

Creating GLBTQIA-Inclusive Forms

Suggestions For Policy And Implementation

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This guide is meant for anyone who is creating a form, survey, or other information-gathering tool. Too often, gay, genderqueer, lesbian, bisexual, transgender, transsexual, questioning, queer, intersex, asexual, and ally (GLBTQIA)¹-identified people are forced to make difficult choices on the forms they fill out – choices that put them in boxes, make them uncomfortable, and don't accurately describe their lives. In addition to alienating a segment of the population, ignoring these issues can decrease the accuracy of the data collected. However, even when form makers recognize some of the problems GLBTQIA people face with "typical" forms, it can be hard to design ones that are more inclusive. Ideally this guide will help you to understand why changes are necessary, and how to implement them in a straightforward manner.

Gender Identity and Sex Options

Sex and gender identity are often conflated on forms; it is not uncommon to see a question about "gender" have only two response options: male or female. However, there are important differences. Sex is a category that describes a person's biology and body; gender identity describes a person's sense of self. These are two different types of information, and you must be clear about which type, if either, is relevant to your data collection.

First, we recommend that you consider whether either category is truly relevant to the data you are collecting. Quite often, information about gender identity and sex is gathered "just because." If this information is not truly pertinent, we recommend eliminating the questions from your forms altogether. Including them unnecessarily causes stress for many transgender and intersex people, reinforces the importance of gender as a category in our culture, and creates more data for you to process!

¹ We have tried to be as inclusive as practicable with the labels included under GLBTQIA; however, we fully recognize that any one set of labels will inherently exclude some members of our greater communit(ies). Our apologies if this is the case here. Furthermore, we have defined some of the terms we use here, but not in any kind of comprehensive way. If there are terms you are unfamiliar with or would like to know more about, we encourage you to do additional research on those identities and experiences.

Second, we would venture that information about a person’s sex is only really necessary in two realms: the legal and the medical. If you need to know a person’s legal sex, there are generally only two pertinent options. However, a transgender person² may be in the process of changing their documents, and so may have different legal status depending on the realm (i.e. they may have one sex listed on a driver’s license, and another listed on their birth certificate). Thus, a space for additional explanation should still be provided. Furthermore, the space for “other” highlights the physical existence of intersex people, despite their lack of legal status. This question should be explicit, as below:

Legal Sex (as shown on Document X [if pertinent]):

- female
- male
- other (please describe): _____

If you are collecting information about a person’s sex pertinent to their medical history, more than two options are necessary. As this is very personal information, it is important to specify its use as medical. The terms “intersex”³ and “transsexual”⁴ are broad, and by themselves do not give enough information necessary for medical purposes (e.g. whether a transsexual person is physically transitioning and the details thereof; the specifics of a person’s intersex condition, etc.). Here it is also important to specify intersex and transsexual rather than simply “other,” both to make intersex and transsexual people know that they are welcome, and to make other people aware of those options.

Because some people are not “out” about the status of their bodies but may feel compelled to disclose this information for health reasons, it is particularly important to treat information about a person’s medical sex as confidential, and to let people know that it will be treated as such (see following page). However, it would be misleading to imply confidentiality if your organization will not be able to maintain it in practice.

² Transgender refers to anyone who transgresses gender norms and self-identifies as transgender. For example, this term can, but does not necessarily, encompass drag kings, drag queens, two-spirit people, women, men, crossdressers, genderqueer people, transsexuals, androgynes, non-, bi-, third-, pan-, and omni-gendered people, and more.

³ According to the Intersex Society of North America, intersex is “a general term used for a variety of conditions in which a person is born with a reproductive or sexual anatomy that doesn’t seem to fit the typical definitions of female or male.” See <http://www.isna.org> for more information.

⁴ Transsexual, which can be a subset of transgender, generally refers to people whose gender is “opposite” the one they were assigned at birth, and/or someone who is physically transitioning their body.

Sex (confidential information, for medical purposes only):

- female
 - male
 - intersex, transsexual, or other, please specify and describe: _____
-

If legal and/or medical sex is included on a form, gender identity should be as well. Including both sex and gender identity makes it clear that you, the data collector, are aware of the difference between the categories and know that a person's gender identity cannot be assumed from their sex. Furthermore, it increases awareness of the difference between sex and gender identity in the general population.

Outside of the legal and medical realms, a person's sex is not pertinent. The relevant category for most endeavors (surveys, etc.) is gender identity. If you decide that gender identity is relevant to your data, we recommend the following format:

Gender Identity (please choose all that apply):

- woman
- transgender
- man
- other: _____

Important elements of this format include:

- 1) Explicit inclusion of "transgender": In attempting to create more inclusive forms, form makers have in some cases begun simply to add an "other" category in addition to the two binary categories they already have. While this is helpful, it is often not enough. We recommend including transgender as an explicit option under gender identity. This inclusion signals to transgender people that they are welcome, no matter their gender identity.
- 2) "Please choose all that apply": Although you may find it difficult to imagine a situation where someone's gender identity did not fall under just one of the options listed above, rest assured that there is at least one person out there who falls under any given combination you can think of. Many transgender people, for example, identify both as transgender and as either a man or a woman or both, concurrently. These categories are not mutually exclusive, and your form should recognize this fact.
- 3) The "other" option: Despite the explicit inclusion of transgender people, we recommend the additional inclusion of an "other" category with blank space for explanation. In terms of gender identity, transgender is meant to be an umbrella term that can include anyone who transgresses gender norms. However, many

people who fit that description do not identify as transgender, but rather as a whole host of more specific identities. This option gives people the space to be more complex than simplified categories.

- 4) Gender Identity: Including the word “identity” after “gender” explicitly indicates that you, the form maker, recognize the importance, power, and validity of self-identification. This is particularly significant to transgender people, who do not always have the luxury of having the world see them as they see themselves.
- 5) Variation on the “traditional” order of options: Traditionally, options are given as male first, then female second. Putting the options under both legal/medical sex and gender identity in some other order makes people who are filling out the form stop and think about the ordering. Furthermore, it helps in a small way to deconstruct hierarchies based on gender.

Data collectors may be concerned that including the options of “transgender” and “other,” and/or allowing people to choose more than one option, could interfere with their ability to categorize the data usefully. While we recognize this difficulty, it is likely that the proportion of the population who will utilize these options will be very small, depending on the population of interest. Thus, these options are not likely to cause any major difficulties.

Furthermore, these options make your results more accurate. If they are not included, transgender and intersex people often fail to answer the relevant questions, mark both of the given options, or self-select out of the process altogether. Finally, to transgender and intersex people, the inclusion of these choices can be a rare and valued glimpse of recognition from a world that largely renders them invisible.

Perceived Gender/Sex

In a very limited number of cases, the category of “perceived gender/sex” may also be relevant. For example, when examining the phenomena of sexism, how a person is perceived by the world may give you more relevant information than their legal sex, medical sex, or their gender identity. The category of “perceived gender/sex” is used because society typically conflates gender and sex; that is, if we see someone who presents as a woman, we assume that person is female. However, because the phrase “perceived gender/sex” may be unclear, we recommend that the question be posed in the following format:

How does the world perceive your gender/sex? Please choose all that apply:

- woman/female
- man/male
- gender variant or other, please describe: _____

Although most people are perceived as men/male or women/female, there are people who are perceived as both, androgynous, or some other category. Therefore, the ability to select more than one option, and to describe a specific experience, should be available.

If perceived gender/sex is included on a form, gender identity should be as well. Including both perceived gender/sex and gender identity makes it clear that you, the data collector, are aware of the difference between the categories and know that a person's gender identity cannot be assumed from their perceived gender/sex. Furthermore, it increases awareness of the difference between perceived gender/sex and gender identity in the general population.

Title Options

If you are collecting information on titles, do not assume that someone's title preference will be linked to their sex or their gender identity. We recommend including all of the following options (and any professional titles that might apply): Mrs./Miss/Mr./Ms./no title, as well as the ability to "choose all that apply". Many people (including non- transgender people) do not feel comfortable with any of these titles, and so it is important to include the option to not be addressed by any of them.

Names

Names are often a complicated area for transgender people in particular. Because the vast majority of names in our culture are specifically gendered, a transgender person's legal name may not reflect their gender identity and preferred name. Even after choosing a new, differently-gendered name, the process of legally changing one's name requires both money and time. In addition, minors generally do not have the ability to change their names without their legal guardian's permission. Furthermore, many non-transgender people use names other than their legal names. We recommend including places for both legal names and preferred names, as follows:

Legal First Name _____
Preferred First Name* _____
Last Name _____

**All mail and non-legal documents will use this name unless you request otherwise.*

The asterisk and note are included for the case someone who is closeted (i.e., not openly transgender) in their living situation. They may have a preferred name that they use with friends, but that their family members are unaware of. Receiving mail to this name would be difficult to explain, and is potentially life-threatening.

Parents/Guardians

Many forms for minors include slots for their parents' names. Including only "mother" and "father" as the options for parents ignores the reality of many people. For example, a child who was raised by a lesbian couple, a transgender parent, three cohabiting adults, adoptive parents, or their grandparents, would have a difficult time filling out this section. We recommend that "Mother" and "Father" be replaced simply by the gender-neutral label "Parent/Guardian," numbered 1, 2, and 3. If you need information about their legal guardians or birth parents, we recommend asking specifically for that information as well, i.e., including a separate question about "Birth Parent" or "Legal Guardian" with the option to indicate that the answers duplicate the "Parent/Guardian" sections, for convenience.

Partners

If these changes have not already been made, forms with spaces for "husband" or "wife" should be changed to the gender-neutral "spouse/domestic partner". It would be useful to specify whether this information is for legal purposes or not.

Sexual Orientation

Generally speaking, a person's sexual orientation is not pertinent to most forms. If you do choose to collect information on this category, at a minimum, your model should include the following:

Sexual Orientation (please choose all that apply):

bisexual

heterosexual

lesbian

gay

other: _____

Additional sexual orientations that could be listed include, but are not limited to: pansexual⁵, omnisexual⁶, straight, same gender loving (SGL)⁷, homosexual, asexual⁸, heteroflexible⁹, homoflexible¹⁰, and queer¹¹. Even with the inclusion of such terms,

⁵ Pansexual describes a person who is attracted to people of any gender.

⁶ Like pansexual, omnisexual describes a person who is attracted to people of any gender.

⁷ Same gender loving (SGL) is a term that originated in the early 1990s in the African American and/or Black GLBTQIA community as an alternative to gay, lesbian, and other identities that may be seen as terms of the white GLBTQIA community.

⁸ Asexual describes a person who does not experience sexual attraction. A person who identifies as asexual may concurrently identify with any other sexual orientation identity. See <http://www.asexuality.org> for more information.

⁹ Heteroflexible describes a person who is primarily, but not exclusively, heterosexual.

¹⁰ Homoflexible describes a person who is primarily, but not exclusively, homosexual.

however, a space for specific other descriptions is recommended. Additionally, we recommend listing options in a semi-random order, as opposed to following the societal hierarchy of heterosexual/gay/lesbian/bisexual.

Each identity should be given its own option. For example, “gay” and “lesbian” should be separate rather than conflated as “gay/lesbian,” because people may identify with one term and not the other. This is true even for sets that appear to be synonyms, such as straight/heterosexual or gay/homosexual. Also, it is important not to include any reference to gender identity in questions about sexual orientation, as these categories are in fact separate (for example, “transgender” should never be an option for a question about sexual orientation, because it is a gender identity). Finally, we would like to explicitly note that a person’s sexual *orientation* does not necessarily predict or describe their sexual *behavior* or level of sexual activity.

Conclusions

Categorizing people is a technique that is often used as a tool of oppression. Many of the suggestions we have made here regarding GLBTQIA people can, and should, be equally applied to making forms more inclusive for people who fall into more than one category in terms of race, religion, ethnicity, national origin, and so on. Similarly, when using these categories on forms, be sure to ask yourself whether the information these categories provide is really pertinent to your endeavors.

Changing forms to be more inclusive is but one minor detail in the work to create institutions that are welcoming to all. Please do not merely implement these changes as a “quick fix” or superficial alteration. Giving people the impression that your institution is welcoming towards and knowledgeable about GLBTQIA people, if in fact it is not, is irresponsible, dangerous, and potentially life-threatening. Anyone who works with the data collected by these forms, for instance, should have at least the basic tools to treat GLBTQIA people with the respect that they deserve. This includes, but is not limited to, maintaining the confidentiality of their status as GLBTQIA people, if you do not have their express permission to make it public, and addressing them by their preferred name and pronouns.

Finally, we would like to note that these recommendations are not set in stone. They are our best attempt at coming up with a system that would allow administrators to collect the data they need in the most inclusive manner. Specifically, we created these guidelines while critiquing a college admissions form; other forms are likely to have categories and problems that we have not addressed. Suggestions, changes, and new ideas are welcomed. Please feel free to contact us at creatingforms@gmail.com if you have any thoughts or questions.

¹¹ Although the term “queer” has been, and in some cases continues to be, used in a derogatory manner, some people have reclaimed this term to describe a person whose sexual orientation and/or gender identity falls outside of cultural norms.