Call for comment on the consultation draft of a

Guide to identifying the sexual orientation, gender identity, and sex characteristics of clients in development and humanitarian settings.

Outright International has developed this pilot guide to help staff of local development and humanitarian organizations create systems to collect data about the sexual orientation, gender identity and sex characteristics of their clients. There are no global standards and only a partial scientific consensus on how to collect such data. Accordingly, Outright International is asking those with expertise in data collection, development, and humanitarian programs, and LGBTIQ populations to review this guide and provide feedback. After feedback is received, Outright International will undertake appropriate steps to finalize and publish this guide.

After reviewing the attached consultation draft, please provide feedback on any aspect of the guide. The comment period is open **until June 30, 2024**. By using the following link, you can type your comments into the response fields or you can upload a separate document: https://www.surveymonkey.com/r/OutrightClientID.

When reviewing the consultation draft, please keep in mind the intended audience for this guide, as set out in the introduction. This guide is intended to be used by development and humanitarian projects providing services and support such as health clinics, psycho-social support for refugees, livelihood projects, or agricultural cooperatives. Organizations using this guide will probably already have systems in place to collect basic demographic data such as age and gender. This guide is not intended to be used by researchers or to construct large-scale surveys. Though government programs or organizations primarily serving LGBTIQ populations may find this guide informative, it is not meant primarily for them.

If you have any questions, please feel free to contact Andrew Park, Senior Advisor for Inclusive Development, Outright International, who is the primary author of the guide and is managing this project. He can be reached at apark+clientid@outrightinternational.org.

Guide to identifying the sexual orientation, gender identity, and sex characteristics of clients in development and humanitarian settings.

CONTENT

1. Introduction.

A. Is this guide for you?

This guide is for staff of development and humanitarian organizations operating at the community level who want to understand the sexual orientation, gender identity, and sex characteristics of adults they serve and interact with. This might include, for example, an organization that provides psychosocial support to refugees, a microfinance program for women entrepreneurs, or a transitional justice project that documents conflict-related sexual violence. This guide uses the term clients to refer to those adults, though others may use terms such as participants, beneficiaries, consumers, or constituents. This guide will help you craft questions that you can ask clients about their sexual orientation, gender identity and/or expression, and sex characteristics (SOGIESC).

This document is not intended as a guide to collecting medical or legal information, for collecting data through large-scale population surveys, or for collecting data in human subject research settings.

B. Why collect data?

Inclusive development goals can only be achieved if development and humanitarian efforts reach all people. Lesbian, gay, bisexual, transgender, intersex and queer (LGBTIQ) people have unique needs, some of which arise from the exclusion and discrimination they face in life and in attempting to access development and humanitarian programs. Understanding clients' SOGIESC can help organizations improve their ability to meet these needs. Without organizational standards for asking questions, data collectors or interviewers may rely on their own perceptions of clients to categorize people. This practice can lower the validity (truthfulness) of data. The process of asking all clients about their SOGIESC helps staff get to know their clients better.

C. What you need before you begin.

1. Protections for privacy, safety, and dignity.

Because LGBTIQ people face stigma and discrimination, information on SOGIESC can be used in ways that cause harm to LGBTIQ people. Outright International recommends that **unless certain conditions can be met, non-governmental organizations should not collect data** about the SOGIESC of people in situations where there is a high level of social stigma, hostile legal norms (such as laws criminalizing same-sex acts and forms of gender expression), and/or a lack of legal protections against discrimination. In such situations, data should only be collected if the NGO can ensure that the collection, storage, and use of the data does not create unacceptable risks to the safety, privacy, and dignity of any individual or organization. Local LGBTIQ community organizations are often in the best position to provide an informed assessment of such risks. You should carefully consider any data collection effort that does not have the support of local LGBTIQ organizations.

Be sure that you are able to comply with legal, ethical, and organizational standards governing the collection, storage, and use of data. These standards might be found in the following:

- Your organization's personnel policies about access, use, storage, and retention of personal data.
- Relevant data protection laws and regulations.
- Professional and ethical guidance of relevant professional associations.
- Requirements of funders and institutional review boards.

2. Supportive organizational leadership.

An effective data collection system requires the support and participation of many people in the organization. Supportive leadership is essential to ensuring that relevant policies are in place, staff are sufficiently trained, and all members of the organization are accountable to the needs of LGBTIQ clients.

3. Already-existing data collection systems.

We assume that those using this guide already have mechanisms in place to collect and store information about other demographic and personal characteristics such as name, age, gender, and other traits. If possible, we recommend integrating the collection and storage of

SOGIESC data into those systems rather than creating a separate system. Accordingly, this guide does not recommend specific, new methods of record-keeping, data storage, or use.
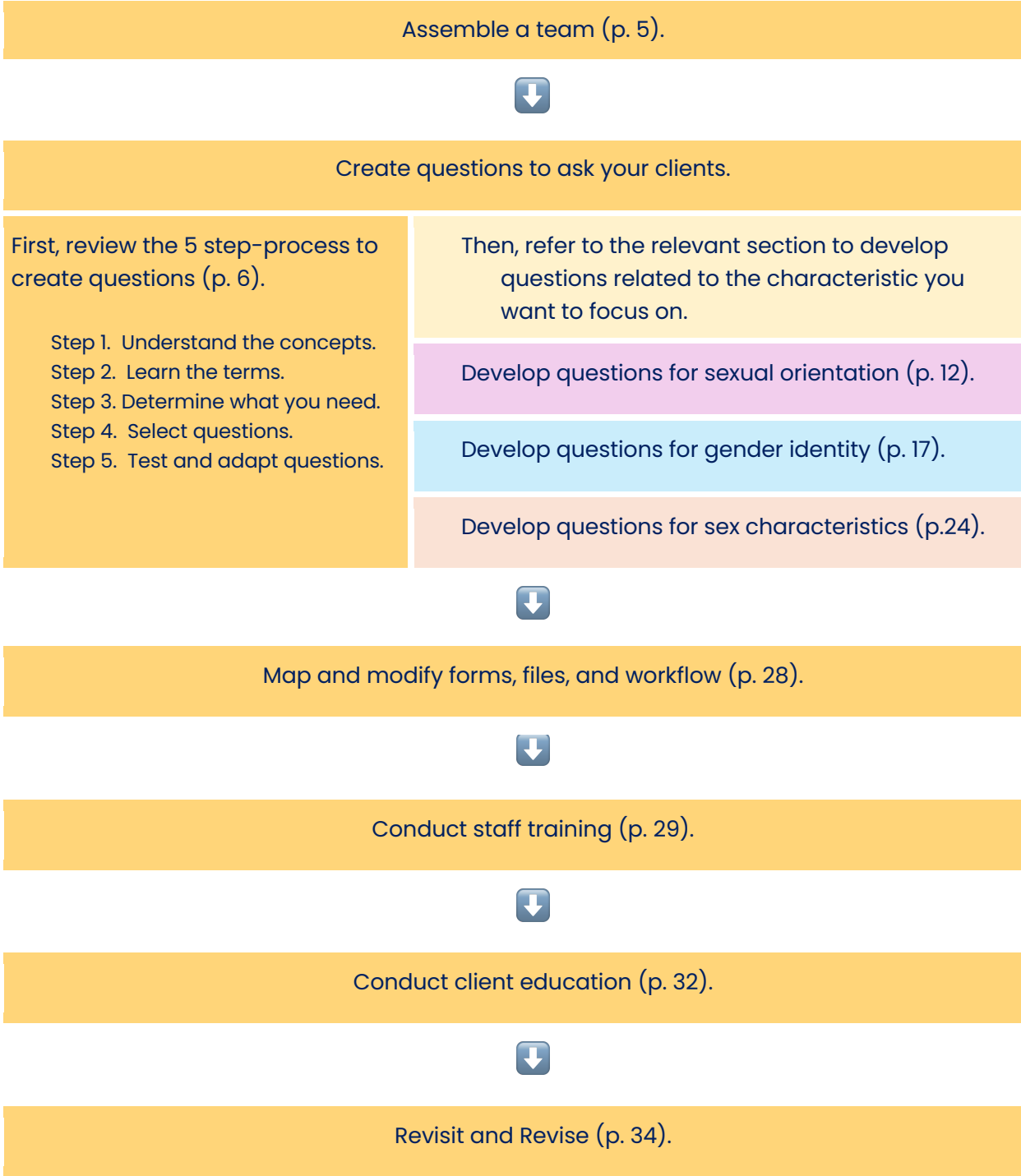
4. An organizational relationship with local LGBTIQ groups.

Creating systems to collect data about LGBTIQ people will require expertise about local LGBTIQ populations. Partnering with local LGBTIQ groups is one way to acquire this knowledge. Keep the following in mind when reaching out to LGBTIQ groups:

- LGBTIQ civil society organizations exist in nearly every country where there is an open and active civil society. You may encounter those who believe that LGBTIQ civil society does not exist in countries where there are laws criminalizing same-sex sexual activity and/or certain types of gender expression. This belief is simply untrue and should not derail your efforts to work with LGBTIQ groups.
- Groups may be small, sometimes unregistered, and operating on very little funding. Accordingly, you may need to be flexible if your organization only partners with groups that have some sort of official status or a certain level of organizational capacity.
- The most effective forms of engagement usually involve formal and remunerated partnerships. Consider entering into a consultation relationship with LGBTIQ groups or individuals with lived experience.
- LGBTIQ groups can provide expertise on a number of issues:

  - Local terminology used to describe people with variations of sexual orientation, gender identity and sex characteristics.
  - The development and humanitarian needs of local LGBTIQ communities.
  - Expertise when assessing risks of harm associated with activities involving LGBTIQ people and other stigmatized populations.
  - Experience devising measures to mitigate and avoid risks.
  - Suggestions about how your organization can be more inclusive of LGBTIQ people.

D. How to use this guide.

This guide is designed to lead you through a sequence of tasks as follows:

Assemble a team (p. 5).

⬇️

Create questions to ask your clients.

First, review the 5 step-process to create questions (p. 6).

Then, refer to the relevant section to develop questions related to the characteristic you want to focus on.

Step 1. Understand the concepts.
Step 2. Learn the terms.
Step 3. Determine what you need.
Step 4. Select questions.
Step 5. Test and adapt questions.

Develop questions for sexual orientation (p. 12).

Develop questions for gender identity (p. 17).

Develop questions for sex characteristics (p.24).

⬇️

Map and modify forms, files, and workflow (p. 28).

⬇️

Conduct staff training (p. 29).

⬇️

Conduct client education (p. 32).

⬇️

Revisit and Revise (p. 34).

2. Begin by assembling a team.

The first step in establishing a data collection system is assembling a team of staff members who are committed to LGBTIQ inclusion. Your team will be responsible for creating the data collection tools suggested in this guide, staff training, and client education. Your team should include staff who are likely to come into contact with clients (front desk/reception), staff who handle any client databases and reporting to headquarters and funders, local language speakers, and program leadership. In addition, your team should meet with LGBTIQ people in the community who represent diverse sexual orientations, gender identities, and sex characteristics as well as other forms of diversity (different language groups, rural vs. urban, etc).

3. Develop questions to ask your clients.

A. Review the 5-step process.

This section lays out a five-step approach to creating questions that you can use when seeking information about your client's SOGIESC.   First, review the five-step approach laid out here.   Then turn to the appropriate section below to develop questions related to the characteristic you are most interested in:

Step 1
Five-step approach

Understand the concepts

Everyone on the team should have a common understanding of sexual orientation, gender identity, and sex characteristics.

- Every person has a sexual orientation, a gender identity, and sex characteristics.
- Humans are very diverse.   Variations in sexual orientation, gender identity, and sex characteristics can be found in all populations in the world throughout history.
- A person's characteristics in one dimension of sexuality or gender do not dictate characteristics in another. For example, a man who has sex with other men may identify as heterosexual or homosexual. Similarly, a transgender woman may identify as straight, bisexual, or lesbian.
- Sexual orientation and gender identity are fluid and can change throughout a person's life. Similarly, individuals may not learn they were born with an intersex variation until later in life.
- Some people may manage their sexual orientation, gender identity, and sex characteristics by disclosing in one context but not in another, such as when someone is open at home but not at work.

Step 2
Five-step approach

Learn the terms

Familiarize yourself with the terms used in the populations that you serve to refer to people with different sexual orientations, gender identities, or sex characteristics. These terms differ from culture to culture. Rather than the terms gay, lesbian, bisexual, and transgender, many people refer to themselves using other contemporary terms (e.g., queer, non-binary, Tongzhi) or traditional terms (e.g., hijra, muxes, fa'afafine). Your questions will be more effective if they use the same terms that people use to refer to themselves.

Try to establish a common, organization-wide understanding of the concepts and terms related to sexual orientation, gender identity and sex characteristics. Different staff members will probably have different levels of awareness. One method used by groups to reach a common understanding is for the group to create a list of terms, who the terms refer to, and whether the terms are derogatory. You will use this list when you draft your pilot questions. This list will also become part of your training materials.

Create a worksheet
to make a list of terms

Worksheet: List of terms	
Terms used to describe identities	Common understanding of the term

Keep in mind the very important difference between using a term as an identity and using a term as a category. A person's identity is whatever they say it is. For example, a client may refer to herself as a heterosexual. Thus, her identity is heterosexual. However, because she and another woman are in an intimate relationship and share a home, she might be included in a category called lesbian when referring to her household structure. Here, the term lesbian is used as a category, not to describe her identity. Similarly, someone who was assigned male at birth might identify as a woman, not a transgender woman. However, she might be included in a category of people called transgender for purposes of healthcare services. Thus, transgender is a term used to categorize her based on health care needs even though she does not use the term to identify herself.

Determine what you need

Think through why you want to know about the sexual orientation, gender identity, or sex characteristics of your clients.

Minimize risks and burdens.
As a general rule, if you cannot identify how the information will help your organization better meet the needs of LGBTIQ people, you should not be collecting this information. The principle of data minimization is a fundamental guideline in data privacy and protection. You should avoid creating unnecessary risks and burdens that come along with additional data collection.

Your purpose determines your needs.
Understanding the primary reason you are collecting this data will help you determine exactly what kind of data you need to collect.

- What decisions will you make using this data?
- Are you collecting this information to understand basic demographic information for its own sake?
- Will this information trigger further inquiry into issues dealing with your client's health, legal rights, family structures, or access to programs, among other things?
- Are you interested in information regarding sexual behavior, medical history, or experiences of social stigma and discrimination?
- Will this data influence the services you provide to your client?

Focus on your current clients.
Always keep in mind that the purpose of creating the data collection tools in this guide is to advance your capability to understand your clients in the context in which you interact with them. You do not need to account for every hypothetical variation in sexual orientation, gender identity, and sex characteristics that may occur. If you encounter individuals who do not fit easily into the categories that you establish, then you probably have other ways to understand and respond to their needs. If this happens frequently, then you can revise your data collection systems.

You have other tools to meet your needs.
These questions are not your only tool to gather information about your clients, and it may not be your best. You might want to gather information about them through some other type of interaction.

Step 4
Five-step approach

Select questions

In the section below, you will find sets of questions and responses related to sexual orientation, gender identity, and sex characteristics. Select a question and response set that seems most useful. You will use this question as your starting point to develop the question you will eventually use.   Keep the following considerations in mind:

- You should always provide "Prefer not to answer" as a possible response.   No client should ever be required to answer questions about their sexual orientation, gender identity, or sex characteristics.
- "I don't know" should also be a possible response.
- You are collecting data about a snapshot of a person's sexual orientation, gender identity, and sex characteristics at the time they respond to your questions. Sexual orientation and gender identity may change over time. While a person's sex characteristics are likely to remain unchanged (unless changed medically or surgically), an intersex person's awareness of their sex characteristics will in many cases change over time.

Step 5
Five-step approach

Test and adapt your questions

You should assess each question you selected using the tests below to make sure it is appropriate for your needs, your organization, and the populations with which you work. These tests reflect common standards used to ensure that respondents understand what they are being asked and that they are able to provide an accurate response.

Gather your team together to review the questions you selected. If needed, bring in additional people to make sure your discussions include LGBTIQ and non-LGBTIQ people of different ages and backgrounds in your discussions. Using your best subjective judgment, review each question and modify them as needed to make sure they pass each of the following tests:

TEST ONE: Elicit needed information.
Do the questions elicit the information you need? Do they accomplish the purpose?

TEST TWO: Minimization.
Are the questions too detailed? It is usually better to minimize the number and complexity of potential responses.

TEST THREE: Familiarity to LGBTIQ people.
Do your LGBTIQ clients understand what they are being asked? Does the question use terms that are relevant to local identities?

TEST FOUR: Familiarity to non-LGBTIQ people.
Do your non-LGBTIQ clients understand what they are being asked? Does the question use terms that are familiar to your non-LGBTIQ clients?   If most of your clients are cisgender, heterosexual, and endosex (non-intersex), then it is important that those groups understand the terms you are using. Incorrect answers from just a few of your non-LGBTIQ clients could introduce a high rate of errors to your data.

TEST FIVE: Best way to ask.
Do you want to prime the questions by adding a sentence about why you are asking them? *Example*: We have begun asking all our clients about their sexual orientation, gender identity, and sex characteristics so we can better serve everyone who comes to us.   I can explain what these terms mean if you have questions, or you can choose not to answer. Can you tell me about yourself?

When someone is asked a question on a survey or in an interview, they go through several cognitive steps to understand and answer the question. The tests suggested in this guide are based on what we know about these cognitive steps.

Comprehension.
Clients first comprehend what they are being asked. To increase comprehension, surveys should use familiar terms

Retrieval.
Clients then check their memory and knowledge to retrieve information relevant to the question. Use questions that prompt memories of events, time periods, and experiences.

Judgement.
Clients exercise judgment about whether the information they have retrieved fits the question and how they can summarize the information to formulate an answer. This may be challenging for people who are unsure of their identity.

Reporting.
During this step, respondents weigh the social costs and benefits of sharing information with their interviewer. They may decide to give an answer that is socially desirable or avoids embarrassment, or involves low levels of risk.   You can have them answer without an interviewer (hand them a form and ask them to fill it out themselves), prime the response by telling them why you are asking them the questions ("The information will assist me…"), assuring them that "there are no right or wrong answers," and explaining how the information the provide will be used.

B. Develop questions.

1. Develop questions for sexual orientation.

Step 1 Sexual orientation	**Understand the concepts**

Sexual orientation is a multi-dimensional concept.

Attraction.
The attraction component of sexual orientation relates to whether a person is attracted to people of the same gender, another gender, or all genders.

Behavior.
Behavior refers to sexual activity. Knowing the sex or gender of a person's sexual partners tells us the sexual orientation of that behavior.

Attraction

Identity.
Sexual orientation identity refers to how an individual views their own sexual orientation. Individuals express their sexual orientation identities using terms that may have specific cultural and historical significance to them and those around them.
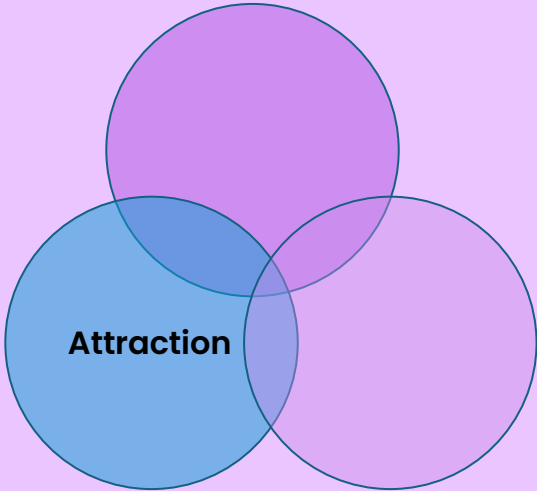
- A person's sexual orientation identity is often unrelated to their attractions and behaviors. Globally, most people who are attracted to and have sexual relations with people of the same sex identify as heterosexual.
- A person's sexual orientation identity is whatever they say it is, even if the identity does not match their attractions and behaviors. For example, it is common to find men and women who identify as straight or heterosexual even though they are attracted to, and have sex with, people of the same gender or sex.
- Not everyone agrees on what certain terms mean. If a person identifies as queer, then that is their identity even though others may think queer means something totally different. Thus, you should have a general understanding of the terms but remain flexible about how they are used.

Step 2
Sexual orientation

Understand the terms

As a group, make a list of terms used to describe different sexual orientation identities and people who identify themselves in different ways. You will use this list when you review and modify your questions. This list will also become part of your materials when you conduct staff training.

Worksheet: Sexual orientation identities
[These are examples. Create your own list and fill in your own terms]

Terms used to describe identities	Common understanding of the term
Lesbian	
Straight	
Tom (Thailand)	
Branché (Senegal)	
…	

Step 3
Sexual Orientation

What do you need?

Identify what information you need to elicit from your clients. What aspect of sexual orientation is most important? Understanding a person's sexual orientation identity might be important if you want to know about social aspects of a person's life such as the experience of stigma and exclusion in the workplace or community. Are you seeking information relevant to health, such as sexual behavior? Understanding a person's attractions may be useful in mental health settings and psycho-social support programs.

Step 4
Sexual Orientation

Select your questions

Below you will find different versions of questions related to sexual orientation.
Choose the one(s) that you think comes closest to what you need.

Sexual orientation – Attraction

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) Attracted to people of all genders;
- (e) Mostly attracted to males;
- (e) Only attracted to males;
- (a) Not sexually attracted to anyone;
- (f) Not sure;
- (g) choose not to answer.

The client's responses to this question would be combined with the client's responses to questions asking about their sex/gender to identify whether they are attracted to people of the same or different sex/gender.

Sexual Orientation – Behavior

In the past (X time interval), who have you had sex with?
Responses:
> (a) Men only;
> (b) Women only;
> (c) Both men and women;
> (d) I have not had sex;
> (e) Not sure;
> (f) choose not to answer.

The client's responses to this question would be combined with the client's responses to questions asking about their sex/gender to identify whether they have had sex with people of the same or different sex/gender.

Sexual Orientation – Identity

Do you think of yourself as: (Check all that apply) or (Please choose the option that best describes you. Currently our system allows only one option.)
Responses:
> (a) Lesbian or gay;
> (b) Straight or heterosexual;
> (c) Bisexual;
> (d) Queer;
> (e) Something else: _____;
> (f) Don't know;
> (g) Prefer not to answer.

Step 5
Sexual Orientation

Test and adapt your questions

Return to the five tests listed on page 10. Discuss each one and modify the wording in your questions accordingly.

2. Develop questions for gender identity.

Step 1
Gender Identity

Understand the concepts

In order to understand a person's gender, and how to refer to them in a respectful way, you should be familiar with the following concepts:

Sex assigned at birth.
Newly born babies are assigned a sex of male or female[1] based on their sex characteristics (such as genitals and chromosomes).

Gender Identity.
Gender is a socially constructed concept, as compared to sex, which is related to one's biology. Examples of terms individuals may use to identify their gender include female, male, transgender, transgender female, transgender male, non-binary, or as culturally specific gender identity (e.g. hijra, kathoey, fa'afafine).

Transgender/cisgender.
A person can be categorized as transgender or cisgender by comparing their sex assigned at birth to their gender.
- People whose gender is the same as the sex they were assigned at birth are referred to as cisgender, "cis" being the Latin prefix for same.
- People whose gender is different than their sex assigned at birth are referred to as transgender, "trans" being the Latin prefix for across or beyond.

People whose gender does not fit into the male-female binary are sometimes referred to as non-binary.

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[1] Though some countries have recently begun to permit the assignment of a gender to newborns that is neither male nor female, no one born under these laws has yet reached adulthood and it is not anticipated that you will encounter such a person among your adult clients.

Some transgender people identify simply as male or female. The following table sets out one possible classification of individuals according to how they identify.

Population groups according to gender identity	
Identify as Female	Cisgender -Assigned female at birth, identifies as female
	Transgender - Assigned male at birth, identifies as female
Identify as Male	Cisgender - Assigned male at birth, identifies as male
	Transgender - Assigned female at birth, identifies as male
Identify as Transgender, Non-binary, or other genders	Assigned male or female at birth -- Identifies with a gender other than male or female

Transition.
Transgender people may undergo a social transition (changing how they present themselves to others), a physical transition (surgical or medical changes to their body), and/or a legal transition (changing names and gender makers in official records). Though these different types of transitions may present issues that need to be addressed by development and humanitarian agencies, it is usually not necessary to collect information about them in initial efforts to gather basic demographic data.

Names.
Some clients use a name that is different from the one on their legal documents. You can ask clients what name they would like your staff to use when interactive with them.

Pronouns.
Pronouns are words we use to refer to someone without using that person's name. In standard English, personal pronouns are different depending on the gender of the person being referenced. Using incorrect pronouns can be very hurtful, even when unintentional. Examples of pronouns are she/her/hers, he/him/his, and they/them/theirs.

Step 2
Gender Identity

Understand the terms

As a group, make a list of terms used to describe different gender identities and people who identify their gender in different ways. You will use this list when you review and modify your questions. This list will also become part of your materials when you conduct staff training.

Worksheet: Gender identities
[These are examples. Create your own list and fill in your own terms]

Terms used to describe identities	Common understanding of the term
Woman	
Male	
Non-binary	
Fa'afafine (Pacific Islands)	
…	

Step 3
Gender Identity

What do you need?

Identify what information you need to elicit from your clients.

Gender identity.
You may decide that all you need to know is whether your client is cisgender or transgender (in this case, transgender includes non-binary). A two-step method might be sufficient. This method relies on two questions, one about the client's sex assigned at birth and a second about their gender identity. If the answers to the two questions are the same, then the client is cisgender, if they are different, then the client is transgender.

Depending on the terms you use in your questions, the two-step method may not provide detailed information about a person's gender identity. If you had more detail, would it make a difference? For example, if one client identified as non-binary, another identified as gender fluid, and another identified as transgender, would knowing those differences impact the services or experiences you provide to each of those clients?   Will you need more detailed information about gender-related healthcare needs?

Names and pronouns.
As a general rule, it is always good to know how a person wants others to refer to them.

Select your questions

Below you will find different versions of questions related to gender identity.
Choose the one(s) that you think comes closest to what you need.

Sex assigned at birth

What sex were you assigned at birth, on your original birth documents?
OR
What sex was listed on your birth documents?

Responses:
    (a) Female;
    (b) Male;
    (c) Don't know;
    (d) Prefer not to answer.

You may also refer to birth documents, birth registration, midwife delivery documents, or baptismal certificate, or to how the person was labeled by others at birth if they do not have any such documents.

Gender Identity - Simple

What is your current gender identity? (Check all that apply) or (Please choose the option that best describes you. Currently our system allows only one option.)

Responses:
    (a) Female;
    (b) Male;
    (c) Another gender: _____;
    (d) Don't know;
    (e) Prefer not to answer.

Gender Identity - Detailed

What is your current gender identity? (Check all that apply) or (Please choose the option that best describes you. Currently our system allows only one option.)

Responses:
- (a) Female/woman;
- (b) Male/man;
- (c) Nonbinary;
- (d) Transgender female/woman;
- (e) Transgender male/man;
- (f) Another gender: _____;
- (g) Don't know;
- (h) Prefer not to answer.

You may want to modify the responses to include gender identities relevant to your clients.

Lived gender

What gender do you currently live as in your day-to-day life?

Responses:
- (a) Female/woman;
- (b) Male/man;
- (c) Sometimes male, sometimes female;
- (d) Something other than male or Female: _____;
- (e) Prefer not to answer.

Name

What name would you like our staff to use?

_____

Pronouns

What are your pronouns?

Responses:
    (a) She/Her/Hers;
    (b) He/Him/His;
    (c) They/Them/Theirs;
    (d) Please specify: _____.

Step 5
Gender Identity

Test and adapt your questions

Return to the six tests listed on page 10. Discuss each one and modify the wording in your questions accordingly.

3. Develop questions for sex characteristics.

Step 1
Sex Characteristics

Understand the concepts

Sex characteristics.
Sex characteristics are physical features that correspond to cultural and medical notions of male or female bodies, such as genitalia, reproductive organs, hormone levels, or chromosomes.

Variations in sex characteristics.
The sex characteristics of most people align with medical and cultural notions of being male or female. A person has variations in sex characteristics if one or more of their sex characteristics align with medical and cultural notions of being male and other sex characteristics align with medical and cultural notions of being female.

Intersex traits.
Intersex traits, or intersex variations, is an umbrella term that refers to a group of roughly two dozen physical traits related to variations in sex characteristics. In medical terminology, these are called differences of sex development (DSD). Examples include atypical genitalia, congenital adrenal hyperplasia, androgen insensitivity, and hypogonadism.

Intersex.
People who are born with variations in sex characteristics are referred to as intersex. Many people with intersex variations may not use the term intersex to describe themselves. Rather, they might use the name of the intersex variation.   They may know the modern medical term or a traditional term. The term hermaphrodite, generally considered stigmatizing and factually invalid, is still used in some parts of the world.

Sex characteristics, identity, and gender identity.
Intersex is not a self-determined identity as it requires an innate physical trait and usually involves a medical encounter or an assessment of a person's physiology. Additionally, intersex does not constitute a gender identity. Intersex persons can have any gender identity or sexual orientation.

Understand the terms

As a group, make a list of terms used to describe different sex characteristics and people that have them.   You will use this list when you review and modify your questions. This list will also become part of your materials when you conduct staff training.

Worksheet: Sex characteristics and identities
[These are examples. Create your own list and fill in your own terms]

Terms used to describe identities	Common understanding of the term
Intersex Person	
Intersex trait	
Difference in Sex Development	
…	

Step 3
Sex Characteristics

What do you need?

Identify what information you need to elicit from your clients. Understanding a person's sex characteristics is most relevant when providing healthcare as well as housing and school environments that involve toilet and shower facilities.   Given this, you may want to gather detailed information about a person's sex characteristics as part of a medical interview when assessing healthcare needs or history of medical trauma.

Programs involving psycho-social support, reproductive health, and rights, or children's rights might also find it useful to know about their client's sex characteristics. In situations where it is not medically necessary to understand a person's sex characteristics, you may only want to find out whether your clients want you to know.

Step 4
Sex Characteristics

Select your questions

Below you will find different versions of questions related to sex characteristics gender identity. Choose the one(s) that you think comes closest to what you need.

Sex characteristics -- Simple

Were you born with a variation of sex characteristics?
    (a) Yes;
    (b) No;
    (c) I'm not sure;
    (d) Choose not to disclose.

Sex characteristics – With explanation

Some people are born with differences in sex anatomy, reproductive organs, chromosomes, and/or hormone function. These differences might be noticed at birth or later in life. Do any of these differences apply to you?
- (a) Yes;
- (b) No;
- (c) I'm not sure;
- (d) Choose not to disclose.

Sex characteristics – Client guided

Some people are born with differences in sex anatomy, reproductive organs, chromosomes, and/or hormone function. Do you have any traits like these that you think we should know about?
- (a) Yes;
- (b) No;
- (c) I'm not sure;
- (d) Choose not to disclose.

Step 5
Sex Characteristics

Test and adapt your questions

Return to the six tests listed on page 10. Discuss each one and modify the wording in your questions accordingly.

4. Map and modify forms, files, and workflow.

Map the workflow for data collection in your project.

- When and where will questions be asked? The easiest way to collect data is to ask these questions at the same time you gather other demographic information.   You can also ask it after the relationship has been established rather than during the first contact.   You can collect it separately if there are particular concerns.
- Where will the data be stored? Review any databases you use to track activity related to clients. Do you need to add database fields to store information about clients' sexual orientation, gender identity, or sex characteristics? Do you need to alter any forms or reports that you submit to funders in order to include this information?

Example of a workflow map for data collection and use
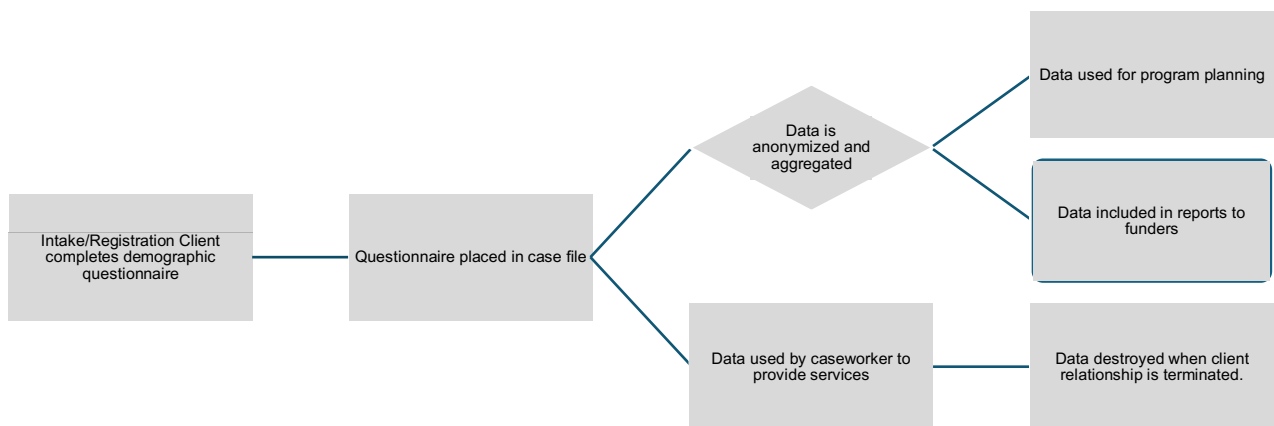
5. Conduct staff training.

Staff training is essential for an effective data collection system. Staff training should include the following goals:

Establish a common understanding of sexual orientation, gender identity, and sex characteristics.
Your staff should understand the basic terms and concepts

- You can use the worksheets you created in *Step 2: Understand the terms* as part of your staff training materials.
- Consider having LGBTIQ people from the local area provide presentations and training to your staff about the local LGBTIQ population.

Know and follow the workflow of the data.
Staff should know when, where, and who will ask the questions, how will the answers be recorded, and where and how will the data be stored.

Know the rules about data protection and privacy.
Staff should understand their individual obligations related to ethical and organizational standards and rules regarding data protection, privacy, and consent.

- All people have the right to consent or withhold consent to provide this data and have you record it.
- Even after a client has given this information to you, it is still their data, not yours. Your staff has an obligation to protect your client's data, and their privacy, from unauthorized use or disclosure.
- Each employee should understand their own role with regard to the collection, use, and storage of the data?

Be comfortable asking questions and responding to clients.
Your staff will use the questions you develop as the initial method of collecting data from your clients. However, in many cases, your staff will engage in a short back-and-forth exchange with a client about the questions. The ability of your staff to engage your clients in a friendly and affirming manner will be the key to successful data collection.

- Coach staff members about the reason why you are asking these questions. It is not about imposing a set of values. Rather is it about effective programming and improving outcomes.

- Provide your staff with clear answers about how they will protect the privacy of their clients.
- Role-playing is a common training method. Not only do role-playing exercises help prepare staff to interact effectively with clients, but they also help ensure that your clients receive a uniform response regardless of which staff person they talk to   Below are suggested scenarios that you can use to structure your role play.

<table>
<tr><td colspan="2" align="center">**Role-playing instructions**</td></tr>
<tr><td colspan="2">Two staff people will role play while others observe. If possible, conduct the role play in the same location where you interview clients.   One staff person will play the role of a client and another staff person will play the role of a staff person interacting with the client and asking about their sexual orientation, gender identity, and/or sex characteristics.

The role play begins with the staff person asking questions as planned.   The client should respond according to one of the scenarios below. Repeat role-plays with multiple staff and multiple scenarios and discuss afterward.</td></tr>
</table>

<table>
<tr><td colspan="2" align="center">**Scenario 1: What are you asking?**</td></tr>
<tr><td>Client:

What is sexual orientation?

What is gender identity?

What are sex characteristics?</td><td>Staff:

[Role play a scenario where each staff member explains to clients what is meant by the terms sexual orientation, gender identity, and sex characteristics. Have staff explain the meaning of each of the questions.]</td></tr>
</table>

Scenario 2: Why are you asking?

Client:

Why are you asking me this question? Why do you need to know my sexual orientation? I have never been asked this before.

Staff:

We are trying to find out more about our clients in order to provide each person with the services that match their individual needs.

We want to make sure that the different kinds of services our program provides match different kinds of people seeking services.

Here is a pamphlet where we have written down some of the answers to your questions.

If you wish, you can talk to your case worker/provider about how this information helps them make decisions about services.

Scenario 3: Concerns about privacy.

Client:

I don't see why these questions are anyone's business. What will you do with this information? Will anyone else find out about me?

Staff:

These questions will be kept confidential. However, if you do not wish to answer, you can check the box "choose not to disclose."

I will put this questionnaire in the same folder as your confidential health records. They are kept in a locked cabinet with other confidential information and only the health director has the keys.

If you would like to discuss this more, your provider will welcome your questions.

You may also wish to read this brochure for an explanation of why we're asking these questions.

6. Conduct client education.

Consider preparing a brochure that you can give to clients and staff that answers common questions about your data collection efforts. Clients will want to know why you are asking these questions, how the information will be used, how you will protect privacy, and what happens if clients do not want to provide an answer. This brochure is a good way to clarify your ethical commitments to your clients to protect their privacy and their rights to consent or decline to consent to the collection of data about them.

Suggested text for sample client brochure.[2]	
Q: WHAT IS GENDER IDENTITY? [Sample Answer] Gender identity is a person's inner sense of being female, male, or a different gender. Sex is based on a person's biology and body. Most babies are assigned a female or male sex based on their bodies at birth. For most people, their sex and their gender both line up to be the same, either female or male. For some people, their inner awareness of their gender may be different from how they present themselves to others. The term "transgender" describes people whose gender identity is different from the sex assigned at birth. [Consider listing some terms used to describe people of different genders:] ◦ Transgender woman describes someone assigned male at birth who has a female gender identity. ◦ Transgender man describes someone assigned female at birth who has a male gender identity. Additional gender identities include, but are not limited to: ◦ Genderqueer/non-binary: describe people whose gender identity falls outside the traditional gender binary of either woman or man.. Q: WHAT IS SEXUAL ORIENTATION? [Sample Answer] Sexual orientation is how people describe their	Q: WHY AM I BEING ASKED ABOUT MY SEXUAL ORIENTATION AND GENDER IDENTITY? [Sample Answer] We serve people of all sexual orientations and gender identities. We can more effectively meet the needs of our clients if we understand more about them. Q: WHAT IF I'M NOT SURE HOW TO ANSWER? [Sample Answer] You can answer "not sure." Q: WHAT IF NONE OF THE CATEGORIES DESCRIBE ME? [Sample Answer] There are many sexual orientations and gender identities. Unfortunately, it is not possible to list them all. If your sexual orientation or gender identity is not included in the list provided, you can select an additional category or, if space is provided, you can write in the terms you use to describe yourself. Q: WHAT IF I DON'T WANT TO PROVIDE THIS INFORMATION? [Sample Answer]

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[2] Credit source

emotional and physical attraction to others and their sexual and intimate relations with others.

◦ Heterosexual (straight) describes women who are primarily attracted to men and men who are primarily attracted to women.

◦ Gay describes people who are primarily attracted to the same gender as themselves. The term "gay" most commonly refers to men attracted to men.

◦ Lesbian describes women who are primarily attracted to other women.

◦ Bisexual describes people who are emotionally and physically attracted to women/females and men/males. Some people define bisexuality as attraction to all genders. Some people use other terms, such as queer, to describe their sexual orientation.

WHAT ARE SEX CHARACTERISTICS?

[Sample Answer]
Sex characteristics are physical features that correspond to cultural and medical notions of being female or male. This includes roughly two dozen physiological systems including the genitalia, reproductive anatomy, chromosomes, hormones, physical features emerging from puberty, and the shape and alignment of certain musculoskeletal systems.

Most people have sex characteristics that all align with maleness, or that all align with femaleness. Some people are born with one or more sex characteristics that do not align with the same sex. Many people would know if they have such a characteristic after they receive a diagnosis from a health professional. The term "intersex" is used to describe a person whose sex characteristics do not fit typical binary notions of female or male bodies. Some health professionals may use the term difference in sex development (DSD).

You can select "Choose not to disclose." You never have to answer these questions if you don't want to.

Q: WHO WILL SEE MY INFORMATION?

[Sample Answer]
Your caseworker and your. ?

Q: HOW WILL MY INFORMATION BE PROTECTED? Where will it be stored? Who will have access? Will family members have access?

[Sample Answer about where it will be kept.]
Your completed questionnaire will be kept in a folder with other confidential information about your case. This is kept in a locked cabinet that only your caseworker can access. The information will be in a password-protected file on a password-protected computer that only the caseworker can access..

[Sample Answer about privacy rules.]
Our rules prohibit staff from disclosing this information to others. All our staff are trained and understand these rules.

Q: WHY AM I BEING ASKED ABOUT PRONOUNS?

[Sample Answer]
Pronouns are the words people use when they are referring to you, but not using your name. In many languages, these pronouns are gendered. Examples of English pronouns are she/her/hers, he/him/his, and they/them/theirs. We want to make sure staff don't make mistakes when referring to people, which can lead to embarrassing and disrespectful situations.

7. Revisit and revise.

After adhering to your data collection system for some time, you should expect that you will want to make changes. Set a date when your team will review your data collection system and make any revisions.   Walk through the steps in this guide and make sure everyone on your staff knows about your changes.

Annexes.

Annex 1. Glossary

To be added.

Annex 2. Resources

To be added.