

Gathering Demographics While Maintaining Rapport

Like assessing for suicide and collaborative problem solving, gathering demographic information is also an important component of an effective crisis conversation. In this tip sheet, you'll find general guidance on how to obtain this data from callers/chat visitors/texters while maintaining a positive connection with the individual. (*Note: If your center participates in a Lifeline subnetwork or is a Lifeline grantee, please refer to the specific tip sheet for guidance on the required demographics for those arrangements.*)

Why gather demographics?

To better serve individuals reaching out for support

- **Inform your clinical approach:** Being familiar with the best practices for specific populations (age groups, ethnicities, etc.) allows you to use clinical approaches and techniques that may be more effective with this individual. Keep in mind, however, to not make assumptions about the individual based on their membership in certain groups.
- **Find the right referrals:** Some organizations limit their services to certain populations based on age, health insurance, income level, location, etc. It's important to gather this information from individuals to match them with appropriate referrals that are more likely to be useful.

Required by funders

- Oftentimes, funders require centers to collect certain information from individuals. These may include the Lifeline (such as centers with a subnetwork agreement or grantees) and/or local stakeholders.
- Your center may have different data collection expectations for different programs (ex: calls vs. chat, local lines vs. the Lifeline). Ensure you understand the differing requirements. (*Note: Your center's leadership should discuss any potential conflicts between Lifeline's requirements/guidance and a funder's requirements with Lifeline staff.*)

Creates a proactive approach

- The more you learn about your "typical" callers/chat visitors/texters, the more proactive your center can be in serving them. By collecting demographic information, you can support these populations through:
 - Implementing trainings to teach crisis counselors skills needed for effective interactions
 - Researching applicable local agencies and adding these to your referral database
 - Identifying individuals and groups to outreach
 - Creating partnerships with local agencies that also serve these groups
 - Reaching out to underserved populations

Principles of demographic gathering

- Gathering demographics should not get in the way of safety. If an individual is in the process of an attempt and/or is at Imminent Risk, focus on safety.
- You will likely have information that is marked as "mandatory" to collect in your documentation. These pieces of information are important to always attempt to collect (barring any immediate safety issues that take precedence); some will be ok to ask directly and others should only be gathered if relevant to the conversation.
- It's important to remember that the individual should always be allowed to decline to answer any demographic question, even a "mandatory" one and still receive the same level of service from the crisis center.
- Most demographic information should only be collected if it's clinically appropriate. If an individual doesn't naturally disclose the information and it does not seem pertinent to supporting them/their safety, respect their boundaries.

What data to gather

Some common demographics that your center may report on include:

- Age
- Race/ethnicity
- Gender identity
- Transgender status
- Zip code and/or county
- Veteran status
- Loved one's veteran status
- Income level
- Preferred language
- How individual heard about the Lifeline

Overcoming fears

It's common for crisis counselors to experience anxiety around asking for demographics. They may worry it will be awkward, will offend the individual, and/or disrupt the flow of the conversation. However, more often than not, the crisis counselor is more worried about this than the individual is, who oftentimes will give their information freely if appropriate rapport has been built. Below you will find techniques to improve this process while keeping the individual engaged. Much like other components of crisis counseling, with practice it will become easier and feel more natural.

Strategies for Gathering Demographics

An individual may disclose bits of demographic information organically throughout the conversation. If they do not (and it's needed for a specific reason), it may be helpful to explain the purpose of asking these questions rather than just asking them at random with no follow up. If an individual knows that disclosing information will ultimately benefit them, they may be more forthcoming. Be sure to follow up with relevant questions/reflections about what they disclose.

During the conversation

Ideally, crisis counselors weave questions about demographics into the conversation.

- *"You mentioned that she doesn't understand how you're feeling because she doesn't remember how it was when she was this age. Would you mind if I asked you how old you are?"*

When providing referrals

Explain how it's easier to find appropriate referrals on the first try if you have certain demographics.

- *"I'm going to look and see if there are some resources for that in your area. Before I do that, can I ask you a few questions to make sure I find resources that may be a good fit for you?"*

At the end of the crisis conversation

Once an individual has deescalated and you are wrapping up a call/chat/text, it may be appropriate to gather additional information for reporting purposes.

- *"I appreciate you sharing with me tonight, and I'm glad you have a plan to move forward. Before we end this (call/chat/text), would it be ok if I ask you just a few questions about yourself? It helps us better prepare for serving those who reach out to us."*

At the beginning of the crisis conversation

Asking demographic questions at the beginning of a conversation is allowed but not generally preferred. Although centers may gather more information this way, it can create a barrier to building rapport and may lead to disconnects.

- *"I definitely want to hear what's going on, but before we get started would you mind answering some quick questions for me? Please know that you do not have to answer any of them if you do not feel comfortable doing so, but they might help me better serve you. Would that be okay?"*

Note for Chat/Text conversations

If you're soliciting more than one piece of demographic information, it's best to ask them all in one message – after building rapport and safety-assessing – with an acknowledgement that it's ok to not answer some or all of them. Since text-based interactions take longer, this allows you to move more efficiently through this step and focus on supporting the person in crisis.

Examples for Gathering Demographics

| | |
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| Age | <p>"You said you were in (xyz grade or organization). Can I ask how old you are?"</p> <p>"May I ask your age please?"</p> |
| Race/Ethnicity | <p>"You mentioned that your family just doesn't get it and it's a 'cultural' thing... Would you mind if I ask what your ethnic background is?"</p> |
| Gender identity | <p>"Thanks for sharing how you're feeling with me. Let's explore that some more. My name is (name/alias) and I go by (she/her) pronouns."</p> <p>"Could you please tell me what gender you identify with?"</p> |
| Transgender status | <p>"I heard you mention (xyz). Would you mind sharing whether you identify as transgender?" <i>(Only ask if clinically appropriate.)</i></p> |
| Zip code and/or county | <p>"You mentioned that you were in [city], are you in [county]?"</p> <p>"Do you feel comfortable sharing your zip code/county?"</p> |
| Veteran status | <p>"Have you ever served in the military?"</p> |
| Loved one's veteran status | <p>"You mentioned (xyz). Does that mean your (loved one) was in the military?"</p> |
| Income level/health insurance status | <p>"This agency (food pantry, utility assistance, etc.) only serves people without insurance/under a certain income level. Would you be comfortable disclosing (whether you have health insurance) (your approximate annual income)?"</p> |
| Preferred language | <p>"What language do you prefer to communicate in?"</p> |
| How they heard about the Lifeline | <p>"Would you mind sharing how you heard about our number/line/the Lifeline?"</p> |