



Innovation, Science and  
Economic Development Canada

Innovation, Sciences et  
Développement économique Canada

Canada



# Every Voice Counts

Introduction to Self-Identification Data  
Collection and Management Practices

July 19, 2023



COLLEGES &  
INSTITUTES  
CANADA

50 – 30  
Challenge

Sheridan



Innovation, Science and  
Economic Development Canada

Innovation, Sciences et  
Développement économique Canada

Canada



# Access Check & Housekeeping



Innovation, Science and  
Economic Development Canada

Innovation, Sciences et  
Développement économique Canada

Canada

# Land Acknowledgment





Describe fundamentals of self-identification and its importance for equity, diversity and inclusion (EDI) in organizations

Recognize promising practices in the self-identification process

**Learning Outcomes**

Assess a case study and review sample self-identification surveys

Illustrate consequences of self-identification data misuse and risks to organizational reputation





Innovation, Science and  
Economic Development Canada

Innovation, Sciences et  
Développement économique Canada

Canada

# Introducing our Speakers

Warm Welcome to....





Innovation, Science and  
Economic Development Canada

Innovation, Sciences et  
Développement économique Canada

Canada



**Alicia Sullivan** (she/her)  
Manager, EDI Knowledge Mobilization  
Sheridan College



**Wil Osbourne-Sorrell** (he/they)  
Training Advisor 50 – 30 Challenge Hub  
Fanshawe College





Innovation, Science and  
Economic Development Canada

Innovation, Sciences et  
Développement économique Canada

Canada



**Mx. Trina Prince** (they/them)

Manager of Equity, Diversity, & Inclusion, Human  
Resources, Kwantlen Polytechnic University



**Yudara Weerakoon** (he/him)

Advisor, EDI Knowledge Mobilization  
Sheridan College





Innovation, Science and  
Economic Development Canada

Innovation, Sciences et  
Développement économique Canada

Canada

# Self-Identification: Context Setting and Promising Practices

**Alicia Sullivan (she/her)**  
Manager, EDI Knowledge Mobilization  
Sheridan College







# Self-identification data - connection to the 50 – 30 Challenge

“To know whether and how we are achieving the goals of the 50 – 30 Challenge and building belonging in our organizations, we need to measure and track our progress. Without that understanding, there is no clear way of knowing how we are working towards our vision and strategy.” (What Works Toolkit)





# Self-identification data collection

- Self-identification involves the collection of demographic (and other) data directly from employees to ensure accurate information about the composition/diversity of the workforce
- Data collection can be done through confidential HR records, periodic employee census, anonymous staff satisfaction/engagement surveys, applicant snapshot at the recruitment stage, etc.





# Essential features of self-identification surveys

Voluntariness

Confidentiality

Information can be changed by employees

Intersectionality of identities

Alternative formats





# Origins of self-identification in Canadian workplaces

Employment Equity  
Act (1995)

Expanded to include  
2SLGBTQIA+



## 4 Designated Groups

*Gold standard: Workforce data collected through self-identification surveys should have a strategic link to the organization's mission, vision and business goals.*





# Why is self-identification data collection important?

- Provide evidenced-based metrics
- Evaluate equity of policies and practices
- Inform the creation of programs and resources
- Facilitate dialogue about EDI and employees' experiences
- Identify challenges and barriers
- Measure success of initiatives and gauge engagement
- Provide a more accurate picture of organizational diversity
- Legislative compliance





# Principles for building a solid foundation for self-identification data collection



Source: Gretchen Ruck, AlixPartners, LLP





# Promising practices - self-identification

## Definitions & Updated Language

- e.g., Racialized People vs Visible Minority; Indigenous Peoples vs. Aboriginals

## Obtain Leadership Buy-in & Approval

- Senior Management Support

## Empower Leaders as Champions

- Champion and Communicate benefits

## Up-to-date data

- Annual reminders





## Promising practices - self-identification cont.'

### Utilize Employee (Business) Resource Groups

- Provide input and feedback on methods and promote the survey

### New Employee Onboarding

- Share link as part of orientation package

### Share Results

- Builds transparency and allows employees to follow actions
- Encourage participation in future efforts

### Take Action

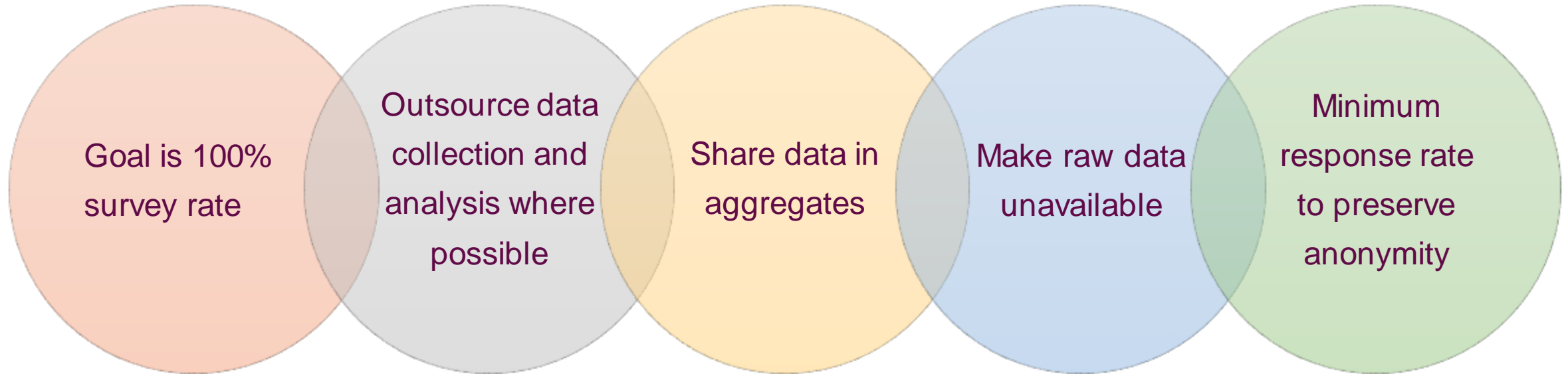
- Start with quick wins
- Address problems identified to build employee confidence







# Reporting self-identification data





# Tips for effective communication about self-identification

"Count Me In"  
Campaign

Trust and  
Transparency

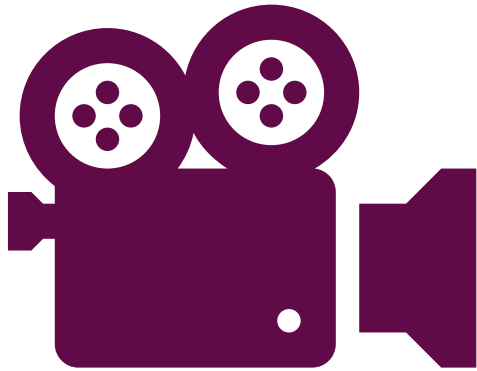
Management and  
bargain agent  
collaboration

Communicate  
Salient Benefits





# Communications tactics to encourage participation



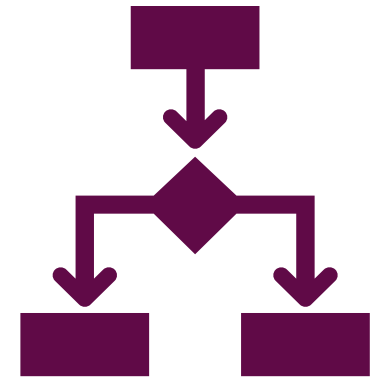
Videos



Information on  
websites



Storytelling



Outcomes of  
actions taken





## Data Governance: privacy, confidentiality, storage and data destruction

Knowledge about regional regulations

Limit access to raw data

Proper infrastructure for collecting and storing data

Present data in percentages vs numerical values

Data destruction when retention period expires

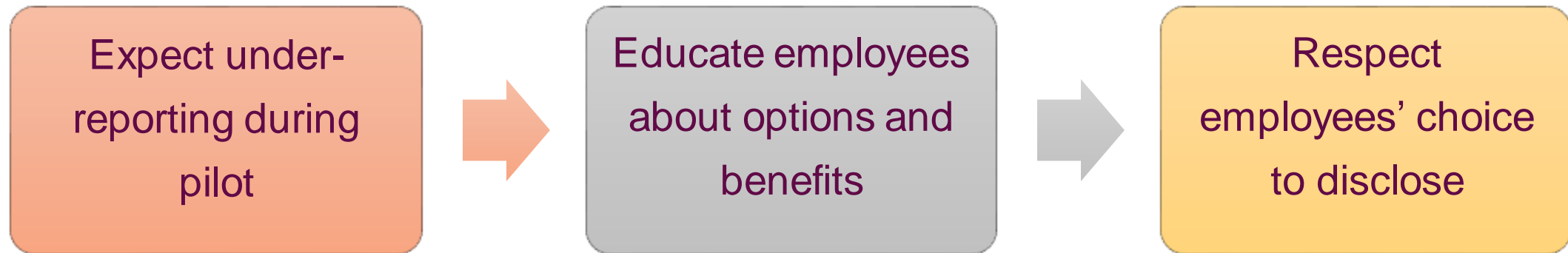
Choice to update/remove voluntary self-identification data

Explicit permission to share personal information





# Managing organizational expectations





# Self-Identification – Scenarios

**Wil Osbourne-Sorrell (he/they)**  
Training Advisor 50 – 30 Challenge Hub,  
Fanshawe College





# Let's play a game

The game is called, "**This or That**" and is designed to provoke fast, crowdsourced results. Use the factors below to evaluate the following three scenarios and determine which is — **This or That** — would be less damaging: (i.e., choose the lesser of two evils)

## Factors to Consider:

- Effect on the individual described in the scenario
- Short-Term Implications/ longer term fall-out from the decisions
- Reputational/ financial impact to your organization

There is no 'correct' answer...

Source: To share or not to share Data and choice in the information age (New York) - <https://www.youtube.com/watch?v=kBxe8gNGQ3Q>





# Scenario 1

## Is this a misuse of data mined from social media?

A series of in-person interviews is being scheduled for a candidate who is a personal referral of one of your employees, who is known to identify as gay.

To gather more background information on the candidate, the in-house recruiter checks out their LinkedIn profile and Facebook page.

Based on what they've gleaned online, the recruiter infers this candidate is gay as well.

HR is aware that some of their employees at the location where this candidate would work can be rough around the edges and sometimes might be inappropriate. In fact, while on Facebook, the recruiter noticed one of interviewers recently reposted something that could be considered homophobic.

Source: To share or not to share Data and choice in the information age (New York) - <https://www.youtube.com/watch?v=kBxe8gNGQ3Q>







**This**

## **Respect their Identity**

**Action:** You choose to inform the interviewers the candidate is gay.

- Prep interviewers on the types of questions that would be inappropriate and distribute Pride flags
- The candidate learned from one of the interviewers that they were outed by the recruiter who snooped online



**Choose Now!!**



**That**

## **Respect their Privacy**

**Action:** You choose not to inform the interviewers

- Everyone is broadly trained on awareness of diversity and inclusiveness and agree to the Code of Conduct annually
- Seeing no signs of diversity, the candidate felt unwelcome and uncertain that this would be a healthy, supportive environment

*Remember, you're the role of the Recruiter!*



## Scenario 2

### How risky is the exposure of sensitive information?

To help the organization keep tabs on employee satisfaction and morale, all employees are asked to complete an anonymous yearly survey. Your survey captures demographic data, office location, reporting level, and business unit.

This year, the CEO has requested that you, as the head of HR, also collect data on gender identity and sexual orientation to help evaluate whether additional 2SLGTBQIA+ aligned benefits are justified. To access the survey, employees click on a personalized email which sends them to an independent third-party website.

While your company is headquartered in a location with legal 2SLGTBQIA+ rights and protections, some of your employees work in a region where they could be fired, or much worse, for being gay.

Source: To share or not to share Data and choice in the information age (New York) - <https://www.youtube.com/watch?v=kBxe8gNGQ3Q>



**This**

## **Risk Employee Security**

**Action:** Feeling confident that collecting orientation/identity data is vital to justify benefits/resources for the 2SLGTBQIA+ employees, you add the survey questions.

- You're aware that the survey can't fully protect the identity of your employees
- There's a risk that employees could be publicly outed, exposing them to harm

**Choose Now!!**

**That**

## **Risk Career Security**

**Action:** Against the wishes of the CEO's, you choose to omit orientation/identity questions to protect your employees

- Abstaining from collecting 2SLGBTQIA+ affiliation loses you favour with the CEO
- Your decision costs the 2SLGTBQIA+ community much-needed benefits

*Remember, you're in the role of the Chief Human Resources Officer!*



## Scenario 3

### Have privacy rights or regulations been violated?

An employee, working with the advice of a therapist and under the supervision of a trained medical professional, "Gretchen", decides to begin taking hormones to help strengthen the alignment between their gender identity and expression.

Insurance coverage won't pay for their prescribed medication because it's not indicated for the gender they have on record with their employer.

The employee reaches out to you, their benefits coordinator, to request an exception or a change to their insurance coverage.

The organization collects gender identity and orientation self-identification information from new employees and the benefits coordinator can see that this person declined to fill-in.

Source: To share or not to share Data and choice in the information age (New York) - <https://www.youtube.com/watch?v=kBxe8gNGQ3Q>



**This**

### **Stick to the Policy**

**Action:** You consult the employee's HR representative on company procedures in place to handle the insurance issue

- The HR rep decides to initiate their newly developed gender transition procedures
- Following these, the HR rep loops in the employee's manager, who proceeds to very awkwardly confront the employee

**Choose Now!!**

**That**

### **Stick to the Principles**

**Action:** You update the employee's gender identification as trans\* and switch their gender marker to reflect male rather than female

- After dealing with insurance, you want to keep this private, but also help the employee avoid similar issues in the future
- Later, these changes propagate unforeseen issues in downstream systems

*Remember, you're in the role of the Benefits Coordinator!*



# Self-Identification Process in Action

**Mx. Trina Prince** (they/them)

Manager of Equity, Diversity, & Inclusion, Human Resources,  
Kwantlen Polytechnic University



# THE 50 – 30 CHALLENGE



**WE'RE IN!**

# Collaboration



- Equity, Diversity, and Inclusion Team in Human Resources
- Office of Planning & Accountability
- Communications & Media Relations
- Board of Governors
- President's Circle



# Building Trust

- How will your privacy be protected?
- Meeting with Board of Governors and the President's Circle
- Creating a space for questions and discomfort



# Asking the Right Questions

## 1. Do you identify as a cisgender man? (Meaning that your assigned sex at birth was male and you still identify as a man.)

*Reasoning: Part of the 50-30 challenge is to report back on the gender diversity of leadership and the board. Part of our commitment to the 50-30 challenge is to ensure that we have at least 50% representation from members of all marginalized genders.*


- Yes
- No
- Prefer not to answer

## 2. Do you consider yourself to be a part of the 2SLGBTQIA+ community?

*2SLGBTQIA+ is an acronym that stands for Two-Spirit, Lesbian, Gay, Bisexual, Transgender, Queer, Intersex, Asexual and additional sexual orientations and gender identities. For full clarity, this acronym does **not** include straight cisgender allies.*

# Sharing the Results!





**What's Next?**



Innovation, Science and  
Economic Development Canada

Innovation, Sciences et  
Développement économique Canada

Canada

# Self-identification Surveys: Samples

Yudara Weerakoon (he/him)  
Advisor, EDI Knowledge Mobilization  
Sheridan College





Innovation, Science and  
Economic Development Canada

Innovation, Sciences et  
Développement économique Canada

Canada

# Q&A





# Self-identification resource list

- [Factsheet 3: Collecting EE Information About your Employees](#)
- [Do Ask, Do Tell: Capturing Data on Sexual Orientation & Gender Identity Globally](#)
- [Collecting Employee Self-Identification Data in a Global Environment](#)
- [Collecting LGBTQ+ Data for Diversity: Initiating Self-ID at IBM](#)
- [Principles for Building a Solid Foundation for Collecting Self-Identification Data](#)
- [Best Practices for Self-Identification \(Disability:IN\)](#)
- [Visibility Counts: Corporate Guidelines for LGBTQ+ Inclusion](#)
- [Self-ID Leading Practices](#)
- [Encouraging Self-Identification of Disability](#)
- [Using Self-ID to Create a More Inclusive Workplace \(Google\)](#)
- [Getting Candidates to Self-Identify](#)
- [Diversity in Governance \[ A Toolkit for Nonprofit Boards \]](#)
- <https://www.toronto.ca/legdocs/mmis/2020/ex/bgrd/backgroundfile-158045.pdf>
- <https://www.toronto.ca/legdocs/mmis/2020/ex/bgrd/backgroundfile-158052.pdf>





# Call to Action: Pledge to the 50 – 30 Challenge

1

Make the  
pledge

2

Get familiar  
with the  
toolkit

3

Email us for  
support

[edi@collegeinstitutes.ca](mailto:edi@collegeinstitutes.ca)

4

Make positive  
change in your  
organization

5

Celebrate  
successes and  
keep momentum  
going







Innovation, Science and  
Economic Development Canada

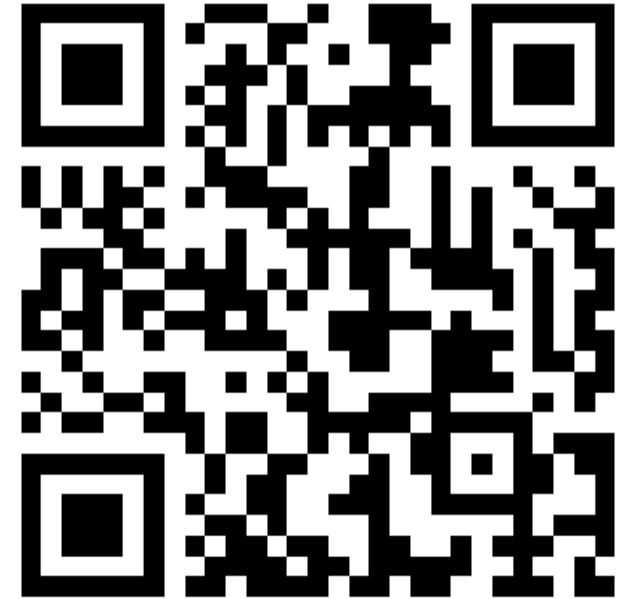
Innovation, Sciences et  
Développement économique Canada

Canada

# Check out the KMDC at Sheridan's microsite!



[sheridancollege.ca/kmdc](https://sheridancollege.ca/kmdc)





Innovation, Science and  
Economic Development Canada

Innovation, Sciences et  
Développement économique Canada

Canada

# Stay Tuned!

Follow CIGan's Eventbrite  
page to keep updated!  
Scan the QR code





Innovation, Science and  
Economic Development Canada

Innovation, Sciences et  
Développement économique Canada

Canada



**@cican5030**





Innovation, Science and  
Economic Development Canada

Innovation, Sciences et  
Développement économique Canada

Canada



# Survey Time!