

# SOGIE\*

## DATA COLLECTION



\*Sexual Orientation, Gender Identity, and Gender Expression

all children  
all families



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# PART 1

## ASSESSING READINESS TO FORMALIZE SOGIE DATA COLLECTION

### USING THIS GUIDE

All Children–All Families developed this guide in response to the growing number of questions on the effective, safe and competent collection of SOGIE (sexual orientation, gender identity and gender expression) data that we receive from our participating agencies. It is intended for agencies that understand the importance of SOGIE and have done considerable work to create a safe and affirming environment for clients with diverse SOGIE—including implementing policies to protect LGBTQ clients from discrimination and conducting regular staff training on LGBTQ cultural competency.

If your agency meets this description then this guide is for you. Part I takes a closer look at assessing your agency's readiness for formalizing SOGIE data collection. Part II of this resource offers in-depth guidance on how to collect SOGIE information with youth and adults, including sample language for data collection during interviews and on forms.

If your agency has not intentionally assessed its climate as it relates to LGBTQ youth and adults and taken significant steps toward policy and practice improvement in this area, take advantage of All Children–All Families resources to do so before formalizing SOGIE data collection.

Not sure? Check out the discussion on assessing your agency's readiness on the next page.

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## Is my agency ready to formalize its SOGIE data collection?

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It is critical that your agency implement key policies and practices prior to systematizing SOGIE data collection. This includes written policies that protect LGBTQ youth and adults from discrimination and routine, ongoing staff training in LGBTQ cultural competency. Youth and adults need to be able to trust that you will use their SOGIE information appropriately, won't discriminate against them, and will honor confidentiality. In the absence of these intentional efforts to build an agency's capacity to serve LGBTQ clients, SOGIE data collection may do more harm than good. Setting an expectation that staff routinely discuss SOGIE with youth and adults without a contextual understanding of and safeguards against bias, discrimination and violence is irresponsible.

### HERE ARE A FEW QUESTIONS TO CONSIDER:

- Does your agency have a policy that protects LGBTQ youth and adults from discrimination?

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- Are all youth and adults routinely informed of their rights to receive services free from discrimination—including discrimination based on their SOGIE—when entering your agency's care?

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- Has your agency created a safe environment for people of diverse SOGIE to feel comfortable discussing this aspect of their lives? For example, by offering staff training in LGBTQ competency?

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- Do you (and your peers) have the knowledge and skills you need to comfortably discuss topics related to gender and sexuality as part of your role?

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- Do you know how to follow best practices when it comes to confidentiality and SOGIE data? It is true that discussing and assessing SOGIE information builds upon pre-existing skills—for example, routinely discussing sensitive issues with clients and protecting confidentiality. But are you clear on how to prioritize the best interests of youth and adults when it comes to documenting and sharing information on SOGIE and using this information in case planning?

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If you answered “no” to any of these questions or you are otherwise unsure of your agency's readiness, All Children—All Families offers several tools to help you assess your current capacity for formalized SOGIE data collection. These include an Agency Self-Assessment of policies and practices as well as a Baseline Staff Assessment of staff members' current LGBTQ-related knowledge, attitudes and practice experience.

For more information on how to access these tools, see Appendix IV.

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## Why formalize SOGIE data collection?

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Chances are you're reading this guide because you already recognize that information on SOGIE is essential to your work with youth and adults. You may, however, work with people who still question the relevance or appropriateness of discussing and assessing SOGIE with clients. The information below helps to explain why SOGIE must be considered in our efforts to strengthen families and ensure all young people can meet their full potential.

Research shows us that systems of care too often fail to meet the individualized needs of LGBTQ youth and adults. LGBTQ youth are over-represented in foster care and face increased risk of negative experiences and outcomes while in care. For example, they have a higher average number of placements; are more likely to report harassment, discrimination, and violence; experience higher rates of health and mental health challenges and lower self-esteem; and are less likely to achieve permanency (Annie E. Casey Foundation, 2016). SOGIE should be included when considering the best interests for all children and youth in care. Information on a young person's SOGIE supports workers in effective case planning and making appropriate referral decisions.

LGBTQ adults—whether they are birthparents, foster/adoptive parents or kinship caregivers—continue to experience barriers rooted in bias when engaging with the child welfare system. Despite the fact that an estimated 2 million LGB parents are interested in adoption in the U.S., the LGBTQ community remains an untapped resource for child welfare agencies seeking to expand their pool of prospective families. SOGIE information is essential for providing families with appropriate services and support. Looking beyond immediate service delivery to practice improvement, SOGIE data can help identify any disparities LGBTQ adults may be facing and understand the effectiveness of agency initiatives, (e.g., recruitment campaigns).

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## What can I learn from SOGIE data on the adults/parents in my care?

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Knowing SOGIE information ensures all adults and families receive services tailored to their needs and that all their strengths can be identified. Easily identifying LGBTQ adults/parents in data systems allows agencies to analyze changes in the demographic profile of families; learn about the satisfaction, retention, placement disruption, and other performance measures related to services for LGBTQ adults/parents; and compare this information to that of their non-LGBTQ peers. This informs the creation and implementation of plans to improve service delivery and family outcomes wherever needed. SOGIE data collection can also be utilized when communicating agency successes to relevant stakeholders.

Ideally, assessing the SOGIE of adults/parents begins at first contact and continues through the full process of service provision. This allows agencies to count LGBTQ inquiries (if applicable), identify outreach materials or public relation strategies that are effective with the LGBTQ community, and to track retention. At the very latest, the SOGIE of adults/parents should be known by the completion of the home assessment process. Consider SOGIE data collection at these process points (as applicable):

- Recruitment/outreach activities
- Intake call and inquiry communications
- Orientation meetings
- Application forms
- Homestudy forms and interviews
- Licensing renewal and recertification activities
- Client satisfaction surveys

### WHAT ABOUT RESEARCH?

An additional benefit to formally collecting SOGIE data is that the information can be shared with internal or external researchers, whose findings can help advance policy and practices to benefit LGBTQ young people. Data collected based on the recommendations in this guide will adapt well for research purposes, and several of the recommended questions have been formally validated—but where practice and scholarly considerations diverged, this guide weighted practice more heavily. If research is the primary goal of your data collection project, we recommend also reviewing the resources under “Research Perspectives on SOGIE Data Collection,” at the end of Appendix III.

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## What can I learn from SOGIE data on the young people in my care?

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Young people with diverse SOGIEs need to know that the adults caring for them support and affirm this aspect of their identities. Many children and youth in foster care have already faced significant abuse and rejection related to their SOGIE/LGBTQ status. The positive impact of an affirming adult cannot be overstated. Nor can the importance of LGBTQ competency among service providers in order to avoid re-traumatizing young people.

Understanding the relationship between children's SOGIE and their health, social and educational outcomes is essential to our efforts to achieve safety, permanency and well-being. We cannot develop individual case plans and ensure appropriate and safe placement settings without considering a young person's SOGIE. The ability to identify LGBTQ youth in data systems allows agencies to analyze changes in the demographic profile of young people and review performance measures for disparities for LGBTQ children and youth. These data then inform the creation and implementation of plans to improve inclusive service delivery and client outcomes wherever needed. Ideally, the SOGIE of the young people in your care (age 10 and older) should be known by completion of the first thorough case plan.

See Part II for much more information on safe, appropriate and competent SOGIE data collection with children and youth. Additional resources such as *Guidelines for Managing Information Related to the SOGIE of Children in Child Welfare Systems* (2013), a publication of Family Builders, Legal Services for Children, the National Center for Lesbian Rights and the Center for the Study of Social Policy, offers guiding principles for assessing and documenting children's SOGIE, and for limiting the disclosure of that information.

# PART 2

## COLLECTING SOGIE DATA

### GOALS

In the previous section, we discussed multiple reasons why collecting SOGIE data is important. Since we collect this data for more than one reason, our system for gathering it needs to achieve more than one goal. In fact, most systems incorporate the four goals outlined below.

### A SYSTEM OR PROCESS FOR COLLECTING SOGIE DATA SHOULD:

- ① Be easy for clients to understand and answer accurately
- ② Be easy for staff to understand and relevant to their practice
- ③ Affirm clients' identities and make them feel welcome
- ④ Be practical for generating reports

Reaching these goals doesn't take a complicated system. In fact, the best systems are simple. However, when figuring out what system to use, it's important to think through whether it meets each of these goals.



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## Choosing a System

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Collecting SOGIE data may mean adding new lines to your current forms, new fields in your database, or questions that staff members are trained to ask. The system you choose will depend on how you currently collect information about your clients:

- Do clients fill out their own paperwork, or do staff complete the forms during an interview?
- Do you use paper forms or digital ones? If your forms are digital, is it possible to add or change fields in your database?

Because it's much easier to learn a new habit or process when it's linked to something we already do, it's best to make SOGIE data collection a part of the existing system used to collect other client information, whether paper or digital. Occasionally it is too difficult to change these forms and it makes more sense to have a separate system, like an additional form, for SOGIE information.

It is important that staff be trained to ask and record SOGIE information for every client, not only clients they assume are LGBTQ. If SOGIE notes are made only for clients perceived to be LGBTQ, it is impossible to know whether the information has been collected consistently—and staff cannot know a child or adult's SOGIE information unless they ask. For instance, a partner in either a same or different-sex couple could be bisexual rather than gay or straight.

## UNSTRUCTURED DATA COLLECTION

If an agency has a digital form that can't be edited, one alternative is to train staff to record SOGIE information in an open-text field such as "Notes." Using "Notes" is mainly possible for smaller agencies, since generating reports on this information would require someone to manually review and count the information from this field.

When using a "Notes" field, staff should be trained with specific prompts for asking about SOGIE. See the "Recommended Questions" section starting on page 8 for suggested language.

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## Introducing the Questions

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While many adults and young people find SOGIE questions unremarkable, some will wonder how the information is used. In addition, if the questions are asked as part of an interview, clients may wonder whether they have been stereotyped as LGBTQ based on their appearance or some other trait. Agencies can simply explain upfront that SOGIE questions are asked of all clients, and that the information is used to ensure that everyone is treated equally and gets their individual needs met. This introduction can also explain how to decline to answer the questions.

**For instance, a form for prospective parents might include the following text before SOGIE questions:**

*The next few questions ask how you identify yourself. We ask these questions because our clients are diverse, and we want to make sure we are treating everyone equally and meeting every person's individual needs. If you don't want to answer these questions, you can leave them blank.*

**Similarly, a staff member interviewing a young person might say:**

*Now I'm going to ask a few questions about how you identify yourself in terms of your sexual orientation and your gender. We ask everyone these questions because we work with all kinds of young people, and they help us make sure everyone is equally safe and supported. If you don't want to answer any of these questions right now, just say "skip" and we can move on.*

**Safety and privacy considerations for LGBTQ youth are discussed at the end of this section, but it may help to mention the agency's practices during this introduction. For instance, a staff member might say:**

*I also take your privacy seriously, so you can let me know if any of this information needs to stay confidential.*

## Recommended SOGIE Questions

How a question is worded can affect whether clients find it easy to answer, and whether you get accurate responses. This section presents suggested wording for a range of questions about SOGIE.

Questions may be asked differently depending on whether the form will be completed by an interviewer or by the client. **For each question, the written version is on the left. The interview version is on the right, followed by the options that the interviewer would complete in a database.**

Appendix I to this guide includes examples of a standard SOGIE section for printed forms and Appendix II provides a sample interview flow. You can use these examples as provided, or adapt them based on your agency's needs and the recommendations below.

In most cases, collecting basic SOGIE data requires at least two specific questions: one about the client's sexual orientation, and one about whether they are transgender and/or gender non-binary. (Because sexual orientation and being transgender/non-binary are separate traits, it's not best practice to combine these two facts about a person into a single question.) Although it's currently less common to collect data on gender expression, we strongly recommend assessing gender expression for children and youth, since it is a strong risk factor for victimization (D'Augelli, Grossman, & Starks, 2006; Gill & Frazer, 2016).

### Sexual Orientation (Children, Youth and Adults)

Sexual orientation information can usually be collected in a single question. Different questions are recommended for children/youth and adults, in part for developmental reasons and in part because of generational differences in how people talk about gender and sexual orientation.

#### Recommended Adult Sexual Orientation Question

The following question is recommended because it is easy for most adults to understand. It also gives adults who do not identify as gay/lesbian, straight or bisexual the opportunity to describe their sexual orientation. If it is not possible to include the write-in field for "Something else" in the agency's system, staff can be trained to record that information in a "Notes" field.

SEXUAL ORIENTATION: ADULT	
WRITTEN	INTERVIEW
<p><b>Which of the following best represents how you think of yourself?</b></p> <p><input type="checkbox"/> Lesbian or gay</p> <p><input type="checkbox"/> Straight (that is, not gay or bisexual)</p> <p><input type="checkbox"/> Bisexual</p> <p><input type="checkbox"/> Something else: _____</p> <p><input type="checkbox"/> Not sure about my sexual orientation</p> <p><input type="checkbox"/> Not sure what this question means</p>	<p><b>Would you say you are lesbian or gay, straight (meaning not gay or bisexual), or bisexual? Or I can write down another word that you use.</b></p> <p><b>SEXUAL ORIENTATION:</b></p> <p><input type="checkbox"/> Lesbian/gay</p> <p><input type="checkbox"/> Heterosexual/straight</p> <p><input type="checkbox"/> Bisexual</p> <p><input type="checkbox"/> Something else</p> <p><input type="checkbox"/> Questioning</p>

### Recommended Child/Youth Sexual Orientation Question

The following question includes sexual orientation identities that are more common among young people.

SEXUAL ORIENTATION: CHILD/YOUTH	
WRITTEN	INTERVIEW
<p><b>Which of the following best describes your sexual orientation?</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Lesbian or gay</li> <li><input type="checkbox"/> Heterosexual or straight</li> <li><input type="checkbox"/> Bisexual</li> <li><input type="checkbox"/> Pansexual</li> <li><input type="checkbox"/> Asexual</li> <li><input type="checkbox"/> Prefer no labels</li> <li><input type="checkbox"/> Something else: _____</li> <li><input type="checkbox"/> Not sure about my sexual orientation</li> <li><input type="checkbox"/> Not sure what this question means</li> </ul>	<p><b>Would you say you are lesbian or gay, bisexual, straight, or another word, such as pansexual or asexual? I can also write down if you are questioning your sexual orientation or if you prefer not to use any label.</b></p> <p>SEXUAL ORIENTATION:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Lesbian/gay</li> <li><input type="checkbox"/> Heterosexual/straight</li> <li><input type="checkbox"/> Bisexual</li> <li><input type="checkbox"/> Pansexual</li> <li><input type="checkbox"/> Asexual</li> <li><input type="checkbox"/> Prefer no labels</li> <li><input type="checkbox"/> Something else</li> <li><input type="checkbox"/> Questioning</li> </ul>

Some of these sexual orientation terms may be less familiar to adults, but there are three major reasons to include them. First, many young people find that the best-known categories—lesbian/gay, bisexual, and straight—miss important dimensions of their sexuality (e.g., asexual youth) or feel incompatible with more nuanced understandings of gender (e.g., pansexuality). Acknowledging these diverse identities helps young people “see themselves” in the data collection process, may build trust and engagement with LGBTQ young people (even those who don’t personally identify with the additional options), and celebrates the introspection that young people dedicate to this topic.

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*“Seeing queer [as an option on the form,] I can actually have a conversation with somebody.”—Transgender boy, queer*

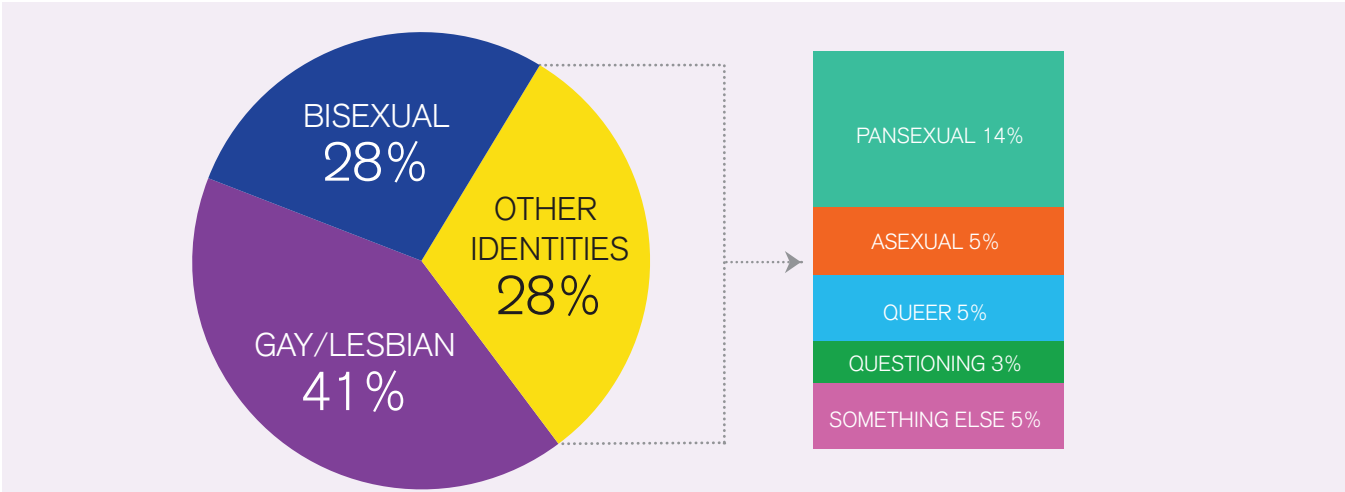
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Besides the benefits to relationships with LGBTQ young people, including a broader range of options has benefits from a data collection perspective: because terms like “pansexual” and “asexual” are relatively common identities among young people (the former representing 14% of LGBTQ youth ages 13-17 in a recent survey), including these choices improves data quality and reduces staff confusion about which option to select. Finally, including these terms is a good opportunity to educate staff. When staff are trained on this question, they should be introduced to definitions for these sexual orientation terms, and they should be prepared to offer basic definitions if young people ask what they mean. A glossary of terms is included in Appendix III.

Agencies may adjust the sexual orientation identity options based on local experiences and needs. For instance, if young people frequently report an identity not included in the sample question (such as “queer”), the agency may consider adding that identity to the list. Conversely, agencies may consider altering the categories based on their data reporting needs, such as by consolidating infrequently used categories into the “Something else” option.

Young people typically begin to identify as lesbian, gay, bisexual or queer between the ages of 11 and 16, although this process may take place earlier or later (D’augelli, Grossman, & Starks, 2008). **We recommend asking children ages 10 and older about their sexual orientation, keeping in mind that developmental stage should also be considered and people of any age may be uncertain of their sexual orientation or not ready to disclose it.** Asking respectfully for this information may make young people more willing to share it at a later date, even if they are not ready to “come out” during the initial discussion.

For children at the younger end of this age range, staff should be equipped with developmentally appropriate ways to raise the topic of sexual orientation with children who may not understand the identity-based question. For instance, they might ask, “Do you ever have crushes or romantic feelings about other people? Are those feelings mostly about boys, or girls, or both?”



Many LGBTQ young people identify their sexual orientation as something other than gay, lesbian or bisexual. This chart shows sexual orientation identities from a national survey of more than 8,000 LGBTQ youth (Human Rights Campaign, 2018).

**Alternate Sexual Orientation Question (Children, Youth and Adults)**

Using an open-response question saves space on a paper form and gives clients the opportunity to describe their sexual orientation in their own words. However, some clients may find this question harder to understand or answer. In addition, the responses will need to be manually counted when the agency needs to report on numbers or outcomes of clients by sexual orientation.

SEXUAL ORIENTATION ALTERNATE: CHILD/YOUTH/ADULT	
WRITTEN	INTERVIEW
<b>Sexual orientation (examples: straight, gay, bisexual):</b> _____  	<b>How would you describe your sexual orientation? If the client does not understand the question, prompt:</b> Sexual orientation means if you are straight, gay, bisexual or something else.  SEXUAL ORIENTATION: _____

**Sex/Gender and Transgender Status (Children, Youth and Adults)**

There are a few different approaches to collecting information about clients' gender and transgender status. One approach is to include "transgender" as an option in the main question about a client's gender, but this approach can be inaccurate and is not recommended. Another approach, known as the "two-step" approach, involves asking about a client's sex assigned at birth (the sex on their original birth certificate) and their current gender identity. This practice is more accurate but may feel invasive in a non-medical setting; it also requires additional analysis to identify transgender clients because data from the first and second questions must be compared. We therefore recommend using a "transgender status" question, like the ones presented here (Jans et al., 2015; The GenIUSS Group, 2014).<sup>1</sup> This approach is usually accurate, feels appropriate and respectful to clients, and is simple to understand when reporting on data. A transgender status question is used alongside a sex/gender question, much like most agencies currently use, although we recommend a third "Another Gender" option in addition to "Male" and "Female." The "Another Gender" option is important because it reflects the identities of gender non-binary clients (those who identify as neither male nor female). These data can be submitted as missing to systems, such as AFCARS, that only allow sex to be recorded as male or female.

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*"For a documentation purpose you need to know [that I'm transgender] but [the 'two-step' approach] doesn't make me feel comfortable in the slightest."*  
 –Transgender boy, queer

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Some people wonder whether questions about being transgender will be confusing or offensive to clients. Fortunately, several research studies have shown that cisgender (non-transgender) youth and adults in the U.S. and Canada find it easy to answer these questions correctly, even if they don't fully understand all of the options. The exact wording is more important to transgender participants, because a badly-worded question could be confusing or even stigmatizing. In suggesting these questions, we carefully considered the existing research, as well as unique considerations in the child welfare community.

Usually, Question 2 ("Gender") will reflect the client's gender identity (whether they think of themselves as male, female or something else). Occasionally, there may be a pressing reason to record a transgender child's gender as something other than their gender identity. Staff should be trained on how to fill in "Gender" for transgender clients based on the agency's individual practices and needs. The following sections explore this topic in more detail.

**The questions below (Transgender Status and Gender) should be used together. On a written form, either question can come first. When interviewing, it is important to ask the transgender status question first.**

TRANSGENDER STATUS & GENDER: CHILD/YOUTH/ADULT	
WRITTEN	INTERVIEW
<p><b>Do you consider yourself to be transgender, non-binary or another gender? Please pick the option that best describes how you think of yourself.</b></p> <p><input type="checkbox"/> No, I am not transgender</p> <p><input type="checkbox"/> Yes, I am a transgender girl/woman (assigned male at birth and identify myself as a girl/woman)</p> <p><input type="checkbox"/> Yes, I am a transgender boy/man (assigned female at birth and identify myself as a boy/man)</p> <p><input type="checkbox"/> Yes, I identify as non-binary, genderqueer, or another term</p> <p><input type="checkbox"/> Not sure whether I am transgender</p> <p><input type="checkbox"/> Not sure what this question means</p>	<p><b>When someone feels their gender—male, female or another gender—doesn't match their original birth certificate, they might think of themselves as transgender, non-binary, or gender non-conforming. Would you say this applies to you?</b></p> <p><b>If unsure/unclear response, ask:</b> It sounds like you're not sure. Is that because you are not sure what the question means, or not sure about your gender identity?</p> <p><b>If yes, ask:</b> Okay, and which of these three would you say best describes you? You are a transgender boy [man], meaning you were assigned female at birth and identify as a boy [man]... you are a transgender girl [woman], meaning you were assigned male at birth and identify as a girl [woman]... or you identify as a gender other than a boy [man] or girl [woman].</p> <p><b>TRANSGENDER STATUS</b></p> <p><input type="checkbox"/> Not transgender</p> <p><input type="checkbox"/> Transgender - identifies as a girl/woman</p> <p><input type="checkbox"/> Transgender - identifies as a boy/man</p> <p><input type="checkbox"/> Non-binary/genderqueer</p> <p><input type="checkbox"/> Questioning</p>
<p><b>Which gender best describes you right now? (If your gender identity doesn't match the sex you were assigned at birth, or if you are expressing your gender differently in different parts of your life, please pick the gender you are currently expressing most of the time.)</b></p> <p><input type="checkbox"/> Male</p> <p><input type="checkbox"/> Female</p> <p><input type="checkbox"/> Another gender: _____</p>	<p><b>For non-transgender clients, ask:</b> Would you say you are male, female or another gender?</p> <p><b>For transgender adults:</b> Fill in "Male" for those who identify as men, "Female" for those who identify as women, and "Another gender" for those who identify in some other way.</p> <p><b>For transgender children and youth:</b> See the guidelines on page 12 <i>Gender Questions: Considerations for Children and Youth</i>.</p> <p><b>CURRENT GENDER</b></p> <p><input type="checkbox"/> Male</p> <p><input type="checkbox"/> Female</p> <p><input type="checkbox"/> Another gender: _____</p>

<sup>1</sup> In this document, we use the term "gender identity" to refer to a person's sense of being male, female or another gender (regardless of whether they are transgender). We use the term "transgender status" to refer to whether or not a person is transgender, that is, whether their gender identity matches the sex they were assigned at birth.

### **Gender Questions: Considerations for Adults**

Adult clients' gender should be recorded based on their gender identity. This means transgender and cisgender women are recorded as female, and transgender and cisgender men are recorded as male, and clients who do not identify as men or women are recorded as another gender. There is rarely any reason to break from this best practice, regardless of the sex on a client's legal documents. Gender identity can be identified using the interview questions suggested above.

Particularly for people who transitioned some time ago, experiences with gender may be a sensitive topic; for this and many other reasons, not everyone who transitions from one gender to another identifies with the term "transgender." While the question proposed above will help agencies identify most LGBTQ families and understand how many transgender adults they serve, we cannot assume that they capture the nuances of every person's experience.

In particular, while it is reasonable to expect a homestudy to include discussion of an adult's past gender transition, staff should not label transgender adults reticent or dishonest if their initial form responses do not disclose their transgender status. Some people consider gender transition a part of their private medical history, and feel it is irrelevant or inappropriate to discuss except in specific settings. Thus, some adults may not share their gender history until later stages of a homestudy process, where other equally intimate information is at play.

**For more information, see All Children–All Families resource guide on serving transgender and non-binary foster and adoptive parents at [hrc.org/acaft-trans](https://hrc.org/resources/all-children-all-families).**

### **Gender Questions: Considerations for Children and Youth**

In child welfare, information about a child's gender may be used for a range of purposes:

- So that staff can address a child appropriately
- So that staff can use appropriate language when communicating with a child's caregivers
- So that staff can use appropriate language when communicating with other institutions, such as family court or schools
- So that staff can consider appropriate placements that may depend on gender

For transgender and gender-expansive children, the relevant "gender" for each of these purposes may not match up. Consider the following scenarios:

- Amalia, a transgender young woman in the 11th grade. Amalia presents as male (her sex assigned at birth) with her biological family, to whom she has not disclosed her transgender status. However, all students at her high school know her as female. Although Amalia's high school principal and counselor know that she is transgender, she expresses a strong desire that all communications with school staff describe her as female, which she believes will reduce the risk of her transgender status being more widely disclosed at school, and potentially subjecting her to harassment or violence. *Staff need to know that communications with the adolescent's family must describe her as "he" and use her birth name, while communications with Amalia herself and with her school must use "she" and the name "Amalia."*
- Leo, a seven-year-old child assigned male at birth who expresses uncertainty about being a boy or girl. Leo is comfortable being called "he" or "she," but most people know Leo as a boy. *Staff need to know that Leo needs to be supported and affirmed as he explores his gender identity, but that it is okay to use his birth name.*
- Charles, a transgender boy in the 9th grade. Charles has been living as a boy since the age of six and his adoptive parents have helped him change his legal name, along with the gender marker on his state identification card. *Staff need to know to use Charles' name and appropriate pronouns ("he") in all communications, while understanding that some older documents may use a different name or gender marker for him.*

Because complex considerations like these are common for transgender children and youth, it is important that staff record detailed notes about what identifiers (name, pronouns) and gender information should be used across various contexts. No single database field, or combination of fields, can capture these nuances. Staff must be trained to check records for information on transgender status and to carefully read colleagues' notes before sharing information about a transgender child's gender. Nonetheless, most agencies will continue to use a field for "Sex," "Gender" or "Current Gender," and will need to determine how to record this information for transgender children and youth. The right approach will likely vary from one child to the next:

- For Amalia, it may be most appropriate to use the “Another gender” option: Although she identifies as female, this record will remind staff that they need to read the most recent notes on her gender-related privacy concerns before disclosing any information.
- Because of the uncertainty about Leo’s gender identity and his present indifference about how others view his gender, it may be simplest to record him as male while continuing to monitor for shifts in identity or any gender-related victimization.
- Finally, although Charles has not changed the sex on his birth certificate, it is both most respectful and most practically useful to record his gender as male.

In recording gender information for transgender children, agencies should consider the following:

- **Keep children and youth informed.** Transgender young people should be informed of who can access gender information, and of any potential impact on their care. **Take children and youth’s input seriously.** Whenever possible, the “Current Gender” field should reflect the young person’s wishes—both to give them a sense of control and because they often have relevant input. Some children may prefer that their gender be recorded as their sex assigned at birth, especially if their caregivers or peers are not aware of their gender identity. Others will prefer that the gender field match their gender identity. When it is impossible to act on the young person’s recommendation, they should receive an explanation of the reasons for that decision, along with the steps that will be taken to ensure that their gender identity is respected and affirmed. In some cases, it may be preferable to record a transgender child’s gender as ‘another gender’ or leave it blank, rather than recording the sex assigned at birth.
- **Be prepared for changes.** Staff should be aware that a child’s understanding of their gender identity may shift over time, as part of normal and healthy identity development—although shifts are much less common for adolescents than for younger children. In addition, a child’s circumstances may change such that updates to the gender field are appropriate (for instance, moving from a non-affirming placement to an affirming placement). Staff should be prepared to re-interview children about their gender identity and update records accordingly.
- **Remember to check for transgender status.** It’s important to consider possible changes in gender identity when searching for previous records on a child, such as those from another county. Sometimes a child’s record may be under a previous name or use a different gender marker. Staff should consider gender transition as one possible explanation for “missing” historical records, and should check the “transgender status” field regularly.

## GENDER IDENTITY DEVELOPMENT

Some children clearly express a transgender identity at an early age, while others take much longer to determine their identity. Many transgender people do not identify or disclose their transgender identity until adolescence or later (Forcier & Olson, 2013). At any age, the best practice is to affirm a child’s identity as the child articulates it, without making assumptions based on gender expression. For instance, we would not assume that a boy is transgender simply because he prefers wearing skirts and dresses. To learn more, see *Supporting & Caring For Transgender Children (hrc.iml/SupportingTransChildren)* from the Human Rights Campaign, the American Academy of Pediatrics and the American College of Osteopathic Pediatricians.

Gender identity typically emerges earlier than sexual orientation identity, and transgender children occasionally articulate their identities as early as age three (Olson, Durwood, DeMeules, & McLaughlin, 2016). Staff should be prepared to record gender identity information for children of any age if it emerges in interviews. **Because young children may not be familiar with the term “transgender,” we recommend beginning the transgender status question at age 10, in parallel with the sexual orientation question, again keeping in mind that developmental stage should also be considered.**

## Gender Expression (Children and Youth)

While *gender identity* refers to a person’s sense of themselves as male, female, or another gender, *gender expression* refers to someone’s traits and behaviors as they relate to typical expectations for men and women. Put another way, gender expression means how people “show” or “do” gender externally. Words typically used to describe gender expression include “masculine” or “feminine.” Many young people who are not transgender express their gender in a manner that’s not considered typical for their assigned sex—one example would be a girl who is considered a “tomboy.”

Research has shown that boys on the feminine end of the gender expression spectrum, and girls on the masculine end, may be at greater risk for problems including family rejection, bullying and sexual harassment. Collecting data on young people’s gender expression can help agencies identify and address these disparities.

Young people may express their gender differently in different settings, so it is generally best to rely on a young person’s reports about their own gender expression rather than on a staff person’s subjective assessment. However, from a safety perspective, understanding how others view the young person is of paramount importance. Therefore, we recommend two questions in which the young person reports how they are viewed and treated relative to their gender expression. The first measures peer perceptions of masculinity and femininity (Wylie, Corliss, Boulanger, Prokop, & Austin, 2010), while the second asks specifically about victimization based on gender expression. Using both questions allows an agency to monitor for active safety concerns, while also flagging youth without a history of victimization who may nonetheless benefit from affirming placements or resources. Gender expression victimization can begin at early ages, so the second question is recommended for all school-age children. (The first question is designed for adolescents and may not be easily understood by younger children.)

Children may begin to exhibit gender-expansive traits (behaviors and preferences not considered typical for their assigned sex) at age 3, or even earlier (Fast & Olson, 2017). Staff should be aware that gender-expansive traits are a potential risk factor for caregiver conflict and mistreatment in this age group—keeping in mind that negative caregiver reactions, not the traits themselves, are the concern. However, preschool children may not understand questions about gender expression, so staff will need to rely on their own observations and adult reports to assess gender expression conflict or victimization in this group.

GENDER EXPRESSION: CHILD/YOUTH	
WRITTEN	INTERVIEW
<p><b>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?</b></p> <p><input type="checkbox"/> Very feminine</p> <p><input type="checkbox"/> Mostly feminine</p> <p><input type="checkbox"/> Somewhat feminine</p> <p><input type="checkbox"/> Equally feminine and masculine</p> <p><input type="checkbox"/> Somewhat masculine</p> <p><input type="checkbox"/> Mostly masculine</p> <p><input type="checkbox"/> Very masculine</p>	<p><b>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? The options are very feminine, mostly feminine, somewhat feminine, equally feminine and masculine, somewhat masculine, mostly masculine, or very masculine.</b></p> <p><b>GENDER EXPRESSION</b></p> <p><input type="checkbox"/> Very feminine</p> <p><input type="checkbox"/> Mostly feminine</p> <p><input type="checkbox"/> Somewhat feminine</p> <p><input type="checkbox"/> Equally feminine and masculine</p> <p><input type="checkbox"/> Somewhat masculine</p> <p><input type="checkbox"/> Mostly masculine</p> <p><input type="checkbox"/> Very masculine</p>
<p><b>Sometimes people are teased or hurt because the way they look or act doesn’t match how other people think boys or girls should look or act. How often do you think this has happened to you?</b></p> <p><input type="checkbox"/> Never</p> <p><input type="checkbox"/> Sometimes</p> <p><input type="checkbox"/> Often</p>	<p><b>Sometimes people are teased or hurt because the way they look or act doesn’t match how other people think boys or girls should look or act. How often do you think this has happened to you?</b></p> <p><b>GENDER EXPRESSION VICTIMIZATION</b></p> <p><input type="checkbox"/> Never</p> <p><input type="checkbox"/> Sometimes</p> <p><input type="checkbox"/> Often</p>



## Other Suggested Questions

Besides basic information about clients' sexual orientation and gender identity, agencies may benefit from tracking other SOGIE-related information. Below are some other questions to consider.

### Preferred Name (Children, Youth and Adults)

Many people prefer to be called a name other than their legal first name. This is especially common for transgender youth or adults, who may go by a name that affirms their gender but have been unable to obtain a legal change of name. However, many cisgender clients prefer to go by a nickname or middle name, too.

Consistently using a client's preferred name is critical in establishing trust, so the preferred name needs to be obvious wherever staff view information about a client.

PREFERRED NAME: CHILD/YOUTH/ADULT	
WRITTEN	INTERVIEW
Preferred Name: _____	<p><b>After recording legal name: Is that the name you would like us to call you, or is there a nickname or another name that you go by?</b></p> <p>PREFERRED NAME: _____</p>

Agencies that use paper files can place "name alert" stickers (or sticky notes) on files where the client's preferred name differs from their legal name. This system helps staff remember to look for the preferred name, and establishes the importance of using it at all times.

### Pronouns (Children, Youth and Adults)

It's a best practice to ask all clients how they want to be addressed, regardless of their appearance or what you know about their gender identity. Recording this information in a database reminds staff to ask, and can help other staff members avoid mistakes.

PRONOUNS: CHILD/YOUTH/ADULT	
WRITTEN	INTERVIEW
<p><b>Which pronouns should we use for you?</b></p> <p><input type="checkbox"/> She / Her</p> <p><input type="checkbox"/> He / Him</p> <p><input type="checkbox"/> They / Them</p> <p><input type="checkbox"/> Something else: _____</p>	<p><b>We ask everyone how they want to be addressed. Should we call you 'he', 'she', 'they' or something else?</b></p> <p><b>PRONOUNS</b></p> <p><input type="checkbox"/> She / Her</p> <p><input type="checkbox"/> He / Him</p> <p><input type="checkbox"/> They / Them</p> <p><input type="checkbox"/> Something else: _____</p>

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## When to Ask

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As with any personal information, adults and young people feel most comfortable disclosing their sexual orientation and gender identity when they have developed trust and rapport with the agency and staff. If there are multiple opportunities for data collection—such as an initial inquiry form followed by a lengthier interview—consider asking detailed SOGIE questions at the later stage. This is particularly true of asking adults about their transgender status, since adults who have transitioned may rarely disclose being transgender in their daily lives, and may consider this information fairly private.

SOGIE questions should be asked in a private space. With children and youth, these questions should not be asked in the presence of family members.

Of course, it may be valuable to get a rough sense of how many LGBTQ families contact the agency without proceeding to later steps. In this case, agencies may wish to ask a general, optional question at the initial stage, such as “Do you or your partner identify as part of the LGBTQ community?”

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## Safety and Privacy

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For children and youth, SOGIE information is vital in finding appropriate, affirming placements and monitoring for safety risks. Of course, shared or used inappropriately, this information can create risks of its own. Staff should take the same precautions they use with other sensitive information. They should also learn to incorporate conversations about safety and privacy into the data collection process. Besides limiting the risk of inappropriate disclosures, these conversations may make staff aware of important issues in a young person’s care, such as ongoing conflict with caregivers about their LGBTQ identity.

When a young person discloses an LGBTQ identity, staff should thank them for sharing the information, explain who can see that information and how it is used, and ask their permission to record it. For instance, if a young person indicates that she identifies as a lesbian, a social worker might respond:

*Thank you for letting me know. Now, normally I write down what someone tells me about their sexual orientation. That information can be seen by other people who work here, and they use it to try and find placements that work well for young people who are LGBTQ, but we won't share it with your biological family or your school without asking you first. Is it okay if I write down that you identify as a lesbian?*

Of course, this discussion should reflect the agency’s specific policies and practices. If the young person is concerned about keeping the information private, it may be helpful to ask who already knows the information, whether there are specific people or systems they do not want the information shared with, and the reasons for those concerns.

It is important to be honest about any circumstances where SOGIE information might be shared without the young person’s permission. It is also important to take any safety and privacy concerns seriously: young people are often attuned to signals of bias and danger that may not be apparent to others. (For instance, staff may incorrectly assume that placements that affirm sexual orientation diversity will necessarily support transgender and gender-expansive young people as well.) If there is reason to believe that a specific disclosure *is* safe, staff can share that reasoning and allow the young person to decide.

Staff can also ask whether the young person *would* like anyone in particular to be informed about their sexual orientation or gender identity. They can then assist by making these disclosures or facilitating a conversation where the young person discloses to others. This is also an opportunity for staff to help the young person decide whether they want this information disclosed by discussing the possible risks and benefits to disclosure.

For a more thorough discussion of this critical topic, please see Chapter 9 (“Respecting Privacy and Purposeful Disclosure”) and Chapter 11 (“Documentation & Records”) of *Safe & Respected: Policy, Best Practices, & Guidance for Serving Transgender & Gender Non-Conforming Children and Youth Involved in the Child Welfare, Detention, and*

# APPENDIX I: SAMPLE FORMS

## CHILDREN AND YOUTH

The next few questions ask about how you identify yourself in terms of your sexual orientation and your gender. We ask everyone these questions because we work with all kinds of young people, and they help us make sure everyone is equally safe and supported. If you don't want to answer any of these questions right now, you can leave them blank.

### Which of the following best describes your sexual orientation?

- Lesbian or gay
- Heterosexual or straight
- Bisexual
- Pansexual
- Asexual
- Prefer no labels
- Something else: \_\_\_\_\_
- Not sure about my sexual orientation
- Not sure what this question means

### Which of the following best describes your gender?

- Male
- Female
- Another gender: \_\_\_\_\_

### Do you consider yourself to be transgender?

- No, I am not transgender
- Yes, I am a transgender girl  
(assigned male at birth and identify myself as a girl)
- Yes, I am a transgender boy  
(assigned female at birth and identify myself as a boy)
- Yes, I identify as non-binary, genderqueer, or another term
- Not sure whether I am transgender
- Not sure what this question means

### Which pronouns should we use for you?

- She / Her
- He / Him
- They / Them
- Something else: \_\_\_\_\_

### 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?

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

### Sometimes people are teased or hurt because the way they look or act doesn't match how other people think boys or girls should look or act. How often do you think this has happened to you?

- Never
- Sometimes
- Often

## ADULTS

The next few questions ask how you identify yourself in terms of your sexual orientation and your gender. We ask these questions because our clients are diverse, and we want to make sure we are treating everyone equally and meeting every person's individual needs. If you don't want to answer any of these questions, you can leave them blank.

### Which of the following best represents how you think of yourself?

- Lesbian or gay
- Straight (that is, not gay or bisexual)
- Bisexual
- Something else: \_\_\_\_\_
- Not sure about my sexual orientation
- Not sure what this question means

### Which of the following best describes your gender?

- Male
- Female
- Another gender: \_\_\_\_\_

### Do you consider yourself to be transgender?

- No, I am not transgender
- Yes, I am a transgender woman  
(assigned male at birth and identify myself as a woman)
- Yes, I am a transgender man  
(assigned female at birth and identify myself as a man)
- Yes, I identify as non-binary, genderqueer, or another term
- Not sure whether I am transgender
- Not sure what this question means

### Which pronouns should we use for you?

- She / Her
- He / Him
- They / Them
- Something else: \_\_\_\_\_

# APPENDIX II: INTERVIEW GUIDE



## ASKING YOUNG PEOPLE ABOUT SOGIE: SAMPLE INTERVIEW FLOW

Now I'm going to ask a few questions about how you identify yourself in terms of your sexual orientation and your gender. We ask everyone these questions because we work with all kinds of young people, and they help us make sure everyone is equally safe and supported. If you don't want to answer any of these questions right now, just say "skip" and we can move on.

**1** The first question is how you think about your sexual orientation. Would you say you are lesbian or gay, bisexual, straight, or another word, such as pansexual or asexual? I can also write down if you are questioning your sexual orientation or if you prefer not to use any label.

Clear response (lesbian/gay, bisexual, straight, asexual, pansexual, etc.)

Unsure/unclear response

It sounds like you're not sure. Is that because you are not sure what the question means, or not sure about your sexual orientation?

Not sure about sexual orientation

Don't understand

Okay, thank you. Now, normally I write down what someone tells me about their sexual orientation. That information can be seen by *[explain agency policy]* and they use it for *[explain agency policy]*. Is it okay if I write down your sexual orientation?

**2** The second question is about your gender. When someone feels their gender—male, female or another gender—doesn't match their original birth certificate, they might think of themselves as transgender, non-binary or gender non-conforming. Would you say that this applies you?

Yes, transgender

No, not transgender

Unsure/unclear response

It sounds like you're not sure. Is that because you are not sure what the question means, or not sure about your gender identity?

Don't understand

Not sure about gender identity

**3** Okay, and which of these three would you say best describes you?

- Transgender girl, meaning you were assigned male at birth and identify as a girl
- Transgender boy, meaning you were assigned female at birth and identify as a boy
- Transgender, and you identify as non-binary, genderqueer or another gender.

**3** Okay, and do you identify yourself as a boy, a girl, or some other way?

Boy or girl

Another gender

**4** Great, thank you for letting me know. So, for now, should I call you "he", "she," "they," or something different?

**4** Great, thank you for letting me know. You said you identify as [a boy/a girl/their term], but just to be sure, should I call you [he/she/they] or something different?

Okay, thank you. Now, normally I write down whether someone mentions being transgender. That information can be seen by *[explain agency policy]* and they use it for *[explain agency policy]*. Is it okay if I write down that you are transgender?

I also have to write down a gender: either male, female or another gender. That information can be seen by *[explain agency policy]* and they use it for *[explain agency policy]*. I want to make sure everyone respects your identity, and I also want to make sure you are safe. Right now, do you think it makes sense to put you down as male, female, or another gender, keeping in mind that *[explain]* will be able to see what I put? We can change all this information later if things change for you.

**END**

**END**

**1 SEXUAL ORIENTATION**

- Lesbian/gay
- Heterosexual/straight
- Bisexual
- Pansexual
- Asexual
- Prefer no labels
- Something else: \_\_\_\_\_
- Questioning

Consider revising based on privacy discussion.

**2 TRANSGENDER STATUS**

- Not transgender
- Transgender - identifies as a girl
- Transgender - identifies as a boy
- Non-binary/genderqueer
- Questioning

For transgender interviewees, use information from the gender identity question (next) to select the appropriate option. Consider revising based on privacy discussion.

**3 GENDER**

- Male
- Female
- Another gender: \_\_\_\_\_

Consider revising based on privacy discussion.

**4 PRONOUNS**

- She / Her
- He / Him
- They / Them
- Something else: \_\_\_\_\_

Consider revising based on privacy discussion

**APPENDIX II: INTERVIEW GUIDE**



**ASKING ADULTS ABOUT SOGIE: SAMPLE INTERVIEW FLOW**

The next few questions ask how you identify yourself in terms of your sexual orientation and your gender. We ask these questions because our clients are diverse, and we want to make sure we are treating everyone equally and meeting every person's individual needs. If you don't want to answer any of these questions right now, just say "skip" and we can move on.

**1** The first question is how you think about your sexual orientation. Would you say you are lesbian or gay, straight (meaning not gay or bisexual), or bisexual? Or I can write down another word that you use.

Clear response  
(lesbian/gay, bisexual, straight, etc.)

Unsure/unclear response

It sounds like you're not sure. Is that because you are not sure what the question means, or not sure about your sexual orientation?

**2** The second question is about your gender. When someone feels their gender—male, female or another gender—doesn't match their original birth certificate, they might think of themselves as transgender, non-binary or gender non-conforming. Would you say that this applies to you?

Not sure about sexual orientation

Don't understand

Yes, transgender

No, not transgender

Unsure/unclear response

It sounds like you're not sure. Is that because you are not sure what the question means, or not sure about your gender identity?

**3** Okay, and which of these three would you say best describes you?  
 • Transgender woman, meaning you were assigned male at birth and identify as a woman  
 • Transgender man, meaning you were assigned female at birth and identify as a man  
 • Transgender, identify as non-binary, genderqueer or another gender

**3** Okay, and do you identify yourself as a man, a woman, or some other way?

Don't understand

Not sure about gender identity

**4** Great, thank you for letting me know. You said you identify as [a man/a woman/their term], but just to be sure, should I call you [he/she/they] or something different?

Man or woman

Another gender

**4** Great, thank you for letting me know. So, for now, should I call you "he", "she," "they," or something different?

**END**

**1** **SEXUAL ORIENTATION**

- Lesbian/gay
- Heterosexual/straight
- Bisexual
- Something else
- Questioning

**2** **TRANSGENDER STATUS**

- Not transgender
- Transgender - identifies as a woman
- Transgender - identifies as a man
- Non-binary / genderqueer
- Questioning

For transgender interviewees, use information from the gender identity question (next) to select the appropriate option.

**3** **GENDER**

- Male
- Female
- Another gender: \_\_\_\_\_

**4** **PRONOUNS**

- She / Her
- He / Him
- They / Them
- Something else: \_\_\_\_\_

# APPENDIX III: GLOSSARY

**Asexual:** A term used to describe a person who does not experience sexual attraction.

**Bisexual:** A person emotionally, romantically or sexually attracted to more than one gender though not necessarily simultaneously, in the same way or to the same degree.

**Cisgender:** A term used to describe a person whose gender identity aligns with that typically associated with the sex assigned to them at birth.

**Gay:** A term used to describe a person who is emotionally, romantically or sexually attracted to people of the same gender.

**Gender Binary:** A system in which gender is constructed into two strict categories of male or female. Gender identity is expected to align with the sex assigned at birth and gender expressions and roles fit traditional expectations.

**Gender-Expansive:** A term that conveys a wider, more flexible range of gender identity and/or expression than typically associated with the binary gender system. Sometimes used to describe young people who are comfortable with the sex they were assigned at birth and simply don't conform to stereotypes that people hold for their sex.

**Gender Expression:** External appearance of one's gender, usually shown through behavior, clothing, haircut or voice, and which may or may not conform to socially defined behaviors and characteristics typically associated with being either masculine or feminine.

**Gender Identity:** One's internal sense of being male, female, a blend of both or neither – how individuals perceive themselves and what they call themselves. One's gender identity can be the same or different from their sex assigned at birth.

**Gender Role:** This is the set of expectations and behaviors assigned to females and males by society. Every culture and community has its own expectations about how men/boys and women/girls should behave, and these expectations often shift over time.

**Gender Non-Conforming:** A broad term referring to people who do not behave in a way that aligns to the traditional expectations of their gender, or whose gender expression does not fit neatly into a category.

**Gender Fluid:** Refers to being unconfined by one single gender identity and able to identify with neither, both and/or other gender(s) (in regards to the male/female gender binary), at different points in time.

**Genderqueer:** Genderqueer people typically reject static categories of gender and often, though not always, sexual orientation. People who identify as "genderqueer" may see themselves as being both male and female, neither male nor female, or as falling completely outside these categories.

**Gender Transition:** The process by which some people strive to more closely align their gender identity with their outward appearance. Some people *socially* transition, whereby they might begin dressing, using names and pronouns and/or be socially recognized as another gender. Others undergo *medical* transitions in which they modify their bodies through medical interventions. There are also *legal* aspects to transitioning (e.g., changing gender marker on birth certificate).

**Heterosexual:** A term used to describe people whose emotional, romantic or sexual attractions are to people of another gender. Also: straight.

**Lesbian:** A term used to describe a woman who is emotionally, romantically or sexually attracted primarily to other women.

**LGBTQ:** An abbreviation for lesbian, gay, bisexual, transgender, queer and questioning.

**Pansexual:** A term which describes someone who has the potential for sexual attraction to people of any gender.

**Queer:** This term can be used as an umbrella term for "LGBT," to express a rejection of other gender and sexual orientation labels, or to describe sexual attraction to people of more than one gender. Historically "queer" has been used as a negative term for LGBTQ people. Some people still find the term offensive while others have embraced the term. It should be used carefully.

**Questioning:** A term used to describe people who are in the process of exploring their sexual orientation, gender identity or gender expression.

**Sexual Orientation:** A person's emotional, romantic and sexual attraction to other people.

**Transgender:** A term used to describe people whose gender identity does not match expectations based on the sex they were assigned at birth. A transgender experience does not imply any specific sexual orientation. Therefore, trans people may be straight, gay, lesbian, bisexual, queer, etc.

# APPENDIX IV: ADDITIONAL RESOURCES

## ALL CHILDREN–ALL FAMILIES RESOURCES

**Beginner’s Guide to LGBTQ Inclusion.** Tip sheets designed for child welfare workers at the early stages of assessing their individual and organizational capacity to competently serve the LGBTQ community. Available at: <https://www.hrc.org/resources/all-children-all-families-beginners-guide-to-lgbtq-inclusion>.

**Caring for LGBTQ Children & Youth.** This guide covers terminology and several key tips on how to best support and care for LGBTQ children and youth. Available at: <http://www.hrc.org/resources/all-children-all-families-caring-for-lgbtq-children-youth>.

**LGBTQ Affirming Homestudy Questions.** This guide discusses considerations for conducting LGBTQ-inclusive and affirming homestudies. Potential questions are listed as well as the rationale for each question. Available at: <https://www.hrc.org/resources/all-children-all-families-lgbtq-affirming-homestudy-questions>.

**National Training Program.** All Children-All Families provides several full-day trainings on LGBTQ competency in addition to a “Training of Facilitators” program. For more information, visit [hrc.im/acaf-training](http://hrc.im/acaf-training).

**Newsletter.** Subscribe to the program’s monthly e-newsletter at [hrc.im/field-forward](http://hrc.im/field-forward).

**Online Learning.** Register for free webinars on LGBTQ inclusion at [hrc.im/acaf-webinars](http://hrc.im/acaf-webinars).

## GUIDELINES AND EXAMPLES FROM AGENCIES

**Respectfully Asking Sexual Orientation and Gender Identity (SOGI) Questions** (n.d.), from New York City’s Administration for Children’s Services (ACS), is an excellent overview of best practices for discussing SOGIE with children and their families. The document includes recommended questions similar to those presented here, as well as questions about the child’s sense of safety with respect to their SOGIE. Some content is specific to ACS staff.

**Safe and Respected: Policy, Best Practices, and Guidance for Serving Transgender and Gender Non-Conforming Children and Youth Involved in the Child Welfare, Detention, and Juvenile Justice Systems** (2014), from New York City’s Administration for Children’s Services, offers detailed recommendations for serving transgender and gender-expansive young people. While some content is specific to New York City, the best practices are broadly applicable. The publication includes detailed guidance for documenting and using appropriate names and pronouns (Chapter 10), documenting other information related to gender identity/gender expression (Chapter 11), and disclosure of this information (Chapter 9). While the publication focuses on gender identity and gender expression, many of the recommendations about data collection and privacy can also be applied to sexual orientation.

**A SOGIE PDSA instruction sheet and questionnaire used in Alameda County, California** (n.d.) is available online. While the questions used in that project differ from those recommended here, the explanations and instructions are a helpful example of how to train staff on SOGIE data collection.

## PROFESSIONAL GUIDELINES

**Guidelines for Managing Information Related to the Sexual Orientation & Gender Identity and Expression of Children in Child Welfare Systems** (2013), a publication of Family Builders, Legal Services for Children, the National Center for Lesbian Rights and the Center for the Study of Social Policy, offers guiding principles for assessing and documenting children’s SOGIE, and for the disclosure of that information.

## RESEARCH PERSPECTIVES ON SOGIE DATA COLLECTION

For more recommendations on collecting accurate information about SOGIE, see two reports by The Williams Institute, **Best Practices for Asking Questions to Identify Transgender and Other Gender Minority Respondents on Population-Based Surveys** (2014) and **Best Practices for Asking Questions about Sexual Orientation on Surveys** (2009). Although researchers have learned even more about SOGIE data collection since the reports were produced, they remain among the best reviews of the topic. Both reports include special considerations for adolescents.

**Surveying LGBTQ Youth in Foster Care: Lessons from Los Angeles** (2016), from The Williams Institute, the Federal Permanency Innovations Initiative, the Los Angeles LGBT Center and Khush Cooper & Associates, is a detailed review of lessons learned from conducting a study of LGBTQ youth in foster care. While focused on data collection methods for research purposes, the report covers broadly relevant concerns including privacy and the types of SOGIE information that can be collected.

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