

Queering research and evaluation: An LGBTQ2S+ primer

A practical guide for researchers
and evaluators



JUNE 2021

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OVERVIEW & SCOPE

This document provides a practical introduction to gender identity and expression, sexual orientation, and the LGBTQ2S+ community and relevant issues for researchers and evaluators. It is designed as a guide for conducting research and evaluation that considers gender and sexual orientation (among other intersecting characteristics) in research and evaluation projects spanning diverse areas of policy. With information about key terms and concepts, relevant theories and frameworks, and guidelines for research and evaluation projects, this document serves as a resource for researchers and evaluators looking to be more inclusive and ethical when it comes to gender and sexual minority individuals in their work.

Research vs. evaluation: What is the difference?

Though the lines are often blurred, there are some important differences between research and evaluation. This document provides information relevant to both research and evaluation, however, some concepts or resources will be more applicable in one context than another. Both research and evaluation seek to systematically answer some type of question, but their purpose, audience, and methodologies – among other things – may differ.

Research: *“Research is a process of systematic inquiry that entails collection of data; documentation of critical information; and analysis and interpretation of that data/information, in accordance with suitable methodologies [...] Research is conducted to evaluate the validity of a hypothesis or an interpretive framework; to assemble a body of substantive knowledge and findings for sharing them in appropriate manners; and to generate questions for further inquiries.”¹*

Evaluation: *“An evaluation is an assessment, conducted as systematically and impartially as possible, of an activity, project, programme, strategy, policy, topic, theme, sector, operational area or institutional performance [...] The purposes of evaluation are to promote accountability and learning. Evaluation aims to understand why — and to what extent — intended and unintended results were achieved and to analyse the implications of the results.”²*

For additional resources describing the differences and similarities between research and evaluation, refer to the endnotes associated with this box.³⁻⁵

CONTEXT & RATIONALE

Gender and sexual minority individuals in Canada – including lesbian, gay, bisexual, transgender, queer, Two-Spirit, and other gender and sexual minority (LGBTQ2S+) people – continue to experience diverse forms of systemic and structural inequities. LGBTQ2S+ individuals are more likely to live in poverty, face greater barriers to employment (including stigma and discrimination), and earn less at work, despite often having higher levels of education than their cisgender, heterosexual counterparts.^{6–9} In addition, gender and sexual minorities tend to have poorer health and mental health outcomes, as well as experience poorer social outcomes, including lower levels of social cohesion and greater rates of social exclusion.^{10–14}

While Canada has fared better than many countries in terms of providing legislative rights and protections to the LGBTQ2S+ community, stigma, prejudice, and discrimination remain pressing challenges.^{15,16} Discrimination experienced by sexual and gender minorities in Canada can take the form of individual-level bullying or harassment, day-to-day practices of schools, clinics, and workplaces, and structural-level inequities grounded in laws and policies,¹⁷ with the resulting disparities being mutually reinforcing.^{18,19}

A comprehensive understanding of LGBTQ2S+ peoples' experiences is complicated by the noted lack of high-quality data on gender identity, gender expression, and sexual orientation in Canada, serving as a major barrier to a comprehensive understanding of LGBTQ2S+ individuals' experiences.²⁰ Overall, LGBTQ2S+ people do not find themselves represented in survey data in Canada, and when there is opportunity to identify as a member of the LGBTQ2S+ community, questions are often limited to sexual identity.¹⁶ A major implication of this is that individuals who are gender minorities (including trans, non-binary, and Two-Spirit people) may be excluded from self-identifying, and thus remain invisible in research.

Contextualizing research in the LGBTQ2S+ community

Prior to engaging in research or evaluation with or about gender and sexual minority individuals, it is important that researchers and evaluators understand the historical context of research for this population. Specifically, research about gender and sexual minority individuals has a complicated history of pathologization: "Prior to 1970, two-thirds of all research concerning gay men and lesbians focused on topics related to sickness, diagnosis, and causation."²¹ This history underscores the importance of research and evaluation that is ethical, inclusive, and explicitly committed to doing no harm, with a view to avoiding further negative experiences among LGBTQ2S+ individuals.

The persistent inequities faced by the LGBTQ2S+ community underscore the significance of considering and including these populations in any policy research or evaluation endeavours, reminding us that different groups experience interventions differently. For example, applied to the field of education, research and evaluation work might be informed by results from a 2011 survey finding that more than almost two-thirds of LGBTQ students in Canada report feeling unsafe at school.²² Research and evaluation in the realm of employment could be shaped by the recognition of increased risks at the workplace for LGBTQ2S+ people, with a recent article finding that gender-diverse employees in Canada's federal public service are between 2.2 and 2.5 times more likely to experience workplace discrimination and harassment than their cisgenderⁱ male peers.¹⁵ These considerations are relevant even for seemingly-less obvious policy areas; for instance, in the realm of climate change, a 2015 report points to Indigenous LGBTQ2S+ people being particularly vulnerable in the face of environmental crises, suffering disproportionately in instances of displacement due to a higher risk of violence and homelessness, among other systemic challenges.²³ In short, there is clear and direct relevance of this lens across multiple areas of policy, with clear implications for researchers and evaluators whose topical focus includes, health and well-being, employment, education, income security, and a host of other subject areas.

ⁱ Someone whose gender identity aligns with the sex they were assigned at birth; opposite of transgender.

WHO ARE LGBTQ2S+ IDENTIFIED INDIVIDUALS?

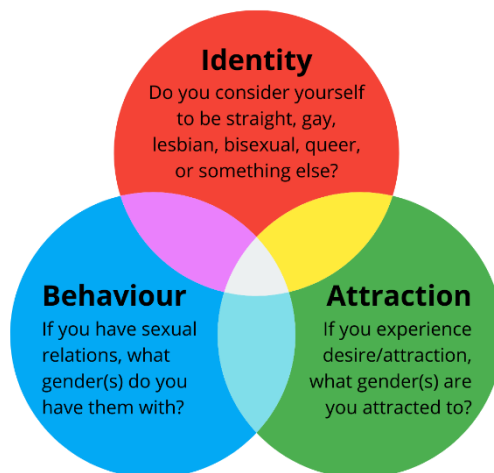
LGBTQ2S+ identity is complex, containing several distinct but interacting elements relating to sexual orientation and gender. Meaningfully addressing and incorporating issues of gender and sexual orientation into research and evaluation requires an understanding of these terms and their prevalence on the part of practitioners. As such, this section provides an overview of these concepts.

Sexual orientation refers to the direction of a person's attraction: straight/heterosexual, gay, lesbian, bisexual, asexual, and pansexual are all examples of sexual orientation, which may change throughout a person's life. The 2014 Canadian Community Health Survey (CCHS) was the first Statistics Canada survey to include a question on sexual orientation, with 1.7 per cent of Canadians aged 18 to 59 reporting in 2014 that they considered themselves to be homosexual (gay or lesbian), and 1.3 per cent reporting that they considered themselves to be bisexual. While the CCHS survey question asked individuals to *identify* with one of these categories, their definitions emphasized sexual relations (i.e., behaviour) with people of the same or opposite sex.ⁱⁱ Some international data has indicated that the proportion of individuals who *identify* as lesbian, gay, bisexual, or another sexual minority identity is much smaller than the proportion who report sexual minority *behaviour* (i.e., having had sexual relations with someone of the same sex), although individuals have been found to be more willing to answer questions about identity rather than behaviour.²⁴ In Canada, recent research suggests that single-item measures of sexual orientation that are commonly found in Canadian population-level datasets may not only understate the prevalence of sexual minority individuals in Canada, but also fails to capture the nuance that may explain differential outcomes based on attraction, behaviour, or identity.^{25,26}

The distinction between identity, attraction, and behaviour when it comes to sexual orientation (see Figure 1) is key in research or evaluation involving LGBTQ2S+ individuals. As mentioned, how questions about sexual orientation are framed (i.e., identity vs. attraction vs. behaviour) may elicit different responses based on respondents' own identity, experiences, and comfort level. Moreover, different dimensions of sexual orientation may be of greater or lesser relevance depending on the topical focus of a research or evaluation project. This will be discussed in greater detail later in this document.

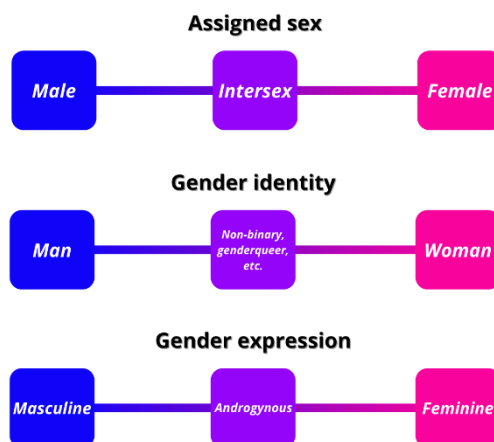
ⁱⁱ Note that this definition does focus on the biological sex of the partner in terms of defining sexual orientation rather than the gender. Statistics Canada is only now moving towards including a measure of gender in addition to a measure of biological sex in their surveys. Surveys to-date have largely framed sexual orientation around the biological sex of an individual's partners, either explicitly (e.g., in the CCHS question referenced here), or implicitly (e.g., through derived classifications of common-law and married partnerships based on identified biological sex of the people involved in that relationship categorization).

Figure 1 Dimensions of sexual orientation



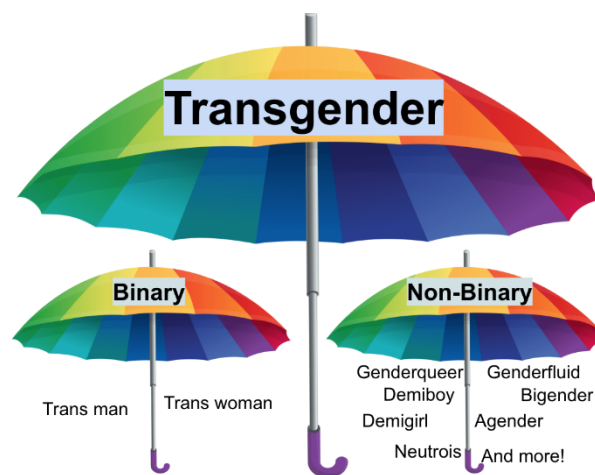
Gender is a socially-constructed system used to classify individuals and prescribe specific emotional, behavioural, and cultural characteristics, often grounded in the binary of “man” or “woman.”²⁷ What we think of as gender is comprised of **gender identity** and **gender expression**: the former refers to a person’s internal sense of their own gender while the latter refers to how a person outwardly presents their gender (including appearance, mannerisms, pronouns, etc.). While gender identity and expression often align, this is not always the case – and in fact may not be safe for all individuals. Examples of gender identities include man, woman, non-binary, gender non-conforming, agender, and genderqueer; examples of gender expressions include masculine, feminine, and androgynous. Figure 2 visualizes sex, gender identity, and gender expression as spectrums, rather than binaries.

Figure 2 Sex, gender identity, and gender expression



Sex refers to a label given at birth describing physical and biological characteristics. While we often think of sex as binary, this is not actually the case; examples of sex include male, female, and intersex. The term cisgender refers to someone's sex assigned at birth aligning with their gender identity, for instance someone who was assigned female at birth and identifies as a woman. The term transgender refers to someone's sex assigned at birth being different than their gender identity; for instance, someone who was assigned female at birth and identifies as a man (trans man). Transgender is an umbrella term for those choosing to identify as such, and includes those who are trans binary (i.e., identifying as transgender and as a woman or man) or trans non-binary (i.e., identifying as transgender but not as either a man or woman, including genderqueer, genderfluid, agender, and so on). This is visualized in Figure 3.

Figure 3 The trans umbrella²⁸



While population-level data on gender minorities (i.e., people whose gender identity does not align with their sex assigned at birth, whether that's transgender men, transgender women, or non-binary people, who may or may not also identify as transgender) is limited, it is estimated that less than 1 per cent of the population identifies as transgender.¹⁵ Importantly, while the number of individuals identifying as trans has increased in recent years – presumably due to improvements in visibility, social acceptance, and legal protections²⁹ – many activists suggest that these numbers may still be inaccurate and underreported, attributable to fear of discrimination and transphobia.³⁰ Being familiar and comfortable with the differences between sex, gender identity, and gender expression – as well as the knowledge that these characteristics may not always align – has implications throughout the research and evaluation process.

While it is important to distinguish between gender, sex, and sexual orientation, recognizing that these terms all mean fundamentally different things, there are several identities within the LGBTQ2S+ umbrella that can incorporate elements of both sexual orientation and gender:

- **Queer** is an umbrella term seeking to encompass a range of sexual and gender identities, behaviours, and expressions, including people who are not straight and/or cisgender. Although many have reclaimed “queer” as a way to self-identify, others are uncomfortable with this reclamation and still view it as a slur – as such, researchers and evaluators are encouraged to approach the use of this term carefully.³¹
- **Two-Spirit** is an English umbrella term coined by Indigenous members of the LGBTQ+ community that transcends Western and colonial ideas of gender and sexuality.³² Two-Spirit is often used to describe someone who possesses both masculine and feminine spirits. Some Indigenous people identify as Two-Spirit rather than, or in addition to, identifying as lesbian, gay, bisexual, trans, or queer. An awareness of this term, and the knowledge that it exceeds the categories of gender or sexual orientation for many individuals, is important for researchers and evaluators working in this space.

The LGBTQ2S+ community: not a homogenous group

While we often speak of an LGBTQ2S+ community, it is important to recognize that this is not a homogenous group. For instance, experiences and inequities encountered by a cisgender gay man are not necessarily shared by a bisexual transgender woman. Moreover, beyond gender and sexual orientation, everyone's experiences are fundamentally shaped by other identities and characteristics, including race, disability, income, and so forth. Owing largely to the knowledge gaps arising from methodological limitations, such as insufficient sample sizes, few studies have been able to conduct stratified analyses between different LGBTQ2S+ identities or by age, sex, ethnicity, or other relevant characteristics, despite the known heterogeneity of LGBTQ2S+ populations. Those working in research and evaluation alike should take caution to acknowledge – and, as feasible, address – the diversity in identities and outcomes among LGBTQ2S+ individuals.

USING TERMS APPROPRIATELY

This short glossary serves as an introduction to frequently used terms related to gender, sexual orientation, and the LGBTQ2S+ community. Using inclusive and appropriate language is one key practice of allyship, while also providing a common ground for conversations about these topics. Knowing what language to use when referring to LGBTQ2S+ individuals has several practical applications, including when drafting data collection instruments, writing and sharing findings, or engaging in knowledge translation and dissemination.

The definitions included in this section adapt and incorporate elements from a number of sources (see endnotes for full references). This list is neither exhaustive nor static: language is both constantly evolving, and inevitably means different things to different people. How an individual self-defines or identifies should always take precedence over the definitions presented here.

- **Ally** (noun): A person who believes in the dignity and respect of all people and takes action by supporting and/or advocating with groups experiencing social injustice. An ally does not identify as a member of the group they are supporting – for instance, a straight person can be an ally for gay, lesbian, and bisexual people and communities; a cisgender gay man can be an ally for transgender people and communities.³³
- **Asexual** (adj.): A term to describe someone who does not experience sexual attraction, or who has little to no interest in sexual activity. Asexuality is often viewed as a spectrum, with “ace” or “ace community” used as a term to acknowledge that spectrum. A person can also be aromantic, meaning they do not experience romantic attraction.³⁴
- **Biphobia** (noun): Intolerance, prejudice, discrimination, or violence against people who are or are presumed to be bisexual.
- **Bisexual** (adj.): A term to describe someone who experiences attraction to more than one gender, not always to the same extent or in the same ways.³⁵ This definition is gradually replacing the idea of bisexuality as attraction to “both” genders (e.g., men and women) as gender is increasingly recognized as a spectrum.³⁶
- **Cisgender** (adj.): A term to describe someone whose gender identity aligns with the sex they were assigned at birth; the opposite of transgender (e.g., someone who was assigned female at birth and identifies as a woman).³⁷
- **Cisnormativity** (noun): A societal bias – often unconscious – that assumes cisgender as the norm or default, ignoring or underrepresenting transgender identities or gender diversity

(e.g., only including “man” or “woman” as options on a survey question about gender, assuming that all respondents will identify with one of these two categories).³³

- **Gay** (adj.): A term to describe someone who experiences attraction to people of the same gender as themselves. Often refers to men who are attracted to other men, but can also be an umbrella term for anyone who experiences same-gender attraction.³³ Note that gay or lesbian should be used in lieu of “homosexual”; this is an outdated term that should be avoided.³⁸
- **Gender** (noun): A socially-constructed system used to classify individuals and prescribe specific emotional, behavioural, and cultural characteristics, often grounded in the binary of “man” or “woman.”
- **Gender expression** (noun): How someone outwardly expresses their gender identity – for instance, through their appearance, speech, or behaviour.³⁷
- **Gender identity** (noun): A person’s individual experience of gender; one’s internal, personal sense of being a man, woman, or any other gender. Because gender identity is internal, it is not necessarily visible to others – and is distinct from sex.³³
- **Heteronormativity** (noun): A societal bias – often unconscious – that assumes heterosexual as the norm or default, ignoring or underrepresenting diversity in attraction and behaviour (e.g., sexual health education in schools that teaches on the assumption that students are or will be engaging in heterosexual sexual behaviour).³³
- **Homophobia** (noun): Intolerance, prejudice, discrimination, or violence against people who are or are presumed to be not heterosexual.
- **Intersex** (adj.): A term to describe someone whose biological sex characteristics fall outside of the male/female binary.³³
- **Lesbian** (noun or adjective): A term used to describe a woman who experiences attraction to other women. Note that gay or lesbian should be used in lieu of “homosexual”; this is an outdated term that should be avoided.³⁸
- **LGBTQ2S+** (adj.): Acronym used to refer to the rainbow community – people from gender and sexual minorities. Standing for Lesbian, Gay, Bisexual, Transgender, Queer/Questioning, and Two-Spirit, the plus sign (+) acknowledges other terms and identities not represented in the acronym – for instance, Asexual, Intersex, and so on.

- **Non-binary** (adj.): An umbrella term to describe people whose gender identities do not fit within the man/woman gender binary.³⁷ Identities that might fall within this umbrella include genderqueer, agender, or genderfluid.
- **Out** (adj.): A term to describe someone who self-identifies as LGBTQ2S+ in their personal, public, and/or professional lives.³⁹ Note that some individuals may be out to certain people or in certain areas of their lives, but not to others; as a result, “outness” is also a spectrum.
- **Pansexual** (adj.): A term to describe someone who experiences attraction to people regardless of their gender or sex.³⁷
- **Pronouns** (noun): In the context of gender, words used to refer to people about whom you are speaking. People may choose to use a range of pronouns, including he/him, she/her, he/they, she/they, they/them, ze/hir, or others. Using someone’s correct gender pronouns is one of the most basic ways to show you respect their identity.⁴⁰
- **QTBIPOC** (noun): Acronym that stands for Queer, Trans, Black, Indigenous, People of Colour.
- **Queer** (adj. or verb): An umbrella term seeking to encompass a range of gender and sexual identities, behaviours, and expressions, including people who are not straight and/or cisgender.⁴¹ Some have reclaimed “queer” as a way to self-identify, though others are uncomfortable with this reclamation and still view it as a slur. Can also be used as a verb; literally, “to queer something.”
- **Questioning** (adj. or verb): A term to describe someone who is processing or exploring their gender identity and/or sexual orientation.
- **Sex** (noun): The classification of a person as male, female, or intersex based on biological characteristics.³⁷
- **Sex/gender binary** (noun): Referring to sex and/or gender, the assumption that something is made up of two distinct and opposing parts: for instance, male/female and man/woman. Generally, we aim to move away from ideas of gender and sex as binary, and towards them existing on a spectrum.
- **Sexual orientation** (noun): The direction of a person’s attraction; gay, lesbian, bisexual, asexual, and pansexual are all examples of sexual orientations, which may change throughout a person’s life.³⁷
- **Transgender/trans*** (adj.): An umbrella term to describe someone whose gender identity differs from the sex they were assigned at birth. The asterisk at the end of the abbreviation

designates other identities falling under the trans umbrella (e.g., non-binary, genderqueer), while recognizing that identifying as transgender is ultimately up to each individual person.³³

- **Transphobia** (noun): Intolerance, prejudice, discrimination, or violence against people who are or are presumed to be transgender.
- **Two-Spirit/2S** (adj.): An English umbrella term coined by Indigenous members of the LGBTQ+ community that transcends Western and colonial ideas of gender and sexuality. Often used to describe someone who possesses both masculine and feminine spirits, Two-Spirit is a cultural term reserved only for those who identify as Indigenous. Some Indigenous people identify as Two-Spirit rather than, or in addition to, identifying as lesbian, gay, bisexual, trans, or queer.^{33,37}

THEORIES, FRAMEWORKS, & MECHANISMS

For researchers and evaluators whose work is concerned primarily with outcomes for LGBTQ2S+ individuals, this section provides an overview of some explanatory theories and frameworks that may be useful in informing research design, methodology, and analysis. The explanations for the differential outcomes for LGBTQ2S+-identified individuals are numerous, spanning multiple disparate fields of study (e.g., population health, sociology); levels of influence (e.g., individual, interpersonal, structural); and levels of applicability (e.g., general explanations applicable to an entire population, and group-specific explanations unique to gender and sexual minority populations). Below we highlight descriptions of two leading explanatory frameworks, as well as other known and theorized mechanisms of disadvantage for LGBTQ2S+ people.

MINORITY STRESS THEORY

Emerging from literature on health disparities, minority stress theory posits that sexual (and other) minorities experience chronic stressors as a result of distal (i.e., external, objective stressful events and conditions, such as prejudice, discrimination, and violence) and proximal (i.e., expectations of the distal stressors and the vigilance this requires, such as expectations of rejection) stressors.⁴²⁻⁴⁴ While this is the leading theoretical framework to explain *health* disparities experienced by sexual and gender minorities, its key principles could be extended to explain other inequities. Minority stressors include structural factors (e.g., social isolation beyond a person's control and rooted in the social environment), interpersonal microaggressions (i.e., the brief and commonplace exchanges that send hostile or derogatory messages to individuals because of their group membership), and personal processes (e.g., internalization of negative societal attitudes, such as internalized homophobia). Together, these combine to create a toxic everyday environment for LGBTQ2S+ people.

Key premises of minority stress theory include its focus on explaining disparities, not differences, and on average effects on the group as a whole *notwithstanding variability among group members*. Disparities are differences in the distribution of outcomes that exist due to social factors or the allocation of resources. They represent an “excess” of poor outcomes for disadvantaged (vs. advantaged) social groups that is systemic, unfair, and avoidable. Minority stress theory has been applied to studies of both general and group-specific mechanisms.⁴⁵ General mechanisms are those applicable to an entire population (e.g., experiences of violence) while group-specific mechanisms are only applicable to (or experienced by) particular population sub-groups (e.g., experiences of transphobic violence).

INTERSECTIONALITY

Grounded in Black feminist thought, intersectionality proposes that “race, class, gender, sexuality, ethnicity, nation, ability, and age operate not as unitary, mutually exclusive characteristics, but as reciprocally constructing phenomena that in turn shape complex social inequalities.”⁴⁶ Intersectionality asks that we reject the notion that axes of oppression, from racism to sexism to ableism and so on, are merely additive. Writing of the experience of Black women, Crenshaw – who coined intersectionality as a term in 1989 – noted that “the intersectional experience is greater than the sum of racism and sexism.”⁴⁷ In other words, the combined racism and sexism experienced by a woman of colour is not simply the sum total of racism experienced by a Black man and sexism experienced by a white woman – rather, they interact to create particular forms of exclusion and marginalization. An intersectional approach therefore suggests that it is a particular combination of disadvantage that affects outcomes; therefore multiple marginalizations cannot be adequately understood or ameliorated by unitary approaches that treat elements of one’s identity – including gender and sexuality – as distinct or independent subjects of inquiry. While often used incorrectly – taken out of its initial context or thought of as synonymous with diversity – intersectionality is, at its core, about power structures.

This highlights the ways in which a person’s social location related to their gender or sexual identity may interact with other salient dimensions of identity (e.g., race, ability), the result of which may confer advantage or disadvantage. For example, research grounded in an intersectional framework has shown that gender and sexual minority people experience anti-queer violence differently depending on their social position.⁴⁸ At the socio-structural level, the combination of multiple disadvantaged positions may be associated with stressors that are synergistic in their effects, and that deprive segments of the LGBTQ2S+ community the benefits of group-level coping and resilience resources.⁴⁵ For example, for an LGBTQ2S+ individual to access group-level coping resources (i.e., norms and values, role models, and opportunities for social support), they must be able to tap into the community to reap the benefits of minority resilience.⁴⁹ The intersections of racism, xenophobia, classism, sexism, ageism, ableism, homo/bi/transphobia, and other exclusions can serve as barriers to accessing coping. The case of multiple or intersecting disadvantaged identities is often overlooked or ignored at the expense of the dominant identity, which may result in a lack of resources needed to contest the disadvantage.

In the context of research and evaluation involving LGBTQ2S+ individuals, intersectionality implores researchers and evaluators to consider and address the multiplicity of individuals’ identities, including the ways in which these identities interact with one another to produce distinct experiences and outcomes. In particular, this means recognizing and engaging with identities and social locations beyond gender and sexual orientation – even in projects where this is the primary focus – and the ways in which LGBTQ2S+ individuals’ lives are further shaped and influenced by race, class, ability, age, ethnicity, religion, geography, and other systems.

EXAMPLES OF KNOWN AND THEORIZED MECHANISMS OF DISADVANTAGE FOR LGBTQ2S+ PEOPLE

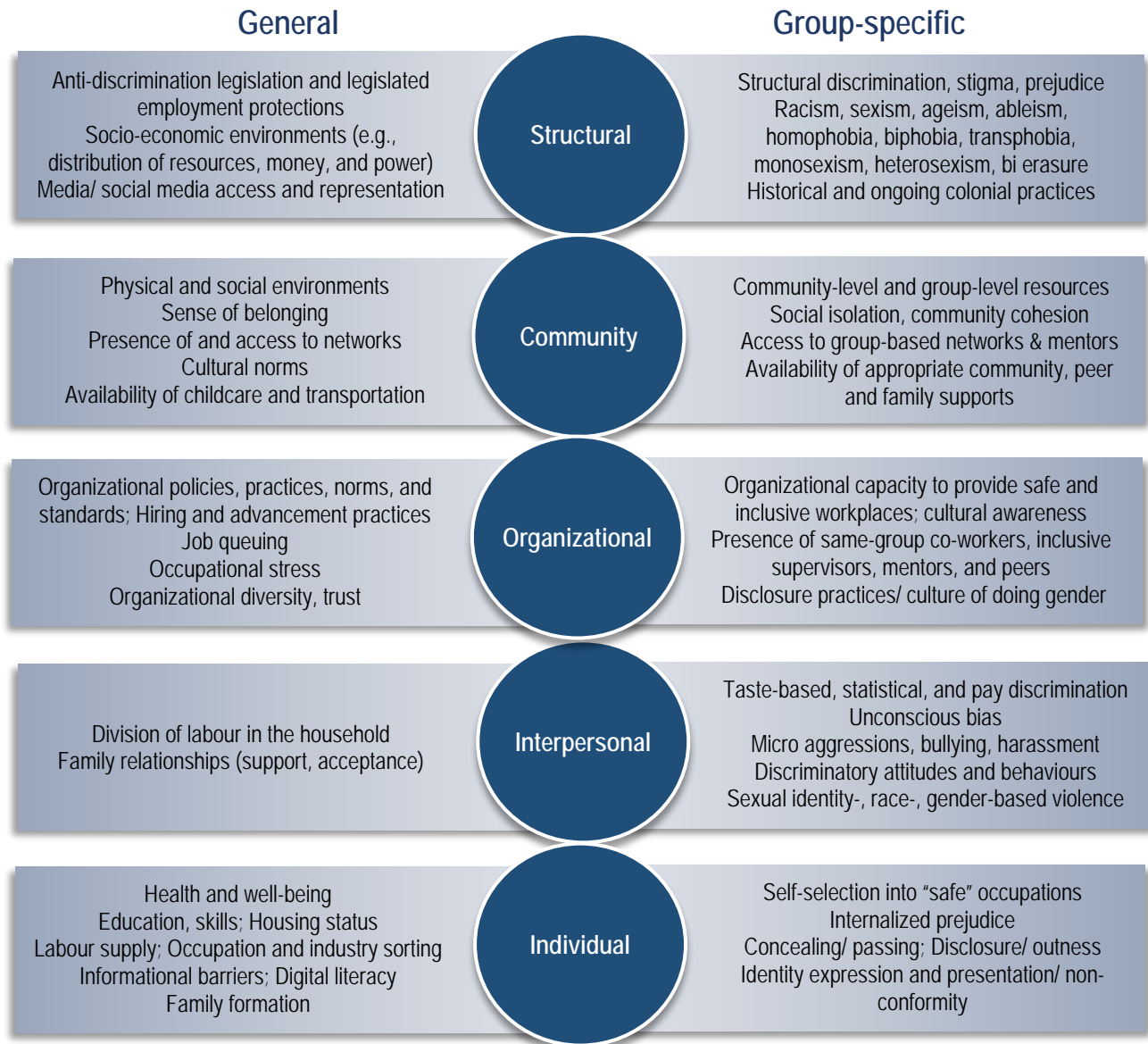
A key component of a current SRDC project, *Building the evidence base about economic, health, and social inequities faced by LGBTQ2S+ individuals in Canada* (funded by Women and Gender Equality Canada) is the development of a unified conceptual framework that bridges known and theorized mechanisms of disadvantage in the realm of health, economic, and social outcomes.

Figure 4 is a *draft* framework that helps convey the complexity of factors at play in this area of research, and how they may begin to be conceptualized. We share it here to show the ways in which diverse projects researchers and evaluators may be working on – such as those in the areas of literacy and essential skills, income security, or education – may be relevant to LGBTQ2S+ populations.

For example, thinking of labour market outcomes, explanations will largely fall within the realm of **general mechanisms** – that is explanations applicable to or experienced by an entire (e.g., not only gender and sexual minority) population. Several studies examine differences in the *shared factors* (e.g., networks, skill levels) that LGBTQ2S+ individuals experience *more or less* compared with their heterosexual/cisgender peers. Indeed, much of the research in this area falls in the bottom left quadrant of the figure, i.e., individual-level general mechanisms, including skills, education, or labour supply. However, when looking at *disparities* – it is critical to distinguish between **general and group-specific mechanisms**. This is because studies of general processes leave unexamined group-specific factors that only LGBTQ2S+ people experience or to which they are exposed. Evidence from the field of mental health suggests general stress processes and ameliorative factors are important, but insufficient in explaining the observed disparities (i.e., the disparity remains after controlling for the general factors).⁴⁵ As such, **group-specific mechanisms** are those unique to gender and sexual minority populations (e.g., biphobic micro-aggressions, discriminatory hiring, etc.).

While these types of mechanisms are essential to understanding LGBTQ2S+ outcomes, population-level datasets do not contain group-specific measures. This is important because, in the absence of this (group-specific) evidence, interventions designed to improve LGBTQ2S+ outcomes are likely to be limited and ineffective, as universal interventions may ameliorate, but will not substantially diminish the disparities.⁴⁵ An intervention that does not explicitly consider mechanisms relevant and specific to sexual and gender minorities is likely to leave unexamined (or unaddressed) the underlying factors responsible for the continued disparity. As a result, minority communities may continue to see few, if any, improvements from programs and interventions designed to ameliorate their outcomes.

Figure 4 Conceptual framework of known and theorized mechanisms of disadvantage for LGBTQ2S+ people



GUIDELINES FOR RESEARCH & EVALUATION

In this section, we outline a number of practical considerations and applications for conducting research or evaluation concerning LGBTQ2S+ people and/or issues. Recall that while the guidelines shared here may be especially pertinent for projects with an explicit focus on gender and sexual minority individuals, they are also broadly applicable given that any research or evaluation is likely to include LGBTQ2S+ people regardless of whether researchers and evaluators are aware of it.

PROJECT PLANNING & MANAGEMENT

- Consider the **potential impact or benefits of your research and evaluation project as it relates to LGBTQ2S+ individuals** prior to beginning the project. Given the complicated history of research among the gender and sexual minority community, this is an area where it can be particularly important to ask “is this research worth doing?,” with a view to identifying, interrogating, and maximizing potential benefits to a community early on.⁵⁰
- Managers or leaders **forming a project team** may seek to strike a balance between ensuring that researchers and evaluators bring lived experience to the project (i.e., self-identify as LGBTQ2S+) while also avoiding tokenizing, pigeon-holing, or inadvertently outing sexual and gender minority team members. Team leaders should take care to ensure that no one on the project team holds any discriminatory views, and that members are provided with adequate resources for their own knowledge and learning as it relates to the project goals and objectives. If any team members are LGBTQ2S+-identified, considering how the project topic might affect them personally, and providing any relevant resources or support, is another important step.⁵⁰

“The ability to conduct research with particular communities is absolutely not limited to members of those communities, but it is important to understand that if you are not a member of the community you are researching, this deprives you of the personal knowledge and experiences that your participants will have.” – LGBT Foundation, n.d.⁵⁰

- In any project with potential implications for LGBTQ2S+ individuals, **researchers and evaluators should familiarize themselves with the relevant issues and language as they relate to research goals**. Ideally, this should occur before the project is underway. Researchers should also acknowledge the importance and irreplaceability of lived

experience: for instance, no matter how well-informed a cisgender person might be on trans issues, this does not bring the same experience as personal knowledge and being part of the trans community.⁵⁰ This also speaks to the importance of recognizing that no LGBTQ2S+-identified researcher or evaluator can or should be expected to speak on behalf of all gender and sexual minority individuals.

- **Researchers should consider and acknowledge their own identity and position** vis-à-vis the project from the outset and throughout the course of the work.⁵¹ What is the *position* of the researcher, and how are they actively *reflecting* on this position throughout the research process. Researchers and evaluators should identify, acknowledge, and, when necessary, actively challenge their own assumptions, beliefs, and biases when it comes to gender and sexual minority individuals or subjects.²¹

“Whether or not the researcher is a member of these communities, we encourage them to ask question from a position of openness and humility.”

– Henrickson et al., 2020⁵²

- In research or evaluation projects with an explicit LGBTQ2S+ focus, consider **adjusting timelines to accommodate for additional time for relationship-building and management**. This may serve multiple purposes, ensuring that researchers and evaluators have ample time to build trust with communities, and that meaningful and enduring relationships with community leaders and allies can be developed.⁵³

RESEARCH QUESTIONS & OBJECTIVES

- Whether it seems explicitly relevant for LGBTQ2S+ people, **consider the ways in which there may be implications for this community at the outset of the project**. For example, in an evaluation examining the impacts of a specific intervention, you might specify the objective of examining how impacts differ among various sub-groups, including the LGBTQ2S+ population. Although a project may not explicitly address gender or sexual identity, you might consider the ways in which various forms of marginalization may feature throughout the research process. Researchers and evaluators are encouraged to think critically about the assumption that certain projects are not relevant to sexual and gender minority individuals.

“Researchers [should] assume that gender or sexually diverse persons or groups will be in any sample, regardless of how participants are selected. Research not focused on [gender and sexual minority individuals] should not assume, for instance, that research participants are all cisgender or heterosexual, or not bisexual or intersex.” – Henrickson et al., 2020⁵²

- When developing research questions:
 - **Consider research questions through an LGBTQ2S+ inclusion lens**, including by examining whether they are free from cis/heterosexist bias and appropriate for the project and relevant community. For instance, in the past, many research questions have centred around causation or origins of gender and sexual minority identities; generally speaking, these would no longer be considered appropriate research questions.²¹
 - **Ensure that research questions do not implicitly or explicitly assume that a group necessarily shares experiences or barriers based on one aspect of their identity** (i.e., avoid homogenizing the LGBTQ2S+ community).⁵⁴ Take this research question, for instance: “What barriers do LGBTQ2S+ employees in Canada experience compared to their cisgender and heterosexual peers?” This question might be reframed as: “What barriers do some groups of LGBTQ2S+ employees experience compared with groups of their cisgender and heterosexual peers, *as well as with other LGBTQ2S+ individuals?*” This creates space for an analysis that considers other identity factors and social locations as well as for exploring differences *between* various sexual and gender minority groups.
 - When thinking of research objectives, **consider whether you wish to study an array of LGBTQ2S+ experiences – or just the negative ones**. Research involved gender and sexual minority individuals in the past has received criticism for its frequent one-dimensional focus on negative outcomes.²¹ While undoubtedly important, consider how you might also integrate concepts related like resilience, coping, and other strength-based factors.

Ethical research and evaluation: outness and protecting participants

In any project that directly involves LGBTQ2S+ participants, extra care should be taken by research and evaluators throughout all phases of the project. In particular, it is crucial that researchers and evaluators ensure that they avoid “outing”ⁱⁱⁱ participants without their consent. While ensuring participants’ privacy and anonymity is important in any research or evaluation project, this can be considered especially true for gender and sexual minority individuals, for whom disclosing their identities may result in prejudice, discrimination, or violence.

Researchers and evaluators should proactively and continually consider how to protect LGBTQ2S+ participants’ identity throughout the research process. Examples of this include: avoiding disclosure of participants’ names to employers/teachers/etc. in these settings; ensuring participants are clearly informed of how any identifying information will be handled or used; stripping any data of identifying information as early as possible; considering off-site or virtual data collection; stressing the importance of maintaining other participants’ anonymity during group data collection activities (e.g., focus groups); and care during reporting, confirming that participants are not identifiable within any reports or publications).^{21,50,55}

If your project transcends different life domains, it can also be important to remember that while an individual may be out in one domain, they may not publicly identify as LGBTQ2S+ in others (e.g., someone who is out in their personal life may or may not be out in their professional life, with their family, or in the communities in which they regularly participate).

In research involving sexual and gender minority youth, researchers may consider seeking permission from research ethics boards to waive parental consent, with a view to ensuring youth who are not out to their parents or guardians are not excluded from research altogether.⁵⁶ If older youth are permitted to provide their own consent, take extra precautions to ensure that they are well-informed of the project and its goals, as well as to minimize any potential harm to participants.⁵⁰

While it is important that participants be protected, this should not dissuade researchers from including LGBTQ2S+ individuals in their projects – nor should it delay or prevent important research and evaluation from taking place.²¹

DESIGN & METHODOLOGY

- In the context of LGBTQ2S+ individuals, **several challenges remain when it comes to collecting reliable quantitative data**, including small sample sizes, the difficulty of accurately collecting and measuring gender identity and sexual orientation, and response bias or unwillingness to disclose.²⁰ Acknowledging these limits, researchers relying primarily on quantitative approaches might consider complementing these with qualitative methods, which can allow for a greater and more holistic understanding of LGBTQ2S+ peoples’ experiences.

ⁱⁱⁱ “Being outed” refers to disclosing an LGBTQ2S+ individual’s gender identity or sexual orientation without that person’s consent.

- **Community-based and/or participatory methodologies are particularly appropriate** in research with LGBTQ2S+ populations, acknowledging the underrepresentation of these groups in research and policy spaces and the importance of meaningful inclusion in the research process as a result.^{53,57} Examples of this may include asking for ongoing feedback from community members throughout the research/evaluation process²¹ or establishing a community advisory board⁵⁵ for the project. In any cases, ensuring community members are actively involved is an important means of building trust, ensuring buy-in, and bringing data back to those most implicated.⁵²

RECRUITING & ENGAGING PARTICIPANTS

- Researchers and evaluators should work to **build trust with participants in the LGBTQ2S+ community**, as some members of the community may be reluctant to take part in research or speak about sensitive information. This might involve researchers and evaluators taking extra time to demonstrate knowledge and sensitivity about the community, as well as clearly articulate the role of privacy and confidentiality.⁵⁸ In some instances, greater trust might be built when researchers and participants identify as being part of the same community. Research or evaluation teams may also consult with other internal staff knowledgeable on the topic, or work with external researchers, evaluators, or consultants.^{54,59}
- Projects that are not exclusively focused on LGBTQ2S+ individuals should seek to recruit a **representative sample of research participants**, including those from gender and sexual minorities. This might include leveraging social media, working with community partners, or snowball sampling.^{58,60} Moreover, recruit diversely within the LGBTQ2S+ community: “Be sure to reach out to all segments of your community of focus, not merely to those members most visibly engaged with the majority LGBTQ community.”⁵⁵ This may include targeted outreach among BIPOC, disability, low-income, and other communities.
- Researchers and evaluators may consider **oversampling as a technique** in either qualitative or quantitative projects. This may take different forms, depending on the project: oversampling LGBTQ2S+-identified individuals in the context of a project also including non-gender or sexual minority people; oversampling specific gender and sexual minority subgroups that are often underrepresented in research (e.g., transgender, bisexual, asexual, or intersexual individuals); or oversampling for diversity (with regards to race, ethnicity, income, ability, or other factors) within the LGBTQ2S+ community to facilitate intersectional analysis.⁵⁵
- Make **gender and sexuality-affirming resources available to participants**, particularly in the context of projects where they may experience any form of distress.^{21,50} This may also be

a useful approach for LGBTQ2S+-identified researchers and evaluators involved in the project.

- To learn more about how to **respectfully engage Two-Spirit individuals in research**, refer to this useful resource developed by Canadian Institutes of Health Research as part of their [methods series](#).³²

COLLECTING DATA

- Consider logistical or administrative steps that researchers can take to **make the data collection process more inclusive and safer for LGBTQ2S+ people**. This might include:
 - **Signifying LGBTQ2S+ inclusion** as an institution/organization, or where data collection takes place (e.g., on an organizational website or at an office space);⁵⁵
 - **Providing training to researchers/evaluators** in the realm of anti-oppression, engaging respectfully with LGBTQ2S+ participants, and LGBTQ2S+ equity and inclusion;⁵⁵
 - Ensuring that physical spaces for interviews or focus groups are **accessible and inclusive** (e.g., the availability of a gender-neutral washroom); and
 - **Normalizing sharing and asking pronouns** in the context of data collection. For instance, a focus group facilitator might choose to begin a session by introducing themselves and their pronouns and asking others to do the same, if they are comfortable doing so. Refer to this resource guide from GLSEN to learn more about sharing and using pronouns.⁶¹

Thinking through inclusion in data collection

While the suggestions shared here regarding more inclusive data collection processes are targeted at LGBTQ2S+ participants in particular, it is important to keep in mind that gender and sexual minority individuals – like everyone – have multiple elements to their identity. Research and evaluation projects that are truly inclusive of the entire LGBTQ2S+ community should consider strategies for more inclusive data collection for individuals who may experience barriers or require accommodation related to other social locations or identities.

For instance, the knowledge that LGBTQ2S+ individuals are more likely to have a disability than their cisgender and/or heterosexual counterparts⁶² means that researchers and evaluators might take particular care to employ additional strategies to ensure data collection activities are accessible to participants. The role of incentives and reimbursements for participants may be compounded given LGBTQ2S+ peoples' greater likelihood of living in poverty⁶³ and the particular importance of valuing lived experience.⁵² These are just a few examples of how researchers and evaluators might consider – and address – inclusion on a broader scale through the data collection phase of a project.

- Develop **data collection instruments using inclusive and affirmative language**, avoiding questions that are inappropriate or intrusive.⁵⁰ Ask questions about gender and sexual orientation when and if relevant, and know from the outset how this information will be used (and, whenever possible, share with participants). At the same time, **do not be afraid to ask questions about one's sexual or gender identity** – asking questions that allow people to self-identify and see themselves reflected in data can be both inclusive and affirming, as well as good research practice. Seek – and, as feasible, incorporate – feedback on instruments from members of the relevant community.
- When designing questions for surveys, interviews, or focus groups, it is advised to include concepts that people can relate to holistically, without assuming that one equality area alone will provide an explanation for an experience of inequality.⁶⁴ Avoid asking participants to attempt to separate out or to rank aspects of their identity (e.g., Do you think that your sexual orientation or your race influenced your experience of the job search process?).⁵⁴ Instead, ask open questions about experience (e.g., In what ways do you think your identity influenced your experience of the job search process?). If possible, avoid asking questions that assume experiences are associated with *one* aspect of a participant's identity (i.e., focus on an individual's holistic identity rather than ask them to speak about their gender identity, sexual orientation, or other identity, in isolation).⁵⁴
- When thinking about how to **ask about gender and/or sexual orientation on surveys**:
 - Refer to **best practice guidelines** – like those from the Williams Institute^{65,66} – but as a general rule, remember that **the choice of measure should be guided by and tailored to the specific research or evaluation project**, considering the research question(s) and the role gender and/or sexual orientation is expected to play in outcomes;
 - Ensure that **questions about gender and sexual orientation are asked separately**, rather than collapsed as one measure;
 - Consider using a **two-step question for gender** in order to capture transgender identity among respondents⁶⁵ (e.g., asking about sex assigned at birth *and* gender identity, or asking a separate question explicitly about trans identity);
 - Provide accurate and accessible **definitions for key terms** (e.g., gender identity, gender expression, sexual orientation, etc.) in survey questions about these subjects;⁵⁵
 - Explain **the reason for collecting data about gender and sexuality in surveys**, and **reaffirm participants' anonymity and confidentiality** in advance of asking these questions;⁵⁵

- Provide **inclusive response options** for questions, ensuring that respondents are not forced to respond in a way that does not reflect their identity.⁵⁵ To the extent possible, **allow respondents the opportunity to self-identify** (i.e., through a write-in option for gender/sexual orientation) as well as decline to respond. Avoid including an “other” option, with a few to avoiding explicitly “othering” participants;⁵²
- Ensure that **response options reflect the question being asked**: for instance, it would not be accurate to include “male” or “female” as response options for a question about gender identity, nor would it be to include “transgender” as an option for a question about sexual orientation;
- Recall that there are **different dimensions of sexual orientation (identity, attraction, and behaviour) and frame questions and response options accordingly**. The decision as to which makes the most sense for a given research or evaluation project will depend on the project itself; sometimes it may make sense to capture more than one of these dimensions, recognize that these may not always align for respondents;⁵⁵
- Consider including other questions related to gender and sexuality, including gender expression and outness, among other things. It may also make sense to create a variable reflecting the hypothesized mechanism through which gender and/or sexual orientation effects “flow” (e.g., childcare responsibilities, labour market attachment, experiences of discrimination, and so on).
- Additional data-related recommendations are available in the [*Building the evidence base about economic, health, and social inequities faced by LGBTQ2S+ individuals in Canada: Phase 1 Report*](#).⁶⁷

Language: importance throughout the research/evaluation process

Using inclusive, appropriate, and affirming language is a key consideration for researchers and evaluators at all stages of a project.

This could include: being specific in participant recruitment materials (e.g., confirming that a study recruiting women is inclusive of trans women); avoiding cis/heteronormative language in data collection instruments, reports, and more (e.g., “parent(s)/guardian(s)” instead of “mother and father”); avoiding othering or pathologizing language (i.e., a reliance on medical terminology or language that treats being a gender or sexual minority individual as an illness or disorder); using gender-neutral language in any written materials (e.g., replacing “he/she” with “they”); and writing inclusively – and informatively – in knowledge dissemination (e.g., defining key terms in reports or publications; maintaining the language that participants used to describe themselves).^{21,55}

ANALYZING & INTERPRETING DATA

- Recognizing the varied experiences and social positions of individuals within the LGBTQ2S+ community, **consider pursuing within-group analysis** (i.e., differences between different gender and sexual minority groups), to better understand these complexities among this community, if feasible.⁶⁸
- In quantitative analysis, regression analysis allows for understanding the effect of one variable on another – for instance, the effect of LGBTQ2S+ identity on mental health outcomes. Thinking of applying intersectionality, **adding an interaction term** permits the analysis of interactions between predictor variables – for example, the interaction of the effect of LGBTQ2S+ identity *and* income on mental health outcomes.⁵⁴
- In qualitative analysis, **an intersectional perspective may warrant reading texts from two different perspectives**. For instance, researchers and evaluators might first ask: “How, if at all, does the gender identity or sexual orientation of the participant(s) inform what they are describing?” and secondly ask: “How, if at all, does gender identity or sexual orientation interact or intersect with other identities or social locations (e.g., disability, race, income, etc.) to inform what participants are describing?”⁵⁴
- Recall that **gender and sexuality are not static characteristics** – and as a result, allow for the possibility that these may change for participants over time (i.e., from pre- to post-measures).
- To the extent possible, **avoid erasing and/or collapsing identities** during the analysis stage.²¹ Researchers should take care to avoid misidentifying participants due to collapsed identity categories (e.g., collapsing bisexual individuals with gay/lesbian or straight people). When collapsing identity categories is necessary due to sample sizes or other reasons, provide a rationale and acknowledge any associated limitations with this approach.

REPORTING & KNOWLEDGE SHARING

- Whenever possible when relaying findings, researchers and evaluators should aim to **amplify the voices of LGBTQ2S+ participants – rather than trying to speak for them**.⁵⁰
- Researchers should take **extra care at the reporting stage, recognizing the challenging history in terms of LGBTQ2S+ research**. Explicitly avoiding promoting stigma and stereotypes and anticipating and confronting ways in which results might be misinterpreted are two important tactics.⁵⁹

“Given the past ethical transgressions in research against LGBTQ individuals, it is important to be vigilant about the potential uses of LGBTQ research and to give careful thought and consideration to how best to present results in ways that are accurate and least susceptible to distortion.” – Blair, 2016²¹

- Whenever possible, **ensure that research or projects involving LGBTQ2S+ individuals are brought back to the community.** This might be accomplished through community presentations (e.g., town halls or webinars), community research reports or plain language summaries, social or digital media, infographics and data visualization, and so on.⁶⁹ Consult with community stakeholders to gauge the best formats and tactics for knowledge sharing and transfer.⁵⁵

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