DATA FOR EQUITY GUIDELINES

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1. Introduction to the Data for Equity Guidelines

These guidelines were developed as part of the Data for Equity Strategy to provide guidance to City of Toronto divisions on why, when and how to collect and manage socio-demographic data in a consistent manner. The guidelines also provide advice on sharing and reporting on data that is broken down by socio-demographic groups for equity purposes.

The goals of the guidelines are to:

1. Outline the steps involved with preparing for socio-demographic data collection and use
2. Support the consistent collection of socio-demographic data from City service users and Toronto residents with standardized questions and answer options
3. Provide evidence-based guidance

These guidelines were adapted from the *Guide to demographic data collection in health-care settings* (2017) by Sinai Health System and includes content from the Ontario Government's *Data Standards for the Identification and Monitoring of Systemic Racism* (2018) and other sources listed in the references section.

2. Data for Equity Strategy

Data for Equity refers to the use of disaggregated data[1] that is broken down by socio-demographic groups to understand needs, identify equity and prosperity goals, develop programs and policies that serve all residents more equitably, monitor progress, and assess equity impacts.

Goal

The goal of the Data for Equity Strategy is to support the collection of socio-demographic data and use of disaggregated data[1] to:

- Inform program planning, policy development and service delivery that is inclusive of and responsive to the needs of all Torontonians, particularly Indigenous[2], Black and equity-seeking groups[3]
- Support equitable, evidence-based and accountable decision-making

Objectives

1. **To collect consistent, high quality socio-demographic data** (such as race, gender, disability) on a voluntary basis[4] from Toronto residents and service users within City programs, services, needs assessments and public consultations that are comparable to other data sets.
2. **To analyze, report and use City program, service, needs assessment, program evaluation and public consultation data that is broken down by socio-demographic groups** to assess equity impacts and inform service planning, delivery and policy development.
3. **To use existing population-level data[5]** that provides information about all Toronto residents and is broken down by socio-demographic groups to inform service planning, delivery and policy development.

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[1] Disaggregated data refers to large data sets that are broken down into smaller units. In the Data for Equity Strategy, disaggregated data refers to data that is broken down and examined by socio-demographic groups such as Indigenous communities, gender identities, racialized groups and neighbourhoods.

[2] For the purposes of these guidelines, the term "Indigenous" is reflective of the many nations that exist within First Nations, Inuit and Métis communities.

[3] Equity-seeking groups refer to communities that face significant collective challenges in participating in society because of barriers to equal access, opportunities and resources due to disadvantage and discrimination, and actively seek social justice and reparation.

[4] It is recognized that many City programs must collect socio-demographic data in different ways to meet the requirements of other levels of government and to determine program eligibility. This data may be mandatory for program eligibility purposes and may also vary in the data being collected.

[5] Population-level data provides information about all Toronto residents or specific groups of residents (e.g. children, seniors and low income people). This includes population-level census data, administrative, income, education and health datasets and survey data.

Supporting transparent, evidence-informed decision-making

Ultimately, the Data for Equity Strategy will support an accountable, transparent, equitable and evidence-informed municipal service system that:

- Provides excellent service and advances equity and inclusion
- Has a strong ability and commitment to measure, monitor and report on progress towards addressing equity priorities, prosperity goals, inequities in service access and inequitable outcomes
- Is capable of and committed to using evidence and considering equity as part of regular planning and decision making at the City-wide and program level
- Has earned public trust and confidence that the City cares about people experiencing inequities, built through its demonstrated commitment to appropriately collect, report and use data to identify and address inequities

Guiding Principles: The City's Responsibilities

The Data for Equity Strategy reflects and adheres to the following five key principles:

1. Equity, Inclusion and Human Rights
2. Privacy and Security
3. Open Data
4. Indigenous Data Governance
5. Black Communities and Data Governance

The Data for Equity Guiding Principles outline the City of Toronto's responsibilities when collecting socio-demographic data and using disaggregated data. These principles are aligned with the City of Toronto's Working Principles for Digital Infrastructure.

1. Equity, Inclusion and Human Rights

The collection of socio-demographic data and the analysis, reporting and use of disaggregated data will:

- Inform services, operations and outcomes that create and sustain equity, inclusion, accessibility and human rights
- Be used to respond to the needs of Indigenous, Black and equity-seeking groups
- Support the identification of barriers, service needs, differential treatment and systemic inequities in order to improve the lives of people facing inequities
- Align with and support existing City of Toronto equity strategies and initiatives, including the Access to City Services for Undocumented Torontonians policy

Equity, Diversity and Human Rights **Equity & Diversity Unit** Provides strategic advice to divisions on workforce and service equity. E-mail: diversity@toronto.ca

Accessibility Unit
Provides advice on making Toronto accessible for all Torontonians.
Email: accessibility@toronto.ca

Human Rights Office
Provides neutral, confidential advice, information and assistance related to human rights and harassment issues to Toronto Public Service, City Council and the public.
Email: humanrights@toronto.ca

2. Privacy and Security

The collection of socio-demographic data, and the analysis and reporting of disaggregated data must be conducted in a way that:

- Protects the privacy of individuals at all times, complying with legislative requirements and the guidance for privacy and fair information management provided by the City Clerk's Office, Corporate Information Management Services
- Incorporates privacy protection into all stages of project design, data collection, storage, use and disposal
- Includes appropriate safeguards to keep personal information secure from theft, breaches and hacks
- Considers "community privacy" and the potential for data to perpetuate stereotypes or stigmatize groups of people

Corporate Information Management Services (CIMS)

Surveys and data collection tools that collect personal or private information, whether internally or externally, must be reviewed by the Forms team at Corporate Information Management Services (CIMS). CIMS provides recommendations to help divisions meet their information management responsibilities when creating forms, surveys or tools to collect information from the public.

In order to keep information that is collected secure and organized, and ensure public and employee trust, all City forms are subject to legislation and policies, and privacy protection.

Forms staff at CIMS provide consultation services about information collection tools such as forms and surveys. Forms staff support City divisions to implement forms management best practices and meet legal and policy requirements when designing City tools. City staff can contact this staff team at forms@toronto.ca or visit their intranet site.

CIMS provides routine and customized training on legislative compliance and best practices in protecting personal information. Staff are encouraged to review training options in the ELI training calendar or contact the training team at infomgmt@toronto.ca.

3. Open Data

When appropriate, anonymized datasets including disaggregated data will:

- Be released to the public in accordance with the Open Data Policy and the Open Data Master Plan in as complete a form as possible while complying with the City's legal obligations to protect personal privacy and other relevant restrictions
- Be made available to the public in a timely fashion to facilitate evidence-informed decision making about City programs, policies and services
- Be made available to anyone to use under the terms and conditions of the Open Data Licence, with no requirement for registration, no exclusive control, and no license or usage fees

Open Data, Technology Services If you have a dataset for open data publication, please contact the Open Data team by emailing opendata@toronto.ca. When contacting the team, you will be asked to provide a completed Approve to Publish form. • Open Data Intranet Site (internal website) • Open Data Internet Site (external website)

4. Indigenous Data Governance

Processes to collect socio-demographic data and analyze and report on disaggregated data will:

- Consider and address the principles of Indigenous data governance and methods of First Nations, Inuit and Métis engagement and guidance in how data is collected, protected, used and shared. The First Nations principles of OCAP®[6] (Ownership, Control, Access and Possession) provide a model for the City's approaches to Indigenous data governance.
- Engage, connect and build relationships with First Nations, Inuit and Métis community members, organizations, researchers and partners, to build collaboration and partnerships, and to ensure First Nations, Inuit and Métis input in data collection and use
- Ensure that data is shared with and used to benefit First Nations, Inuit and Métis communities and not stigmatize, harm, or negatively impact First Nations, Inuit and Métis communities

See section 5 on Indigenous Data Governance for more information.

[6] OCAP® is a registered trademark of the First Nations Information Governance Centre (FNIGC). For more information please see www.FNIGC.ca/OCAP

Indigenous Affairs Office (IAO)

Focused on supporting City divisions in their work with First Nations, Inuit and Métis peoples and working with all urban Indigenous communities. The IAO strives to strengthen the City's relationships with Indigenous communities and support City staff in advancing truth, reconciliation and decolonization.

External Website

Email: Indigenous@toronto.ca

5. Black Communities and Data Governance

Processes to collect socio-demographic data and analyze and report on disaggregated data will:

- Use an Anti-Black Racism Analysis as embedded in the Toronto Action Plan to Confront Anti-Black Racism to guide the creation, implementation and evaluation of any initiative
- Ensure that Black communities are engaged in the City's development, collection, analysis, reporting, and use of data and that disaggregated data is reported to Black communities
- Share data, collaborate and engage with Black communities, experts and organizations to ensure that data supports positive community outcomes and does not stigmatize, harm, or negatively impact Black communities

Confronting Anti-Black Racism Unit (CABR)

Established in 2017, CABR implements the Toronto Action Plan to Confront Anti-Black Racism to respond to the priorities identified by Toronto's diverse Black communities.

Email: CABR@toronto.ca

Staff Supports

Data for Equity Unit

A Data for Equity Unit within the People and Equity Division will be established to lead the implementation of the Data for Equity Strategy.

Prior to the approval and establishment of the Data for Equity Unit, staff within Equity, Diversity and Human Rights are available to provide:

- advice and support to divisions on applying the guidelines
- support to divisions to interpret data from an equity perspective

Email: diversity@toronto.ca

3. Steps in the Data Collection Process

Collecting socio-demographic data requires careful planning and implementation including appropriate resources, expertise and infrastructure within City divisions, and must be done with extreme care. Prior to launching socio-demographic data collection in your division, the following actions need to be taken:

- commit to analyzing and using the data collected to improve resident outcomes
- allocate appropriate resources as outlined below
- train staff to collect and utilize data collected
- ensure privacy and information management measures are in place
- develop communication strategies to inform service users and/or Toronto residents about data collection

The section below outlines key steps and considerations in planning for successful socio-demographic data collection within City programs and services. This section should be reviewed alongside section 4 on Privacy, Information Management and Technology to ensure your division's data collection plans comply with applicable privacy legislation.

Step 1: Assign Staff Lead

It is recommended that a Staff Lead be assigned to oversee the planning and implementation of socio-demographic data collection in your division, unit or program. This individual will:

- liaise with Data for Equity project staff
- lead Steering Committee meetings (see Step 2)
- coordinate socio-demographic data collection education and resource sharing
- act as an internal champion for advancing equity through data collection
- oversee the development and progress of a work plan, including goals, deliverables and timelines

Defining clear roles and responsibilities will help divisions comply with the guidelines, support transparency, and promote accountability for the proper management of socio-demographic information, as well as reporting for the purposes set out in the guidelines.

Step 2: Form Steering Committee

Forming a steering committee with key staff in your division will ensure the successful planning and implementation of your division's socio-demographic data plan. The responsibilities of the Steering Committee can be to:

- develop a work plan that includes goals, objectives, and a timeline for the initial implementation of socio-demographic data collection
- identify key stakeholders who are involved in or impacted by this project

- use feedback to improve the socio-demographic data plan
- identify and gain consensus on equity planning goals
- plan for the use of socio-demographic data in equity planning
- engage senior management on an ongoing basis
- keep all stakeholders updated on progress of the plan

Socio-demographic data collection is a process that requires input from several key players. Below is a list of additional expertise to consider. A member of the Data for Equity Unit is also available to sit on divisional steering committees.

Checklist: Steering Committee Expertise. A sample list of the expertise recommended for the committee

☐ Data Analysts, Research Analysts/Coordinators
☐ Registration, Intake Staff, Case Managers, other front line staff (the data collectors)
☐ Privacy staff or person knowledgeable about divisional data privacy practices
☐ Technology staff who are knowledgeable about data systems
☐ Program Analysts, Policy Development Officers
☐ Project Managers, Program Managers

Step 3: Determine the scope of data collection

Identifying the scope of data collection will help with determining the types of socio-demographic questions to ask service users and Toronto residents.

3.1 Identify Purpose

Socio-demographic data may be used at three levels:

<u>Organizational-level use</u>

- Develop a profile of the populations being served by the City of Toronto
- Identify trends and gaps in City-wide service provision for Indigenous, Black and equity-seeking groups
- Monitor and measure progress on the City's equity priorities
- Determine alignment of divisional data and findings to Council, divisional and corporate priorities, including analyzing findings by socio-demographic groups to identify inequities

<u>Divisional-level use</u>

- Develop a profile of the socio-demographic groups being served by your division or program
- Analyze service access data by socio-demographics to identify inequities
- Understand service user experiences and outcomes for different socio-demographic groups through customer satisfaction surveys and evaluations

- Plan programs and services based on the communities being (or not being) served to address inequities in service access, experience and outcomes

Individual-level use

- Identify need for accommodation or language interpretation
- Identify need for transportation, child care or financial supports
- Refer service users to services or supports based on socio-demographic characteristics
- Determine program eligibility and to meet the requirements of other levels of government

3.2 Internal Scan

Your division may already be collecting socio-demographic data within existing programs and services. Conduct an internal scan to determine:

- What socio-demographic data is being collected?
- In which programs and services? By whom?
- How is the data being stored, analyzed, reported and used?

The Staff Lead can reach out to those who already collect some of this data to get information on what works and what does not:

- What advice can data collectors provide?
- What are best practices and lessons learned within your division?

3.3 Identify type of data to collect

The Data for Equity Strategy focuses on three types of socio-demographic data collection from service users and Toronto residents:

- **Program and service data**: The collection and use of data through City of Toronto programs and services provides information about the people who access those services. This data is generally linked to individual service user records and is confidential but not anonymous. The data can be used to:
    - Identify who is accessing a service and who benefits from it
    - Evaluate the impact of programs and interventions
    - Inform current and future service planning and delivery practices
    - Conduct other analysis that can improve program management or inform evidence-based policymaking
- **Needs assessment and program evaluation data**: The collection and use of needs assessment and program evaluation data provides an understanding of service needs, barriers, experiences and impacts to help inform service planning.

- **Public consultation data**: The collection and use of public consultation data provides insights into the needs, barriers, preferences and values of Toronto residents to help inform policies, projects and services.

3.4 Determine socio-demographic data to collect

The Data for Equity Strategy includes 17 standardized data elements – 10 core and 7 optional. The full list of socio-demographic questions including question wording and answer options can be found in Appendix A on page 31.

Core and Optional Socio-demographic Data Elements

Core	Optional
1. Age	1. Ethnicity
2. Neighbourhood or postal code	2. Religion or spiritual affiliation
3. Language preference	3. Citizenship and immigration status
4. Canadian-born or immigrant and Time of immigration	4. Housing situation
5. Indigenous identity and Two-Spirit identity	5. Family and household composition
6. Race	6. Education level
7. Disability	7. Employment status
8. Gender	
9. Sexual orientation	
10. Household income and Household size	

For City divisions, staff need to determine which socio-demographic questions are most appropriate to their situation based on equity priorities, data analysis resources and capacity, the format of their data collection tool, what is already being collected, what they hope to learn from the data and how they plan to use it.

It is recommended that programs consider collecting and analyzing data on all of the core socio-demographic data elements listed above. If a program is already collecting date of birth and home address of service users, then there is no need to collect the age and neighbourhood/postal code data elements. Optional data elements may be important for certain program contexts, and should only be included where relevant and likely to be used for service planning. Also consider if the information is available within existing population-level data sets (see Using Existing Population Level Data in section 6).

Appendix A on page 31 outlines all the City of Toronto Data for Equity socio-demographic data elements including core and optional data elements, and different question options for some data elements based on context and needs.

Step 4: Data Collection Methods and Procedures

4.1 Identify data collectors and data collection locations

Divisions should consider two factors when selecting location for data collection:

- The ease with which asking socio-demographic questions can be streamlined into existing workflows: Data collection is more easily incorporated into the roles of staff who regularly collect demographic information, record program data and administer forms.
- The volume or percentage of service users who can be reached in the area of collection: Unless you start in a small area in order to learn lessons and gain experience in data collection, the recommendation is that you focus on large programs and sites with high numbers of service users. Doing so offers a better return on the investment of training staff and developing data collection solutions.

In addition, divisions should consider if collecting socio-demographic data will create barriers to service and discuss strategies to address them.

Based on the type of data you collect (see step 3.3), you have different options for how to collect it. Below are some examples of locations and situations where socio-demographic data can be collected from service users and residents.

- **Intake or registration**: The workflow at intake or registration often requires collecting or confirming personal information with service users. Collecting socio-demographic data can be an extension of that work.
- **Service user interaction**: An ideal location and time to collect socio-demographic data of service users is during an in-person interaction such as a case management appointment in a private office or cubicle. This situation allows more time to build rapport and develop more trusting relationships between City staff and service users
- **Surveys (online and paper-based)**: Collecting socio-demographics in surveys can help you understand the demographic profiles of program participants, survey respondents, public consultation participants, or people who are attending an event.

The data can be collected using different methods:

- In person
- On paper
- Using technology, such as tablet

When choosing a method to collect the data, consider the method that is easiest to embed within existing workflows and best suited to the type of data being collected.

TIP: when choosing the location and method to collect data, consider volume, busyness, privacy (see section 4), staff availability and workload.

4.2 Develop data collection tool

City divisions should consider the types of tools they will need to design to allow for accurate and easy data collection.

- Ensure the tool is accessible and in plain language
- Determine if the tool will be translated into other languages based on existing data about service users
- Consult Appendix A for standardized socio-demographic data questions

Internal Tools:

Digital Resources intranet site for accessibility

Training guides on creating accessible documents

The City of Toronto Multilingual Information Provisions Policy aims to ensure that information about the City's programs, services and engagement activities reflect the linguistic diversity of the City and helps the public to engage, participate and be informed of City services, programs and engagement activities.

Step 5: Prepare for collection

Your data collection plan should ensure it addresses the following areas:

- Information is provided on a voluntary basis, except where required for program eligibility and to meet the requirements of other levels of government
- Information collected should not create barriers to access, except where program eligibility is based on this information
- Information must be collected for a specific purpose and with the intent to use it to understand and address inequities
- The minimum needed data should be collected
- Those providing data must be informed of the legal authority to collect the information, the purpose of the collection and (if applicable) voluntary nature of collection
- All privacy requirements under the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA) must be upheld (see section 4)

5.1 Information to provide service users and residents

City staff must share three key pieces of information with service users and residents when collecting socio-demographic information. If applicable, Notice of Collection should also be provided as outlined in the Privacy, Information Management and Transportation section below.

1. Why is our division collecting demographic data?

The consensus is that when people understand the importance of sharing their socio-demographic data, they are more likely to share that information. Share your goals for socio-demographic data collection, such as outlining how the data can be used to plan services and provide actionable recommendations for staff (e.g., identify the need for an interpreter or financial supports).

2. Who has access to your socio-demographic data?

An important piece of information for people's consent and comfort with sharing their data is knowing who will have access to it both internally (e.g. which City staff) and externally (e.g. researchers) and how individual data will be protected. This information should be clearly provided.

3. Do you have to respond to all questions?

People should have the option to respond that they ‘prefer not to answer’ to any questions that are not required for program eligibility purposes. This respects their right to not participate and makes staff more comfortable about asking. It is also essential that respondents are informed that withholding the information will not negatively impact service access or delivery, unless the information is required to access a program.

Service users are more likely to share socio-demographic information when they have answers to these questions.

Listed below are sample key messages to communicate to service users and residents when collecting socio-demographic information. These messages were developed based on best practices in socio-demographic data collection.

Purpose	To find out who we serve.
	To identify service user needs.
	To understand variation in service user experiences and outcomes.
	To help us provide better services
Access to data	[Where applicable] Information can be seen by the staff team providing services.
	Information is kept secure, private and confidential like all your personal information.
	Information and results that are shared will be from combined data of all service users only and be reported at the group level so that individuals cannot be identified.
Voluntary	Questions are voluntary.
	You can choose “prefer not to answer” to any or all of the questions.
	Choosing to not respond will not affect your access to services.

Sample preamble for data collection tools:

> We are collecting information about Toronto residents and service users to help us understand:
>
> - Who is using our services and programs
> - The needs of service users
>
> This information will help us provide better services to meet the diverse needs of our service users. All results will be kept confidential and the results will only be reported at the group or aggregate level. No information that can identify you will be shared.
>
> The questions are voluntary and you can select 'prefer not to answer' for any question you don't want to answer. This will not affect any services you receive from the City of Toronto programs and services or [insert name of specific City service or program].

5.2 Communication Tools

It is a best practice to provide information to service users and residents about the collection of socio-demographic data. You can engage service users and residents through communication tools such as:

- Posters placed near data collection locations
- Brochures that address frequently asked questions
- Promotional materials and questions and answers shared through social media, by email and on City service web pages
- Telephone-based promotion and information that is broadcast while service users are on hold

5.3 Staff Training and Education

Training is the cornerstone of successful socio-demographic data collection. All organizations and projects the Data for Equity team consulted in the development of these guidelines emphasized the vital importance of training and education for staff. Education will increase staff buy-in as well as help staff explain the purpose and importance of this work to service users and support their participation.

Addressing staff discomfort and communicating clear goals are key learning objectives. All City of Toronto socio-demographic data collection plans should include staff training in their work plans. Contact the Data for Equity Unit for guidance and support in developing staff education plans.

Below are recommended goals for a socio-demographic data collection training program:

- Emphasize the rationale and importance of asking socio-demographic questions to build awareness, including education on barriers and inequities experienced by Indigenous, Black and equity-seeking groups.
- Ensure staff develop an understanding of equity principles, terminology related to the questions, and the purpose and scope of the work.
- Familiarize data collectors with protocols and tools for data collection:
    - Through exposure to real-life scenarios and tips on how to answer questions and address difficult situations, staff will become more comfortable with the data collection process.
    - It is vital to make staff comfortable with data collection, as ‘discomfort’ and ‘anxiety’ are often cited as the top reservations in collecting sensitive socio-demographic information from service users.
- Use a hands-on approach with ample opportunities for practice.

Tools at the City

As part of Phase One of the Data for Equity Strategy, educational tools, resources and training curriculum will be developed to support staff capacity building for successful socio-demographic data collection and use.

The Data for Equity Community of Practice established in 2019 will provide a forum for City staff to:

- share information, learning tools and experiences
- troubleshoot and provide advice to one another
- test tools, resources and training developed

5.4 Community Engagement and Input

As there are well-documented concerns about discrimination and previous data collection initiatives reinforcing discrimination or stigma, community involvement and oversight is recommended as a best practice. Consulting with community representatives and other appropriate individuals and organizations can help foster an informed understanding and dialogue, so that data collection initiatives are well supported and effective. This is particularly important for Indigenous (see section 5) and Black communities. Contact the Data for Equity Unit to be informed of the community guidance measures in place.

4. Privacy, Information Management and Technology

This section provides City staff with instructions, guidance and best practices to comply with applicable legislation with respect to managing information when collecting personal information through the Data for Equity Strategy. The content in this section does not replace the specific provisions of the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA) or other applicable legislation that requires the protection of privacy or outlines information management requirements.

Staff are encouraged to seek assistance from Corporate Information Management Services (CIMS) in all stages of the collection, use, disclosure, and disposition of personal information. CIMS staff can be reached at infomgmt@toronto.ca.

What is personal information?

Personal information means recorded information about an identifiable individual. Any of the Data for Equity socio-demographic data elements will be considered personal information if attached to an identifiable individual, or if there is a reasonable expectation that an individual can be identified.

For example, an individual's name, postal code, disability, or a combination of these can be used to identify an individual.

Staff engaged in the collection of socio-demographic data must be aware that they are collecting personal information, and that the collection, use, storage, disclosure, and disposition must comply with applicable legislation and City policies, as outlined in this section.

Collection of Personal Information

All City of Toronto staff have legal obligations to protect the privacy of individuals when collecting personal information. This section complements the resources listed below with a focus on socio-demographic data collected through the Data for Equity Strategy:

- What You Need to Know When Collecting Personal Information Fact Sheet
  This Fact Sheet outlines the obligations that staff have when collecting personal information, including:
    - Ensuring there is legal authority for the collection;
    - Providing a Notice of Collection Statement; and
    - Providing the contact information for an individual who can answer questions about the collection.
- Personal Information: Collection, Use and Disclosure Guideline
  This document outlines the steps that staff should take when collecting, using, and disclosing personal information. It provides guidance, applicable for anyone, including staff engaged in socio-demographic data collection, about:
    - How personal information should be handled;
    - Who has the right to collect and access the information; and
    - The requirement for secure storage and disposal of personal information.

- Protecting Privacy in City Surveys Fact Sheet
  This Fact Sheet outlines best practices in conducting surveys and includes information about:
    - Primary and quasi-identifiers;
    - De-identification;
    - Survey best practices; and
    - Tips that would be helpful to staff engaged in collecting and analyzing socio-demographic data.

Who should collect personal information?

It is always optimal for City of Toronto staff to collect personal information, versus a third party, as staff will have the necessary training and accountability for personal information under the custody or control of the City.

However, depending on the need and the scope of the project, a third party may be contracted to collect personal information. The third party may be a survey or consulting firm that specializes in data collection. Contact CIMS and your representatives in Legal Services to ensure that the privacy and information requirements that third parties are required to meet are sufficiently detailed in any vendor contract.

Note: Regardless of who collects the personal information, full accountability for the privacy and security of personal information always remains with the City.

Direct Collection

Staff must ensure that data is collected directly from the individual to whom the information relates, unless the individual authorizes another person or entity to provide their personal information. Section 29(1) of MFIPPA requires that personal information be collected directly from the individual to whom it relates, unless certain circumstances listed in sections 29(1) exist, for example:

- where the individual authorizes another manner of collection; or
- where another manner of collection is authorized by or under a statute.

Indirect Collection

There are several scenarios in which an indirect collection of personal information may occur (MFIPPA Section 29 (a-h)). Indirect collection is where personal information is collected from someone other than the person to whom the information relates. For example, an individual may authorize the collection of their own personal information by a legal representative. Such authorization should generally include:

- the identification of the personal information to be collected;
- the source from which the personal information may be collected; and
- the name of the institution that is to collect the personal information.

TIP: Ask the following questions:

- Are you authorized to provide this information?
- Are you a legal representative of the individual?
- Are you the parent of a minor (if applicable)?

A record should be kept with the date and the details of the authorization. For example, the information collection form or tool should be designed to record the authorization of a legal representative, or confirmation of legal custody in the case of a minor.

Data Collection Methods & Privacy Requirements

The methods of collecting personal information must be considered to ensure the protection of an individual's privacy. These include:

- consideration of the environment in which the individual is requested to provide information; and
- the means used to document the information.

TIP:

- Avoid unintended disclosure to family members who may be present while you are collecting personal information. An individual may not want a family member to be present while providing answers to questions. Staff can advise the individual to provide another time when they can be contacted.
- Verify the respondent's identity (except with anonymous surveys) before collecting personal information. This can be done by simply requesting the individual to provide their full name.
- Do not provide personal information to a respondent in order to verify their identity. Instead, ask the respondent to provide this information and validate it by checking your records.

Conducting a Privacy Impact Assessment

All new or modified technology projects or programs that involve the handling of personal information are required to complete the Privacy Impact Assessment (PIA) Screening Tool to determine the level of privacy risk at the project initiation phase.

Staff must first contact the City Clerk's Office at infomgmt@toronto.ca to receive guidance on information classification and initial privacy risk screening before contacting the Office of the Chief Information Security Officer (CISO) at CISO@toronto.ca.

Some questions City staff must be prepared to answer are:

- Is this a new or modified application or system?
- Will the system be collecting personal information?
- How will be the personal information be collected and stored?

- What kind of system features are in place to protect the transmission of personal information? (e.g. encryption, authentication, identity management)
- What kind of procedures are in place to limit access to the personal information only to those who require it? (e.g. role-based access)

Technology Implications

Technology Services Division (TSD) enables staff to deliver City services and guide City divisions by providing support and resources to create and adapt technological systems to collect and/or analyze data.

The data requirements of a City's program, service or business capability are owned by City divisions or business units. These requirements (contained throughout this document) specify which data City applications can collect and store. If this data gathering technology does not exist or needs to be improved, a technology solution can be requested by contacting your TSD Client Relationship Manager.

When planning for socio-demographic data collection, your program's technological capabilities must ensure data is captured and managed throughout its lifecycle. This includes managing the data according to legislation, policies and standards that govern the data. Data Governance is the process of managing the quality, consistency, security, usability, and availability of data across the enterprise. It is about keeping business data accurate throughout its lifecycle. The data lifecycle stages that need to be considered include:

- **Planning** (intended uses of data and potential consequence using a risk approach)
    - What are the technological implications of collecting, using and storing this data?
- **Acquisition** (data collection respectful of legislative requirements and public interest)
    - What are the technological implications of acquiring this data?
- **Security and Access Control** (protection throughout data lifecycle and all forms of storage media)
    - What security requirements need to be part of the technology?
- **Data Storage** (storage considering data sovereignty and residency)
    - What are the technology requirements for storing the data?
- **Data Sharing and Publishing** (licensing and open data, contracts and agreements)
    - What are the technological implications of sharing and publishing this data?

TSD will also work with you to ensure that digital infrastructure and technologies comply with the Working Principles for Digital Infrastructure:

1. Equity and Inclusion

2. A Well-run City
3. Social, Economic and Environmental Benefits
4. Privacy and Security
5. Democracy and Transparency

Divisions engaged in socio-demographic data collection and use need to consider these working principles when implementing the digital infrastructure plan. Their Technology Services Client Relationship Management (CRM) representative can advise of the implementation path the new or revised technology initiative must follow to incorporate these principles into the technology.

Disclosure of personal information to another institution

The collection of personal information from another institution, or its disclosure to another institution covered under MFIPPA is only permitted in limited circumstances, and subject to notification and data sharing agreement requirements outlined in MFIPPA.

Section 32 (a-l) of MFIPPA lists the possible grounds and requirements under which personal information can be collected from or disclosed to another institution. These include, but are not limited to:

- For the purposes of law enforcement, i.e. to aid in a law enforcement proceeding or likely to result in a law enforcement proceeding
- Under compassionate or compelling circumstances
- To the Information and Privacy Commissioner
- For a consistent purpose

Each of the above circumstances has unique requirements established by the Information and Privacy Commissioner of Ontario.

In the event that a Data for Equity project determines that it is necessary to collect or share personal information with another institution under any of the circumstances listed in MFIPPA section 32, the following process must be followed:

- In anticipation of sharing socio-demographic data with other institutions to further the goals of the Data for Equity Strategy, it is necessary to list the potential sharing of this data in the Notice of Collection.
- In the absence of notice at the time of collection to share the data with another institution, the individual must provide consent to the sharing of their personal information with another institution.
- Sections 29(2) and 29(3) provides direction on notification requirements and exceptions to these requirements
- Contact CIMS to determine the permissibility and process for collecting or sharing personal information with another institution, notification requirements and data sharing agreements if applicable.

All privacy obligations for the use and disclosure of the personal information will continue to apply.

5. Indigenous Data Governance

Background

Indigenous communities have an extremely difficult history associated with research and data collection. Many communities and persons have been the subject of non-consensual medical and social experiments without regard for their human rights. In addition, the government of Canada assigned names and identification numbers, and collected data, to control the movement of Indigenous peoples, limit access to services, and monitor Indigenous populations.

Many Indigenous people and communities are understandably suspicious of government data collection efforts. There may be an unwillingness to disclose Indigenous identity, especially in services where government or law enforcement workers have had a significant role in enforcing assimilation and other punitive laws and policies.

Care must be taken to ensure that Indigenous people's information is collected according to appropriate policies and protocols, and that the information is managed and used in ways that benefit Indigenous communities.

Indigenous data governance at the City

The City of Toronto is taking measures to strengthen relationships with Indigenous communities and advance prosperity. Building and strengthening relationships with Indigenous communities is a process that takes commitment, consistency, time and dedication.

When collecting and using information about Indigenous peoples, City staff must ensure that Indigenous community engagement, input and oversight guides how data is collected, protected, used and shared, including a focus on ensuring that data is used to benefit Indigenous communities. The First Nations principles of OCAP®[7] (Ownership, Control, Access and Possession) provide a model that sets out principles and a framework to address the City's approaches to Indigenous data governance.

The guidance below has been developed based on engagement thus far. This approach will be further developed as part of the development of the Indigenous Data Governance model in Phase One of the Data for Equity Strategy.

1. **<u>Importance of Relationship Building and Collaboration</u>**

In order to collaborate with Indigenous communities on data collection and use, time and commitment must be put in to build relationships and trust. Settlers in Canada

[7] OCAP® is a registered trademark of the First Nations Information Governance Centre (FNIGC). For more information please see www.FNIGC.ca/OCAP.

heavily relied on and exploited the knowledge and resources of Indigenous people. Working towards Indigenous data governance requires time, commitment, partnerships, capacity building and knowledge exchange.

There are already a number of programs, strategies, and divisional efforts with long standing connections that need to be honoured. For example, Toronto's first Indigenous Health Strategy is the culmination of many years of engagement and relationship building.

2. Importance of Reciprocity and Accountability

Indigenous data governance principles aim to ensure that information collected from Indigenous communities is used to empower communities with knowledge and tools to work towards positive community defined outcomes. If we look at the work of Children's Services, Toronto Aboriginal Support Services Council, and the "Raising the Village" initiative, City staff spent time working with Indigenous researchers and communities to analyze and share data that could support the development of EarlyON centres and access to funding to meet the needs identified by these communities. All of this work was based on long standing relationships, connections, and a strong advisory group.

3. No single "Indigenous" identity

When working with information about Indigenous communities, it is important to not take a "Pan-Indigenous" approach. It must be recognized that there is diversity amongst First Nations, Métis, Inuit, non-status, status, and different Nations, reserves and band affiliations. Indigenous identity may be tied to an individual’s family name or clan, community, territory, nationhood, or language family. This is an important consideration when collecting information about Indigenous identity. The Indigenous identity data element has been broken down to allow options and multiple ways Indigenous people can choose to self-identify. The Indigenous identity question is distinct from the question about race, supporting a better picture of how a person can identify. Where possible and appropriate, data should be collected and broken down to identify this diversity and uniqueness.

Guiding questions

When planning for data collection, it is imperative that City divisions abide by the Indigenous Data Governance guiding principles and consider the following guiding questions:

- Who are your current partners or collaborators? Are there communities, organizations, research institutes, or divisions you need to connect with?
- What current policies, strategies, or engagement approaches are in place related to your work? Are there already identified community or City actions to be taken?
- Is there a plan to engage and connect with unique Indigenous communities and has there been engagement early on? Has co-development been discussed? How can you support co-development?

- What existing information and data does the City or partners have access to? Have you reviewed existing population data (see section 6 below) or connected with the City's Social Research and Information Management Unit?
- Where there is currently no partner or community connections, have you connected with the Data for Equity Unit and/or Indigenous Affairs Office to set a pathway and support direction and collaboration with relevant Indigenous persons, organizations and community partners?

Resource: Meeting in the Middle: Engagement Strategy and Action Plan - The purpose of Meeting in the Middle was to foster better relationships between the City's Shelter, Support and Housing Administration division (SSHA) and Indigenous organizations in order to more meaningfully address Indigenous homelessness in Toronto.

The Indigenous Affairs Office (IAO) is your one-stop shop for information, advice, programs and policies that support the City of Toronto's Commitment to Indigenous peoples. The IAO will emphasize the importance of understanding and implementing the "Nothing about us without us" approach, ensuring Indigenous voices are front and centre in this work. Contact IAO at Indigenous@toronto.ca.

6. Data Sharing and Use

Linking socio-demographic data to equitable service access, delivery and outcomes requires careful planning and procedures to accurately assess and analyze the data sets collected. The Data for Equity Unit is available to provide guidance and support at each stage of data analysis, sharing, application and use.

This section provides guidance on how to:

- share the data including open data
- use existing population data sets

Sharing the Data

De-Identified and Aggregated Data

One of the fundamental principles of personal information protection is that the personal information will only be used for the purpose for which it was collected in the first place. However, information that is properly de-identified[8] and/or aggregated[9] may be shared for broader societal use and benefit (e.g. as Open Data) provided that the necessary safeguards are in place.

[8] "De-identification" is the general term for the process of removing personal information from a record or data set. De-identification protects the privacy of individuals because once de-identified, a data set is considered to no longer contain personal information. If a data set does not contain personal information, its use or disclosure cannot violate the privacy of individual.

[9] Data is aggregated when all the individual data points in a data set are rolled up to provide an overall picture.

De-identification of personal information is the process where the primary identifiers (name, address, email address etc.) have been masked or replaced with random strings of information to ensure that the individual cannot be re-identified.

To properly de-identify data, the following must be taken into consideration:

- Redacting or masking of primary identifiers
- Redacting or masking of the last three digits of a postal code
- Privacy review of any free text fields where a participant may inadvertently provide an identifying piece of information
- Careful review of an application's features that may pose a privacy risk (e.g. hidden rows in Microsoft Excel)

Caution: The combination of quasi-identifiers (such as gender, postal code etc.) if brought together with other information may result in re-identification.

To learn more about primary and quasi-identifiers, de-identification and aggregation, please refer to the Fact Sheet on Protecting Privacy in City Surveys and the **Information and Privacy Commission's** De-identification Guidelines for Structured Data**.**

Sharing on Open Data

Data that has been de-identified and aggregated to minimize the risk of re-identification can be published on the City's Open Data Portal after the established review process. The steps below must be followed:

- Divisions will review the dataset that will be published on the Open Data Portal for personal or confidential information and for any inappropriate language used in open text fields;
- Personal information must be de-identified by either deleting the field or masking or anonymizing the information;
- Divisions must consult CIMS and engage in community stakeholder discussions to determine whether specific data elements can be included in the dataset. For example, consideration must be given to data elements that may potentially cause 'community harm'. Community harm may include perpetuating stereotypes of a specific community through analysis and reporting of data elements such as ethnicity, race, etc. without community engagement to understand the nuances of the data collected;
- All free-text fields must be thoroughly reviewed for personal information;
- Divisions must contact the Open Data Team in Technology Services Division to initiate the process of transferring the dataset for review and publication. The Open Data team will review for data quality, format and other Open Data publication requirements; and
- Datasets that are published on the Open Data website will be subject to the Open Data Licence and made available without restriction.

Data sharing within the City across divisions

MFIPPA allows for the disclosure of personal information within an institution. Section 32(e) states "if the disclosure is made to an officer, employee, consultant, or agent of the institution who needs the record in the performance of their duties and if the disclosure is necessary and proper in the discharge of the institution's functions."

Since the personal information collected under the Data for Equity Strategy is highly sensitive (gender, race, etc.), sharing of the data with another division (or between programs in the same division) should only be done if it is necessary to achieve the outcomes of the Data for Equity Strategy for the delivery of City services. If it is necessary to be shared, the following process should be followed:

- A senior staff member within the Data for Equity Unit will review and determine whether sharing of the data is justified or not, in consultation with the applicable City division and CIMS. The staff member conducting the assessment must consider whether the proposed use of the personal information is for the original purpose stated, or for a consistent purpose.
- If the proposed use is for a consistent purpose, consider sharing of aggregate data only, if appropriate (i.e. data that has been de-identified and rolled up to a level of aggregation to ensure there is no possibility of re-identification).
- For applications that require staff from another program area to access a system that contains personal information, it is necessary to review and identify which staff will need access to the system based on their roles. Only staff with defined levels of access should access specific parts of the database or system that holds the personal information.
- If the proposed use of the information is not for the original or a consistent purpose, the personal information cannot be shared unless consent is obtained from the individuals to whom the information belongs.
- Consent can be obtained by communicating directly with the individual to whom the information relates, or through their authorized representative.
- Contact CIMS for advice where there is a request for personal information and you are unsure if the information can be shared or not.

Even if it is determined that it is appropriate to share personal information, consider sharing only those data elements that are required for the discharge of the specific function. This includes limiting a data report or spreadsheet to only those fields that are necessary.

Using Existing Population Level Data

There are several population-level data resources at the City that provide information about equity and diversity. Most of this data at the City is accessed through the *Canadian Community Data Program*, a consortium of 30+ municipalities that define, purchase and analyse such data. Other data sources are shared with the City through data sharing agreements with specific institutions (e.g., Immigration, Refugees and Citizenship Canada).

Data are reported and shared through a number of external and internal City resources:

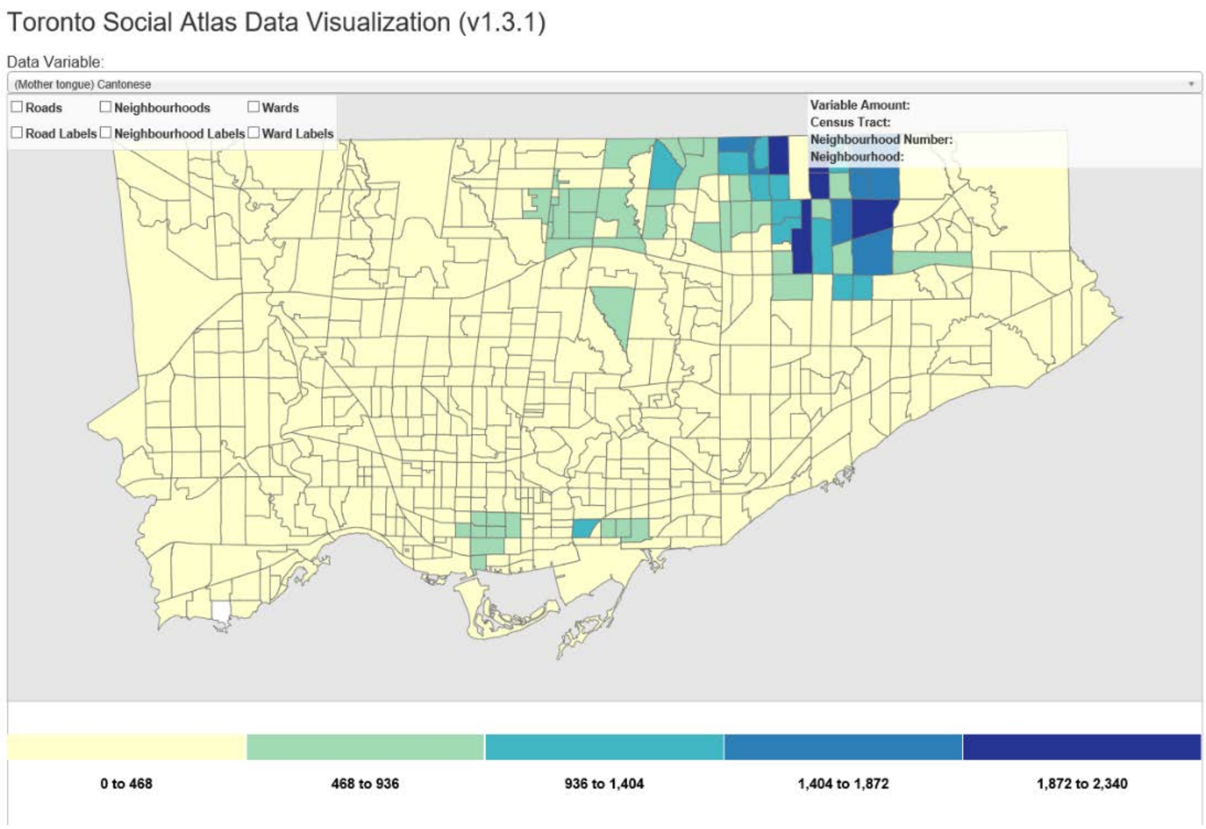
Internal (available for use by City staff)

1. **Toronto Social Atlas** displays mapped data at small geographic levels (Census Tracts) for all Census information including language, ethnicity and citizenship. This tool is currently being modified to become available externally on the City's website in Q2 of 2021. The Social Atlas is available to City staff through these links:

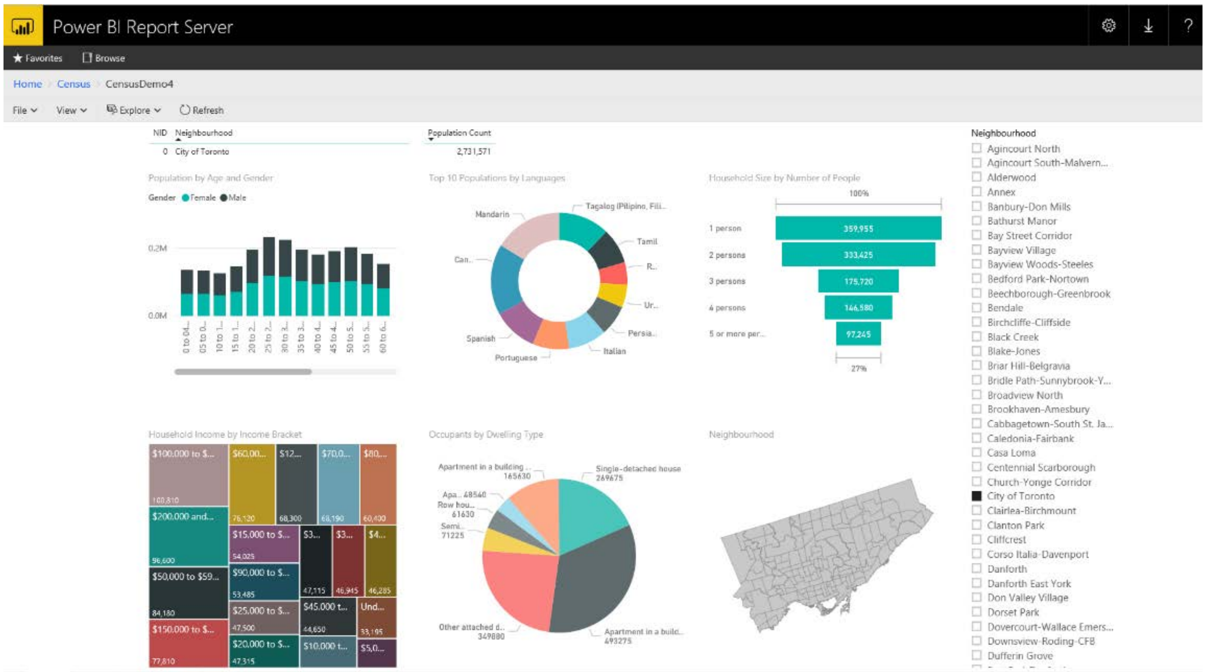
   2001 - https://sdfa13.toronto.ca/socialatlas2001DEV/

   2006 - https://sdfa13.toronto.ca/socialatlas2006DEV/

   2016 - https://sdfa13.toronto.ca/socialatlasDEV/



2. **Census Business Intelligence Tool** allows users to access and manipulate Census information at a neighbourhood level. This tool allows users to display Census data in a series of user-friendly charts and graphs. The tool is designed for users familiar with Census Data who wish to examine data in customized ways. The Census Business Intelligence Tool "Dashboard" is available here: http://sdfa16.toronto.ca/pbireports/powerbi/Census/CensusDemo4?rs:Command=Render&rc:Toolbar=false



3. **Census Data Warehouse** allows advanced users who are familiar with Census data and have working knowledge of Excel pivot tables to access and retrieve raw Census data (including all ethnicity and gender variables) from a single core source. Access and training for this tool is available free to City staff upon request to the Research Manager of the SDFA Social Research and Information Management Unit.

SDFA Social Data Warehouse Query Tool

Attributes to Display	Knowledge of official languages
Neighbourhood	City of Toronto

Amount	GenderID	
Attribute	F	M
Knowledge of official languages - Total population excluding institutional residents	1344960	1244125
English only	1134795	1087900
French only	1710	1270
English and French	126805	100570
Neither English nor French	81650	54390
Total - Knowledge of official languages for the total population excluding institutional	1402515	1301900
English only	1183655	1139580
French only	1580	1140
English and French	137705	107985
Neither English nor French	79570	53195

External (publicly available)

1. **City of Toronto's Demographic Portal** provides access to data, research reports, and maps on population data. Specifically, there are population profiles on income, diversity, and housing. Links connect users to related data from Planning, Economic Development, Children's Services and Public Health. It is available on the City's website at: www.toronto.ca/demographics

Data, Research & Maps

Toronto at a Glance

Quick facts about the City, including population, land area, average household income and more.

City Stats in Detail

Find detailed data and information about labour force, demographics and property development.

Open Data

The City makes data available to the public, businesses, institutions, visitors and other levels of government.

Neighbourhoods & Communities

Detailed information regarding Toronto neighbourhoods and Wards, including profiles, census and community data.

Research & Reports

A collection of research and reports on various topics within Toronto.

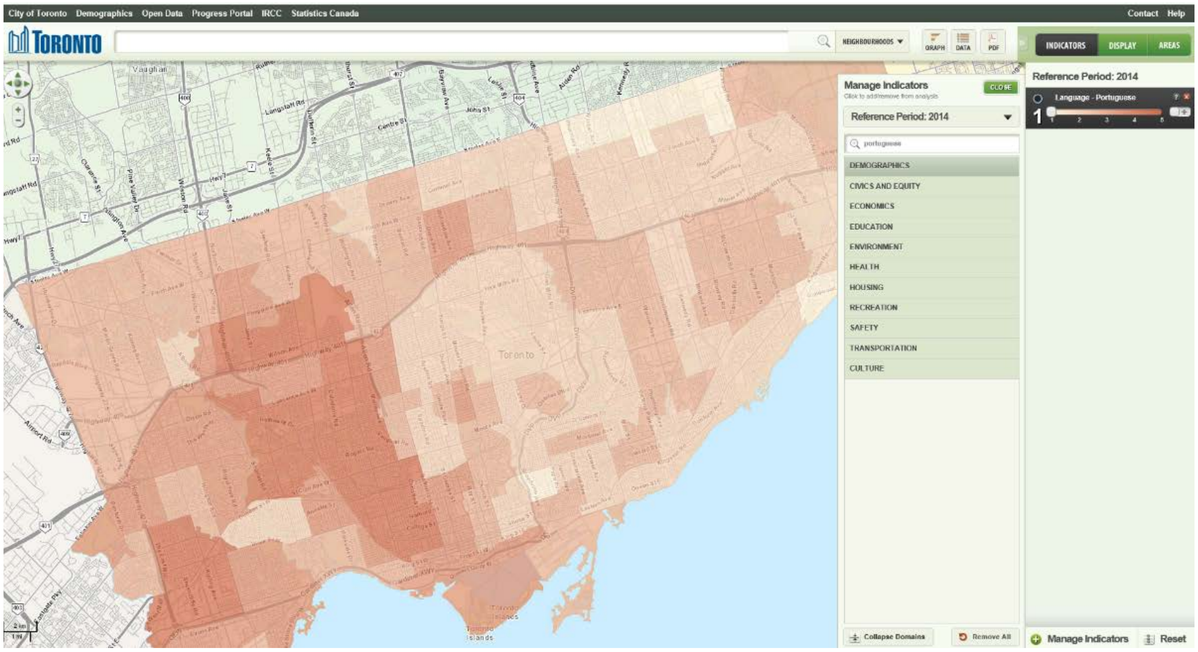
Maps

Explore City maps, as well as purchase a map from our catalogue.

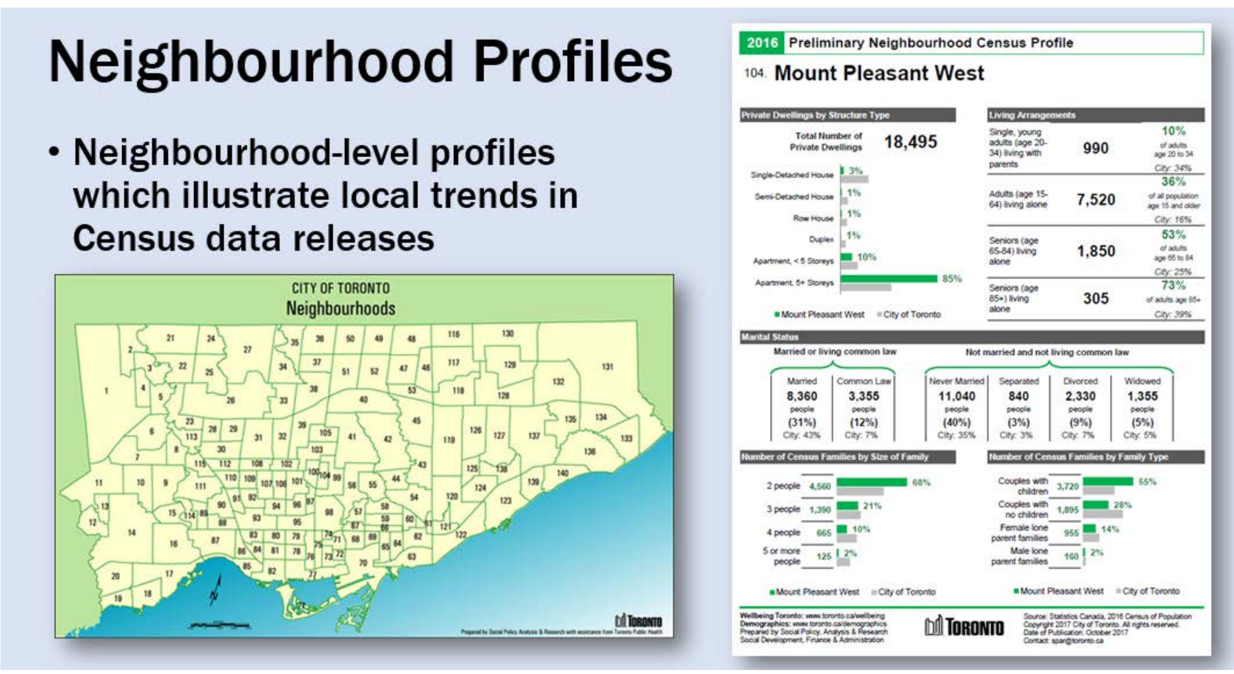
Toronto's Dashboard

Toronto measures its performance to identify where the City is doing well and where more effort or new approaches are needed.

2. **Wellbeing Toronto** is a data visualization mapping tool that allows users to layer different types of population data such as home language, education, and labour market data. Information is displayed at the City Neighbourhood level and can be exported as a data file. A new version of Wellbeing Toronto will be released in Q4 2020. This new version will contain updated data when it becomes available. It will also be compatible on mobile devices. Wellbeing Toronto is available on the City's website at: www.toronto.ca/wellbeing



3. **Neighbourhood Profiles** are a series of PDF reports that display key socio-economic data for each of the City's 158 neighbourhoods. The profiles are available through the City's Demographics Portal or directly here: https://www.toronto.ca/city-government/data-research-maps/neighbourhoods-communities/neighbourhood-profiles/



The Research Unit of SDFA continues to add more data to its inventory. If information cannot be found within these applications, or you have any questions, please contact:

Social Research & Information Management Unit
spar@toronto.ca

Appendix A: Data for Equity Socio-Demographic Questions

This section provides City staff with core and optional socio-demographic data elements to collect and standardized questions for collecting these data elements from City service users and Toronto residents. The purpose of this document is to support consistent socio-demographic data collection for the purpose of identifying inequities in service access and outcomes. Each socio-demographic question includes:

- Wording for the question and answer options
- An explanation of what the question intends to capture or measure

The standardized socio-demographic data questions below are for collecting data from adults and youth.

The core[10] set of socio-demographic questions have been selected because:

- There is extensive evidence that these factors impact people's experiences of discrimination, barriers to service, and result in inequitable outcomes
- They can be analyzed to identify inequities and explore barriers
- They can be acted upon to address barriers and provide more equitable services
- A scan of City divisions and other jurisdictions identified these factors as measurable data elements that are relevant and important to many programs
- They are based on validated questions and consultation with researchers, experts, community leaders and Indigenous, Black and equity-seeking communities
- They reflect the City's equity and prosperity priorities

Core and Optional Socio-demographic Data Elements

Note: by clicking each data element listed in the table below, you will be taken to its applicable page in the document.

Core	Optional
1. Age 2. Neighbourhood or postal code 3. Language preference 4. Canadian-born or immigrant and Time of immigration 5. Indigenous identity and Two-Spirit identity 6. Race	1. Ethnicity 2. Religion or spiritual affiliation 3. Citizenship and immigration status 4. Housing situation 5. Family and household composition 6. Education level 7. Employment status

[10] It is recognized that many City programs collect socio-demographic data in different ways to meet to meet the requirements of other levels of government and to determine program eligibility. The Data for Equity Unit can work with City divisions to assess the consistency of program data with these core questions.

Core	Optional
7. Disability 8. Gender 9. Sexual orientation 10. Household income and Household size	

General recommendation for order of questions:

Evidence on survey methods shows that the order of questions affects how people respond. Socio-demographic questions are best ordered in a way that takes into account the comfort level of people answering the question[11] and how it fits with other socio-demographic information being collected. When designing your data collection tool, it is recommended to start with the least sensitive question, such as language, and move to most sensitive, such as income. It is generally recommended to follow this order:

- Age (core)
- Neighbourhood or postal code (core)
- Language preference (core)
- Canadian-born or immigrant and time of immigration (core)
- Citizen or Immigration status (optional)
- Indigenous identity and Two-Spirit identity (core)
- Ethnicity (optional)
- Race (core)
- Religion or spiritual affiliation (optional)
- Disability (core)
- Gender (core)
- Sexual orientation (core)
- Education level (optional)
- Employment status (optional)
- Household income and Household size (core)
- Housing situation (optional)
- Family or household composition (core)

"Select One Only" Single Response Questions

For most of the core socio-demographic questions below, it is recommended that City programs and services allow only one response per question, as opposed to allowing multiple responses. Many stakeholders identified that allowing multiple responses can be more inclusive and make it easier for residents and service users to self-identify.

[11] https://www.mountsinai.on.ca/about_us/health-equity/images/SHANKARDASS.ppt

However, the single-answer approach is recommended based on expert consultations and a review of best practices and literature, for the following reasons:

- Since the recommended socio-demographic questions are about self-identity, we believe it is important to allow the respondents to decide which category best represents them, even when a single category does not provide a perfect reflection of their whole identity.
- Allowing only single responses makes data analysis less complex, less open to interpretation and less subject to error.

Open-ended Text Answers

Many of the recommended socio-demographic data elements offer more than one version of the same question. For some questions, there is a multiple choice version with a list of answer options and an open-ended version that provides only an open-ended text field where respondents can provide an answer in their own words.

In addition, many questions with a list of answer choices have a "not listed, please describe" selection with an open-ended text field where people can answer the question in their own words. For these questions, staff must decide whether or not to include the open-ended text field or if their data collection tool should only offer a "not listed" choice that does not provide an opportunity to write in additional text.

Providing the opportunity for a person to describe their identity in their own words can be more inclusive and makes it easier for residents and service users to accurately self-identify. However, open-ended questions require additional staff time and capacity to appropriately review, process, organize and analyze text responses. Generally, text field answers vary much more than data gathered from a set list of choices, making the data collected less consistent and more likely to require interpretation by the person analyzing the data. Interpreted open-ended data may be assigned to a category that is different from what a person would actually choose. Open-ended data can also be difficult to interpret and impossible to assign to a category, sometimes resulting in data that cannot be used at all.

If staff intend to include open-ended text responses, a plan for how to review the data, categorize and analyze is recommended. If a clear plan and adequate resources for data processing is not possible, it is recommended to:

- Use multiple choice versions of questions
- For all multiple choice questions, remove all open-ended text boxes and only offer a "Not listed" answer option.

Core socio-demographic data elements

Age

For programs that already collect and verify age and date of birth for program eligibility and program records, asking about age is not recommended. Date of birth information from a verified source is a more accurate and reliable way to determine age and allows for the calculation of current age at any time. This data element is recommended for programs that do not already collect date of birth.

<u>Purpose</u>

- To determine the age range of service users and residents
- To determine whether the age groups of the people in your data set are representative of the age groups in the general population of Toronto
- To identify if and how many people from various age groups are using City services, what programs they are accessing and how well these services are addressing their needs
- To assess program access and impact for specific target populations such as youth or seniors, and in some cases more specific age groups within populations

<u>Points to remember</u>

- For surveys and consultations focused on a single point in time, asking about current age is appropriate.
- The City has programs, strategies and priorities that focus on specific age groups, including youth and seniors. Definitions of youth vary by program. The Youth Service Review will assess City of Toronto youth programs using ages 12-29 as its definition of youth. While there is no single definition of a senior in Toronto, people aged 65+ are often considered when planning programs for older adults and seniors.
- Age can be a sensitive topic and providing age categories rather than asking for a specific age can help minimize concerns. The wider the categories, the less sensitive the question will be.

NOTE 1: We are presenting one option for the collection of age data. There are many different ways to capture age depending on purpose and what information programs and services need to know. For example, year of birth allows current age to be determined at any time and provides a number that can be used to calculate average age, while 5-year age groups can be used to compare with Census data on the overall population. Contact the Data for Equity Unit for more information and guidance on the best approach.

NOTE 2: Age categories can be broken down into smaller categories to be more appropriate for your service user group or if this will provide a level of detail needed to inform your program. For example, some programs serving youth might want to break down the age 20-29 category into 20-24 and 25-29, or a program serving seniors may want to break down the age 65+ category into 65-74 and 75+.

The question

What is your age? Please select one only.

- ☐ 0-9 [or broken down into 2 categories: 0-4, 5-9]
- ☐ 10-19
- ☐ 20-29 [or broken down into 2 categories: 20-24, 25-29]
- ☐ 30-64 [or broken down into 2 categories: 30-54, 55-64]
- ☐ 65+ [or broken down into 2 categories: 65-74, 75+]
- ☐ Prefer not to answer

Analysis Guidelines

Comparing to the Overall Toronto Population

- Age data for the general population of Toronto is available in Statistics Canada data sets and is usually broken down into 5-year or single year age groups depending on the data source.
- Population counts for the City of Toronto in 5-year age groups can be found on the City of Toronto Census Profile webpage and the City of Toronto's 2016 Census Report: Age and Sex, Type of Dwelling
- Population counts for single years of age for the City of Toronto is publicly available the Statistics Canada Census Data Tables webpage. One way to access this is to select "Age and sex" under the "by topic" tab, then select table #1.2 "Age (in Single Years) and Average Age (127) and Sex (3) for the Population". This table contains data on single years of age for "Census Subdivisions" – the City of Toronto is a Census Subdivision according to Statistics Canada's geography categories. In this table, select "Toronto, C" for the City of Toronto geography.

Neighbourhood or Postal Code

NOTE: For programs that collect and verify address for program eligibility and program records, asking about neighbourhood or postal code is not recommended as neighbourhood can be determined from this data and verified address information is more accurate and reliable.

Purpose

- To identify the Toronto neighbourhood where people live, by directly collecting neighbourhood or by collecting the full postal code, and then converting the data to neighbourhood

- To identify if and how many people from various neighbourhoods are using City services, and what programs they are accessing
- To assess program access and impact for people from specific neighbourhoods experiencing inequities, including Neighbourhood Improvement Areas, low-income neighbourhoods and underserved neighbourhoods
- To assess program access and impact for people without a fixed address

Points to remember

- The first three digits of a postal code, also known as FSA (forward sortation area), cannot be converted to a neighbourhood, Ward or Census geography; instead, the full postal code is needed. Therefore, FSA data collected cannot be used to understand service access, impact and inequities by neighbourhood. It is not recommended to collect FSA unless a program's service areas are based on FSAs.
- There are privacy considerations for collecting full postal code data depending on the total sample size and therefore it is recommended to contact Corporate Information Management Services at forms@toronto.ca to discuss your specific data collection initiative and get advice on how to inform service users or residents about the collection and use of their data.

Question options

There are two options for how to collect data on where a person lives.

- Option 1 collects full postal code data, which can later be converted to Toronto neighbourhood data.
- Option 2 collects Toronto neighbourhood data directly.

To determine which option is best, consider how the data will be collected, how you plan to use the data, and capacity and resources for conducting analysis. Collecting neighbourhood data is ideal because meaningful equity analysis can be conducted at the neighbourhood level and there are fewer privacy concerns. However, residents do not typically know their Toronto neighbourhood by name.

Option 1 is the best choice when the service user or resident will be providing information without assistance. However, it is important to note that some people do not know their full postal code and some may be hesitant to provide it for privacy reasons, so some data for Option 1 may be incomplete. Also, depending on how many people you are collecting information from, there may be additional privacy considerations for collecting postal code data because it represents a small geographic area.

Data collected from Option 1 will require data to be converted to neighbourhood after it is collected, which in turn requires adequate staff, data and software resources in the division. An important benefit of collecting postal code is that postal code data can be converted to other geographical units, including Census geographies and Wards, in the analysis stage.

Option 2 is preferable in situations where a staff person will be helping service users or residents provide their information. In most cases the most appropriate way to do this would be to provide the City of Toronto Neighbourhood and Ward look-up tool and have the resident enter their address to verify their neighbourhood. In some cases where a service is focused on residents of a small geographic area, it may be appropriate to provide a map showing all streets and neighbourhoods, and have a resident identify their neighbourhood by locating their address on a map. For online surveys in Checkmarket, it is also possible to set up a link where residents can select their neighbourhood by finding their place of residence on a map. For more information about this option and how to set it up, please contact the Data for Equity Unit.

The benefits of Option 2 include: more accurate and complete information, fewer privacy concerns, and no need to convert postal code to neighbourhood. A drawback of collecting neighbourhood data directly is that, unlike postal code data, it cannot be converted to other geographical units such as Wards and Census geographies in the analysis stage.

<u>Option 1: Postal Code</u>

Please provide your postal code (e.g. M5H 2N2):

- ☐ Your postal code: ________________
- ☐ No fixed address
- ☐ Don't know
- ☐ Prefer not to answer

<u>Option 2: Neighbourhood</u>

What Toronto neighbourhood do you live in? Please select <u>one</u> only.

- ☐ Agincourt North
- ☐ Agincourt South-Malvern
- ☐ [list additional 136 neighbourhoods found at link below]
- ☐ York University Heights
- ☐ Yorkdale-Glen Park
- ☐ No fixed address
- ☐ Don't know
- ☐ Prefer not to answer

NOTE: For the full list of Toronto neighbourhoods, visit the City of Toronto webpage on Neighbourhood Profiles.

Analysis Guidelines

Converting Postal Code to Neighbourhood

Postal code data can be converted to neighbourhood data by:

- Converting the full postal code data to Census Tracts and then neighbourhoods:
  - Convert the postal code data to Census Tract using the Postal Code Conversion File (PCCF), available to all divisions and organizations that are members of the Community Data Program[12]. Additional information about the PCCF and how to use it can be found at: https://guides.lib.uoguelph.ca/PCCF
  - Once your data set includes Census Tracts, convert the Census Tract data to neighbourhood using the file: Census Tract 2016 to Neighbourhood.xlsx available on this intranet link. The conversion can be done manually or using a statistical software package.
- Manually entering postal codes into the City of Toronto Neighbourhood and Ward look-up tool then entering the corresponding neighbourhoods into your data set.

Comparing to Toronto Neighbourhoods

Socio-demographic information and maps about Toronto's neighbourhoods are available on the City of Toronto Neighbourhoods and Communities, Neighbourhood Profiles and Neighbourhood Improvement Area Profiles webpages.

Language Preference

Purpose

- To identify the preferred language spoken by service users and residents
- To determine interpreter (verbal) and translation (print) needs of service users
- To ensure that information about City services is communicated in languages that community members understand. Examples include providing spoken interpreter services and translated written information on topics such as voting, emergency planning and public health in languages that residents understand.

Points to remember

- The list of languages in Option 1 reflects the top 30 home languages reported in the 2016 Census for City of Toronto plus Indigenous languages, African languages and American Sign Language (ASL). It is ordered with English first then alphabetically.
- Data collected through this question may underestimate the need for service provision in multiple languages. Some people may say they prefer to speak

[12] As of September 2020, the following divisions were part of the Community Data Program: Children's Services, City Manager's Office, City Planning, Economic Development and Culture, Employment and Social Services, Parks, Forestry and Recreation, Shelter, Support and Housing Administration, Social Development, Finance and Administration, and Toronto Public Health.

English, but may have difficulty expressing complex and sensitive issues when accessing services such as case management and health care. The need for interpretation may still be required during service provision.

- City divisions need to have capacity to review, process, organize and analyze text field responses for Option 2 and for the "Not listed, please describe" selection in Option 1.
- The City of Toronto recognizes that providing information in languages other than English allows diverse communities to better access City services and programs, helps improve engagement with the City, and fosters inclusion for residents, groups and organizations.

Question options

There are two options for how to collect data on language preference.

- Option 1 includes a list of languages for people to select and a text field option for any languages not listed.
- Option 2 asks people to write in their language preference and does not provide a list of languages.

Option 1 is recommended in most cases as it will provide more consistent data that is easier to process and analyze.

Option 2 may be preferable in cases where staff are using short paper forms or surveys that do not have space for a long list of options.

To determine which option to choose, consider whether the space available on the form or survey would make a list of options less appropriate, and whether the staff team responsible for reviewing, organizing and analyzing data will have the time and capacity to appropriately process and organize text field responses.

Option 1: List of top languages

What language do you prefer speaking? Please select one only.

- ☐ English
- ☐ Albanian
- ☐ American Sign Language (ASL)
- ☐ Amharic
- ☐ Arabic
- ☐ Armenian
- ☐ Assyrian Neo-Aramaic
- ☐ Bengali
- ☐ Chinese-Cantonese
- ☐ Chinese-Mandarin
- ☐ Chinese-Other Dialects
- ☐ Farsi
- ☐ French
- ☐ Greek
- ☐ Gujarati
- ☐ Hindi
- ☐ Hungarian
- ☐ Indigenous-Cree
- ☐ Indigenous-Mohawk
- ☐ Indigenous-Ojibway
- ☐ Indigenous-Oji-Cree
- ☐ Indigenous-Other
- ☐ Italian
- ☐ Korean
- ☐ Polish
- ☐ Portuguese
- ☐ Punjabi
- ☐ Romanian
- ☐ Russian
- ☐ Serbian
- ☐ Somali
- ☐ Spanish
- ☐ Tagalog
- ☐ Tamil
- ☐ Tibetan

- ☐ Turkish
- ☐ Ukrainian
- ☐ Urdu
- ☐ Vietnamese
- ☐ Not listed, please describe: _______________
- ☐ Prefer not to answer

Option 2: Write-in language preferred

What language do you prefer speaking?

- ☐ English
- ☐ _____________ [text field]
- ☐ Prefer not to answer

Canadian-born or immigrant and Time of immigration

Purpose

- To determine whether a service user or resident was born in Canada or immigrated to Canada, and whether immigrants to Canada are recent or longer-term immigrants
- To help identify if and how many newcomers and immigrants are using City services, what programs they are accessing, and how well these services are addressing their needs
- To identify inequities experienced by newcomers and immigrants such as barriers to services and understand the experiences of newcomers and immigrants to Canada.

Points to remember

- There is no need to collect this information in programs that already collect citizenship and time of immigration from service users
- This data element will capture point in time data that determines how long a person has been Canada at the time the question is asked. For program data, City staff may consider asking year of immigration instead, such as "If no, what year did you arrive in Canada?" as data on year of arrival can be used to determine length of time in Canada regardless of when the question was asked.
- This data element intentionally avoids asking about immigration status[13], which has been shown to make individuals feel anxious and may put undocumented residents at risk.
- Collecting this information poses minimal risk to service users and residents as immigration status is not captured

[13] Information about immigration status and citizenship is only collected by the City of Toronto when required for program eligibility or in anonymous surveys, as outlined in the City's Access T.O. guidelines.

The question

a) Were you born in Canada?

- ☐ Yes
- ☐ No
- ☐ Prefer not to answer

b) If no, how long have you been in Canada?

- ☐ 0-5 years
- ☐ 6-10 years
- ☐ More than 10 years
- ☐ Don't know
- ☐ Prefer not to answer

NOTE: When possible in electronic survey tools and forms, question b) should be a branch question that is only asked of people who selected "No" for the "Were you born in Canada?" question: "How long have you been in Canada?"

Indigenous identity

NOTE: Immediately following this question, persons identifying as Indigenous to Canada should be asked the Two-Spirit identity question (p. 42). When possible in electronic survey tools and forms, this should be a branch question that is only asked of people who selected a "Yes" response for the Indigenous identity question.

Purpose

- To determine whether a service user or resident identifies as Indigenous to Canada
- To help understand if and how many First Nations, Inuit, and Métis persons are using City programs and services and which services they are accessing
- To help identify:
    - Indigenous identified persons' unique experiences of systemic racism and oppression resulting from the history of colonialism and the impacts of the settler state
    - Barriers, negative experiences and gaps experienced by Indigenous people
    - What is working well, opportunities to share good practices, where change is needed, and where services should adapt and be responsive to community needs
- This information can support the City's actions towards truth, reconciliation, decolonization and to identify and eliminate anti-Indigenous racism in programs, services, and functions

Points to remember

- Care must be taken to ensure that Indigenous-related information is collected according to appropriate policies and protocols, and that the information is used in ways that benefit Indigenous communities. Anyone responsible for collecting information must also be trained to understand the causes of the deep mistrust that Indigenous people and communities have of government systems, personnel, and information collection efforts.
- Many Indigenous people and communities are understandably suspicious of government data collection efforts. There may be an unwillingness to disclose Indigenous identity, especially where particular groups of government or law enforcement workers have had a significant role in enforcing assimilation and other punitive laws and policies.
- Indigenous communities across what is currently known as Canada may not self-identify as belonging to one pan-Indigenous group. Instead, Indigenous identity may be tied to an individual's clan, community, nationhood, or language family.
- Please consult with the Data for Equity Unit and the Indigenous Affairs Office in the use of this question.

The question

a) Indigenous people from Canada identify as First Nations (status, non-status, treaty or non-treaty), Inuit, Métis, Aboriginal, Native or Indian.

Do you identify as Indigenous to Canada? Please select one only.

☐ Yes
☐ No
☐ Prefer not to answer

b) If yes, please select all that apply.

☐ First Nations (examples: Ojibway, Cree, Mohawk, Mi'kmaq)
☐ Inuit
☐ Métis
☐ Prefer not to answer

Two-Spirit identity

NOTE: This question should be asked immediately following the Indigenous identity question. When possible in electronic survey tools and forms, this should be a branch question that is only asked of people who selected a "Yes" response for the Indigenous identity question: "Do you identify as Two-Spirit?"

Purpose

- To determine whether an Indigenous service user or resident identifies as Two-Spirit
- To assess if and how many Two-Spirit Indigenous people are using City programs and services and how well these services are meeting their needs

Points to remember

- This is recommended as the best approach to collecting Two-Spirit identity of Indigenous people as it is an identity that only applies to Indigenous people.
- Two-Spirit answer options are also included in the gender and sexual orientation questions because it is a term that some people may use to describe their overall identity, their gender, their sexual orientation or any combination of these.

The question

If you answered 'yes' to the Indigenous to Canada question, do you identify as Two-Spirit?

NOTE: Two-Spirit is a term some Indigenous people use to describe their overall identity, gender and/or sexual orientation.

- ☐ Yes
- ☐ No
- ☐ Prefer not to answer

Race

Purpose

- To determine a person’s racial identity
- To help understand the racial diversity of people using City programs or services
- To help identify:
    - If and how different racialized groups are using City services and what programs they are accessing
    - Inequities experienced by racialized communities in using City programs and services, such as barriers to service
    - People's experiences based on race including experiences of systemic racism. Systemic racism includes organizational culture, policies, directives, practices or procedures that exclude, displace or marginalize some racialized groups or create unfair barriers for them to access valuable benefits and opportunities.

Points to remember

- The race categories reflect how people generally understand and use race as a social descriptor in Ontario and are comparable to other key national, provincial and local sectors collecting and providing standards for race-based data, including Statistics Canada and the Ontario Anti-Racism Directorate.
- These are commonly used categories, but individuals may describe their racial backgrounds in ways that are not expressed in the categories below. The open-ended text option can be included to address this limitation.
- It will be difficult for some people to find the racial category that best fits their identity. For example, a person who identifies as Black and Latin American will have to choose one of these identities or instead select "More than one race category or mixed race". It is difficult to create perfect racial categories because race and racial groups are ideas that have been created by society and used to categorize people, and can overlap with other racial, ethnic and national identities. Despite being imperfect, it is important to collect race-based data to help track experiences of racism and racial inequities.

Question options

There are two recommended options for how to collect data on race. The difference between these options is the approach for collecting data from people who identify as "more than one race category or mixed race".

- Option 1 allows people who select the "more than one race category or mixed race" answer option to select one or more race categories from a list.
- Option 2 asks people to provide an open-ended text description for their selection of "more than one race category or mixed race".

Option 1 is recommended in most cases as it will provide more consistent data that is easier to process and analyze. Toronto's population includes an increasingly diverse population of mixed race, biracial and multiracial people, and there can be many different ways of describing mixed race in an open-ended text field, which may be difficult to interpret and categorize.

Option 2 may be preferable in cases where staff are using short paper forms or surveys that do not have space for a long list of options. To determine which option to choose, please consider whether the space available on the form or survey would make a list of options less appropriate, and whether the staff team responsible for reviewing, processing, organizing and analyzing data will have the time and capacity to appropriately process and organize text field responses.

Option 1: List of race categories for "more than one race category or mixed race"

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

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

- ☐ Arab, Middle Eastern or West Asian (examples: Afghan, Armenian, Iranian, Lebanese, Persian, Turkish)
- ☐ Black (examples: African, African-Canadian, Afro-Caribbean)
- ☐ East Asian (examples: Chinese, Japanese, Korean)
- ☐ First Nations (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
  - ☐ Black
  - ☐ East Asian
  - ☐ First Nations, Inuit or Métis
  - ☐ Latin American
  - ☐ South Asian or Indo-Caribbean
  - ☐ Southeast Asian
  - ☐ White
  - ☐ Not listed, please describe: ______
- ☐ Not listed, please describe: ____________
- ☐ Prefer not to answer

NOTE: When possible in electronic survey tools and forms, people who select "More than one race category or mixed race" should be directed to answer the following branch question:

> You selected "More than one race category or mixed race". Which race categories best describe you? Please select all that apply:
>
> - ☐ Arab, Middle Eastern or West Asian
> - ☐ Black
> - ☐ East Asian
> - ☐ First Nations, Inuit or Métis
> - ☐ Latin American
> - ☐ South Asian or Indo-Caribbean
> - ☐ Southeast Asian
> - ☐ White
> - ☐ Not listed, please describe: ___________

Option 2: Write-in for "more than one race category or mixed race"

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

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

- ☐ Arab, Middle Eastern or West Asian (examples: Afghan, Armenian, Iranian, Lebanese, Persian, Turkish)
- ☐ Black (examples: African, African-Canadian, Afro-Caribbean)
- ☐ East Asian (examples: Chinese, Japanese, Korean)
- ☐ First Nations (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 describe: __________
- ☐ Not listed, please describe: ____________
- ☐ Prefer not to answer

Disability

Purpose

- To determine whether a resident or service user has a disability
- To help identify how many people with disabilities are using City programs and services, what programs they are accessing, and how well these services are addressing their needs
- To determine the type of disability they live with, whether they encounter barriers when accessing City programs and services, and the types of barriers they experience

Points to remember

- The recommended question options may not capture all residents and service users with disabilities. Due to societal stigma, people may be reluctant to self-identify as a person with a disability or to disclose specific information about their disability. As a result, residents and service users may be unwilling to identify as having a disability, possibly resulting in an underestimate of the number of people with disabilities. For Option 2, people may be unwilling to provide additional information about their disabilities.
- The City of Toronto's Accommodation Policy outlines the process for receiving and addressing any accessibility accommodation requests from residents and staff.

- The City of Toronto's Corporate Accessibility Policy and Multi-Year Accessibility Plan affirms the City's commitment to upholding the principles of the Accessibility for Ontarians with Disabilities Act and creating and maintaining an accessible and equitable community for all.

Question options

There are two options for collecting disability data:

- Option 1 is a single question that asks if the person identifies as a person with a disability based on the definition provided. This option provides information on the number of service users and residents who identify as a person with a disability.
- Option 2 includes four questions and asks if the person identifies as a person with a disability, the types of disabilities they live with, whether they have experienced any barriers when accessing City programs and services, and where those barriers have occurred while accessing services. This option provides information on the number of service users and residents with disabilities, types of disabilities, how often accessibility barriers are experienced and where people with disabilities have encountered barriers when accessing City programs, services, goods and facilities.

Depending on the type of information you are seeking, each option will provide data that can help to inform the development and implementation of the programs and services your division offers to residents with disabilities.

Option 2 can help to gain a better understanding of the types of disabilities people live with and the barriers they may experience with accessing and using City programs and services. Option 2 is recommended only in cases where the data will be used to inform current and future service planning and delivery practices, or address accessibility barriers that have been identified.

If your division requires assistance in determining which option would best suit your needs, contact the Accessibility Unit at 416-338-2632 or accessibility@toronto.ca.

Option 1: Definition-based identity as a person with a disability

Disability is understood as any physical, mental, developmental, cognitive, learning, communication, sight, hearing or functional limitation that, in interaction with a barrier, hinders a person’s full and equal participation in society. A disability can be permanent, temporary or episodic, and visible or invisible.

Do you identify as a person with a disability? Please select one only.

- ☐ Yes
- ☐ No
- ☐ Don't know
- ☐ Prefer not to answer

Option 2: Types of Disability and Accessibility Barriers

NOTE: This option contains four questions.

a) Do you identify as a person with a disability? Please select one only.

- ☐ Yes
- ☐ No
- ☐ Don't know
- ☐ Prefer not to answer

b) If yes, what type of disability do you live with? Please select all that apply

- ☐ Blindness or low vision (does not include vision correctable by glasses or contact lenses)
- ☐ Deaf, deafened or hard or hearing
- ☐ Developmental or cognitive disability (example: Down syndrome)
- ☐ Learning disability (example: dyslexia)
- ☐ Mental health disability (examples: addictions, bipolar disorder, depression)
- ☐ Mobility disability (examples: cane, wheelchair)
- ☐ Physical, coordination, manual dexterity, or strength (example: handling objects)
- ☐ Physical illness and/or pain (examples: diabetes, epilepsy, heart condition, kidney disease, lung disease, rheumatoid arthritis)
- ☐ Speech and language disability (not caused by hearing loss)
- ☐ Not listed, please describe: ________
- ☐ Prefer not to answer

c) Do you experience barriers that limit your ability to fully access or participate in [insert name of City service or program]?

- ☐ Yes
- ☐ No
- ☐ Don't know
- ☐ Prefer not to answer

d) If yes, when have you experienced access barrier(s)? Please select all that apply.

- ☐ Attending an event or program in person
- ☐ Entering or navigating a building
- ☐ Accessing counter services (wait lines, ticketing system)
- ☐ Finding, accessing, or understanding print or online information
- ☐ Completing forms or instructions
- ☐ Communicating and interacting with staff
- ☐ Overall uncomfortable environment (noise, lighting, smells)
- ☐ Other, please describe: ____________
- ☐ Prefer not to answer

NOTE: When possible in electronic survey tools and forms, Question #2, 3 and 4 should be branch questions that are only asked of people who selected "Yes" for the "Do you identify as a person with a disability" question. For branch questions, "If yes," should be left out at the beginning of each follow-up question.

Gender

Purpose

- To determine a service user or resident's gender and gender identity information
- To help understand the genders and gender identities of people who are accessing programs and services, what programs and services they are accessing and how well these services are addressing their needs
- To help identify inequities experienced by women, girls, trans, non-binary and Two-Spirit people

Points to remember

- It is now widely recognized that it is more appropriate to collect gender data than sex data, and that collecting sex information is no longer an acceptable practice. Gender data collection has evolved in recent years to reflect this. Organizations and sectors have been making concerted efforts and changing their practices to move towards collecting gender identity instead.
- Gender identity can change over a person's lifetime and from day to day or moment to moment. Gender identity is different and completely separate from sexual orientation.
- Some people may find questions about gender intrusive, sensitive and triggering of emotional reactions or traumatic memories. People who are trans-identified or gender non-binary may be concerned with who will have access to this information. It is important to explain why this information is being collected and who will have access to it.
- The gender questions include a Two-Spirit answer option for Indigenous people whose gender identity is Two-Spirit. Two-Spirit is a term some Indigenous people may use to describe their overall identity, their gender, their sexual orientation or any combination of these.
- The question may underestimate the number of trans people because individuals who have transitioned may identify as "man" or "woman".
- For divisions and programs that require the collection of sex at birth data, contact the Data for Equity Unit for more information on the best ways to capture both sex at birth and gender data.

The question

Gender identity is the gender that people identify with or how they perceive themselves, which may be different from their sex assigned at birth.

What best describes your gender? Please select one only.

- ☐ Woman
- ☐ Man
- ☐ Trans woman
- ☐ Trans man
- ☐ Gender non-binary (including gender fluid, genderqueer, androgynous)
- ☐ Two-Spirit
- ☐ Not listed, please describe: _______________
- ☐ Prefer not to answer

Sexual Orientation

Purpose

- To determine a person's sexual orientation
- To understand if and how many people of diverse sexual orientations are using City programs or services, what programs and services they are accessing and how well these services are addressing their needs

Points to remember

- Sexual orientation is a term for a person's emotional, physical, romantic, and/or sexual attraction towards other people. Lesbian, gay, bisexual, queer, Two-Spirit and heterosexual or straight are all sexual orientations. Sexual orientation is different from gender. Trans is not a sexual orientation.
- Some people may find this question intrusive so it is important to explain who will have access to the information, how their privacy will be protected and why the information is being collected.
- The sexual orientation question includes a Two-Spirit answer option for those Indigenous people who describe their sexual orientation as Two-Spirit. Two-Spirit is a term some Indigenous people may use to describe their overall identity, their gender, their sexual orientation or any combination of these.
- Answers are ordered alphabetically except for "heterosexual or straight" which is the first answer. This is due to evidence and experience from socio-demographic data collection in other settings, where the placement of a first answer option such as Asexual or Bisexual has led to a higher number of responses than would be expected. This was likely due to a lack of understanding of sexual orientation terms and concepts by people answering the question.
- Option 2 is recommended for programs specifically focused on LGBTQ2S+ people as it includes additional answer options.

Question options

There are two recommended options for collecting data on sexual orientation. Both options ask a person to select the answer option that best describes their sexual orientation. Option 2 provides additional answer options.

Option 1: Shorter list of answer options (Recommended in most cases)

Sexual orientation describes a person's emotional, physical, romantic and/or sexual attraction to other people.

What best describes your sexual orientation? Please select one only.

- ☐ Heterosexual or Straight
- ☐ Bisexual
- ☐ Gay
- ☐ Lesbian
- ☐ Queer
- ☐ Two-Spirit
- ☐ Don't know
- ☐ Not listed, please describe: _________
- ☐ Prefer not to answer

Option 2: Additional answer options

What best describes your sexual orientation? Please select one only.

- ☐ Heterosexual or Straight
- ☐ Asexual
- ☐ Bisexual
- ☐ Gay
- ☐ Lesbian
- ☐ Pansexual
- ☐ Queer
- ☐ Questioning
- ☐ Two-Spirit
- ☐ Don't know
- ☐ Not listed, please describe: _________
- ☐ Prefer not to answer

Household Income

Purpose

- To determine whether a service user or resident has low income. This is based on the estimate of household income from this question, analyzed with data from the Household size question that immediately follows this question.

- To determine whether the income levels of the people your data set are representative of the income groups in the general population of Toronto
- To help identify if and how many low income people are using City services, what programs they are accessing and how well these services are addressing their needs

Points to remember

- There is no need to use this question in programs with income eligibility criteria that already collect more detailed income information about their service users.
- This data element should be collected and analyzed along with the Household size data element.
- These income groups were selected because, when analyzed together with household size, they roughly align with Low Income Measures (LIMs) and for one-person households, the annual salary of a person working full-time for minimum wage.
- To help respondents answer the question, you may choose to include estimates of weekly, daily or hourly wages as examples in brackets for each income category.

NOTE: Income categories can be broken down into smaller categories to be more appropriate for your service user group or if this will provide a level of detail needed to inform your program. For example, some programs serving low-income groups might be interested in $5,000 and $10,000 income groups in the lower income categories.

The question

What was your total household income before taxes last year? Your best estimate is fine. Please select one only.

- ☐ 0 - $29,999
- ☐ $30,000-$49,999
- ☐ $50,000-$69,999
- ☐ $70,000-$99,999
- ☐ $100,000-149,999
- ☐ $150,000 or more
- ☐ Don't know
- ☐ Prefer not to answer

Analysis Guidelines

This data element should be collected and analyzed along with the Household size data element

Assessing Low Income

The table below provides rough estimates to identify people living in low-income households based on their reported household income and household size. For example, if a person reports their income as $30,000-$49,999 and their household size as 3, they could be categorized as low income. If a person reports their income as $70,000-$99,999 and their household size as 3, they would not be categorized as low income.

Income range	**Notes**
0 - $29,999	Roughly aligns with: • Low Income Measures (LIMs) for **one person households** • Annual salary of a person working full-time for minimum wage
$30,000-$49,999	Roughly aligns with Low Income Measures (LIMs) for **2, 3, and 4 person households**
$50,000-$69,999	Roughly aligns with Low Income Measures (LIMs) for **5, 6, 7, 8 and 9 person households**
$70,000-$99,999	Roughly aligns with Low Income Measures (LIMs) for **10 person households**
$100,000-149,999	
$150,000 or more	

Comparing to the Overall Toronto Population

- Income data for the general population of Toronto is available in Statistics Canada data sets and is usually broken down into $5,000 or $10,000 income groups depending on the measure and the income level. Statistics Canada comparison data that align with the recommended income groups above can be found on the publicly available City of Toronto Census Profile webpage: refer to "Household total income groups" under "Income of households".
- If you are breaking down the income categories into smaller categories and need to determine whether the income levels of the people your data set are representative of the income groups in the general population of Toronto, please ensure that your categories align with the census comparison data you will be using. The Statistics Canada Census Profile for the City of Toronto (refer to "Household total income groups" under "Income of households") provides household income groups that vary. The lower income categories are by $5,000, middle categories by $10,000, and higher income categories are larger, therefore, ensure that your smaller income groups can be combined to match these categories.

Household Size

NOTE: This question should be asked along with the Household income question above. The data collected from this question should be analyzed in combination with the Household income data.

Purpose

- To determine the number of people in a service user's or resident's household who live together and share income and resources
- Additional purposes are the same as for Household income. Please see the Household income purpose and points to remember outlined above.

Points to remember

- There is no need to use this question in programs that already collect more detailed information about their service users' household income, family and household composition and household size.

The question

Including yourself, how many people live in your household on a regular basis? Please select one only.

☐ 1
☐ 2
☐ 3
☐ 4
☐ 5
☐ More than 5, please specify: ______
☐ Prefer not to answer

Optional socio-demographic questions

The seven (7) optional data elements below are to be collected at the discretion of each division and program where applicable.

Ethnicity

Purpose

- To identify ethnic diversity of service users and residents
- To help understand the ethnic diversity of service users and residents using City programs and services, which services they are accessing and how well these services are meeting their needs

Points to remember

- City divisions need to have capacity to review, process, group and analyze text field responses for this question.
- Collecting this data element can result in more accurate responses for the race question and should be asked immediately before the race question if included. By providing people with an opportunity to describe their ethnic and cultural identity in their own words first, people may be more ready to select from a list of defined racial groups in the question that follows.
- Consider collecting ethnicity where service users will be predominantly one racial group, but differing ethnicity and cultural origins. For example, a program focusing on Black Torontonians may want to assess whether its program is inclusive to Black Torontonians of Caribbean, East African and West African origin.
- Ethnicity data can help provide a more thorough understanding of demographics and needs of service users and residents, particularly when ethnicity data is analyzed and cross-referenced with information about language, Canadian-born or immigrant, race and religion.

The question

What is your ethnic or cultural background?

[Examples: Afghani, Arab, Bengali, Canadian, Chilean, Chinese, Cree, Cuban, Dutch, English, Ethiopian, Filipino, French, German, Greek, Guyanese, Hungarian, Indian, Inuit, Irish, Iranian, Italian, Jamaican, Jewish, Kenyan, Korean, Lebanese, Métis, Nigerian, Ojibway, Pakistani, Polish, Portuguese, Roma, Russian, Scottish, Somali, Sri Lankan, Syrian, Trinidadian, Vietnamese, etc.]

- ☐ ________________
- ☐ Prefer not to answer

Religion/spiritual affiliation

Purpose

- To identify religious and spiritual diversity of service users and residents
- To help understand access barriers and the needs of service users and residents who may be experiencing discrimination on the basis of religion, including Islamophobia, anti-Semitism or xenophobia

Points to remember

- People can experience racism based on their religion or perceived religion, which may lead to unique negative impacts and unequal outcomes. In addition, there may be differences in experiences of systemic racism within and between religious groups.

- The question about religion can be placed either before the Indigenous identity question or after the race question.
- Religion data can help provide a better understanding of the demographics and needs of service users and residents, particularly when religion data is analyzed and cross-referenced with information about language, Canadian-born or immigrant, race and ethnicity.

The question

Religion refers to an individual's self-identification or affiliation with any religious denomination, group, or other religiously defined community, system of belief or spiritual faith practices.

What is your religion or spiritual affiliation? Please select one only.

- ☐ Agnosticism (Agnostic)
- ☐ Atheism (Atheist)
- ☐ Buddhism (Buddhist)
- ☐ Christianity (Christian)
- ☐ Hinduism (Hindu)
- ☐ Indigenous spirituality
- ☐ Islam (Muslim)
- ☐ Judaism (Jewish)
- ☐ Sikhism (Sikh)
- ☐ Spiritual
- ☐ More than one faith or religion
- ☐ No religion
- ☐ Not listed, please describe: _________
- ☐ Prefer not to answer

Citizenship and Immigration Status

Collecting information about citizenship and immigration status should be done with caution. Unless this data is required for program eligibility, immigration status and citizenship should only be collected in anonymous surveys where the IP address is not tracked and location cannot be determined. This is consistent with the City of Toronto's Access to City Services for Undocumented Torontonians guidelines, which advises City staff that information about immigration status should be collected separately from personal information and kept in an aggregate form, unless it is a service requirement or prerequisite.

While immigration status data is sensitive, information related to the profile of service users is also necessary in order to plan and provide adequate services and supports. Please contact the Toronto Newcomer Office to determine if it is appropriate to collect immigration status and citizenship data in your situation. The Toronto Newcomer Office will provide advice on if and how you should collect this information, and what question(s) to use to minimize potential risk and harm.

If collecting this information in a survey, the introduction section of the survey should provide respondents with clear information on confidentiality, how the data collected will be used, and the reason for collecting immigration information. City staff should take care when asking for immigration information, and ensure that their tone and approach does not discourage service users from completing other parts of the survey.

For more information on collecting citizenship and immigration status, please contact:

Merona Abbas Estiphanos, Community Development Officer
Toronto Newcomer Office
Telephone: 416-392-5187
Email: MeronaAbbas.Estiphanos@toronto.ca

Housing Situation

Purpose

- To identify the housing situation of service users or residents, specifically if a person lives in stable housing and if they own or rent their home
- For Option 2, to understand the housing situation and housing type a person lives in
- To help understand how many people of different housing situations are using City programs or services, what programs and services they are accessing and how well these services are addressing their needs

Points to remember

- The suggested housing questions below can provide some general information about housing situation, including housing stability, home ownership and housing type. These questions will not provide information on quality of housing, density, safety, adequacy, suitability and affordability
- When developing a housing question, please consider the purpose and plan for data collection, analysis and use, and design your question to reflect this purpose. This may include understanding:
    - whether people are housed
    - stability of housing
    - quality of housing
    - suitability of housing
    - residing in Toronto Community Housing, Non-Profit housing, Co-op housing or supportive housing

Question options

There are two suggested options for how to collect data on a person's housing situation. Both are general questions that can help determine if a person lives in stable housing and if they own or rent their home. Option 1 provides a shorter list of answer options that do not provide insight into housing type. Option 2 provides additional more detailed answer options about a person's housing situation and housing type. You may choose to include all or some of the answer choices in Option 2 depending on your program context, what you hope to learn from the data and how you plan to use it.

For both options, information on quality of housing, density, safety, adequacy, suitability and affordability is not assessed.

Option 1: Shorter list of answer options

What best describes your current housing situation? Please select one only.

- ☐ Home owner
- ☐ Renting
- ☐ Permanently living with parent(s) or other family member(s)
- ☐ Temporarily staying with others (no fixed address)
- ☐ Homeless (staying outside, in a shelter, in a 24-hour respite)
- ☐ Not listed, please describe:_________
- ☐ Prefer not to answer

Option 2: Additional answer options

NOTE: You may choose to include all or some of these answer options depending on what you hope to learn from the data, how you will use the data, and who will be answering this question. Please consider and select answer options based on what information is needed to inform your program and what options will be most appropriate for the service users or residents providing the information.

What best describes your current housing situation? Please select one only.

- ☐ Home owner
- ☐ Renting
    - o If renting, please specify who owns your housing:
        - ☐ Private landlord
        - ☐ TCH building
        - ☐ Non-profit housing or Housing Co-operative
        - ☐ Rooming house (multi-tenant house)
- ☐ Correctional Facility
- ☐ Group Home
- ☐ Permanently living with parent(s) or other family member(s)
- ☐ Temporarily staying with others (no fixed address)
- ☐ Supportive Housing

- ☐ Retirement homes
- ☐ Long-term care or nursing homes
- ☐ Homeless:
  - ☐ Staying outside
  - ☐ Staying in a shelter
  - ☐ Staying in a 24-hr respite
- ☐ Not listed, please describe:______
- ☐ Prefer not to answer

<u>Optional follow up question for Option 1 or Option 2 for those that rent:</u>

Is your rent subsidized? For example, do you get a housing allowance, or live in rent geared to income social housing?

- ☐ Yes
- ☐ No

Family and Household Composition

<u>Purpose</u>

- To understand the structure of households and families in Toronto
- To help understand what types of family structures are accessing programs and services, what programs and services they are accessing and how well these services are addressing their needs

<u>Points to remember</u>

- This question is a more appropriate question than asking about marital status as it provides information on household composition and family make-up.
- City staff can cross-tabulate data from this question with answers from the gender question to identify lone-parent families led by women as well as families with trans or non-binary parents.
- City staff can cross-tabulate data from this question with answers from the sexual orientation question to get an understanding of same-gender families. However, it is important to recognize that a person's sexual orientation may not indicate if they are living in a same-gender relationship. For this reason, cross-referencing sexual orientation data with household and family composition may overestimate the number of LGBTQ2S+ families living in Toronto.

<u>The question</u>

Who are the family members living in your household? Please select <u>one</u> only.

- ☐ One parent with child(ren)
- ☐ Couple with child(ren)
- ☐ Couple without child(ren)

- ☐ Inter-generational household (examples: children, parents and grandparents)
- ☐ Multiple families (examples: two adult sisters, their partners and their children)
- ☐ Not listed, please describe:_______________
- ☐ Prefer not to answer

Education level

Purpose

- To determine the educational level of service users and residents
- To understand if and how many people of diverse educational backgrounds are using City programs or services, what programs and services they are accessing and how well these services are addressing their needs

The question

What is the highest level of education you have completed? Please select one only.

- ☐ Less than high school
- ☐ High school or equivalent
- ☐ Degree or diploma from a college or university
- ☐ Graduate or professional degree (examples: Master, PhD, MD or LLB/JD)
- ☐ Prefer not to answer

Note: If relevant to your program, you may want to ask a follow-up question about whether the degree was obtained in Canada, such as:

Did you receive your highest degree or diploma in Canada?

- ☐ Yes
- ☐ No, please specify country_______
- ☐ Prefer not to answer

Employment status

Purpose

- To determine the employment status of service users and residents
- To understand if and how many people of different employment situations are using City programs or services, what programs and services they are accessing and how well these services are addressing their needs

Points to remember

- If including this question, it is recommended to provide a multiple select format where people can select more than one response, because people's employment situation may fit equally in more than one category.

- Information on employment is sometimes used to help measure income. However, the recommended employment question will not provide information on how much a person is paid by that employment, or about the income of other members of the household. The recommended household income and household size questions above are expected to result in more accurate income information.

The question

Which of the following best describes your current employment status? Please select all that apply.

- ☐ Employed - full-time
- ☐ Employed - part-time
- ☐ Employed - casual, on-call, temporary or seasonal
- ☐ Unemployed or looking for a job
- ☐ Stay at home caregiver
- ☐ Student
- ☐ Retired
- ☐ Unable to work
- ☐ Not listed, please describe: _____
- ☐ Prefer not to answer

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