or Métis)
- Latin American (examples: Brazilian, Colombian, Cuban, Mexican, Peruvian)
- South Asian or Indo-Caribbean (examples: Indian, Indo-Guyanese, Indo-Trinidadian, Pakistani, Sri Lankan)
- Southeast Asian (examples: Filipino, Malaysian, Singaporean, Thai, Vietnamese)
- White (examples: English, Greek, Italian, Portuguese, Russian, Slovakian)
- More than one race category or mixed race, please select all that apply:
 - ☐ Arab, Middle Eastern or West Asian (examples: Afghan, Armenian, Iranian, Lebanese, Persian, Turkish)
 - ☐ Black (examples: Afro-Caribbean, African, Afro-Canadian)
 - ☐ East Asian (examples: Chinese, Japanese, Korean)
 - ☐ First Nations (examples: status, non-status, treaty or non-treaty, Inuit or Métis)
 - ☐ Latin American (examples: Brazilian, Colombian, Cuban, Mexican, Peruvian)
 - ☐ South Asian or Indo-Caribbean (examples: Indian, Indo-Guyanese, Indo-Trinidadian, Pakistani, Sri Lankan)
 - ☐ Southeast Asian (examples: Filipino, Malaysian, Singaporean, Thai, Vietnamese)
 - ☐ White (examples: English, Greek, Italian, Portuguese, Russian, Slovakian)
- Not listed, please describe: _____
- Prefer not to answer

Asking about racialized group: Ontario Health

Source: Anti-Racism Directorate

Which of the following best describes your racialized group? (check all that apply, for example if you belong to multiple racialized groups)	
<input type="checkbox"/> Black <input type="checkbox"/> East Asian <input type="checkbox"/> Latin American <input type="checkbox"/> Middle Eastern <input type="checkbox"/> South Asian	<input type="checkbox"/> Southeast Asian <input type="checkbox"/> White <input type="checkbox"/> Another race group (please specify): _____ <input type="checkbox"/> Do not know <input type="checkbox"/> Prefer not to answer

QUESTION TYPE

This question allows multiple selections and includes the option of providing another racialized group in a free-text response field.

Another way of asking about identity (including race)

These questions help us understand the people we serve. They are voluntary. If you don't want to answer a question, just skip it or select 'prefer not to answer'.

We want to learn how our programs impact specific groups of people who may face barriers to success in our society. Do you consider yourself to be...

 [Select all that apply](#)

- ☐ Person of Colour (a person belonging to a racialized community)
- ☐ First Nations, Inuk (Inuit) or Métis
- ☐ Person with a disability
- ☐ 2SLGBTQIA+
- ☐ None of the above
- ☐ Prefer not to say

Break out!



10 minutes to discuss:

What 'big questions' drive your organization's collection of social identity data?

What data collection tools and practices have worked best for you?

What is the biggest challenge you've encountered?

6. Selecting a survey platform

Features to look out for:

- **Privacy and security** – compliance with regulations, protection of personal information, role-based access, control over data retention and deletion, data residency
- **Customizability** – complex survey logic, "other" option, customization of labels, question types
- **Accessibility** - multi-lingual, works on different devices, easy interface
- **Cost-effectiveness** – cost per user and team, nonprofit discount availability
- **Integration** – compatibility with existing processes and systems
- **Advanced analytics** – analytics and dashboard available



Choosing the right survey platform

Platform	Strengths	Limitations	Approx. Cost (CAD)
Google Forms	Free with unlimited responses; Easy Google Workspace integration	Limited customization and question types; Analytics require external tools; Minimal accessibility features	Free
Microsoft Forms	Enterprise security and encryption; Built-in Office 365 integration	Limited customization and question types; Integration mainly within Microsoft ecosystem	Included with M365
SurveyMonkey	Strong accessibility support; High privacy options; Highly customizable with advanced logic; Advanced analytics; Extensive integrations	Free plan limited; Paid plans necessary for most features	\$30+/month
JotForm	Enhanced privacy options; Highly customizable with advanced logic; 100+ integrations; Offline capability	Free plan limited; Complex interface for beginners; Privacy features require paid plans	\$25+/month
LimeSurvey	Open-source with self-hosted option; Unlimited surveys and responses; Advanced question types and logic; Multi-language support	Requires technical expertise; Less intuitive interface	Self-hosted and cloud options

7. Helpful resources

Data equity

Urban Institute (2020) [“Principles for advancing equitable data practice”](#)

Survey design guide

Jarrett, Caroline (2021) [*Surveys That Work: A Practical Guide for Designing and Running Better Surveys*](#)

Sociodemographic data collection

Ontario Health (2024) [Guidance for the Collection and Use of Sociodemographic Data for Equity Analytics](#)

City of Toronto (2022) [Data for equity guidelines](#)

Statistics Canada [Visible Minority and Population Group Reference Guide, Census of Population, 2021](#)

We All Count (2022) [“Introducing Identity Sorting Dials”](#)

UBC Equity & Inclusion Office [Inclusive Forms](#)

Examples of outcomes measures

Statistics Canada [Canadian Community Health Survey \(CCHS\)](#)

[Quality of Life Framework for Canada](#)

[Positive Mental Health Surveillance Indicator Framework](#)

[Child and Youth Resilience Measure \(CYRM\)](#)

info@logicaloutcomes.net

logicaloutcomes.net

