

Making your evaluation inclusive: **A practical guide for evaluation research with lesbian, gay, bisexual, transgender, and queer (LGBTQ) people and communities**

**American Evaluation Association
Conference 2015**

Nov 12th, 2015

Introductions

- **Laura Adams**, USAID Center of Excellence on Democracy, Human Rights and Governance
- **Emily Greytak**, GLSEN (Gay, Lesbian & Straight Education Network)
- **Efrain Gutierrez**, FSG

Lesbian, Gay, Bisexual, and Transgender (LGBT) Issues TIG

- Promotes better understanding of LGBT issues
- Develops and sponsors LGBT-focused conference programs
- Provides support and guidance for evaluators working with LGBT related issues
- Further enhances and supports the diversity efforts within AEA and our profession

Lesbian, Gay, Bisexual, and Transgender (LGBT) Issues TIG

Get involved!

- Join the LGBT Issues TIG
- Attend TIG-sponsored conference sessions
 - Tomorrow Friday from 3:30 pm to 6:15 pm at McCormick Room
- Submit session to TIG for 2016 conference
- Come to business meeting or social
 - Business meeting today at 6:20 pm, Dusable Room
 - Diversity TIGs social at 8:30 pm at Moe's Cantina (155 W Kinzie St)

Ground Rules

- 1 Listen actively and do not interrupt if someone is speaking

- 2 What is said here, stays here; What is learned here leaves here

- 3 No one knows everything; together we know a lot

- 4 Notice your experience, emotions and feelings

- 5 Speak from the I not for the group

- 6 We cannot be articulate all the time

- 7 Expect and accept a lack of closure

Agenda

Time	Activity
3:00 pm – 3:15 pm	Introduction
3:15 pm – 3:25 pm	LGBTQ Issues in Our Work: Building an Understanding of Issues Affecting Our Community
3:25 pm – 3:45 pm	Understanding and Using Proper Terminology
3:45 pm – 4:05 pm	Identifying LGBTQ People in Evaluation Research: What, When, & How to Ask
4:05 pm – 4:30 pm	Q&A

1 Introduction

2 LGBTQ Issues in Our Work

3 Terminology

4 Identifying LGBTQ People in
Evaluation Research

5 Q&A

There Are Three Topics Evaluators Should Be Aware of When Engaging with the LGBTQ Community

1. The LGBTQ community replicates patterns of sexism, racism, and classism prevalent in our society
2. The diversity of voices within the LGBTQ community is not usually represented in the movement
3. The issues concerning the LGBTQ community are broader than marriage or HIV

There Are Some Initial Steps You Can Take to Improve Your Work with LGBTQ Communities

- Be open and prepared to discuss different social issues when engaging with members of our community LGBTQs
- Account for the “multiplier” effect. Consider the broad range of social issues affecting the recipients of the program you are evaluating
- Consider the different voices of the LGBTQ community in your evaluation and reach out to queer people of color, trans folks, and other members of our community that are not typically represented in focus groups and interviews

1 Introduction

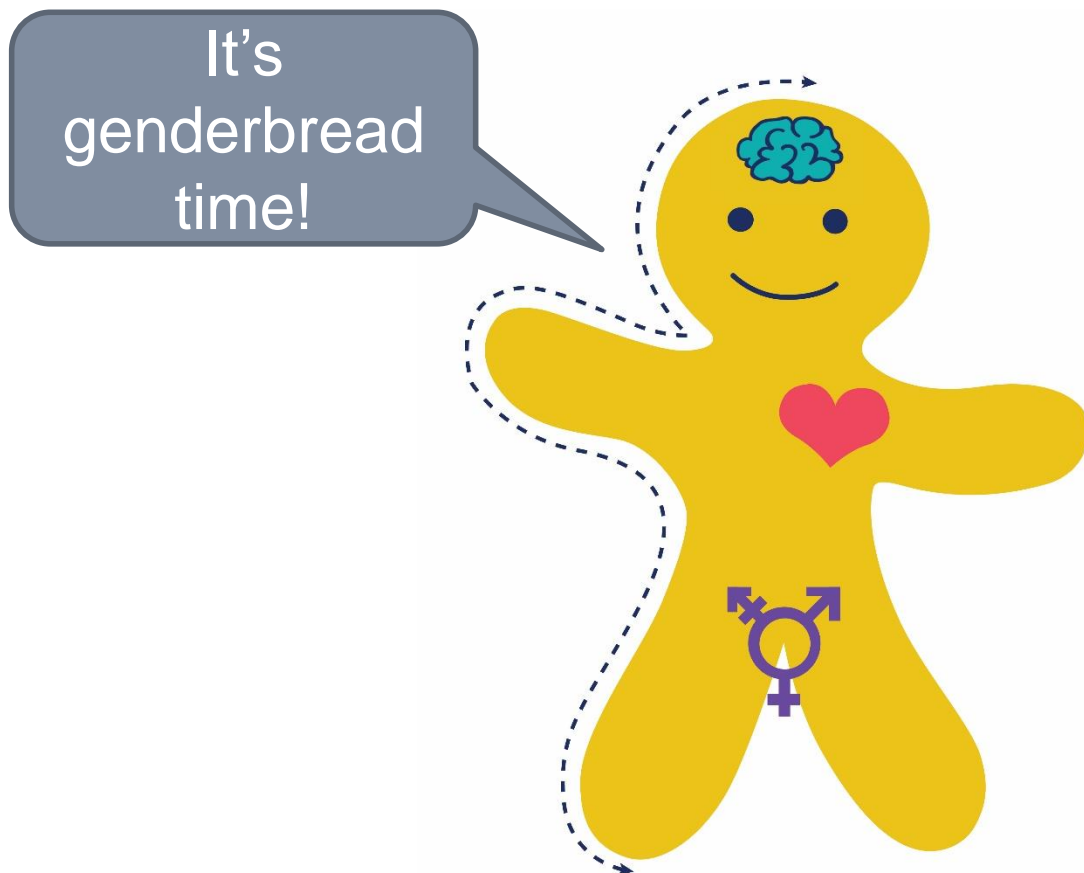
2 LGBTQ Issues in Our Work

3 Terminology

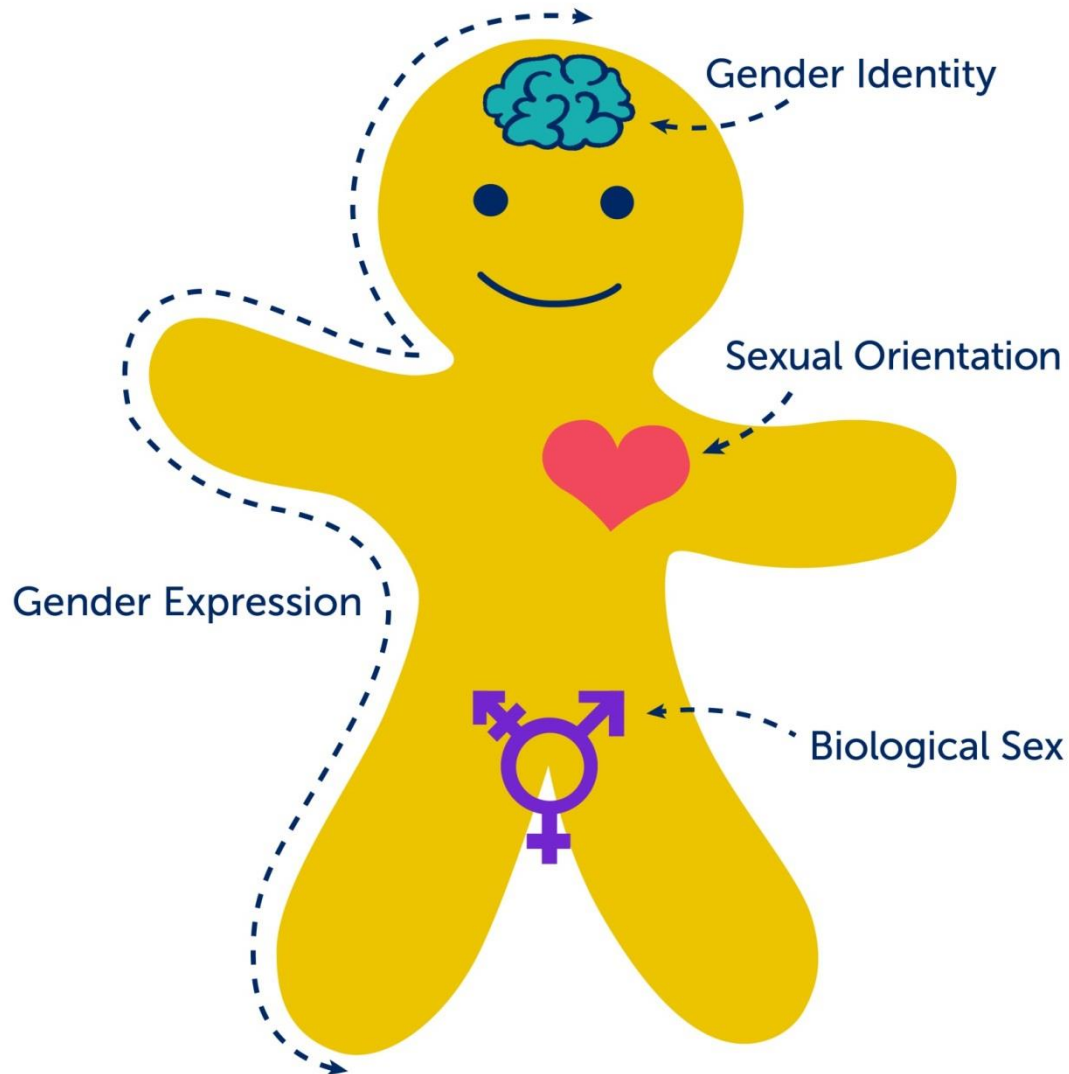
4 Identifying LGBTQ People in
Evaluation Research

5 Q&A

Terminology: Getting Comfortable!



The (surprisingly controversial!) “Genderbread” Person



Sex and biology

Sex is a medical term used to refer to the chromosomal, hormonal, and anatomical characteristics that are used to classify an individual as female or male or intersex.



Intersex: a general term used for a variety of conditions in which a person is born with a reproductive or sexual anatomy that doesn't seem to fit the typical definitions

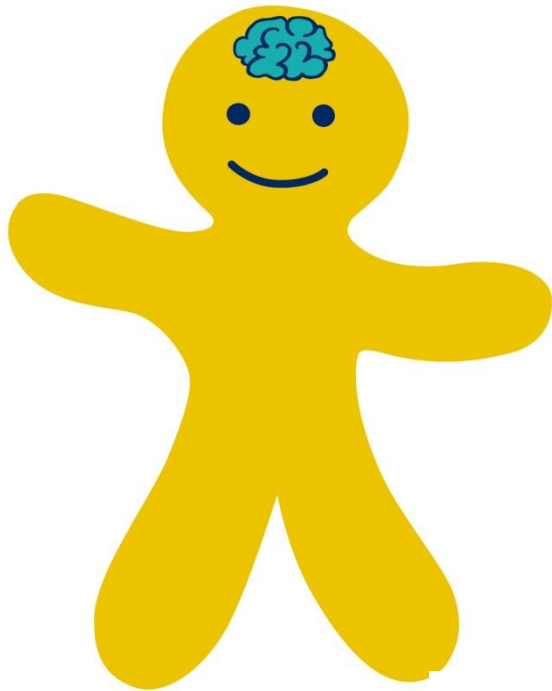


Intersex health, legal and research implications



Gender Identity

A person's deeply felt internal and individual experience of gender, which may or may not correspond with the sex assigned at birth.



Transgender: an umbrella term referring to an individual whose gender identity is different from their sex assigned at birth

Cisgender: an individual whose gender identity is the same as their sex assigned at birth



Terminology: Sexual Orientation

The enduring emotional, romantic, or sexual attraction a person experiences to men, women, both, or neither.



Heterosexuality

Homosexuality

Bisexuality

Asexuality

Asexual!!



Sexual Orientation



Heterosexual

Homosexual

Gender Expression

The external display of one's gender, through a combination of appearance, disposition, social behavior, and other factors, generally measured on a scale of masculinity and femininity.



Gender norms: A culturally-defined set of roles (economic, social, and political roles), responsibilities, rights, entitlements and obligations, associated with being female and male, as well as the power relations between and among women and men, boys and girls.





Challenge Questions:

- What criteria are necessary to qualify as a transgender man? What would be the proper pronoun (he or she) for the person?
- In an evaluation of the provision of care for survivors of gender-based violence, should you interview lesbians? How about transgender women? A transgender men?
- Have you ever heard the term MSM? Why do people use this term instead of gay or homosexual?

Applying SOGIE terminology in evaluation practice

- SOGIE = sexual orientation, gender identity, and expression
- Individual exercise:
 - Look at the terminology sheet and pick one term that you think would be most useful in your evaluation work or might help you approach something differently in your work
 - In a few sentences, reflect on how you would use this term to refine your measurement, to sample differently, etc.
 - 3-5 people will share with the larger group the term that they chose and how they might use it

Key Takeaways

1. Everyone has a sex, gender expression, gender identity, and sexual orientation. None of these is an either/or binary and the mixture naturally varies from person to person.
2. It is important to understand that terms and concepts related to SOGIE vary across cultures and that respectful research likely needs to be designed inductively.
3. Be cognizant of common myths regarding gender non conforming persons and be ready to question measurement and research design accordingly.

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4 Key Questions

- What do you want to assess?
 - Sexual orientation
 - Gender constructs
- What is your sample?
 - LGBTQ specific or general population?
 - Age range?
- What are your measurement options/limitations?
 - Select all?
 - Open ended “branches”?
 - Click or prompt definitions?
 - How many questions?
- What can do you with it? (analysis considerations)
 - Capacity
 - Expertise
 - Use

What do you think?

HomeTweet

LGBT(Q) Equality Survey

100%

All responses are completely confidential.
Thank you for your valuable feedback.

29. How would you describe your sexual preference/gender identity?

- ☐ Gay
- ☐ Lesbian
- ☐ Bisexual
- ☐ Transgender
- ☐ Questioning (Unsure)
- ☐ Straight
- ☐ Other



What did respondent think?



Measurement Guidelines: Items Should....

- Not be stigmatizing or troublesome to LGBTQ people
- Not conflate sexual orientation and gender
- Allow for those who do not identify at LGBTQ or straight and those who do not identify as male, female, and/or transgender
 - Multi-check
 - “Some other identity” write-in
- Be understandable
 - Definition (i.e., of transgender)
 - Reading level

MEASURES: SEXUAL ORIENTATION

Sexual Orientation

- What do you want to assess?
 - Identity?
 - Attraction?
 - Behavior?

Sexual Identity: Sample Adult Measure

- *Self-identification: how one identifies one's sexual orientation (gay, lesbian, bisexual, or heterosexual)*

Recommended Item: Do you consider yourself to be:

- a) Heterosexual or straight;
- b) Gay or lesbian; or
- c) Bisexual?

Sexual Identity: Sample Adult Measure

Do you think of yourself as:

- a. Gay or lesbian*
- b. Straight, that is not gay or lesbian*
- c. Bisexual*
- d. Something else*
- e. Not sure*

- Could have gender-specific response options
- Branching option for responses *d* & *e*
 - Allows you to meaningfully categorize those respondents

Sexual Identity: Sample Youth Measure

- Which of the following best describes you?
 - A. Heterosexual (straight)
 - B. Gay or lesbian
 - C. Bisexual
 - D. Not sure

Sexual Identity: Sample LGBTQ Youth Measure

- How would you describe yourself? (check all that apply)
 - ☐ Heterosexual or Straight
 - ☐ Gay
 - ☐ Lesbian
 - ☐ Bisexual
 - ☐ Queer
 - ☐ Pansexual
 - ☐ Questioning
 - ☐ Something Else (please describe: _____)

Sexual Behavior: Sample Adult Measure

- *Sexual behavior: the sex of sex partners (i.e. individuals of the same sex, different sex, or both sexes).*

Recommended Item: In the past (time period e.g. year) who have you had sex with?

- a) Men only,
- b) Women only,
- c) Both men and women,
- d) I have not had sex

Sexual Behavior: Sample Youth Measure

During your life, with whom have you had sexual contact?

- A. I have never had sexual contact
- B. Females
- C. Males
- D. Females and males

Sexual Attraction: Sample Adult Measure

- *Sexual attraction: the sex or gender of individuals that someone feels attracted to.*

Recommended Item:

People are different in their sexual attraction to other people. Which best describes your feelings? Are you:

- a) Only attracted to females?
- b) Mostly attracted to females?
- c) Equally attracted to females and males?
- d) Mostly attracted to males?
- e) Only attracted to males?
- f) Not sure?

Source: SMART. (2009). *Best Practices for Asking Questions about Sexual Orientation on Surveys*. Williams Institute. Los Angeles, CA.

Sexual Attraction: Sample Youth Measure

2-items:

Q1. “Have you ever had a romantic attraction to a female?”

Q2. “Have you ever had a romantic attraction to a male?”

MEASURES: SEX/GENDER

Gender Constructs

- What do you want to assess?
 - Gender Identity?
 - Transgender Status?
 - Gender Expression?

A “Sex” Sidebar

Assessing Sex (e.g. male, female)

- What do you want to know? (and why?)
 - Birth sex
 - Could/should include intersex (consider definition)
 - Assigned sex
 - Binary only
 - Don’t include intersex
 - Not “biological sex”
 - Gender
 - This isn’t sex, but gender identity

What is [OR: how would you describe] your sex?

- Male
- Female
- Intersex/Ambiguous

What is your assigned sex (what the doctor put on your birth certificate?)

- Male
- Female

What is your gender? (check all that apply)

- ☐ Male
- ☐ Male [or Man/Boy]
- ☐ Female
- ☐ Female [or Woman/Girl]
- ☐ Transgender
- ☐ Another gender not listed

Gender Identity/Transgender Status: Sample Adults Measure

1. TRANSGENDER/CISGENDER STATUS VIA THE “TWO-STEP” APPROACH

When two demographic items can be added to an adult survey (or, in most instances, a standing measure of sex replaced and a measure of current gender identity added), we recommend including measures of self-reported assigned sex at birth and current gender identity. Testing shows that the “two step” approach appears the most likely to have high sensitivity, as well as high specificity, with adults. It is unclear whether assigned sex at birth should precede or follow current gender identity on population-based surveys; future studies should investigate ordering effects.

RECOMMENDED MEASURES FOR THE “TWO-STEP” APPROACH:

ASSIGNED SEX AT BIRTH

What sex were you assigned at birth, on your original birth certificate?

- ☐ Male
- ☐ Female

CURRENT GENDER IDENTITY

How do you describe yourself? (check one)

- ☐ Male
- ☐ Female
- ☐ Transgender
- ☐ Do not identify as female, male, or transgender

PROMISING MEASURE FOR THE “CURRENT GENDER IDENTITY” STEP IN THE “TWO STEP” APPROACH (RECOMMENDED FOR FURTHER TESTING):

CURRENT GENDER IDENTITY

What is your current gender identity? (Check all that apply)

- ☐ Male
- ☐ Female
- ☐ Trans male/Trans man
- ☐ Trans female/Trans woman
- ☐ Genderqueer/Gender non-conforming
- ☐ Different identity (please state): _____

Source: GenIUSS Group. (2014). *Best Practices for Asking Questions to Identify Transgender and Other Gender Minority Respondents on Population-Based Surveys*. Williams Institute. Los Angeles, CA.

Transgender Status – Adult Measure

RECOMMENDED MEASURE FOR SINGLE-ITEM TRANSGENDER/CISGENDER STATUS APPROACH:

Some people describe themselves as transgender when they experience a different gender identity from their sex at birth. For example, a person born into a male body, but who feels female or lives as a woman. Do you consider yourself to be transgender?

- ☐ Yes, transgender, male to female
- ☐ Yes, transgender, female to male
- ☐ Yes, transgender, gender non-conforming
- ☐ No

Note—Additional information for telephone interviewer if asked about definition of transgender:

Some people describe themselves as transgender when they experience a different gender identity from their sex at birth. For example, a person born into a male body, but who feels female or lives as a woman would be transgender. Some transgender people change their physical appearance so that it matches their internal gender identity. Some transgender people take hormones and some have surgery. A transgender person may be of any sexual orientation – straight, gay, lesbian, or bisexual.

Note—Additional information for interviewer if asked about definition of gender non-conforming:

Some people think of themselves as gender non-conforming when they do not identify only as a man or only as a woman.

Gender Identity – LGBTQ Youth Measure

How would you describe your gender? (check all that apply)

- ☐ Male
- ☐ Female
- ☐ Transgender
- ☐ Transgender Male-to-Female
- ☐ Transgender Female-to-Male
- ☐ Genderqueer
- ☐ Something Else (please describe: _____)

Transgender Status – Youth Measure

When a person's sex and gender do not match, they might think of themselves as transgender. Sex is what a person is born. Gender is how a person feels. Which one response best describes you?

- I am not transgender
- I am transgender and identify as a boy or man
- I am transgender and identify as a girl or woman
- I am transgender and identify in some other way

Sex is what a person is born. Gender is how a person feels. When a person's sex and gender do not match, they might think of themselves as transgender. Are you transgender?

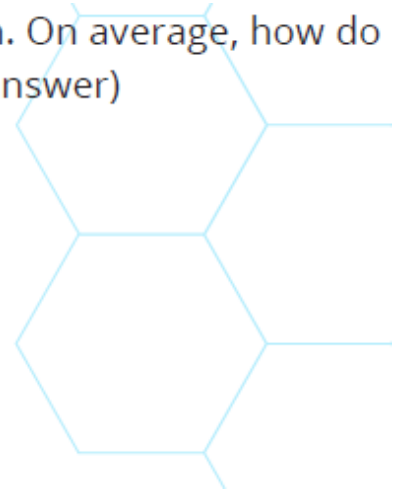
- No
- Yes
- Not sure

Gender Expression –Adult Measure

- Pair with assigned sex measure

A person's appearance, style, or dress may affect the way people think of them. On average, how do you think people would describe your appearance, style, or dress? (Mark one answer)

- ☐ Very feminine
- ☐ Mostly feminine
- ☐ Somewhat feminine
- ☐ Equally feminine and masculine
- ☐ Somewhat masculine
- ☐ Mostly masculine
- ☐ Very masculine



A person's mannerisms (such as the way they walk or talk) may affect the way people think of them. On average, how do you think people would describe your mannerisms? (Mark one answer)

- ☐ Very feminine
- ☐ Mostly feminine
- ☐ Somewhat feminine
- ☐ Equally feminine and masculine
- ☐ Somewhat masculine
- ☐ Mostly masculine
- ☐ Very masculine

Gender Expression – Youth Measure

- Pair with assigned sex measure (*ideally*)
- A person's appearance, style, dress, or the way they walk or talk may affect how people describe them. How do you think other people at school would describe you?
 - A. Very feminine
 - B. Mostly feminine
 - C. Somewhat feminine
 - D. Equally feminine and masculine
 - E. Somewhat masculine
 - F. Mostly masculine
 - G. Very masculine

Additional Considerations with Youth

- **Parental Consent/IRB Issues**

May be able to advocate to waive parental consent, or obtain passive consent

- **Influences of Data Collection Site**

School vs home computer (private?) vs youth group

- **Fluidity of Identity/Rejection of Labels**

A priori thinking re if/how to categorize

- **“Joke” Responses**

Consider how to minimize and/or data triangulation

- **Resistance to asking LGBT-related items**

Anticipate, Advocate, Alternatives

Case Study of Putting into Practice: Oregon Dept of Public Health

- Challenge to balance reliability and respect in a statewide phone-based health survey
 - Some terms can act as “flags” that a survey or a program is inclusive (a.k.a. “What sex were you assigned at birth?”)
 - However, want to make sure language isn’t confusing to others
- General population appear to be accepting of sexual orientation and transgender items
 - Far fewer refusals than income & weight questions!

Key Resources for Measurement

- SMART. (2009). *Best Practices for Asking Questions about Sexual Orientation on Surveys*. Williams Institute. Los Angeles, CA.
- GenIUSS Group. (2014). *Best Practices for Asking Questions to Identify Transgender and Other Gender Minority Respondents on Population-Based Surveys*. Williams Institute. Los Angeles, CA.
- Reisner, S. L., Conron, K. J., Baker, K., Herman, J. L., Lombardi, E., Greytak, E. A., ... & Matthews, A. K. (2015). "Counting" Transgender and Gender-Nonconforming Adults in Health Research Recommendations from the Gender Identity in US Surveillance Group. *TSQ: Transgender Studies Quarterly*, 2(1), 34-57.
- Bradford, J. B., Sean Cahill, S., Grasso, C., & Makadon, H.J. (2012). *How to Gather Data on Sexual Orientation and Gender Identity in Clinical Settings*. The Fenway Institute. Boston, MA.
- Wilber, S. (2013). *Guidelines for Managing Information Related to the Sexual Orientation & Gender Identity and Expression of Children in Child Welfare Systems*. Putting Pride Into Practice Project, Family Builders by Adoption, Oakland, CA.
- National Resource Center on LGBT Aging. (2013). *Inclusive Questions for Older Adults A Practical Guide to Collecting Data on Sexual Orientation and Gender Identity*. SAGE and the National Resource Center on LGBT Aging.

Questions?

Thank you so much for your participation!

Feel free to contact us with any further questions!

- Laura Adams: lauraadams.1967@gmail.com
- Efrain Gutierrez: efrain.gutierrez@Fsg.org
- Emily Greytak: emily.greytak@glsen.org