Gendered Intelligence

Monitoring and Data Capture: Gender Related Options

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Monitoring and Data Capture:

Gender-Related Options

Introduction

Organisations often choose to capture data related to gender.

This can include:

- Gender identity – often just called 'gender'
- Whether someone is a person of trans experience
- Title
- Pronoun

The right approach varies according to what information is needed, what it's used for and how, the setting you are working in, and the range of people that might be filling in the form.

In particular, an important distinction is whether this is identifiable information which will form part of an individual's record, or whether it is anonymous monitoring data.

Many organisations want to be more trans-inclusive, and an important part of tracking that journey is monitoring.

Good monitoring in itself is a way to encourage trans people to engage with your organisation. If your questions are thoughtfully phrased and trans-inclusive, that promotes confidence.

The same goes for asking positive questions about the language you need to interact respectfully with a given individual, such as pronouns and titles.

It's also useful to recognise that monitoring forms are an educative tool - they bring categories and language in front of people who may not have done much thinking in the area of gender as yet, and the options you offer will develop their perceptions and understandings. The implicit messages those questions carry can be really key.

Here are some key points to consider about gender-related questions:

1. Why Are We Capturing This Information and How Will We Use It?

The first thing to consider is what information you want to capture and why.

There are valid reasons why some organisations want to capture data about gender and/or about having a trans life experience. However, it's always worth questioning what the reason actually is and what you will do/achieve with the information.

If you are capturing gender-related data about an identifiable individual when it isn't needed, such as requiring someone to give their gender identity in order to sign up to wi-fi, that's easily perceived as negative or thoughtless, so only ask for data that you genuinely need.

Confidentiality also needs to be considered. It is important to think about how you will keep individually identifiable sensitive personal data safe and on a need-to-know basis (in accordance with the DPA).

It's also important to think about how you will keep anonymous data genuinely anonymous. If you are collecting anonymous monitoring data, you should consider whether numbers are sufficient that true anonymity can be achieved and a trans person would not be 'outed' in the process. (An example: If there are a dozen people in an office and monitoring comes back showing one person is trans, then it is quite likely that person's anonymity will be compromised.)

2. Build Confidence

Whether people answer your questions truthfully (or at all) depends in part on people's confidence in the system of recording and the integrity of the organisation operating it, which in turn relies on making clear the rationale for why you are capturing the information, and how it will be stored and used. Trans people are unlikely to answer questions if they don't know what will happen to the data.

3. Put Questions about Gender in the "Gender" Section

It sounds obvious, but make sure your questions about gender are in the gender section of your form, not in the sexual orientation section.

There are still some forms that conflate the two, and this tends to be read by trans people as a strong indicator that the organisation is not trans-knowledgeable.

4. Separate Gender Identity from Life Experience

'Man', 'woman' and 'non-binary' (for example) are descriptions of gender identities, whereas 'trans' can be thought of as a description of a life experience that could be had by someone of any gender.

Many trans people have clear male or female gender identities, and some do not consider 'trans' as a current description of themselves at all, certainly not one that overrides their sense of self as a man or as a woman.

It is therefore important not to put e.g. 'man', 'woman' and 'trans' as mutually exclusive options on the same list which forces people to choose between two different aspects of themselves.

The same goes for putting both 'man' and 'trans man' on the same list. A key reason why trans people may dislike having 'man', 'woman', 'trans man' and 'trans woman' as mutually exclusive options on the same list is that it effectively draws a distinction between e.g. men and trans men, saying they are not equivalent. i.e. if you're a trans man, you can't be a man, which isn't a good message.

5. Gender Identity Options

Offer more than just man / male and woman / female as options.

"Non-binary" is beginning to be used more frequently as an umbrella term for genders beyond the typical M/F. It may be used by people whose gender is beyond, between or unrelated to man or woman, so that's one possibility as an additional option.

Likewise, "gender fluid" is beginning to be used more frequently by people who have a gender that varies - from day to day, from week to week, according to environment / setting or for any other reason, so that's another possibility.

Some people are unsure about their gender. This is particularly relevant to young people who are exploring their sense of self, but can also be relevant to adults.

"Questioning" is a common term used to describe this.

"Other" is generally to be avoided as it is (unsurprisingly) 'othering'.

Making gender an open text response field is another option as it allows people to describe their gender in whatever terms they wish.

What's workable does depend on how the data is then processed and used - if it links to database fields and / or stats and analysis, then open text can be quite complicated to manage. However, if you find there are few uses of such a box, then it's potentially manageable on an exception basis; if there are many uses then it indicates the system needs to be able to cope with more descriptions, so either way it's something to think about.

So if you are asking about gender identity, then you could ask, for example:

Which of these best describes your gender?

- Man / male
- Woman / female
- Non-binary
- Gender fluid
- Questioning
- My own description or I prefer to self-describe [write-in space]
- Prefer not to say

6. Gender Experience Options

If you want to capture the number of people who are trans / have a trans history, you'll need a second question, broadly around whether someone's gender identity is the same as that they were assumed to have at birth on the basis of their assigned sex. This is because many trans people will have a distinct gender identity as a man or as a woman, and will be invisible whatever approach is taken to the gender question.

This is typically an anonymous monitoring question and in terms of any link to an individual there would need to be a very good reason why that information is requested. Again, confidentiality needs to be considered.

A typical question might be "Does your gender identity match the sex you were assigned at birth (or in early childhood)?" Yes / No / Prefer not to say

The question 'Are you trans?' is not ideal. 'Are you trans / do you have a trans history' is acceptable, but still slightly less inclusive than our suggested question.

Whilst we have used the term 'trans' as an umbrella term in this document, not all people who have a gender identity that doesn't match the sex they were assigned at birth consider themselves 'trans' or use that term about themselves. This may, for example, be because they are non-binary and 'trans' implies a sense of crossing that they don't experience; or because they transitioned long ago and now consider themselves a man or a woman who is no longer trans.

7. Intelligibility of the form

It's important to think about the audience and seek to avoid 'false positives'. People who are not themselves trans may not understand certain options (such as 'non-binary', or the question about whether their sex and gender match), and then put ticks in boxes that don't actually apply to them, so some explanation is typically needed alongside these newer, less familiar questions.

8. Pronouns

You could consider a question about the pronouns someone would like to be used to refer to them. There is an increasing number of people who like to be referred to as 'they', alongside people who choose 'he' or 'she', and sometimes people who make other choices too, including multiple pronouns e.g. 'she or they'.

As with gender, you could offer option buttons for common choices and an open text box for other choices, for example:

- Please use 'he/him' pronouns to describe me
- Please use 'she/her' pronouns to describe me
- Please use 'they/them' pronouns to describe me
- Please use the following pronouns to describe me [write in space]

This can also be captured in a more general way, for example asking:

"Is there anything else you want to tell us?

(This might be your access requirements, your pronouns, or something else you'd like us to know about you)"

9. Titles

In terms of titles, Gendered Intelligence would certainly support the offer of a wider range of options, not just for trans people but for everyone. We often find when we discuss this subject in training that many delegates (who are typically not trans) would prefer not to have to select a title, or might like a gender neutral one.

Alongside existing titles, positive steps could include:

- Adding Mx to the options drop-down list
- Enabling people to select 'no title' as an option
- Enabling people to enter their own chosen title

You can also consider making the title field a non-mandatory field (which is slightly different to enabling a 'no title' option), or not capturing titles at all.

10. Other

HMRC Reporting

HMRC can only accept a binary gender marker for reporting (M/F), but this need not be the person's legal sex. Although HMRC/DWP hold a person's legal sex in the background, the marker submitted by employers does not have to match.

We have a separate briefing on the practicalities surrounding HMRC reporting by employers, available on request

Further Details on Capturing Sex/Gender Information and the Equality Act

We have a separate, fuller briefing which explores the question of whether to ask for sex or gender, and whether this should relate to someone's legal marker or not. This is available on request.

11. Further help

If you would like support in exploring or developing gender-related monitoring or data capture in your organisation, contact us at:
training@genderedintelligence.co.uk

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About the term 'Trans'

In this document we have used the umbrella term 'trans' to mean anyone who feels that the sex they were assigned at birth, and the corresponding gender they were assumed to have, does not match or sit easily with their own sense of self.

This guidance is intended to help you support and include everyone who has an experience of gender like, or similar to this. We have chosen 'trans' because it is one of the broadest and most widely accepted single words in current use. However, we recognise it is not a term everyone uses and we recognise and respect everyone's right to choose how they are described as individuals.

These terms may include, but are not limited to: trans, non-binary, gender fluid, agender, man with a trans history, woman with a trans history, man or woman. We particularly note that some people who transition will regard themselves as men or women afterwards and no longer consider themselves trans.

We also acknowledge those who are exploring their gender identity and may describe themselves as gender questioning.

Expanding understandings of gender to improve trans lives

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