



Summary Principles for the Collection of Self-Identification Data

Advocacy begins with evidence

Appropriate and informed advocacy for equity, reconciliation, and systemic change in the education sector requires an understanding of the needs and representation of the members that the CTF/FCE and its Member and Associate Organizations (MOs/AOs) serve. Beyond knowing if demographic data is collected, it is important to consider how such data is collected – be that a Member Organization conducting an annual member survey, or one attempting to gather this data for the first time. The following Guiding Principles provide a summary of the best practices to keep in mind when gathering disaggregated self-identification (self-ID) data to inform diversity, equity, and inclusion strategies. The aim is to support MOs/AOs to develop or refine a thoughtful approach to gathering members' self-identification data that can inform ongoing and meaningful equity and inclusion efforts.

What is disaggregated self-identification data?

- **Self-identification** is a process of disclosing details about how one identifies. Self-identification takes place when a person defines their own identity, not when others define a person's identity on their behalf.
- **Self-identification data** is the information collected from people about how they identify across different categories (e.g. gender, race, ethnicity, disability, sexual orientation).
- **Disaggregated self-identification data** is self-identification data that is grouped into separate categories (e.g. breaking down gender data into sub-categories of woman, man, non-binary, or transgender).

Guiding principles

1. Clarify the purpose for collecting self-ID data

- Before designing a research instrument to collect self-identification data, it is important to define **why** the data is being collected and **how** this will inform future actions. Respondents are more likely to respond to self-ID surveys when they trust and understand that the results are being used to promote positive aims or how their data will be used in these aims.
- The purpose of the data collection must be transparent – this should be communicated clearly to respondents within the research instrument itself, and questions should be limited to those needed to achieve specific aims.

2. Acknowledge the fluidity of identity

- A person's identity is not fixed, but rather something that changes over time in response to a broad range of contextual factors. This means identity data should be collected in regular cycles to continue to attend to shifting identities and demographics.
- Research instruments should be designed in such a way that allows for intersecting identities to be reported (e.g. enabling multiple identities to be selected; providing an open-text field for respondents to describe their identity in their own words). You may risk offending participants if their identity is only listed as an 'Other' category to select from, therefore it is worth acknowledging this possible limitation and encouraging them to write in their identity in their own terms if preferred.
- Questions should be formatted to ensure they are asking about a participant's *current identity* and not assume their identity remains the same.

3. Ensure self-identification is always a choice

- Individuals may be asked to answer questions about different aspects of their identity, but this should never be mandatory. While many respondents will voluntarily self-report their identity, others may be reluctant to do so for a variety of reasons. Some individuals for instance may not provide identity data given how such data has historically been used as a tool for systemic oppression, rather than systemic justice.
- Self-ID questions must be designed thoughtfully to give respondents autonomy over how they identify – wording has a strong influence on the likelihood that a survey is completed.

4. Prioritize consistency

- A consistent approach and regular cycles for gathering self-ID data will ensure your findings are more comparable, which in turn, can better support advocacy efforts (e.g. demonstrating the extent to which representation changes year-to-year).
- Consistency is also helpful in the type of identity data being collected (e.g., collecting gender, racialization, and sexuality data within each survey, if warranted, ensures consistent understanding of the dynamics and changes in members who identify with/in these groups).
- Be mindful to balance the benefits of consistent data collection with minimizing the burden of participation for respondents. Consider the frequency and breadth of surveys members are receiving, and take steps to mitigate survey fatigue.

Consult CTF/FCE's full *Gathering Disaggregated Self-Identification Data: Guiding Principles and Practices* resource for more specific guidance on how to conduct a self-identification survey, including best practices and a list of sample questions to draw from and adapt based on the needs of individual MOs or AOs.