

WELCOME TO:



Advances in Federal SOGISC Data:
The Federal Evidence Agenda, OMB
Guidance, and the NASEM Report

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Join us for the Next Webinar in the 2023 Series:

Leveraging Auxiliary Frame Data to Improve Survey
Quality

Presenter: Paul Lavrakas

June 20, 2023

1:00 PM – 2:00 PM ET



Please enter your questions in the Q&A box at the bottom of your screen.



Please complete the webinar survey immediately following the session.



TODAY'S PRESENTERS



Christina Dragon

Measurement and Data Lead in the NIH
Sexual and Gender Minority Research Office



Renee Ellis

Survey Methodologist in the US Census
Bureau



Erica H. Zielewski

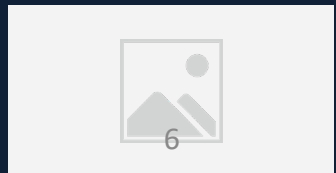
Senior Evidence Analyst on the Evidence
Team in the Office of Management and

Collecting Sexual Orientation, Gender Identity, and Sex Characteristics in Federal Data

Updates on a Coordinated Federal Approach to Equitable Data

Christina Dragon, MSPH, CHES (she | her)
Measurement & Data Lead
Sexual & Gender Minority Research Office

10 May 2023



Overview of Presentation

Background

Federal Overview

EO 14075: OMB Report

EO 14075: Federal Evidence Agenda

SOGI Data Action Plans

Resources



Definitions

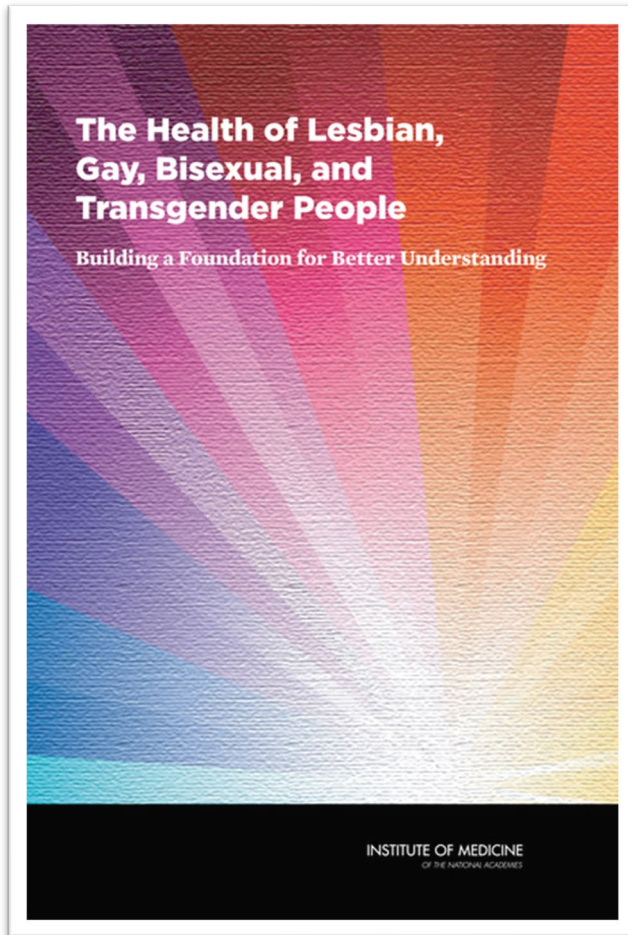
Sexual and gender minority (SGM) populations include, but are not limited to, individuals who identify as lesbian, gay, bisexual, asexual, transgender, Two-Spirit, queer, and/or intersex. Individuals with same-sex or -gender attractions or behaviors and those with a difference in sex development are also included. These populations also encompass those who do not self-identify with one of these terms but whose sexual orientation, gender identity or expression, or reproductive development is characterized by non-binary constructs of sexual orientation, gender, and/or sex.

[NIH Sexual & Gender Minority Research Office](#)

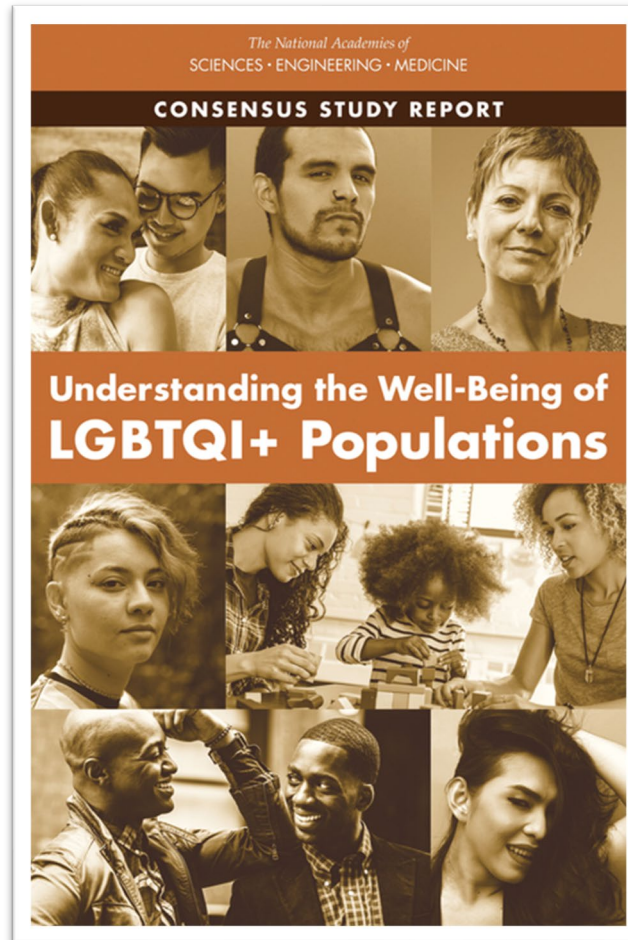
BACKGROUND



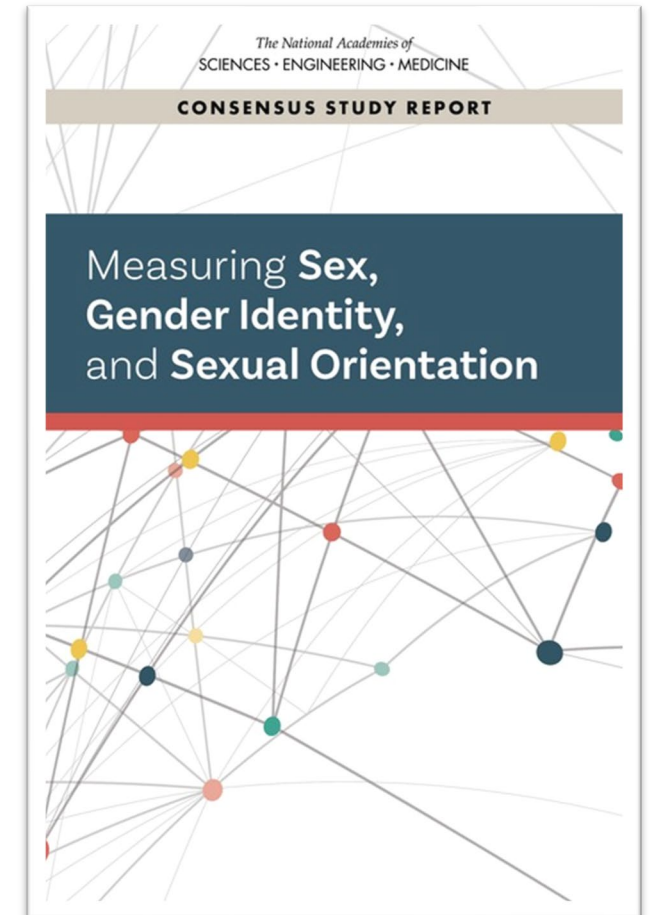
NASEM Reports



2011



2020



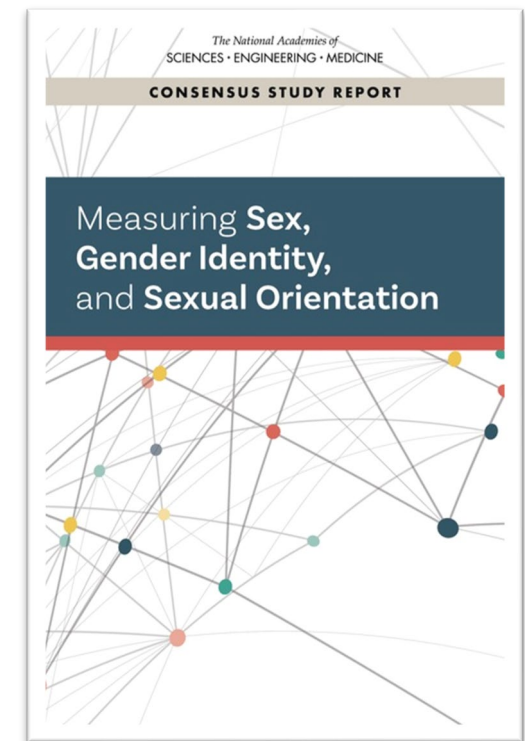
2022

Persisting Measurement Challenges

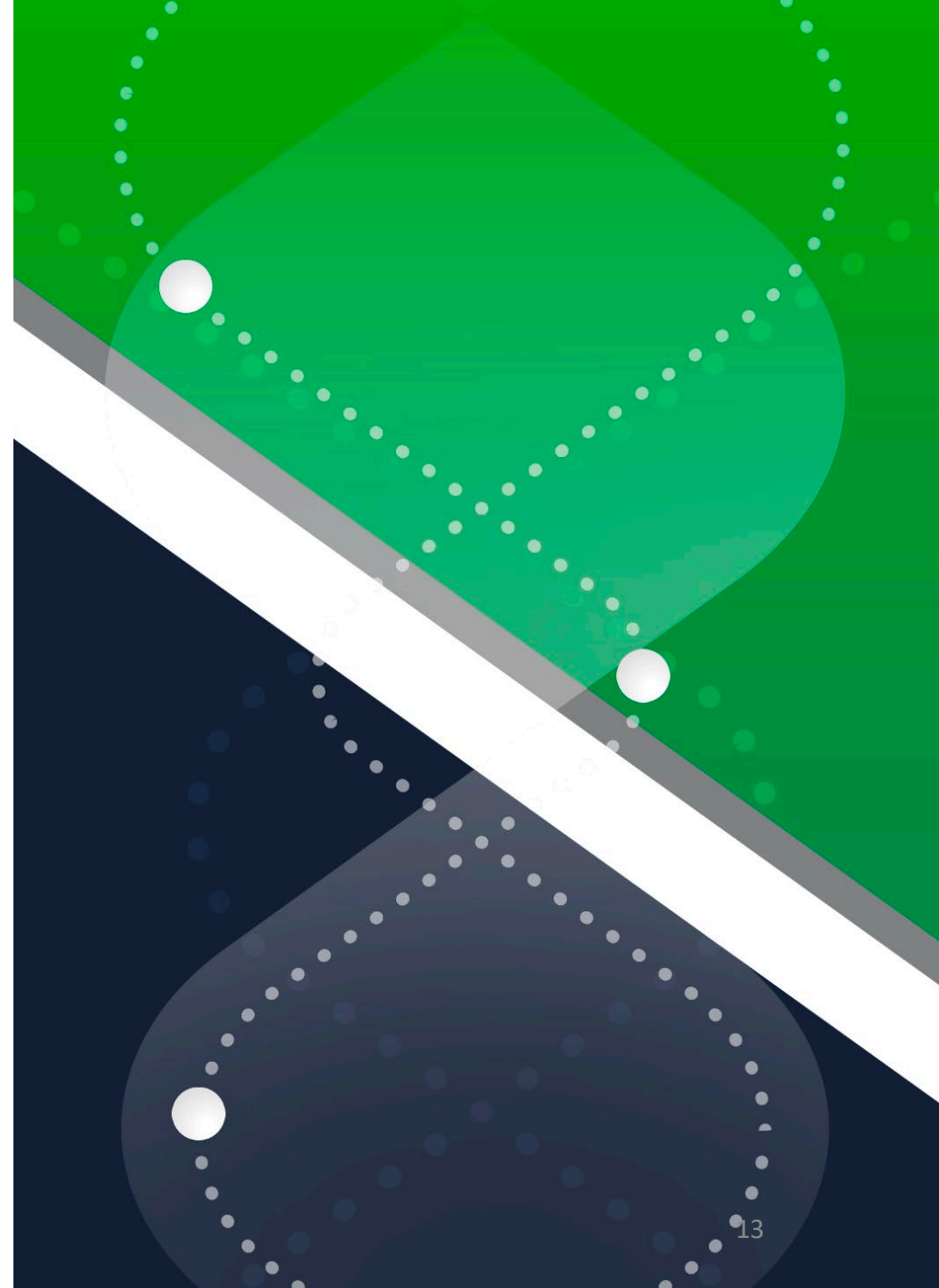
- No official standards
- Labels/definitions are fluid and rapidly changing
- Many terms are unfamiliar to sexual majorities and cisgender populations
- Official statistics require time-series, repeated measures over time
- Lack of production survey vehicles to conduct experiments
- Need for translations into languages other than English
- Questions must work for interviewer and self-administered response modes, as well as when asking proxies to respond for other household members
- Dearth of research on measuring intersex or DSD

Guiding Principles

- **Inclusiveness**
 - People deserve to count and be counted
- **Precision**
 - Use precise terminology that reflects the constructs of interest
- **Autonomy**
 - Respect individual identity and autonomy
- **Parsimony**
 - Collect only necessary data
- **Privacy**
 - Use data in a manner that benefits respondents and respects their privacy and confidentiality



FEDERAL OVERVIEW



Federal Resources

National Academies Consensus Studies drive and focus LGBTQI+ Data Efforts Across Time

Interagency Working Group on Measuring Relationships in Federal Household Surveys (**MRFHS IWG**)

FCSM Measuring Sexual Orientation and Gender Identity Research Group (**SOGI RG**)

OMB Report:
Recommendations on the Best Practices for the Collection of SOGI Data on Federal Surveys (released 10 January 2023)

2015–2016

2022 to present

2010–2014

2018 to present

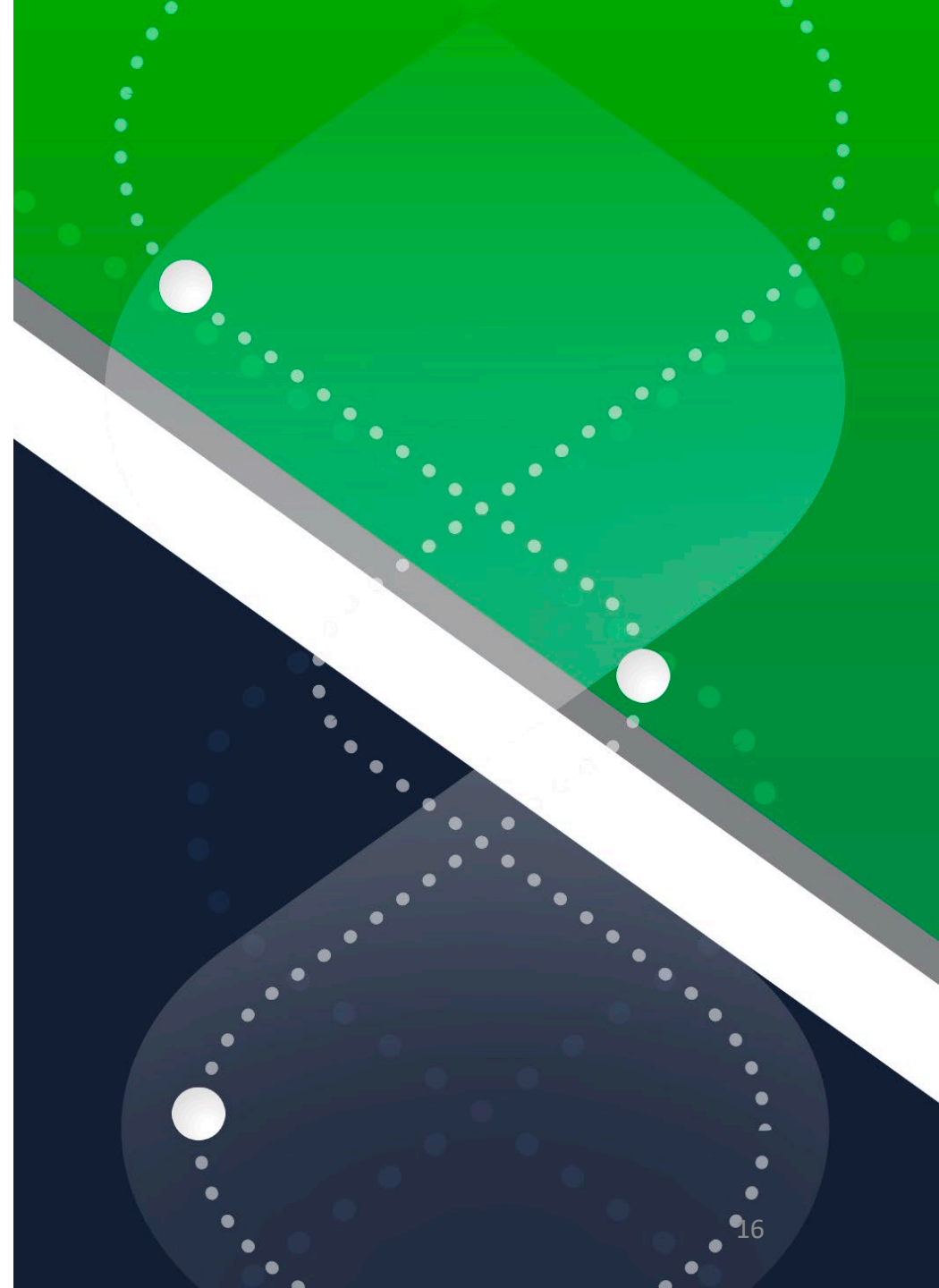
Interagency Working Group on Measuring Sexual Orientation and Gender Identity (**SOGI IWG**)

Interagency Working Group on EO 14075 Federal Evidence Agenda on LGBTQI+ Equity (released 24 January 2023)

Data and Evidence in EO 14075

- EO 14075 (Advancing Equality for Lesbian, Gay, Bisexual, Transgender, Queer, and Intersex Individuals) (LGBTQI+)
- Wide-ranging EO with many components and requirements
- Recognition that advancing equity and full inclusion requires improvements in data collection and evidence use
- Emphasis on promoting inclusive and responsible Federal data collection practices:
 - Development of Federal Evidence Agenda on LGBTQI+ Equity
 - Development and implementation of agency SOGI Data Action Plans
 - Recommendations for agencies on the best practices for collection of SOGI data on Federal statistical surveys

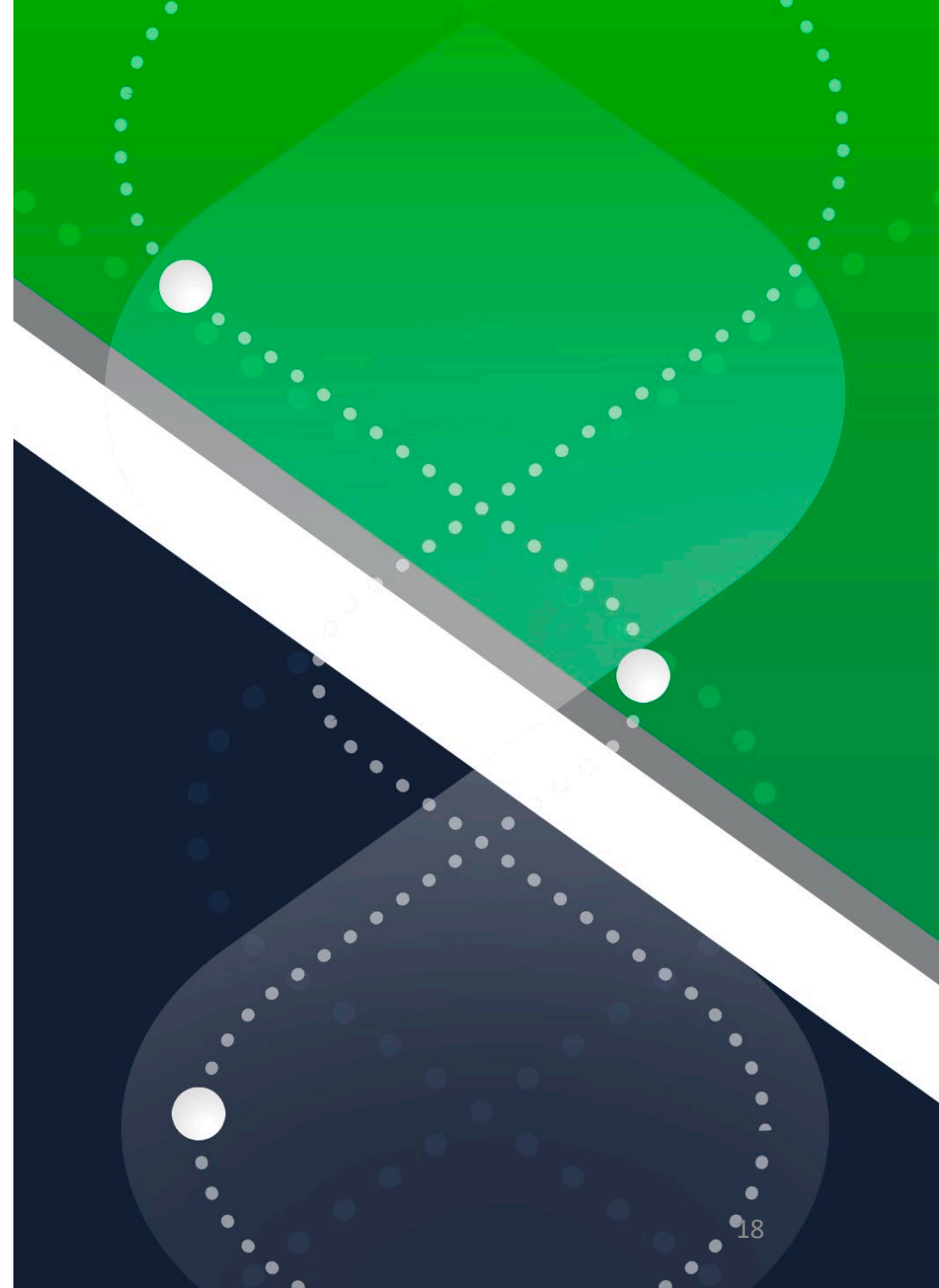
EO 14075: OMB REPORT



OMB Report: Recommendations on the Best Practices for the Collection of SOGI Data on Federal Statistical Surveys

- It is not the intent of this report to limit the continued evolution and improvement of SOGI data collection methods.
- This report does not mandate any particular approach or create any new requirements for agencies. In the future, Federal agencies may need to diverge from the recommendations in this report to reflect new, evidence-based best practices.
- Data should only be collected if there are plans to publish statistics, release data to the public or researchers, or to otherwise support the mission of the agency.
- SOGI measures need to be flexible and adapt over time to maintain usefulness.
- There's no best practice for the minimum survey sample size needed to collect SOGI data.
- Current surveys collecting SOGI data show that respondents are unlikely to skip SOGI questions (low item nonresponse), especially compared to other sensitive data items.
- There is no single, best practice set of questions for soliciting information about a person's sexual orientation or gender identity.

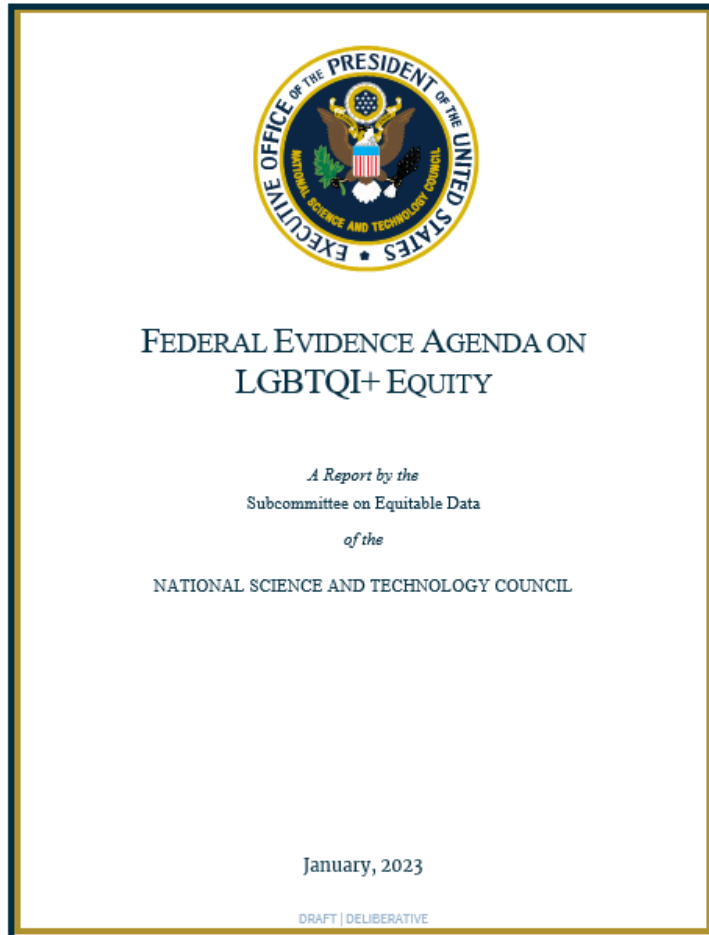
EO 14075: FEDERAL EVIDENCE AGENDA



Subcommittee on SOGI Data

- EO 14075 requires EDWG co-chairs to establish an interagency working group on sexual orientation, gender identity, and sex characteristics (SOGI) data (Section 11)
- Co-chaired by OSTP and OMB
- Charged with developing [Federal Evidence Agenda on LGBTQI+ Equity](https://www.whitehouse.gov/wp-content/uploads/2023/01/Federal-Evidence-Agenda-on-LGBTQI-Equity.pdf)

Federal Evidence Agenda: Process



- 45+ IWG members
- 20+ Federal agencies
- 70+ RFI responses representing 200+ community members and subject matter experts
- 9 listening sessions with 50+ community members and subject matter experts
- Input from Evaluation Officers, CDOs, Statistical Officials, USG researchers

Federal Evidence Agenda: Content

- Chapter 1: An Overview of LGBTQI+ Data Needs – This chapter provides an overview of the SOGI-related data needs throughout the Federal Government that, if addressed, could improve the Federal Government’s ability to make data-informed, evidence-based decisions to improve the health and well-being of LGBTQI+ individuals.
- Chapter 2: Learning Agenda to Advance LGBTQI+ Equity – This Learning Agenda identifies a series of overarching and illustrative questions that will guide the Federal Government’s efforts to understand, support, and improve the lives of LGBTQI+ individuals and families.
- Chapter 3: Guidelines for Collecting SOGI Data on Federal Administrative Forms – This chapter identifies important guidelines for collecting SOGI data on Federal administrative forms, like applications for benefits and services.

Federal Evidence Agenda: Key Takeaways

Data Needs

- SOGI data are demographic data
- Data collection must start immediately
- SOGI data have the most utility when they are disaggregated
- SOGI data must be used to serve LGBTQI+ people
- The value of SOGI data is unlocked by analysis
- Integrate the needs of LGBTQI+ people in privacy, training, and public trust work

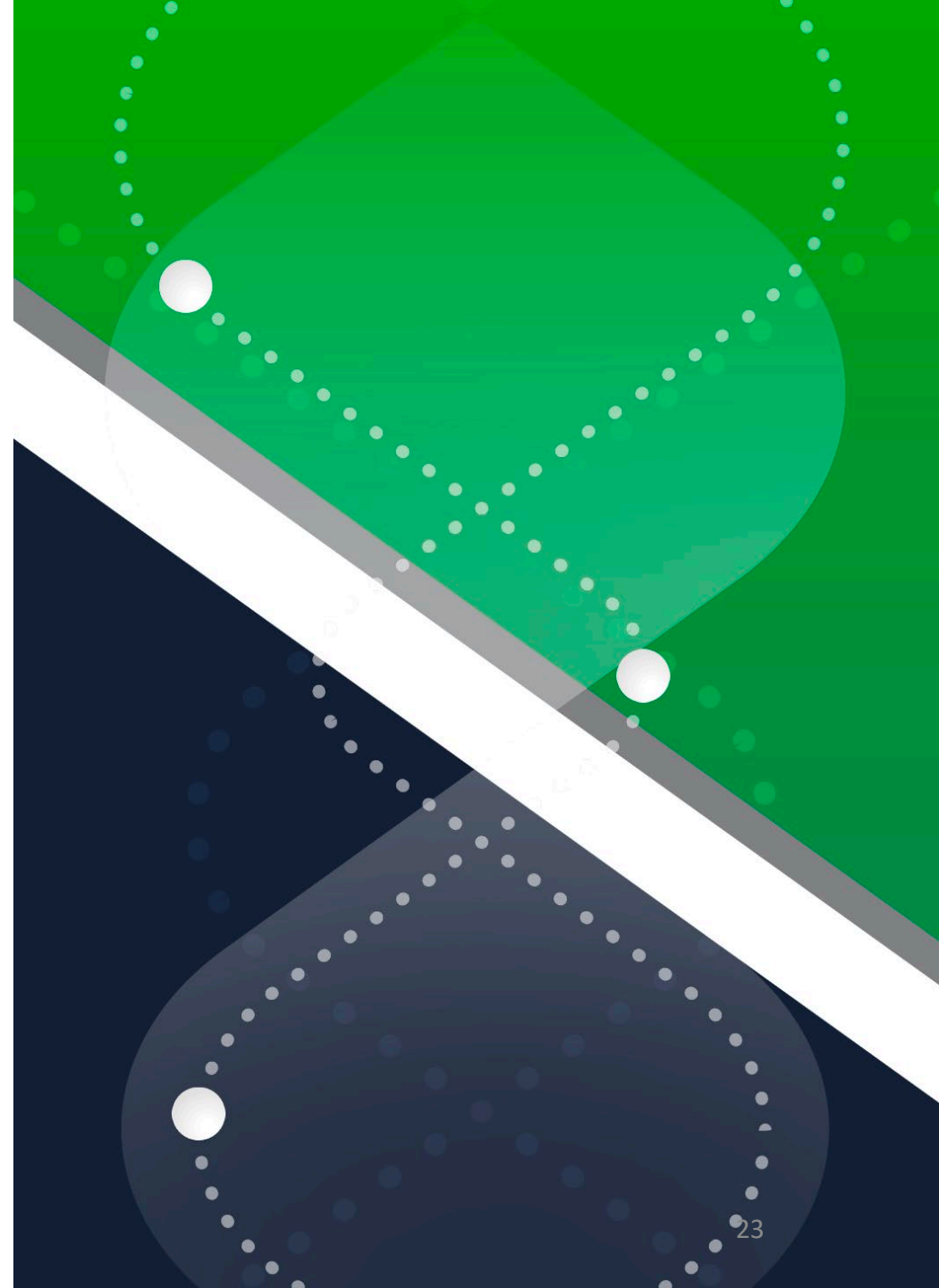
Learning Agenda Topics

- Health, Healthcare, and Access to Care
- Housing Stability and Security
- Economic Security and Education
- Safety, Security, and Justice

Administrative Forms

- Ensure relevant data are collected and privacy protections are properly applied
- Prevent adverse adjudication
- Make responses voluntary
- Rely on self-attestation
- Be consistent and intentional

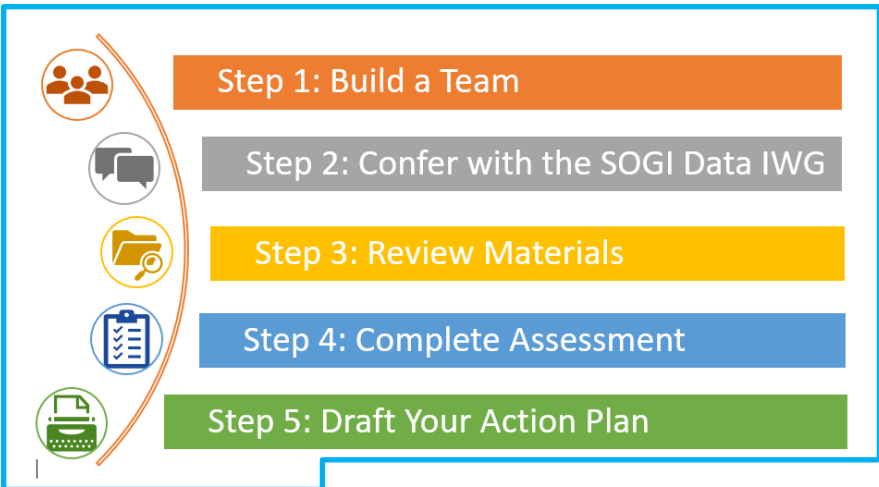
SOGI DATA ACTION PLANS



Section 11(c) SOGI Data Action Plans

(c) Within 200 days of the date of this order, the head of each agency that conducts relevant programs or statistical surveys related to the Federal Evidence Agenda on LGBTQI+ Equity shall submit to the Co-Chairs of the Interagency Working Group on Equitable Data a SOGI Data Action Plan, which shall detail how the agency plans to use SOGI data to advance equity for LGBTQI+ individuals and shall identify how the agency plans to implement the recommendations in the Federal Evidence Agenda on LGBTQI+ Equity.

IWG Support: Tools and Templates



Step 3: Review Materials

Meeting with your colleagues in the SOGI Data IWG will help you understand which materials in the package we shared would be most helpful for you and your team to review. For reference, the full suite of materials includes:

Informational Materials

- Federal LGBTQI+ Evidence Agenda (full report)
- Fact Sheet: Federal LGBTQI+ Evidence Agenda Overview
- Fact Sheet: LGBTQI+ Data Needs
- Fact Sheet: LGBTQI+ Learning Agenda
- Fact Sheet: LGBTQI+ Forms

Tools and Templates:

- Agency SOGI Data Assessment
- SOGI Data Action Plan Template

Fact Sheet: Federal Evidence Agenda on LGBTQI+ Equity

Purpose: The purpose of the Federal Evidence Agenda on LGBTQI+ Equity (“Evidence Agenda”) is to provide a **roadmap for Federal agencies** as they work to create their own data-driven and measurable Sexual Orientation Gender Identity (SOGI) Data Action Plans to help assess, improve, and monitor the health and well-being of LGBTQI+ people over time as required by President Biden in Executive Order 14075 (Advancing Equality for Lesbian, Gay, Bisexual, Transgender, and Intersex Individuals).

Per Section 11(b) of EO 14075, the Evidence Agenda shall:

- i. Describe disparities faced by LGBTQI+ individuals that could be better understood through Federal statistics and data collection;
- ii. Identify, in coordination with agency Statistical Officials, Chief Science Officers, Chief Data Officers, and Evaluation Officers, federal data collections where improved SOGI data collection may be important for advancing the Federal Government’s ability to measure disparities facing LGBTQI+ individuals; and
- iii. Identify practices for all agencies engaging in SOGI data collection to follow in order to safeguard

TEMPLATE

SOGI Data Action Plan for the Department of _____

POLICY

Goal: *If relevant, describe why having a policy related to SOGI data collection would help your agency achieve its mission.*

Action: *Describe the action steps that would be feasible for your agency to conduct in the next year toward the goal of adopting a SOGI data collection policy or integrating SOGI data into your existing data collection policies.*

PEOPLE

Goals: *Describe how your agency plans to use SOGI data to implement/enforce its nondiscrimination protections. If relevant, describe why your agency is committed to having staff dedicated to SOGI data collection or analysis.*

Actions:

- *Describe the action steps that would be feasible for your agency to conduct in the next year*

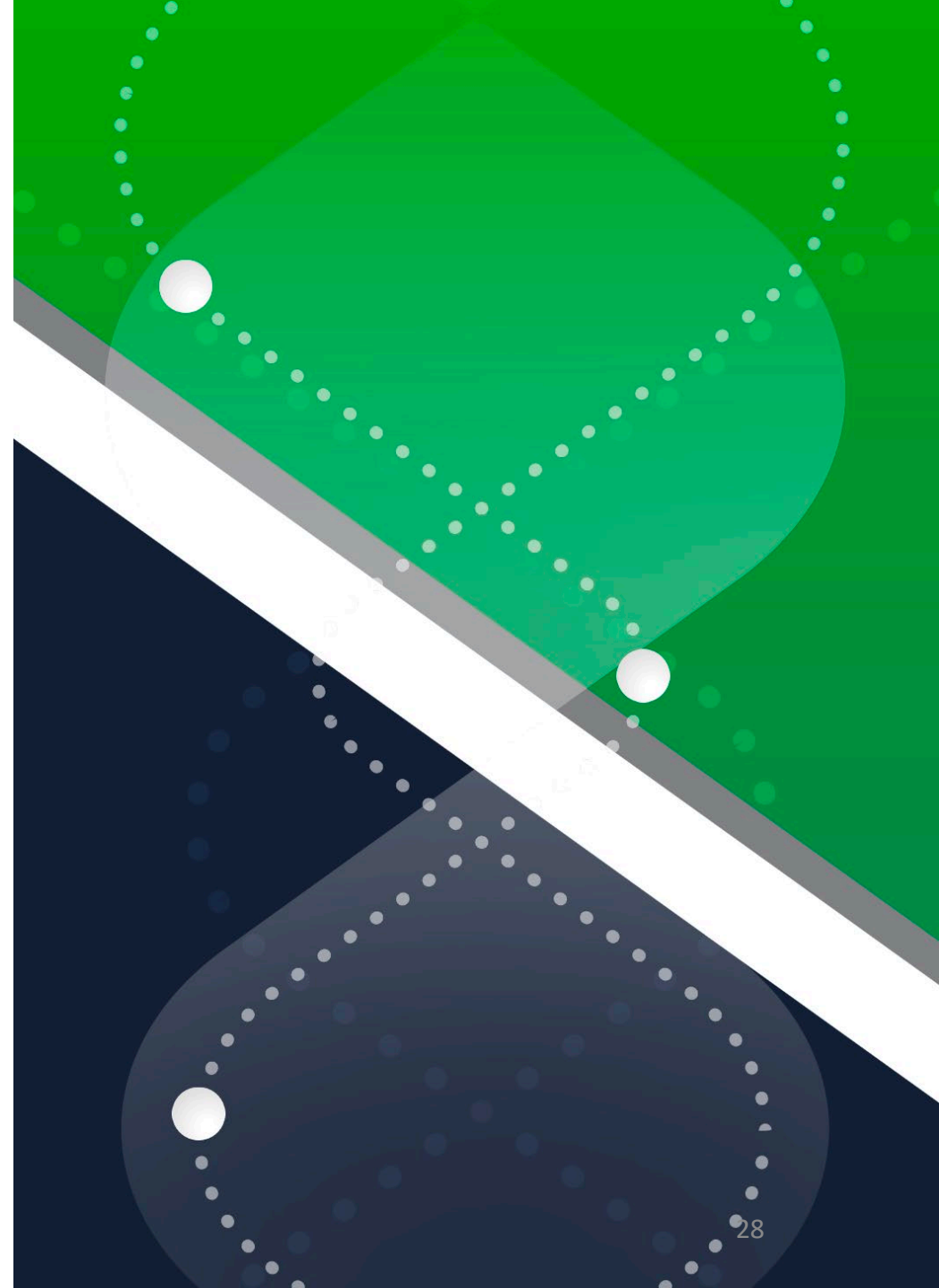
SOGI Data Action Plan & Moving Forward

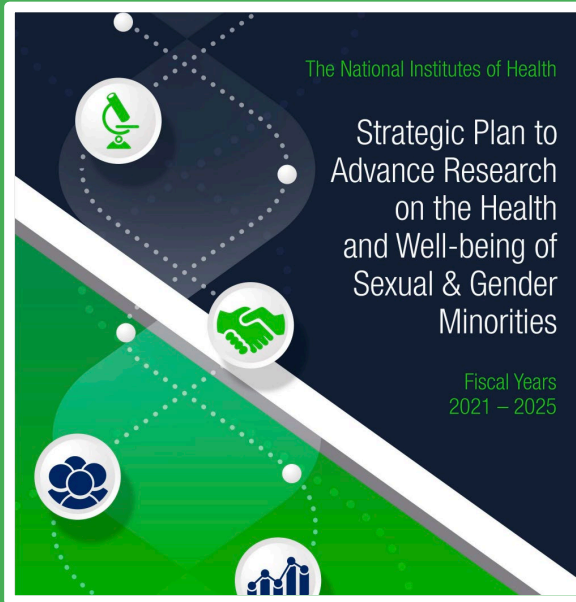
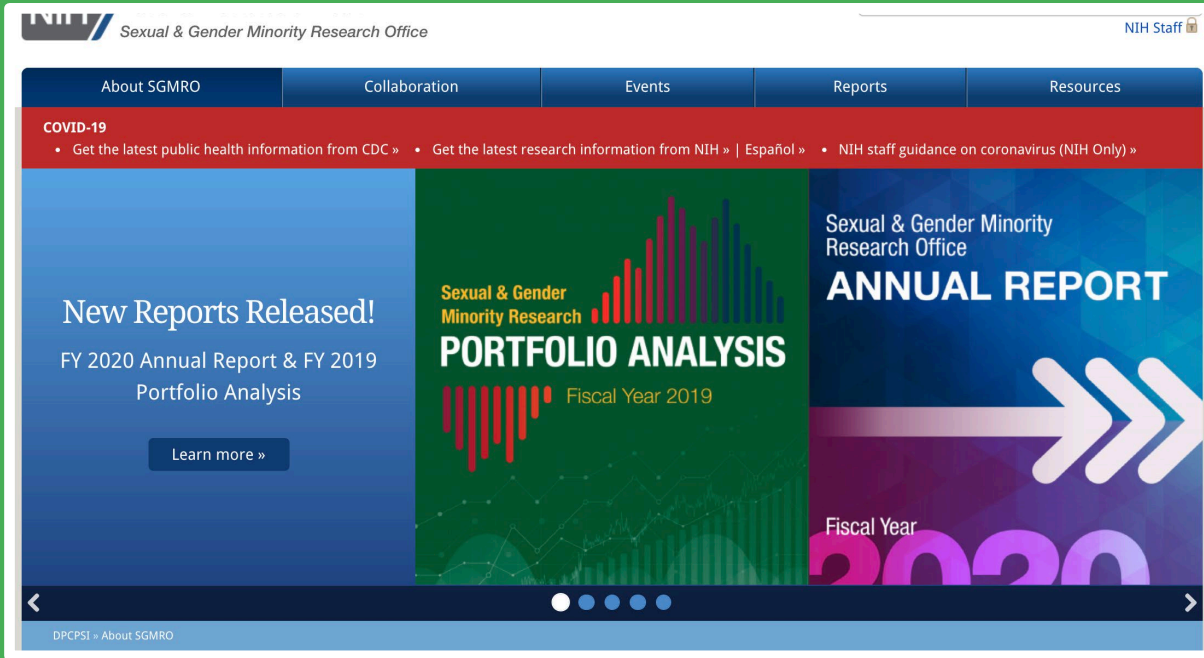
- HHS SOGI Data Action Plan is high level, with highlighted administration priorities, but each agency will be encouraged to work on identifying their own priorities in their work plan.
- Identify relationships/intersections with agency Learning Agendas
- SGMRO is working on providing guidance and support to the newly formed Inclusion Governance Committee, who will provide recommendations if there will be a coordinated NIH wide approach.
- The SGMRO is always available for technical assistance for sexual orientation, gender identity, and sex characteristic data collection.

FOR REFERENCE: SOGI IWG & Research Group Reports

- [Federal Evidence Agenda on Lesbian, Gay, Bisexual, Transgender, Queer, and Intersex \(LGBTQI+\) Equity \(Factsheet\)](#)
- [Recommendations on the Best Practices for the Collection of Sexual Orientation and Gender Identity Data on Federal Statistical Surveys \(whitehouse.gov\)](#)
- [Measuring Sex, Gender Identity, and Sexual Orientation \(NASEM\)](#)
- [Why Do Federal Agencies Ask About Sexual Orientation and Gender Identity \(SOGI\) on Surveys? \(2021\)](#)
- [Updates of Terminology of Sexual Orientation and Gender Identity Survey Measures \(2020\)](#)
- [Current Measures of Sexual Orientation and Gender Identity in Federal Surveys \(2016\)](#)
- [Evaluations of Sexual Orientation and Gender Identity Survey Measures: What Have We Learned? \(2016\)](#)
- [Toward a Research Agenda for Measuring Sexual Orientation and Gender Identity in Federal Surveys: Findings, Recommendations, and Next Steps \(2016\)](#)
- [NIH Sexual & Gender Minority Research Office](#)
- [Healthy People 2030](#)
- [SOGI on the Census Bureau's Household Pulse Survey](#)

THANK YOU!





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<https://tinyurl.com/SGMGROUP>