Outline of Demographic Data Guidance

One-Pagers:

- Benefits of demographic data collection
- How to collect demographic data
- Reporting
- Net Promoter Score (NPS)
- Frequently Asked Questions (FAQ)
Benefits of Collecting Demographic Data

By collecting demographic information, organizations can better understand the people they are serving, notice changes in the communities they serve and identify needs as they emerge. This information in combination with the context in which the organization operates and other data, will enable:

- informed decision-making about program delivery;
- tailoring of programs and services to those most in need; and
- identification of professional development needs for program staff.

Case Example of Using Demographic Data for an Organization’s Operations

For example, Organization X notices that within 6 months, the percentage of Latino individuals who received SNAP application assistance is lower than the percentage of non-Latino individuals served. This seems odd because the neighborhoods being targeted are majority Latino.

As a result, Organization X revisits the list of their partners and explores connecting with community-based organizations that specialize in serving the unique cultural and linguistic needs of Latino communities in these neighborhoods.

Case Example of Using Demographic Data for AARP Foundation’s Operations

Similarly, for AARP Foundation, demographic data from grantees will allow for a better understanding of its own grantmaking, specifically who is being served and not being served by the programs it funds and the extent to which outcomes differ among sub-populations or communities of older adults.

For example, the data may reveal that low-income older adults who have more than three household members and participate in AARP Foundation-funded SNAP enrollment programs are likely to experience greater food insecurity when compared to their counterparts who have less than three household members. This may lead to recommendations about how to tailor outreach to account for differences in food insecurity by household size.

For questions or more information, please contact your AARP Foundation Grants Officer.
How to Ask and Collect Demographic Data from Program Participants

There are various ways to ask questions and collect demographic data from program participants. Each method (way of asking) and mode (way of recording the information) has pros and cons. Tables 1 and 2 below shows the pros and cons of each method and mode and offers recommendations for addressing the cons.

Table 1: Ways to Ask Demographic Questions

<table>
<thead>
<tr>
<th>Method</th>
<th>Pros</th>
<th>Cons</th>
<th>Recommendations to address cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-administered questionnaire</td>
<td>Allows for privacy and is considered the gold standard for data collection</td>
<td>Participant may have difficulty reading or completing questionnaire and require assistance</td>
<td>Staff is present to check-in with the client if they have difficulties interpreting questions</td>
</tr>
<tr>
<td>Interview style</td>
<td>Can explain questions if the participant finds them unclear</td>
<td>Lack of privacy to answer questions that may be sensitive or awkward to ask (e.g., what is your gender?).</td>
<td>Staff clarifies at the beginning of the conversation that they do not want to assume a person’s racial, ethnic or gender identity and will ask questions in the exact way that the questions are worded in the document/questionnaire</td>
</tr>
</tbody>
</table>

Table 2: Ways to Collect Demographic Data

<table>
<thead>
<tr>
<th>Mode</th>
<th>Pros</th>
<th>Cons</th>
<th>Recommendations to address cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronically²</td>
<td>• No manual data entry needed</td>
<td>Participant may not feel comfortable with technology or have trouble reading</td>
<td>• Staff asks for preferred choice of technology and comfort level prior to directing them to the questionnaire (e.g. laptop, tablet, or phone)</td>
</tr>
<tr>
<td></td>
<td>• Questions may be tailored based on how a participant responds throughout the questionnaire</td>
<td></td>
<td>• Ensure that staff are present to assist with technology issues</td>
</tr>
<tr>
<td>Paper³</td>
<td>Some participants are more comfortable providing information on paper</td>
<td>May be more burdensome to grantees because the data have to be entered manually (e.g., into an Excel spreadsheet or a database)</td>
<td>Determine whether there is a staff person who can enter these data into an electronic system prior to deciding to offer a paper version</td>
</tr>
<tr>
<td>File review</td>
<td>Reduces the number of times a participant is asked demographic questions</td>
<td>The program file may not include all data of interest and may require asking participants the questions that they weren’t included in the program intake or application forms</td>
<td>Refer to participant’s file to cross-check some of the demographic information, flag the demographic data that is missing, and ask the participant the questions associated with the missing data</td>
</tr>
</tbody>
</table>

¹ This is a best practice in data collection to maximize privacy and get the most accurate data
² Ibid. The demographic questions can be administered using an online survey. This survey preview link https://test.cmix.com/#/?cmixPrj=71191&cmixLocale=170182&cmixSampleSource=246769&cmixTest=B764C173 illustrates how to operationalize the questions using an online survey. You can enter data to “test” the survey, but please do not use the preview link to collect “real” data. Please contact Amina Khawja (akhawja@aarp.org) or Claire Cecilia (cccecilia@aarp.org) if you would like assistance with administering the demographic questions using an online survey.
³ If your organization would like to administer these questions using a paper format, please contact your AARP Foundation Grants Officer for the most updated and formatted version.
When to Collect Demographic Data from Program Participants

For AARP Foundation, these questions only need be asked and reported once per program participant. Depending on how participants ‘flow’ through an organization, it may make sense to include demographic questions as part of an intake process or to collect data when participants return for additional services. However, if participants do not return after the intake session or the initial interaction, omitting the demographic questions from the initial encounter becomes a missed opportunity.

Reporting Existing Demographic Data from Program Participants

It is likely that prior to receiving AARP Foundation funding, an organization already collects some demographic data on program participants upon intake and/or throughout the time the participant receives services from their program. If an organization has all or partial demographic data from participant files (e.g., from an application for public benefits), it is appropriate to refer to the file for information related to their age, household size, annual or monthly household income, race/ethnicity, or gender and provide it to AARP Foundation as part of the quarterly reporting process.

For questions or more information, please contact your AARP Foundation Grants Officer.
Reporting Demographic Data to AARP Foundation

AARP Foundation asks that grantees report demographic data on a quarterly basis. These data can be reported at the individual person-level or at the group level (in the aggregate), depending on what data collection system grantees use and how data are stored. If an individual is served more than one time by a program during the grant period, their data should be reported once. The data reported must be separated from Personally Identifiable Data (PII). In other words, the participant data that is reported to AARP Foundation must not include individual names, emails, or street addresses.

Box 1: Importance of Reporting Total People Served to Obtain an Accurate Picture of Aggregate-Level Demographic Data

If demographic data are reported in the aggregate, the grantee must provide the total number of unduplicated individuals served during the quarter. AARP Foundation will then use the total number of people served during a quarter as the denominator in calculating percentages. Refer to Box 1 for an example how to best report aggregate data.

Box 2: Quarterly Demographic Data Reporting Template

An aggregate quarterly reporting template in excel (similar to the one featured in Box 2) is provided to all grantees. If grantees prefer to submit individual-level data, they should inform their AARP Foundation Grants Officer.

The template can be populated and uploaded with the narrative portion of the report via Foundation Connect.

For questions or more information, please contact your AARP Foundation Grants Officer.
Net Promoter Score (NPS)

AARP and AARP Foundation use Net Promoter Score to measure participant satisfaction with services provided by its programs. This measure helps to quantify the effect of AARP Foundation supported programs within different communities. Satisfaction should be gauged as a two-part question. The following two questions in Box 1 represent how the Net Promoter Score is to be administered to program participants. These questions can be distributed as a stand-alone survey or incorporated into an existing survey tool used by your program.

<table>
<thead>
<tr>
<th>Box 1: Participant Satisfaction Questions</th>
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<tbody>
<tr>
<td>1. On a scale from 0-10, how likely is it that you would recommend this program or project to a friend or family member?</td>
</tr>
<tr>
<td>0           1           2           3          4           5           6           7           8           9           10</td>
</tr>
<tr>
<td>Not likely at all                          Extremely likely</td>
</tr>
<tr>
<td>2. Please comment about why you selected the response option.</td>
</tr>
</tbody>
</table>

When to Administer the NPS Questions

Grantee partners are encouraged to distribute these questions to program participants on at least an annual basis. Based on the type of service offered and the number of times staff interact with the same program participant as part of their workflow, grantees should determine when would be the best time to ask these questions. For example, if you are not likely to interact with the same participant more than once, it would be beneficial to ask the NPS questions at the end of the interaction (after the service has been provided). On the other hand, if your program staff interact with participants multiple times over the course of a month (e.g., at intake, follow-up calls 1-3 weeks after intake), it may be best to ask the NPS questions at the end of the complete interaction.

Reporting NPS to AARP Foundation

AARP Foundation requests that grantees provide NPS data at least once during the calendar year. The data should be included in the quarterly reporting excel template. NPS can be calculated using the formula in Box 2. For example, among the 2500 program participants you served in Quarter 1, 2,100 (84%) rated your service as a 9 or 10, 300 (12%) rated it a 7 or 8, and 100 (4%) rated it between 0 and 6, resulting in a NPS of 80% (Promoters at 84% minus Detractors at 4% equals 80%).

For questions or more information, please contact your AARP Foundation Grants Officer.

June 2021
Frequently Asked Questions (FAQs)

1. **We already collect these data from program participants, but our question wording is different. Does our question wording need to match what AARP Foundation recommends?**

   Not necessarily. Please reach out to your AARP Foundation Grants Officer to discuss the current wording of these questions. If you have all or partial demographic data from participant files (e.g., from an application for public benefits), it is appropriate to provide information about age, household size, annual/monthly household income, ethnicity, race, and gender as part of the quarterly report. However, if participants have only a portion of the demographic data in their file, they must be asked the questions that correspond to the missing information.

2. **Do these questions need to be asked in a particular order?**

   It depends, as certain questions need to be asked in order. The household size must be asked before the income question and the ethnicity question must be asked before the race question. The remaining questions may be asked in any order.

3. **Will our grant funding be jeopardized if program participants refuse to provide us with these data?**

   No. AARP Foundation is requiring that grantees providing direct services to older adults collect and report demographic data from program participants. However, we understand that not every participant will agree to respond to the questions. All participants should receive services/program offerings whether they answer the questions or not. If your organization experiences challenges in collecting the data from participants, please discuss these with your AARP Foundation Grants Officer.

4. **I am afraid we are going to offend or turn off some program participants if we ask them these questions. Do we have to ask them?**

   Yes. AARP Foundation is requiring that grantees providing direct services to older adults collect and report demographic data from program participants. Every demographic question includes an option of ‘Prefer not to answer’ which participants are free to select.

5. **How will AARP Foundation ensure that these data are protected?**

   All data provided to AARP Foundation will be confidential and stored on a secure network. AARP Foundation will not share these data with any other entity. These data will be used for program and strategy improvement.

   For questions or more information, please contact your AARP Foundation Grants Officer.