

Best Practices for Gender Inclusion in Research

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Introduction

Penn State has [several](#) educational equity initiatives on the cutting edge of campus educational equity measures regarding gender and sexually diverse individuals, such as our [gender-inclusive housing](#); our free [Clothing Transit Center](#) through 3rd Way Collective; the expansion of the [Sexual and Gender Diversity Center](#); our ongoing development of [gender-inclusive bathrooms](#); and informed consent regarding hormone therapy (as with other medical procedures) in our [University Health Services](#). Most of these initiatives focus on undergraduate students (and to a lesser extent, graduate students), and - important to note - are limited in their availability, existing primarily at the University Park campus despite growing [resources](#) at our Commonwealth Campuses and World Campus. However, there are key aspects of student, faculty, and staff experiences at Penn State that could be adjusted to foster more inclusive classroom experiences, and more ethical, updated research experiences. This document illustrates why expanding diversity and inclusivity measures and taking a broad, multi-pronged approach will have [positive repercussions](#) for teaching and student success ([Staples et al., 2018](#)); research design and implementation (GenIUSS, 2014); and other Penn State initiatives ([Garvey et al., 2017](#)).

The first section discusses [changing demographics](#) across the United States regarding [sexual identity and expression](#) (to whom one is attracted and how that is expressed, e.g., [lesbian](#), [gay](#), [bisexual](#), [pansexual](#), [queer](#), [asexual](#), [straight](#)), [gender identity](#) (the gender/s with which one aligns, e.g., [transgender](#), [non-binary](#), [cisgender](#), [agender](#), [two-spirit](#), [genderqueer](#)), and [gender expression](#) (how one expresses the social/external aspects of gender, e.g., [feminine](#), [gender non-conforming](#), [masculine](#), [butch](#)); and lays out why these changing demographics matter to a large multi-campus research institution like Penn State.

The second section moves from an ethical and inclusive pedagogy to ethical and inclusive research practices, as gathering accurate data (and teaching others to do the same) is essential to anyone affiliated with a research institution ([Pitcher, 2018](#); Stewart et al., 2018). Quantitative and qualitative research on gender and sexually diverse populations have historically excluded or mis-categorized certain identities ([Berberick, 2018](#)), so this section provides a brief primer on the importance of accurate terminology ([Sánchez, 2018](#)), how to collect demographic information in research ([Nicolazzo, 2016b](#); Garvey et al.,

2017; GenIUSS, 2014), and the positive impact doing so has on a practical level ([Nicolazzo, 2016a](#); [Beemyn, 2015](#); [Adair, 2015](#)).

Gender and Sexual Diversity in Higher Education: The Importance of Ethical and Inclusive Research

"At a time when... scholarship and curricula in general have yet to become very inclusive of [queer and transgender] people, a growing number of mostly younger queer individuals are identifying beyond or outside of bisexual and transgender" ([Beemyn, 2015, p. 359](#)). Indeed, Beemyn's work is corroborated by a number of surveys undertaken within the past decade seeking to gain more accurate information about the estimated 1 million transgender folks living in the United States ([Meerwijk & Sevelius, 2017](#)); these surveys found transgender, genderqueer, and non-conforming populations are on the rise ([Berberick, 2018](#)). Some of this may be due to the fact that researchers are including gender and sexually diverse populations within large-scale surveys (Goodman et al., 2019); and some may be due to increased visibility of gender and sexual diversity within higher education itself (Alexander, 2005). Our colleagues, peers, and students are increasingly gender and sexually diverse, and a key part of educational equity is [having the tools to be informed](#) on acknowledging and respecting these identities in the classroom and in the lab.

Best Practices

Just like gathering data on other demographics, such as ethnicity, town of origin, religion, or age, [gathering accurate data on gender and sexual identities](#) leads to more accurate results. With gender and sexually diverse populations, gathering demographic data has two parts: recognizing challenges that accompany studying historically understudied populations; and making sure one's research design is asking questions in an ethical, accurate way. Historically, [minoritized groups have been excluded](#) as research subjects not because these identities do not exist, but rather because of the biases and oversights of researchers ([Berberick, 2018](#)). As such, not only does accurate demography produce more accurate and nuanced overall data, it is also more ethically sound, as it acknowledges the diversity of gender and sexual identity and expression.

T. J. Jourian ([2015](#)) notes that one strategy to make sure research design is both ethical and accurate is to "[use] a model that distinguishes between four components of sexual identity: sex, gender identity, gender expression, and sexual orientation" (p. 11). Some examples of this combination of accuracy and ethicality may be found in medical research, wherein more accurate demography of gender and sexually diverse populations may lead to better cancer screenings (Goodman et al., 2019) mammographies ([Brown & Jones, 2015](#)), and mental health services ([Reisner et al., 2016](#)). With higher education, accurate and ethical demography can aid in resource allocation and grant writing as federal agencies like the NIH,

CDC, and NSF keep abreast of demographic best practices ([APA, 2016](#)). Accurate research design may also boost student success rates, enrollment, and retention rates ([Stolzenberg & Hughes, 2017](#)).

Quantitative Research Strategies

1. **What demographic data matters to this project?:** What aspects of your subjects' identities are important for the purposes of this study? If you are asking about certain identities, like religion, age, ethnicity, would it be relevant to also ask about gender and sexuality? Demographic information is not always appropriate for a given study, but if a research team is using a bevy of demographic markers already, then including questions regarding gender and sexual diversity makes sense.
2. **Asking about gender and sexual identities and expressions is similar to other demographic questions:** A given response will necessarily change a dataset, e.g., if one respondent is much younger than the others, their experiences may be reflected in the data. However, this is not a negative, rather, just illustrative of general human diversity! Gender and sexual diversity are similar in that getting many different results will not skew or mess up a dataset, but will just cause differentiation like any other demographic information would.
3. **When asking questions, be mindful of terminology:** Demographic language is constantly changing, and this will cause survey questions to change as well. While older surveys may have asked if participants were "cross-dressers," "colored," or "alien," now surveys would use words like "genderqueer," "person of color," or "international student" instead. Examples of what these questions might look like (in 2019) are below.

The "Two-Step" survey approach to gender identity, adapted from the [GenIUSS Group](#) and the [University of Maryland's LGBT Equity Center](#)

<p>Assigned sex at birth</p> <p>What sex were you assigned at birth, on your original birth certificate?</p> <ul style="list-style-type: none"> · Female · Male · Other (please state): _____ 	<p>This question may be used in research where one's assigned sex may be important.</p> <p>Having a write-in category acknowledges global practices of doctors assigning sex at birth (e.g., the "indeterminate" assignation in New Zealand).</p>
<p>Current gender identity</p> <p>What is your current gender identity (check all that apply)?</p> <ul style="list-style-type: none"> · Woman · Man · Two-spirit · Non-binary/Genderqueer · Different identity (please state): _____ 	<p>This question removes the methodologically vague question of "male/female/transgender" common among older surveys and provides less confusing, more accurate wording. With this second question, researchers can gain demographic data about their respondents in a way that is simple for respondents to answer.</p>

Expanded "Two-Step" Approach on gender identity *and* gender expression, adapted from the [GenIUSS Group](#) and Penn State's Center for Sexual and Gender Diversity [terminology guide](#)

<p>Current gender identity</p> <p>What is your current gender identity (check all that apply)?</p> <ul style="list-style-type: none"> · Woman · Man · Two-spirit · Non-binary · Genderqueer · Genderfluid · Pangender · Agender · Queer · Different identity (please state): _____ 	<p>This question is more specific in asking respondents the gender/s they are, and may be useful for surveys needing specific demographic information.</p>
<p>Current gender expression</p> <p>How would you describe your current gender expression (check all that apply)?</p> <ul style="list-style-type: none"> · Androgynous · Gender non-conforming · Femme · Feminine · Butch · Masculine · Neutral · Different expression (please state): _____ 	<p>This follow-up question is specific in its focus on "behaviors, mannerisms, interests, and styles of dress that are generally considered to be feminine, masculine, or some combination thereof" (Serano); this may be useful in surveys focusing on both identities and how they are expressed in everyday life.</p>

Qualitative Research Strategies

4. **Be thoughtful with terminologies and language:** As mentioned above, the language communities use changes through time, and in more interpersonally-driven qualitative work, it is

crucial to stay informed of how focus group members, interviewees, and other respondents may refer to their identities.

5. **Respect interviewee self-identification:** With qualitative research, there are different considerations regarding gender and sexual diversity, especially in interviewing folks. An important aspect of qualitative research is the nuance accompanying terminologies of gender and sexual identity. Language is an evolving entity, so terms referring to gender and sexual identities have changed through time (and will continue to change in the future); this means there may be generational, regional, and cultural splits in how folks refer to themselves. Ethically speaking, it is important to allow interviewees to self-identify and to be respectful of their chosen terminologies, even if those terms have fallen out of popular usage, are new, or if the interviewer would use other language. By the same token, however, it is important to contextualize that just because someone self-identifies using a term, that does not mean the term may be used by anyone, anywhere, as discussed in the example questions below.

Asking interview, focus group, and ethnographic questions regarding gender and sexual diversity

<p>Avoid questions like:</p> <ul style="list-style-type: none"> · "What do you identify as?" · "What are your preferred pronouns?" · "When did you become a woman/man?" · "Will you have 'the surgery'?" · "Do folks often realize you are not an actual woman/man?" 	<p>Instead, use:</p> <ul style="list-style-type: none"> · "What is, or are, your gender identity/ies?" · "What are your pronouns?" · "When and how did you realize your gender identity?" · "What would be your ideal transition trajectory, if you have one?" · "Have you experienced being misgendered?" 	<p>When asking questions of qualitative respondents, be mindful of current best practices and ask questions that will lead to the most nuanced response. For instance, asking someone their "preferred pronouns" instead of just "pronouns" implies you have the final say in how you discuss interviewees based on your own preferences. Using current terminologies and a general ethic of care will result in richer answers.</p>
<p>Avoid qualitative analysis language like:</p> <ul style="list-style-type: none"> · "Jill, born Rogelio, identifies as a transwoman" · "Despite still looking like a woman, Ayden stated he is rarely mistaken for a woman" · "Anjelica is [transgender]" 	<p>Instead, use descriptions like:</p> <ul style="list-style-type: none"> · "Jill is a transwoman" · "Ayden stated he is rarely misgendered" · "Anjelica refers to herself as 'a proud tranny', reclaiming, as Riki Wilchins has done, an old slur" 	<p>In discussing interviewees, respondents, and subjects, avoid letting one's own biases interfere with interviewee self-identification; however, it may be useful to contextualize why interviewees use certain terminologies as well. There may be times when revealing someone's gender or name assigned at birth may be relevant, but if those are not crucial it may be wise to stick to neutral observations rather than making your own judgments of how well an interviewee "passes" (e.g., the "despite" in the left column).</p>

Conclusion

Ultimately, diversity and inclusion across the Penn State campuses should be a multi-pronged approach including student communities, policies, educational resources, and strategies for faculty, staff, and students. For all populations at Penn State—staff members, professors, adjuncts, graduate students, undergraduate students, alumni—understanding the importance of ethical research design regarding gender and sexually diverse populations serves dual purposes. Inclusive classroom and research design directly feeds into Penn State's existing educational equity and diversity initiatives, and it may also have a ripple effect in letting minoritized populations at Penn State know their research experiences are valued.

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