

MAKING THE CASE FOR DEMOGRAPHIC DATA COLLECTION: WHY IS IT IMPORTANT? HOW DO WE DO IT?

POSITIONING FOR IMPACT

Why is it important collect demographic data? *Because it's the only way for foundations to know fully what impact we're having and how to maximize our impacts.* It's the only way to ground strategy in a comprehensive understanding of what's needed and what's possible for the communities we seek to serve, and to make informed decisions about investments and interventions, and our own organizational development.

As funders, we ask: Who needs our program? Who's being served? What's the best way to serve them? What outcomes are being produced for distinct communities and populations?

These are basic and <u>necessary</u> questions for designing, implementing, and assessing the impact of programs and investments, and the answers can only be found by gathering and analyzing demographic data – disaggregated by variables such as race, ethnicity, gender, ability, and sexual orientation. These dimensions, and others such as age, geography, and socioeconomic backgrounds, allow organizations to illuminate effective strategies, gaps and overlaps, and opportunities for impact for distinct communities and populations. They'll also point us to an understanding of who we need on our staff and in our leadership so our organizations and our partners reflect and engage the communities they serve, which is essential for ensuring that our approaches are responsive and relevant.

DEEPENING CONTRIBUTIONS AT EVERY LEVEL

Whatever your role, demographic data is an essential tool for improving your contribution toward your organization's mission.

Role in the Organization	Demographic Data Is An Essential Tool For		
Board Member	 Making informed decisions about the direction of the organization Ensuring inclusion of the full range of community voices, perspectives, and talents at every level of the organization 		
CEO/Executive Director	 Informing high level strategy Assessing the inclusivity of the organization 		
Grants Manager	 Analyzing grants and investments Improving robustness of data 		
Program Staff	 Informing recommendations and decisions 		

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	_	Building a comprehensive picture of organizational impacts across programs and initiatives
HR/Legal	-	Creating inclusive organizational cultures and systems to ensure
		everyone has a voice and role in shaping strategies
Communications	-	Clarifying and deepening stories of impact and communities served

ADVANCING EQUITY REQUIRES DATA

Are the outcomes of your efforts equitable – or are they producing disparate outcomes? Do you collect data that gives you a clear answer? This is information that you need to know because if a program or grant is producing disparate outcomes, it is inadvertently perpetuating inequities, and of course that's not what we want.

People start in different places and need different things because of societal and institutional systems, policies and history. So they will navigate schools and dental clinics, museums and performances, housing and job programs *differently*. There is a tremendous opportunity in that realization to make our efforts more strategic – and we can only take advantage of that opportunity through clear data about who needs the program, who is being served, the best way to serve them, and what outcomes are being produced for distinct communities and populations.

Collecting and analyzing disaggregated data by race, ethnicity, gender, ability, sexual orientation, and other demographic variables makes it possible to manage, allocate, and assess resources and programs – effectively – for all communities. We are at the beginning stages of achieving better data. As more organizations share data and use disaggregated data to fully understand impact and promote equity and inclusion, the sector will be considerably more effective toward promoting the common good.

AN EXAMPLE

(Because Theory is Nice, But What Does It Look Like in Practice?)

Take a hypothetical collective impact approach, for example, aimed at increasing the rate of high school to college connection rates for a community with strained public resources. It might develop an intervention that brings together municipal social service providers, the local community college, and the public school system. The approach might develop college prep and counseling services that engage content and counseling instructors from a nearby community college to strengthen students' pathways to college and to offer supplemental life skills training through a regional workplace development agency. It might feature all of the components of a collective impact approach, and pre- and post-program analysis might show a meaningful uptick with respect to college attendance overall, perhaps leading the collective impact partners to conclude that the intervention as designed is working.

But without data on the demographic variables among the population, the strategy might miss the fact that most gains in graduation were accruing to males even though there were an equal number of girls and boys participating in the program. Only with this data could one surface the insight that the range of prep courses and the timing of the afterschool services conflicted with afterschool jobs that a disproportionate number of girls worked because a home health care agency actively recruited them for positions at a newly opened nursing home.

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Without the ability to analyze demographic variables, not only would the intervention miss this finding, but it would lack insight into ways to improve the design to promote more equitable outcomes for young men and women and thus overall success. It would miss an opportunity to gain insight into a labor market dynamic that might be entrenching larger gender-based systemic inequities over time. In short, demographic data is essential for understanding and improving our strategies and outcomes.

OVERCOMING THE BARRIERS

The idea of asking people about issues of identity can, to some, seem awkward. But engaging people about their identities and sense of who they are can also be empowering and enrolling. Otherwise, we make assumptions that can hide or exclude important aspects of who people are that can inform our cultures, processes, and understanding. In fact, not engaging people around these issues can make them feel invisible and undervalued.

Yet, because there is history of excluding or discriminating against people based on aspects of their identity, some may wonder— is it legal to ask such questions? Is it racist or sexist or homophobic? How can I do this without offending anyone? How can I protect people's right to privacy?

These are important questions. First, is it legal? Short answer: yes. But be sure you're doing it in a way that protects everyone's rights and privacy. Check with your own legal advisors and HR department as it's important to do this right for your organization.

Second, how do I go about doing this in a way that will get useful data while protecting individuals' privacy and dignity? Check out D5's primer, *So you want to collect demographic data...*, here: (http://www.d5coalition.org/wp-content/uploads/2015/12/Tips-for-data-collection-12.8.151.pdf)The paper outlines recommended steps for establishing an organizational commitment and supportive environment for collecting and using demographic data. This means making sure everyone understands the importance of data and finding the right approach for your organization. It also means designing tools and processes that are comfortable for your organization and that use recommended standards for wording questions, which thanks to a range of efforts in the field outlined below, are available to all.

TOOLS FOR DATA COLLECTION

For a long time, we lacked the tools to collect and use demographic data effectively and systematically to assess philanthropic and programmatic impact. But we now have several options to collect and use demographic data to advance the common good.

GUIDESTAR

In 2014, GuideStar launched the first-of-its-kind program to collect demographic data from nonprofits and foundations at scale. As part of the GuideStar Nonprofit Profiles, organizations now have a platform for reporting data about staff, board, and volunteer demographics in the nonprofit and philanthropic sectors. The voluntary program appears as a section within the GuideStar Nonprofit Profiles.

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In the first year following the launch, more than 4,300 organizations shared demographic data, including more than 180 foundations, **among them** The California Endowment, Marguerite Casey Foundation, Rockefeller Brothers Fund, The Bullitt Foundation, The Ford Foundation, the David and Lucile Packard Foundation, the William and Flora Hewlett Foundation, Kresge Foundation, Meyer Memorial Trust, Gordon and Betty Moore Foundation, The Joyce Foundation, the JPB Foundation and the Doris Duke Charitable Foundation to name just a few.

More organizations are sharing demographic data every month. The inclusion of demographic data has launched numerous conversations in individual organizations and various sectors about diversity and inclusion, and strategies for improving both. This is a critical opportunity to increase philanthropy's openness and transparency, and to ensure the field has data that allows it to understand gaps and strategies to enhance impact. Nonprofits and foundations are strongly encouraged to share their demographic data through GuideStar (and see below for information on Simplify, which allows foundations to streamline online applications by using GuideStar data): http://www.guidestar.org/rxg/update-nonprofit-report/index.aspx

GET ON THE MAP

Twenty-four regional associations of grantmakers are promoting "Get on the Map," a national partnership between the Forum of Regional Associations of Grantmakers, the Foundation Center, and member regional associations, that encourages funders to share grants data directly with Foundation Center following the eReporting Standard.

Moving beyond basic grant descriptions commonly found on tax returns, the campaign encourages details like populations served and geographic reach, which marks a significant departure from the incomplete snapshots of populations that were previously available.

The cornerstone of the campaign is that each region receives a custom version of Foundation Center's flagship data mapping and visualization tool, Foundation Maps, which allows members to interact with grants data to scan their funding landscape for gaps and overlaps, identify collaborators, and monitor trends in giving – all with current and accurate data supplied by funders themselves. For more information, go to:

http://foundationcenter.org/grantmakers/ereporting/gotm.html

SIMPLIFY

Simplify's purpose is to help foundations embrace technology to facilitate data sharing. In partnership with GuideStar, Simplify developed data sharing for grant applications to allow nonprofits to enter their core information their GuideStar Nonprofit Profile, which is then automatically added to every online application they complete for any participating funder. Once the GuideStar Profile is established, the nonprofit simply enters its EIN on grant applications for participating funders, and the core information – contact information, board of directors, demographic profile, financial information – automatically populates the relevant fields. This means nonprofits maintain core data in a single place rather then entering the same information for each grant application. The result: saved time for nonprofits and improved data quality for funders.

Vendors now offering Simplify are Fluxx, MicroEdge, RoundCorner, and SmartSimple. Those with Simplify in development are Altum, Bromelkamp Company, Foundant Technologies, Stellar Technology Solutions, and Versaic. Foundations that use custom software can use Simplify with an application program interface (API) that can be integrated into their software. Foundations pay a nominal fee per year to access the Simplify data sharing functionality. Some vendors may include Simplify as part of the standard package provided to clients. More information is here: http://www.simplifynow.org/

NONPROFIT CAPACITY – AN IMPORTANT CONSIDERATION

We have new and increasingly effective platforms for data collection. Ultimately, they'll only be as strong as the data that populates them. Nonprofits are essential partners in building the field's understanding of who is being served and how, and philanthropic organizations need to play a role in supporting nonprofit capacity to: 1) understand the importance of demographic data, and 2) build the will and know-how for collecting and sharing demographic data. Funders can play educational, convening, coordination, and funding roles to increase nonprofit participation and capacity in data sharing.

How? Ask grantee partners about the demographic data of populations served and about who is working in and leading organizations. Educate nonprofits about why you're asking and how they can use demographic data. Learn about it together. Promote the use of the GuideStar Nonprofit Profiles, and make it easier for nonprofits to see the benefit by employing Simplify for your application and reporting processes.

POSITIONING FOR THE FUTURE STATE OF DATA COLLECTION

We're at the leading edge of a wave of tools and insights that will improve the investments and strategies that foundations and nonprofits undertake in communities. We know that organizations are increasingly engaging with issues related to collecting and using demographic data – and sometimes it's a struggle. Navigating issues of identity is personal and complex, but until we fully dig into the issues and understand their interplay with the strategies that we implement and the outcomes that we produce, we won't realize our potential for impact.

These tools present tremendous opportunities – and the opportunities will be proportionate to the number of organizations that collect and share demographic data. The more organizations that participate, the more effective the data will be. And data sharing only works if everyone formats information consistently. Use commonly adopted standards from GuideStar and the Foundation Center to allow different organizations and platforms to exchange information.

Tools and information to collect and share data are in place – and now is the time to position our organizations to leverage them for impact, and to engage with the tools to inform continual improvements and to ensure the field has the kind of data that can be used effectively.