Conducting LGBTQIA+ Responsive Research in Development and Humanitarian Settings: A Practical Guidebook

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Edge Effect is a global diverse SOGIESC (aka LGBTQIA+) humanitarian and development organization established in 2017. Edge Effect's mission is to ensure that the rights, needs and strengths of people with diverse sexual orientations, gender identities and expressions and sex characteristics are addressed within the humanitarian and development sectors. Edge Effect works with LGBTQIA+ civil society organizations and communities, alongside donors, UN agencies, and international non-government organizations.

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This reference guide is the result of consultations that took place in 2023-24 and a review of academic and grey literature. Consultations involved staff of the Australian Government's Department for Foreign Affairs and Trade (DFAT), employees of International NGOs that partner with DFAT, and volunteers and staff from regional LGBTQIA+ led civil society organisations.

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Preamble

Guidance around global social protection policy and practice routinely fails to acknowledge or address diversity of sexual orientation, gender identity, gender expression, and sex characteristics (SOGIESC). The exceptions tend to be passing mentions, unlikely to generate activity amongst development or humanitarian actors that are unfamiliar with diverse SOGIESC issues and communities.

As per the title of a recent Edge Effect report (a quote from an interview), the status quo remains one where "We don't do a lot for them specifically".[1] A key contributing factor is the lack of research that specifically and meaningfully accounts for diversity of SOGIESC. This notion has been reinforced by the UN Independent Expert on Sexual Orientation and Gender Identity (IE SOGI), who has observed that accurate data that captures the lived realities of people with diverse SOGIESC would not only provide evidence of the challenges they face, but would also indicate the way forward towards meaningful inclusion and equality.[2]

While robust data can provide a foundation for policy-makers and advocates to enhance socio-economic inclusion, and to formulate anti-discriminatory measures to prevent abuses, it can also play a powerful role in "dispelling myths and stereotypes that feed stigma and discrimination."[3] This speaks to the transformative potential of SOGIESC-responsive research within and beyond the social protection realm.

By documenting experiences and stories – not only of discrimination but also of resilience – data collection projects can legitimise queer populations in contexts where they may be systematically invisibilised or criminalised by forces of state and society. While this in itself presents an important reason to generate data concerning these populations, it also highlights the inherent risks posed to project participants, data collectors and wider communities whom the project concerns.

Nonetheless, rather than putting SOGIESC inclusion in the 'too hard basket,' it is incumbent upon all practitioners designing and conducting research that will have direct or indirect impacts on the lives of LGBTQIA+ people (including by their omission), to understand and prioritise responsive research that goes beyond binaries wherever possible. The leveraging of robust data that provides insight into the experiences and needs of diverse SOGIESC communities can ensure that subsequent programmes or policies better serve to promote and protect their rights.

Purpose

Reliable, valid and comparable SOGIESC data is a prerequisite for evidence-based policies to foster equality and non-discrimination at the subnational, national, and regional levels. However, conducting research, assessments, and other learning and evaluation activities with and about people with diverse SOGIESC presents specific risks and opportunities.

Ensuring that data collection, analysis, storage and communication for such projects is ethical, safe and effective will vary according to context and the circumstances of individuals. This document offers guiding principles to help navigate diverse projects and contexts and provides a shared language to begin conversations with partners and stakeholders.

This document and its accompanying decision tree tool are intended to be used as part of wider and holistic efforts within organisations to engage on diverse gender and sexuality issues and ensure the meaningful inclusion of people with diverse SOGIESC in policy and programming.

Intended Audience

This reference guide is primarily aimed at humanitarian and development practitioners involved in research, assessments and data collection. It is suitable for those collecting data specifically about LGBTQIA+ people, as well as those wishing to ensure that data collection activities are generally inclusive of LGBTQIA+ people.

Some content, particularly throughout Chapter 5, is geared towards social protection initiatives, including those that support government partners and local authorities in the design, rollout and expansion of their own contributory and/or non-contributory social protection schemes and programmes.

However, the guidance is also readily applicable to research projects outside the scope of social protection, for a vast array of research enquiries pertaining to international development and humanitarian response. This includes the establishment of baselines for monitoring, evaluation and learning (MEL) purposes. The principles and accompanying decision tree tool are relevant to those working within I/NGOs, government departments and agencies, and to queer CSOs.

Scope

The principles outlined in this document are intended to supplement rather than substitute existing guidelines and principles on ethical research, evaluation and data collection. Users should refer to guidance and policies relevant to their field, institution and/or national context in addition to this document. If your project requires formal review, you should consider which ethical review boards are relevant and whether any risk is posed to partners or participants by naming investigation of SOGIESC themes or inclusion approaches.

This document does not offer guidance on working with LGBTQIA+ children or youth in research, assessments or other data collection activities; users intending to engage these groups must seek additional safeguarding guidance.

Glossary

Epistemic Justice: Epistemic justice refers to the fair and equitable treatment of individuals as knowers, reasoners, and contributors to knowledge. It encompasses the recognition and inclusion of diverse ways of knowing and understanding, ensuring that all voices, particularly those from marginalized or oppressed groups, are heard and valued in the production and dissemination of knowledge.

Gender Binarism: This norm assumes there are only two genders—man and woman—ignoring the existence of gender diverse groups including trans and non-binary identities. It marginalises and reinforces discrimination against those who do not fit into these binary categories.

Gender Expression: The external communication of gender traits through appearance, behavior, and interaction patterns.

Gender Identity: Each person's deeply felt internal experience of gender, which may or may not align with the sex assigned at birth. This includes personal body perception and gender expressions such as dress, speech, and mannerisms.

Heteronormativity: This norm assumes heterosexuality is the only normal form of sexuality, embedding this belief in laws, institutions, culture, and practices. It enforces the gender binary and marginalises non-heterosexual orientations and relationships.

Intersectionality: It is the complex, cumulative way in which the effects of multiple forms of discrimination (such as homophobia, transphobia, ableism, misogyny, patriarchy, racism, sexism, and classism) combine, overlap, or intersect especially in the experiences of marginalized individuals or groups.

Qualitative Data: Qualitative data refers to non-numerical information that describes qualities, characteristics, and attributes of a phenomenon or subject. This type of data is collected through methods such as interviews, focus groups, observations, and open-ended survey questions. It is often presented in narrative form and aims to provide a deep, nuanced understanding of human experiences, behaviors, perceptions, and attitudes.

Quantitative Data: Quantitative data is information that can be quantified, counted, or measured and is expressed in numerical values. This type of data answers questions such as "how many," "how much," and "how often," making it suitable for mathematical calculations and statistical analysis.

Research fatigue: Research fatigue is a condition characterized by a state of indifference or apathy towards participating in research, often resulting from overexposure to research activities. This phenomenon can occur when individuals or communities are repeatedly approached to participate in various studies, leading to a reluctance to engage with current or future research projects, regardless of their significance.

Sex Characteristics: Genetic, hormonal, and anatomical features used to categorize bodies as male, female, or intersex.

Sexual Orientation: Defined by the Yogyakarta Principles as a person's capacity for deep emotional, affectional, and sexual attraction to individuals of the same gender, different gender, or more than one gender.

Social Protection: Social protection refers to the set of policies and programs aimed at preventing or protecting all people. against poverty, vulnerability, and social exclusion throughout their life cycles, with a particular emphasis. towards vulnerable groups.

Tokenism: Tokenism is the practice of making only a superficial or symbolic effort to include members of marginalized or underrepresented groups. This is often done to create the appearance of diversity and inclusion without genuinely addressing systemic inequalities or fostering a culture of belonging.

L: Lesbian – a woman emotionally, physically, and/or sexually attracted to another woman

G: Gay – a man emotionally, physically, and/or sexually attracted to another man

B: Bi/Bisexual – an individual emotionally, physically, and/or sexually attracted to two (or more) genders

T: Transgender – an individual whose gender identity does not conform with the gender (or sex) that has been assigned to them at birth

I: Intersex – an individual whose sex characteristics (or sex assigned at birth) do not fit the binary notion of male or female. This includes diversity at the level of anatomy (sexual organs and genitalia), physiology (hormones), and/or genetics (chromosomes).

Q: Queer – originally having a pejorative notion, the term has been reclaimed in the 1980s and serves as an umbrella term to describe a person whose gender identity and/or gender expression and/or sexual orientation and/or sex characteristics are non-normative

Q: Questioning – a term that refers to the process of exploration and uncertainty around one's sexual orientation, gender identity, and/or gender expression

(+) - The "+" in LGBTQIA+ is an inclusive symbol that represents the diversity of sexual orientations, gender identities, and expressions that are not explicitly covered by the initialism LGBTIQ. It acknowledges that there are many other identities and experiences beyond those listed, ensuring that the community is inclusive of all individuals who do not fit into traditional heterosexual or cisgender categories.

Examples:

P – Pansexual: an individual who is attracted to another regardless of their gender identity

A – Asexual (ace): an individual who experiences little to no sexual attraction to others

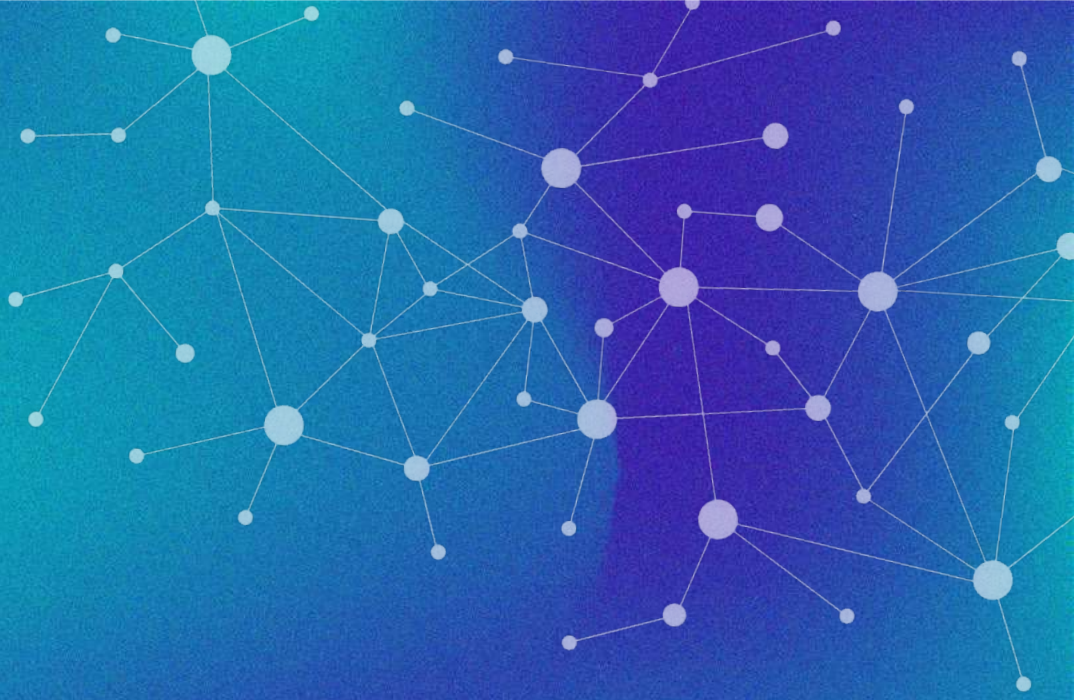
A – Agender: an individual who does not identify with any normative or traditional gender identity, nor

do they identify with any gender. They may also describe themselves as gender-neutral or gender-free.

NB – Non-binary: an individual whose gender identity does not fit within the binary of man/boy or woman/girl

Hijra: (in India) a person who adopts a gender role that is neither traditionally male nor traditionally female

Kothi: A South Asian queer identity used to refer to the "feminine" partner in gender structured same-sex relationships known as Kothi. Kothi is a gender identity of its own; however, from a western perspective a Kothi can be considered as either a transwoman or a feminine gay man.



Chapter 1

Introduction and Context Setting

Research informs the design, operation and evaluation of a wide range of social and economic programs, including domestic government programs implemented through line ministries, as well as international programs implemented by UN entities, INGOs and other development actors using official development assistance or humanitarian relief funding. A diverse range of research might inform these programs, from national censuses or household or other societal research programs, to assessments undertaken as part of the design of specific development and humanitarian programs, to academic or policy research by various institutes, to research by civil society that might highlight lived experience and different voices.

Decisions are influenced by data, and organisations may commit to 'evidence-based decision-making'. For example:

- The Australian Bureau of Statistics explains that the national census "helps us understand what we need now, and into the future. Community groups, not-for-profit organisations, businesses and governments use Census data to make important decisions. Census data informs planwning for schools, health care, transport and infrastructure. It is also used to help plan local services for individuals, families and communities." [4]
- OCHA's Centre for Humanitarian Data reported that "Organizations added 3,700 new and updated datasets, bringing the total to over 20400, which were downloaded over 1.8 million times" in 2022, with "strong demand for data about the world's largest humanitarian crises, from the war in Ukraine to drought and food insecurity in the Horn of Africa." [5]
- Australia's Department of Foreign Affairs and Trade notes that M&E provides data that tests the hypotheses within theories of change and helps to guide policy dialogue on key reform issues, and that the "quality of monitoring and evaluation products has important implications for the basis on which programming decisions are made." [6]

So, what happens if people like you are systematically invisible in research, data and analysis? How are decisions about government and local services responsive to the needs of LGBTQIA+ people if their lives are not reflected in national censuses? How do humanitarian organisations meet the needs of LGBTQIA+ people in crises when they know so little about their needs? How do development programs ensure that the most marginalised are not left behind, when LGBTQIA+ people are a footnote in analysis?

Many LGBTQIA+ organisations and activists are critical of the humanitarian and development sectors for overlooking LGBTQIA+ people. They advocate for new efforts to collect data about LGBTQIA+ people, to ensure that their lives are better understood and to inform programs that are newly responsive to their rights, needs and strengths. This profound call to action comes with many complexities, for **visibility in data** is a double-edged sword. While **invisibility in data** may limit access to humanitarian and development assistance, invisibility is also one of the few tactics available to some LGBTQIA+ people to avoid discrimination, violence and related forms of exclusion.

Is there a way through this conundrum? Is there a way to learn more about LGBTQIA+ people for the purpose of creating more inclusive programs and services, while avoiding placing LGBTQIA+ people at greater risk? This reference guide and its associated interactive guide and training resources answer these questions with a qualified 'yes' and will support your efforts to safely and effectively include LGBTQIA+ people.

LGBTQIA+ inclusion is almost always context-dependent and requires flexibility, adaptation and care. So as you take this journey it is essential to avoid thinking that there is only one solution or that there is a binary yes/no answer to many of the more detailed questions we will explore together.

This chapter explores tensions between **invisibility** and **visibility** in sections 1.1 and 1.2. A taxonomy of LGBTQIA+ **inclusion** is introduced in section 1.3, distinguishing between intentional, incidental, and default inclusion. Factors leading to the **exclusion** of LGBTQIA+ people in research, data and analysis are explored in section 1.4, covering **implicit exclusions** through accidental omission or oversight, **explicit exclusions** by researchers, and **self-exclusion** by LGBTQIA+ people - perhaps due to fears of discrimination or harm.

Epistemic Justice in SOGIESC-Responsive Research

Audre Lorde famously noted that "There is no thing as a single-issue struggle because we do not live single-issue lives."[7] So, while one response to invisibility may be to 'add queers and stir', the authors of this Reference Guide urge readers to address broader issues of epistemic justice while solving problems of LGBTQIA+ inclusion. Do busy development and humanitarian workers have time or reason to grapple with abstract concepts such as epistemic justice? Somehow, we must. While epistemic justice may sound conceptual, it has essential and practical ramifications for aid programs, especially those seeking to address inequalities. In a nutshell, a concern for epistemic justice is a concern for how knowledge is created, valued, controlled and deployed.

The aid sector status quo is that knowledge – including research, data and analysis – remains generated and controlled by official researchers and minority world organisations that design, implement and evaluate projects and services on behalf of people in need. The recognition that this form of aid is untenable – and resulting commitments to locally-led development (and localisation in humanitarian action), inclusion, accountability and decolonisation – requires a new approach to knowledge … to what counts as knowledge … to who is involved in the production of knowledge … to who owns the knowledge … to who decides how that knowledge will be used and for whose benefit. Outside the dynamics of foreign assistance these same concerns may exist regarding hierarchies of knowledge and power within countries. For example, experts in governments and researchers in universities (sometimes supported by foreign assistance programs) determining what is best for everyone else.

Feminist and postcolonial researchers – and people in countries where aid programs are implemented – have long realised that research, data and analysis can themselves act as vehicles of exclusion that marginalise the knowledge and perspectives of certain groups. This Reference Guide calls for a collective effort to acknowledge and address these hard truths. Does this make research more complicated? More time-consuming? More expensive? Less convenient? In the short-term, possibly. However, insisting on approaches to research, data, and analysis that rely on poorly selected or planned methods can perpetuate injustice and cause significant harm.

Is this Reference Guide then proposing that all that has been learned about research methods, data collection, analytic frameworks and more be tossed out? Absolutely not. Knowledge generated in the natural and social sciences has undeniable value, as has the deployment of that knowledge to address

problems from population health to weather prediction, to energy systems, to behaviour change, and so much more. As any good queer theorist knows, the answer is not either/or but both/and. This Reference Guide seeks a rebalancing while recognising the value of different ways of knowing and different ways of approaching research, data and analysis.

Returning to SOGIESC-diverse people, an epistemic justice-based approach highlights their unique knowledge within research, policy-making, and societal narratives. This involves ensuring that the voices, experiences, and realities of LGBTQI individuals are not only included in research projects, but respected, amplified and given due weight in the creation and dissemination of knowledge. Similar processes are needed to ensure people with other protected characteristics – e.g., such as people with disabilities, or younger or older people, or indigenous peoples – also have the same engagement, as do people whose lives are layered across these boundaries.

Here the **process** of doing research on or with SOGIESC-diverse people is critically important alongside analysis, findings and recommendations. As researchers, our own multiple intersecting identities can position us as insiders, outsiders, or a combination of both. Being conscious of our own **positionality** in relation to any participants and co-researchers, and **reflexive** about how these positions shape the particular construction of knowledge within a project, recognises that "the subjects and objects of research are intertwined, and personal experiences can be used to create scientifically sound knowledge."[8]

Later chapters explore ways of engaging with LGBTQIA+ communities and reasons for choosing specific research methods. Meaningful choices regarding those aspects of research are not merely technical, but are rooted in "knowledge production [being] done in an accountable way." [9] Throughout the Reference Guide and its associated interactive guide and training resources, look out for these handy indicators of opportunities to reflect on epistemic justice:

Epistemic Justice Opportunity: Epistemic justice refers to the fair and equitable treatment of individuals as knowers, reasoners, and contributors to knowledge. It encompasses the recognition and inclusion of diverse ways of knowing and understanding, ensuring that all voices, particularly those from marginalized or oppressed groups, are heard and valued in the production and dissemination of knowledge.

With regards to SOGIESC-diverse people, an epistemic justice-based approach highlights their unique knowledge within research, policy-making, and societal narratives. This involves ensuring that the voices, experiences, and realities of LGBTQI individuals are not only included in research projects, but respected, amplified and given due weight in the creation and dissemination of knowledge. Throughout this document, when you see this indicator, use it as an opportunity to reflect on Epistemic Justice.

Epistemic Injustice Risk: Epistemic Injustice on the other hand, is when the knowledge, experiences and realities of SOGIESC-diverse people are excluded in the creation and dissemination of knowledge. Throughout this Reference Guide, this indicator is a reminder of areas to look out for – and avoid – potential epistemic injustice.

1.1 Risks of Invisibility

Many LGBTQIA+ organisations and activists have taken up the phrase "If we're not counted, we don't count." Activists at the 2018 Asia and Pacific Pride in the Humanitarian System consultation (PitHS) in Bangkok used the phrase to highlight gaps in humanitarian response that result from needs assessments that often fail to include LGBTQIA+ people.[10]

Needs assessments are a fundamental part of the humanitarian system, informing project designs and proposals within humanitarian organisations and feeding into humanitarian response-level documents such as Humanitarian Needs Overviews. This lack of data directly contributes to inadequate and insufficiently relevant services for people with diverse SOGIESC in crisis response. PitHS participants commented that the availability, quality, and accessibility of data varied strongly across contexts, and in virtually no context did data capture the diversity within diverse SOGIESC communities, the differential needs of LBTIQ women, or the needs of people of diverse SOGIESC with intersecting needs and protected characteristics – such as people with disabilities.

The need for actionable data is just as important in development contexts, whether programs are implemented by governments and their service providers or through organisations funded directly through foreign aid programs. This is true of almost all social and economic development programs, whether their focus is social protection, climate justice, gender-based violence, health, labour rights, vocational training or many other thematic areas.

Versions of the phrase 'If we're not counted, we don't count' have also been used by LGBTQIA+ advocates in the context of health service provision [11] and in advocacy for inclusion in the census data. [12] When activists use the phrase, they do not always mean it literally, in the sense that every individual needs to be identified and counted. Rather, they are asking to be seen and reached.

There are times when this may require individual data to assist individuals to be connected with services, where risks associated with visibility can be mitigated (see the following section on the risks of visibility). Equally, it can mean that governments and other service providers learn enough about LGBTQIA+ people's lives to design services that are safer and more effective, and that do oblige LGBTQIA+ people to be 'out' in order to receive support or access opportunities.

Case Study: During the Pride in the Humanitarian System Consultation in Bangkok in 2018

Participants acknowledged and discussed the barriers to increased data collection and research, both qualitative and quantitative, including:

Lack of capacity of humanitarian actors to safely and securely collect data on SOGIESC, and lack of capacity of diverse SOGIESC networks to collect disaster risk data or carry out post-disaster needs assessments
Heteronormative and cis-normative assumptions in the design of disaster needs assessment forms, e.g. adhering to strict gender binaries or assuming households to consist of heterosexual couples
Concerns about disclosing SOGIESC, especially in environments with high levels of criminalisation and discrimination.

In light of these challenges, participants noted that while working towards strengthening the evidence base, it is also important to advocate that the lack of quantitative data is not a barrier to the design of inclusive policies and programmes.

It was suggested to employ qualitative data collection mechanisms, including feminist participatory action research and storytelling, while working in conjunction with local diverse SOGIESC networks, for collection of diverse SOGIESC experiences. It was suggested to use the conservative figure of 5% to calculate what percentage of any population may be SOGIESC community members.

For example, social protection programs may need to be designed in specific ways to meet the needs of the LGBTQIA+ people, whether this involves a specific fund or mainstreaming of LGBTQIA+ needs in a more general fund. How many LGBTQIA+ people need social protection support? Are their needs similar or different in type and scale as with other people? How can an individual be identified and registered without exposing them to harm? Will some delivery mechanisms be more effective than others, due to bank account access or mobile phone ownership? Might conditional aspects of programs increase risks for LGBTQIA+ people? Answering these questions requires research and analysis.

As noted by a senior government official in Uruguay interviewed during the COVID-19 pandemic:

"When public policy, especially social protection policy, is not explicitly engineered to cover a social group such as LGBT people, most of the time, they end up excluding people."[13]

The same is true in considering whether GBV services or services for migrant workers or any other services are meeting the needs of LGBTQIA+ people or whether they are leaving them behind.

Invisibility of LGBTQIA+ people in research and data extends to broader reporting and national and global measures of aid effectiveness such as the Sustainable Development Goals (SDGs). None of the SDG goals, targets or indicators directly mention sexual orientation, gender identity or sex characteristics. This absence limits incentive or pressure for states to collect or report data on diverse SOGIESC inclusion, a situation exacerbated by the absence of diversity of SOGIESC within standardised gender indicators used by the UN and many governments worldwide.[14]

LGBTQIA+ activists have regularly pointed out that the absence of data on the development status of SOGIESC-diverse people means that governments and aid agencies often have no way of knowing how many are being left behind or how far they are being left behind. Routine absence of LGBTQIA+ people in data and reporting may also contribute to the sense that SOGIESC inclusion is too hard, or is optional. This shifts extraordinary and ongoing burdens onto poorly-resourced LGBTQIA+ organisations to collect evidence and make the case for LGBTQIA+ inclusion.

Initiatives to address some of these gaps are hindered by the lack of data about LGBTQIA+ people or the unwillingness of governments to address LGBTQIA+ issues. For example, the World Bank, UNDP and many LGBTQIA+ civil society organisations have worked since 2015 to establish an LGBT Inclusion Index. The index includes 51 indicators intended to provide aggregated measures of Economic Well-Being, Political and Civil Participation, Education, Health, and Personal Security and Violence.

The 2024 Report on the Pilot Implementation highlights deep challenges that need to be addressed before the LGBT Inclusion Index can function as intended.[15] For example, many of the indicators could not be piloted as statistical data about a) rates of bullying in schools or b) unemployment and earnings rates, or c) access to healthcare are not collected by governments or other agencies in ways that are specific to LGBTQIA+ people or that allow disaggregation from population studies. National Statistics Offices in some countries were uncooperative and concerns were raised about the safety of the process for civil society. Despite these challenges the 2024 Report on the Pilot Implementation proposes that much can be learned and recommends scaling up.

As outlined by the UN Independent Expert on Sexual Orientation and Gender Identity (IE SOGI) in 2019, the principle of due diligence requires states to protect those at particular risk of violence and discrimination and to take measures to eliminate cultural and social stigmatisation.[16] This principle underpins the state's responsibility to take action when it knows, or has reasonable grounds to believe, that abuses are being perpetrated. Therefore, the (safe, robust) collection and disaggregation of data to compare population groups forms part of the human rights obligations of states and an essential element of the human rights-based approach to data.

The IE SOGI recommends that States design and implement comprehensive data collection procedures to assess the type, prevalence, trends and patterns of violence and discrimination against LGBT persons. Without this, "in most contexts, policymakers are working in the dark, left only with personal preconceptions and prejudices to guide their decisions."[17] The types of data required, according to the IE SOGIE's report, include those relating to demographic, economic, social and cultural characteristics, literacy rates, unemployment rates, the number of reported cases of violence and other indicators.

1.2 Risks of Visibility

"We are here, but we have many reasons to be cautious, & may stay out of sight" [18]

Some form of visibility in research, data and analysis seems important for LGBTQIA+ inclusive social and economic development and crisis response. However, visibility in research, data and analysis also carries considerable risks, and invisibility may offer essential protection to LGBTQIA+ people. There is no single answer available for how to balance these competing interests in specific contexts across countries. Nor can this balance be determined at the outset of a project and then forgotten; instead, methodological choices and risk management must be living processes. Understanding and mitigating these risks may be time and resource intensive, but are part and parcel of being inclusive of this deeply marginalised group.

LGBTQIA+ people often have enhanced concerns around privacy and confidentiality due to societal persecution, stigma, discrimination and marginalisation. Participating in data collection projects, whether through being observed or having identifiable data collected, stored and shared, can risk exposing their identity and increase risks of further violence, discrimination and exclusion. The IE SOGI has noted that information about an individual's sexuality and gender is highly stigmatising in many contexts and collecting data about SOGIESC "therefore raises significant concerns about privacy, identity, self-determination, and security."[19]

Stigma exacerbates risks by potentially motivating hacking, theft or unlawful access to data, and increases the harmful effects of information disclosure due to negligence or errors. Those gathering data on SOGIESC-diverse populations in any context, but especially in development or humanitarian settings, must address data security through comprehensive policies, guidance, and training. Strengthening the capacity of all stakeholders such as CSO and government staff to manage and mitigate cybersecurity risks is essential [See Chapter 5 and Annexe X for more on the specific risks of digitisation, AI and automation for LGBTQIA+ people]. Rather than assuming benevolence among state actors, including subnational or local authorities, it is important to remember that in some contexts, collected data has reportedly been used for surveillance, harassment, arrest and persecution by government officials.[20]

LGBTQIA+ people experience high rates of violence, discrimination, and poor mental health, and participation in research, assessments, or other data collection projects carries the risk of re-traumatisation. This can occur through the retelling of traumatic experiences. Insensitive or stigmatising questions may exacerbate feelings of marginalisation, perpetuating cycles of trauma and exclusion. It is essential for researchers to design and implement studies with a deep awareness of these risks, employing trauma-informed approaches, ensuring sensitivity and respect in their interactions, and actively working to create a safe and supportive environment for all participants.

LGBTQIA+ people are often represented only through negative lenses and the data collection process risks reinforcing negative stories about communities. Whether through the pathologisation of LGBTQIA+ identities and/or issues, or through a focus on hardships faced by the community, research and other learning activities with marginalised populations often contributes to portraying these populations as only being vulnerable and victimised. Edge Effect's consultations with LGBTQIA+

CSOs has revealed an unfortunate tendency for non-LGBTQIA+ organisations to adopt tokenistic and extractive approaches to research projects that claim to include LGBTQIA+ people or to address our issues. In the worst case, the lived experience of LGBTQIA+ people is reduced to 'story porn', a colloquialism used to refer to the representation of LGBTQIA+ people as victims and objects of sympathy, rather than as rights-holders with agency.

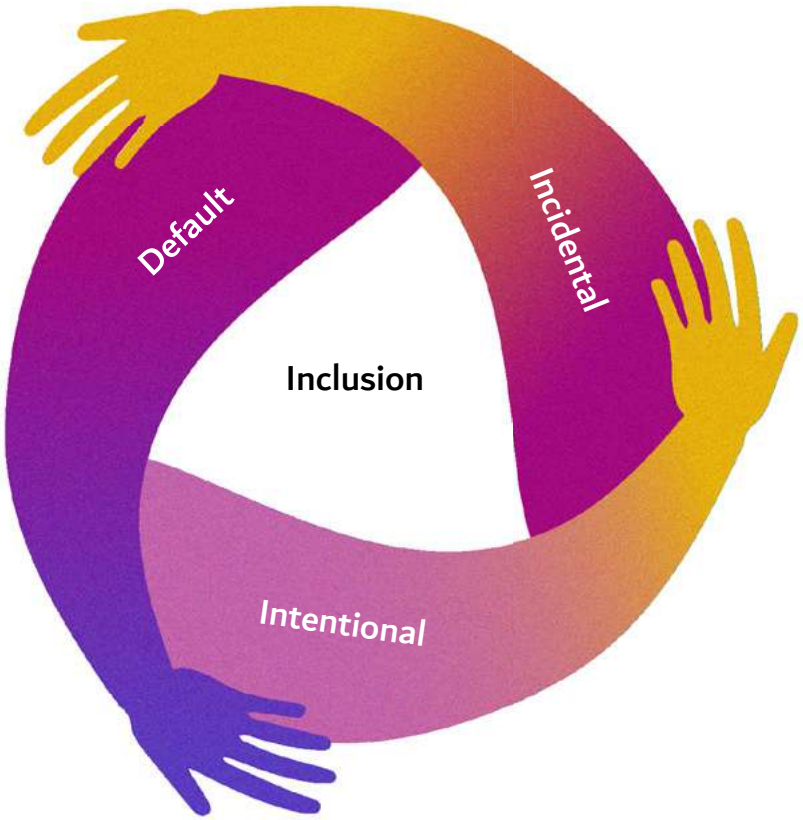
LGBTQIA+ people rarely experience positive changes in their lives as a direct consequence of participation in data collection projects. This may be because the changes needed are at the level of legal and policy reform, which takes a long time and requires much more than data. Additionally, many project designs fail to consider the lasting impact on participants and community members, often ending without providing any tangible benefits or follow-up support. Consequently, participants may feel used and forgotten once the project concludes.

Moreover, LGBTQIA+ individuals are often repeatedly asked to participate in data collection projects by various aid organisations that come and go. These organisations frequently fail to establish long-term commitments or sustainable relationships with the communities they study. This 'hit-and-run' approach can leave participants disillusioned and sceptical about the true intentions and effectiveness of these initiatives. As a result, LGBTQIA+ people may experience research fatigue, becoming increasingly wary and unwilling to engage in new projects.

The fatigue that LGBTQIA+ people experience can significantly impact their trust and willingness to participate in future research, particularly when compounded by other dynamics such as knowledge production led by non-LGBTQIA+ foreign (often post-imperial) actors. These dynamics can further alienate participants, making them feel as though their experiences are being exploited rather than genuinely understood and addressed. The presence of foreign researchers can also perpetuate a sense of power imbalance and historical injustice, leading to further distrust and reluctance to engage.

To build trust and encourage meaningful participation, it is crucial for researchers to demonstrate a commitment to the well-being and empowerment of LGBTQIA+ communities. This involves ensuring that research projects are designed with a clear understanding of the long-term impact on participants and providing tangible, positive outcomes. Researchers should prioritise collaboration with local LGBTQIA+ organisations and leaders, ensuring that the research process is inclusive and respectful of the community's needs and perspectives.

1.3 Lay of the land: Inclusion



Default Inclusion

"Much of the impact on sexual and gender minorities may go unnoticed, as data collection by governments and aid organisations often fails to include [SOGIESC] people and issues. But we're in every community; and we are very likely to be part of your programs even if you're not aware of it"

Default inclusion of people with diverse SOGIESC in humanitarian and development contexts occurs when these individuals are included in data collection efforts without specific targeting or mechanisms to facilitate data disaggregation by LGBTQIA+ identities. For example, LGBTQIA+ people may participate in a survey or interview without any questions about their SOGIESC status and without volunteering that information. Those LGBTQIA+ people and their views are in that sense included in the research, data and analysis.

In some cases, this may be sufficient as LGBTQIA+ people have many other aspects of their lives and may have views or experiences that are independent of their SOGIESC. However, in many cases researchers will not know if someone's SOGIESC status is relevant. If the data fails to reveal the particular vulnerabilities and inequalities faced by LGBTQIA+ people, then subsequent analysis and design processes will very often miss the chance to adequately address their needs. This becomes a bigger problem when designers and implementers of programs falsely assume that generally-available services will be relevant and accessible for LGBTQIA+ people.

Intentional Inclusion

Intentional inclusion involves designing data collection processes specifically to ensure that the views and experiences of LGBTQIA+ individuals are represented. This could involve conducting surveys, interview or focus groups in ways that allow safe collection of data on gender identity and sexual orientation. Disaggregation may uncover unique experiences, views and needs of LGBTQIA+ people through which researchers can identify specific challenges and develop targeted interventions.

Intentional inclusion may also mean bypassing quantitative methods altogether in favour of more qualitative ones, for instance in contexts where the safety of collecting large-scale data on SOGIESC-diverse individuals cannot be guaranteed. Such methodological decisions are explored in Ch. 3.

Where possible, intentional inclusion should also feature SOGIESC-diverse people as knowledge creators as well as subjects, ensuring that those who have traditionally been marginalised are actively involved in the research process. By including SOGIESC individuals in the design, implementation, and analysis of research, the resulting data is enriched with their insights and lived experiences. This not only enhances the quality and relevance of the research but also empowers SOGIESC communities by recognising and valuing their contributions to knowledge production.

Intentional inclusion, where including questions on SOGIESC is safe and appropriate, not only validates the identities of LGBTQIA+ individuals but also empowers them by ensuring their voices are considered in humanitarian and development programming. This approach best promotes equity and enables more effective and inclusive policies and programs that better serve the needs of SOGIESC-diverse populations.

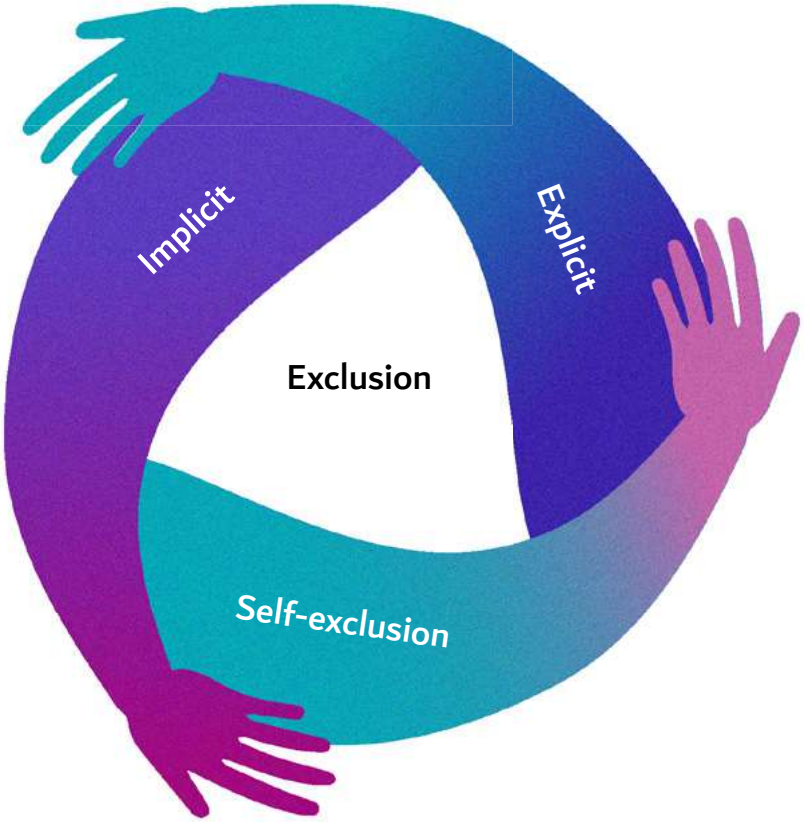
Incidental Inclusion

Incidental inclusion occurs when data about SOGIESC-diverse individuals is collected less intentionally, often as a byproduct of gathering information for other purposes. For example, administrative data such as sign-ins for per diem or attendance at events may capture information about LGBTQIA+ people. This may include non-SOGIESC data such as phone numbers, or may include data about their SOGIESC status, such as their gender identity.

Collection of this kind of data may be required by donors for monitoring and evaluation, or may be well-intentioned organisational policy, or may occur out of habitual design of forms to collect more data than is really needed. This data may be available to many people inside of development or humanitarian organisations and could be stored on paper or unsecured digital devices. While such data may seem insignificant, it could directly or indirectly identify LGBTQIA+ people, especially if the data is about a workshop specifically involving LGBTQIA+ people or involves collection of SOGIESC data.

1.4 Lay of the land: Exclusion

This exclusion may happen unconsciously and without direct intent (implicit) or consciously and with clear intent (explicit). SOGIESC-diverse people may also decline to participate in a research project for a range of reasons.



Implicit Exclusion

- **Lack of awareness:** Researchers may not be fully aware of the specific needs and issues faced by people with diverse SOGIESC, leading to their unintentional exclusion. Assumptions that hetero-sexual or cisgender or binary experiences are the norm can result in research designs that overlook LGBTQIA+ populations.
- **Inadequate training:** Researchers may be aware of the need to address LGBTQIA+ issues but may not have received sufficient training on how to include diversity of SOGIESC in research, data and analysis.
- **Insufficient data:** A lack of existing data on people with diverse SOGIESC can make it more challenging to identify and include these populations in new research. Without foundational data,

researchers may struggle to design studies that accurately represent these communities.

- **Survey design flaws:** Research tools may not include questions that capture the identities of people with diverse SOGIESC. They may use categories that are overly broad such as 'other' or may overlook local language and cultural terms that are more relevant than LGBTQIA+. They may also lack write-in options or other measures that make LGBTQIA+ people feel safe and included. Researchers may reuse instruments from a previous study or programme cycle without updating it to be SOGIESC-inclusive or may be forced to use a global tool that lacks local nuance.
- **Research design:** An overreliance on quantitative methods can be less appropriate for people with diverse SOGIESC. Quantitative methods often rely on standardised questions and binary categories that may not capture the full range of diverse SOGIESC identities and experiences. Further, sampling strategies can also miss people who are less visible or vocal within their communities. For instance, older queer people might not be reached via an online survey and may also be less likely to attend an LGBTQIA+ community drop-in centre. This can result in a skewed sample that does not accurately represent the full spectrum of SOGIESC experiences.
- **Language barriers:** Lack of inclusive language or understanding of SOGIESC terminology can result in exclusion during data collection. Researchers must be equipped with the appropriate language to engage all participants effectively.
- **Focus on majorities 'for now':** A focus on majority populations in rapid-response situations might unintentionally sideline minority groups, including people with diverse SOGIESC. For instance, during humanitarian disasters or health crises, relief efforts and resources may be directed towards the larger population, neglecting the specific needs and vulnerabilities of SOGIESC-diverse individuals, who might face unique challenges and heightened risks that go unaddressed.
- **Assumptions of non-relevance:** Researchers might incorrectly assume that SOGIESC is not relevant to the research focus. For instance, in studies on reproductive health outcomes, researchers may overlook the distinct experiences and needs of LGBTQIA+ individuals and families, leading to incomplete and biassed findings that do not fully represent the entire population.

Explicit Exclusion

Exclusion that is conscious and intentional, driven by deliberate decisions, policies, or actions to omit certain groups. Reasons researchers might deliberately exclude people with diverse SOGIESC can include:

- **Political pressure:** Researchers might face or anticipate pressure from governments or other institutions that have hostile stances toward LGBTQIA+ rights, leading them to exclude SOGIESC-diverse populations to secure support or avoid tensions. For instance, in a country with anti-LGBT laws, researchers might omit SOGIESC-related questions from their survey to avoid backlash.
- **Cultural sensitivity:** In regions where SOGIESC-diverse identities are highly stigmatised or criminalised, researchers may deliberately avoid including LGBTQIA+ issues to avoid tensions or conflict with local co-researchers and/or research subjects.
- **Privacy and safety concerns:** Concerns about confidentiality and the safety of people with diverse SOGIESC might discourage researchers from explicitly including them to avoid putting them at risk of discrimination, violence, or persecution.
- **Institutional bias:** Research institutions with discriminatory policies or biases may instruct researchers to exclude people with diverse SOGIESC from their studies.

- **Funding restrictions:** Some funding sources may have explicit restrictions against researching SOGIESC issues, leading researchers to exclude these populations to comply with funding requirements. For instance, a grant from a religious organisation might stipulate that funds cannot be used for studies involving SOGIESC topics.
- **Research focus:** Researchers might deliberately exclude SOGIESC-diverse individuals if they believe that including them would complicate or dilute the primary focus of their study.
- **Resource constraints and methodological challenges:** Deliberate exclusion might happen if researchers believe they lack the resources or expertise to appropriately or representatively include people with diverse SOGIESC.

Self-exclusion

Many LGBTQIA+ people are cautious about sharing aspects of their identity outside of trusted groups. They may therefore opt out of research participation, in ways that can be visible or invisible to the researchers. Reasons for doing so include:

- **Dynamics of queer lives:** The complex and often precarious dynamics of queer lives in development and humanitarian settings may lead individuals to opt out of research projects. Beyond concerns about privacy, safety, and potential re-traumatisation, the daily challenges of maintaining livelihoods, often through informal employment, can further discourage participation.
- **Enhanced privacy & confidentiality concerns:** LGBTQIA+ people often have enhanced concerns around privacy and confidentiality due to societal persecution, stigma, discrimination and marginalisation. Participating in data collection projects, whether through being observed or having identifiable data collected, stored and shared, can risk exposing their identity and increase risks of discrimination, violence and exclusion. Even when assurances of confidentiality are given, the perceived risks of being identified can outweigh the potential benefits of participation.
- **Re-traumatisation through retelling:** People with diverse SOGIESC experience high rates of violence, discrimination and poor mental health. Participation in research, assessments or other data collection projects carries a risk of re-traumatisation through the retelling of traumatic experiences, and exposure to insensitive, dehumanising or stigmatising questions. Doing so without adequate support or follow-up can exacerbate their distress and harm their mental well- being, especially for LGBTQIA+ people who may be asked to repeat stories for different researchers.
- **Fatigue and past experiences of extraction:** LGBTQIA+ people may question if they will experience positive changes in their lives as a direct consequence of participation in data collection.
- **Negative representations of LGBTIQ people:** Negative portrayals of LGBTIQ people in research as victims or pathologised subjects can discourage participation. When research consistently reinforces harmful stereotypes and fails to recognise their agency and resilience, this can lead to fatigue and reluctance to participate in studies.
- **Perceived irrelevance of the research study:** SOGIESC-diverse people may perceive certain research studies as irrelevant to their lives and concerns, leading to self-exclusion. If the research topics or questions do not resonate with their experiences or address their specific needs, they may see no value in participating. This perceived irrelevance can be exacerbated by a lack of engagement with the community during the research design phase, resulting in studies that fail to capture the priorities and realities of SOGIESC individuals.

Chapter 2

Risk Mitigation and Community Engagement

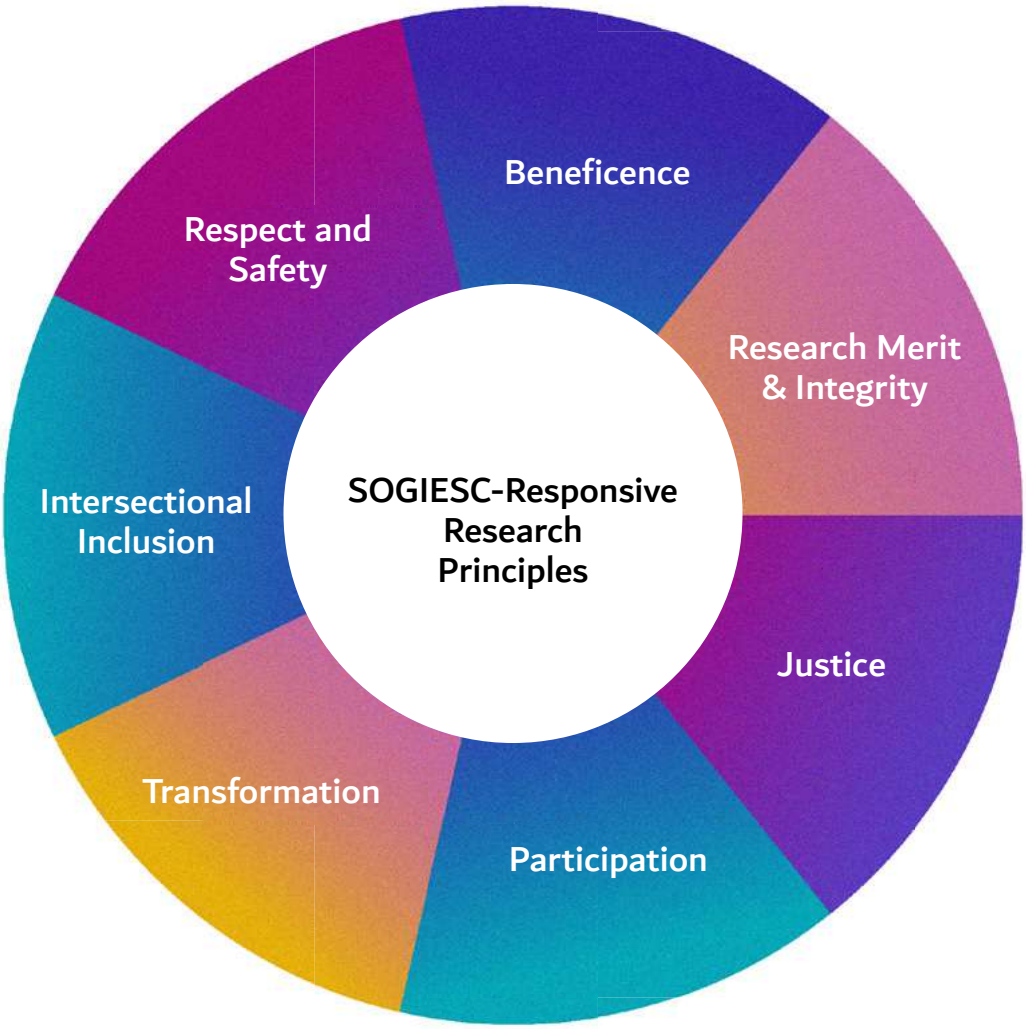
This chapter explores key aspects of SOGIESC-responsive research design, focusing on risk mitigation and community engagement. It provides guidance on designing data collection and analysis that acknowledges and caters to the rights, needs and strengths of LGBTQIA+ people from the outset. It also emphasises maintaining core ethical principles while embracing flexibility in working with diverse SOGIESC groups. This might mean leaving the research design unfinalised enough to ensure genuine community participation and ownership, rather than pinning everything down internally and only then seeking inputs or co-creation. It could also mean accommodating less orthodox research practices if requested by local CSOs and networks to ensure safety or privacy.

2.1 Designing SOGIESC-Responsive Research Projects

While SOGIESC-inclusive research aims to ensure the participation and representation of SOGIESC-diverse individuals, SOGIESC-responsive research seeks to go beyond mere inclusion by addressing and transforming the underlying power dynamics and social/institutional structures that perpetuate discrimination.

This approach isn't just about understanding marginalisation – it's about actively dismantling the conditions that lead to it. SOGIESC-responsive research is action-oriented, aiming to create lasting positive impacts for LGBTQIA+ people, their families, and communities.

Seven Principles of SOGIESC-Responsive Research:



These SOGIESC-responsive research principles are consistent with and build upon established good practice in the humanitarian and development sectors[21], and embrace power-shifting feminist research frameworks[22]. These principles are designed to support researchers to address the unique needs and experiences of SOGIESC-diverse communities, ideally designing research that is not only ethical but also impactful and transformative.

1. **Respect for SOGIESC-Diverse individuals and concern for their safety:** Respect is an overarching consideration that recognises each person's intrinsic value. It involves honouring the rights, privacy, dignity, and diversity of those participating in research, ensuring their identities and experiences are valued and protected. Safety considerations are paramount, including safeguarding privacy, especially in hostile environments. Researchers must be adaptable and responsive to the specific needs and risks faced by SOGIESC-diverse individuals.

2. **Beneficence:** Beneficence acknowledges that research is an intervention that should actively benefit SOGIESC-diverse people, going beyond the principle of non-maleficence (doing no harm). While 'do

no harm' is crucial, especially for LGBTQIA+ individuals vulnerable to research risks, SOGIESC-responsive research aims higher. Like feminist research, it strives to be inherently beneficent in both approach and outcomes, seeking to create positive change for the communities involved.

3. **Research merit and integrity:** Research regarding SOGIESC-diverse populations must be well-justified, in that it should avoid duplication of previous research efforts and should have clearly defined objectives that are beneficial to the community in some way. It should also be high quality, and led by teams with a deep understanding of the local cultural, historical, and political context. Upholding research integrity demands honest conduct, transparent dissemination of results, and fostering trust. Ethical processes such as obtaining informed consent must be robust.

4. **Justice:** SOGIESC-responsive research recognises, mitigates, and ideally transforms power imbalances within research settings. It champions epistemic justice, taking a hard look at how research practices and outcomes can either uphold or challenge heteronormative and neo-colonial dynamics. This approach identifies and dismantles hierarchies both those within research processes and those that research may perpetuate. It achieves greater equity by recognising SOGIESC-diverse people as knowledgeable agents capable of leading research production without needing 'objective' outsiders to interpret their lives.

5. **Participation:** SOGIESC-responsive research thrives on the meaningful involvement of LGBTQIA+ individuals and groups, ideally throughout the entire project. Whether a project specifically targets an LGBTQIA+ population, or aims to incorporating SOGIESC-diverse people into broader research frameworks, objectives should be co-defined with local LGBTQIA+ experts. This collaborative approach (e.g., co-creating research questions, methodologies, and dissemination strategies) can ensure relevance and achievable goals, and foster ownership and agency within diverse SOGIESC communities.

It's vital to recognise, however, that diverse SOGIESC communities are not an inexhaustible resource. Their contributions must be compensated fairly, ensuring respectful, sustainable, and empowering involvement rather than forming yet another burden for people living busy and potentially precarious lives. Researchers must also inform queer networks or individuals that they have the right to decline collaboration without any negative consequences.

6. **Transformation:** In the final stages of a SOGIESC-responsive data collection project, its research outputs (reports) and uptake strategies (advocacy) go beyond mere documentation. Rather, they strive to **achieve transformative outcomes** that empower SOGIESC-diverse individuals and communities by addressing systemic issues and promoting social justice. For instance, they might aim to identify, challenge and change discriminatory policies and norms. **Research uptake** opportunities should be strategically considered from the project's outset and discussed with relevant SOGIESC-diverse stakeholders to maximise impact.

7. **Intersectional inclusion:** Intersectionality is crucial in SOGIESC-responsive research. It requires concerted efforts to understand and address the multiple, overlapping identities and experiences that shape the lives of SOGIESC-diverse individuals in a given context. Researchers must recognise how factors such as ethnicity, caste, class, gender, disability, and migration status intersect with SOGIESC diversity to shape vulnerabilities and resilience. Researchers must also be vigilant about how their own identities can create asymmetrical power dynamics in research settings.

Being SOGIESC-responsive also means taking extra care when partnering with government agencies and other state actors. Most governments do not systematically collect data on LGBTQIA+ people. As discussed in Chapter 1, such a gap results in a lack of evidence to inform policies and programs targeting their specific rights, needs and challenges. It also makes it harder to compare progress and successful policies across countries."[23] However, it's crucial to remember that government agencies, ministries, subnational authorities or any other state bodies collecting data on people with heightened vulnerabilities are not inherently benevolent. Some states or institutions within states may be actively hostile towards LGBTQIA+ people. Even states previously supportive of SOGIESC rights may backslide.

It is therefore vital to actively mitigate the risks associated with including SOGIESC-identifying information in surveys and assessments involving government partners and stakeholders. See below for example measures::

Anonymisation

Description: Ensures that even if the data is accessed by unauthorised individuals or entities, it is not possible to identify or target specific individuals based on the information collected.
Examples:

- **Anonymise Data:** Replace personal identifiers with unique codes. Avoid storing names, addresses, or any other identifiable information alongside research data.
- **Separate Data:** Keep any identifiers (if absolutely necessary) separate from main data set, stored in a different location with additional security measures.
- **Aggregation:** Report data in aggregate form, ensuring individual responses cannot be traced back.
- **Data Masking**: Use techniques like data masking to obscure identifiable information in case the data needs to be shared or reviewed.

Secure Data Storage

Description: Prevents unauthorised access and protects the data from breaches, ensuring that even if storage locations are compromised, the data remains unintelligible without the encryption keys.
Examples:

- **Encryption**: Encrypt all data both in transit and at rest using strong encryption standards. Ensure that encryption keys are stored securely and separately from the data.
- **Secure Servers:** Use secure, reputable servers for storing digital data. Avoid using local servers that might be more vulnerable to unauthorized access.
- **Backup Protocols:** Regularly back up encrypted data in a secure location to prevent data loss while ensuring backups are as secure as the primary data storage.

Access Control

Description: Limiting access to data to only those who need it and monitoring that access helps prevent misuse and unauthorized dissemination of sensitive information.
Examples

- **Role-Based Access:** Implement role-based access controls (RBAC) so that only personnel with a legitimate need can access the data. Define and enforce strict roles and permissions.
- **Audit Logs:** Maintain detailed audit logs to track who accesses the data, when, and for what purpose. Regularly review these logs for any unauthorised access attempts.
- **Two-Factor Authentication (2FA):** Require two-factor authentication for accessing the data systems.
- **Access Reviews:** Periodically review access permissions and revoke access for individuals who no longer need it.

A data sharing agreement (DSA)[24] between researchers and government partners that captures agreed measures (including but not limited to those in the table on the right) is particularly important in contexts where a risk of misuse or data-based discrimination has been identified. For an example of how to approach a data-sharing agreement for collecting data about LGBTQIA+ people with a government, see Annexe X.

If, following comprehensive risk assessments and discussions with local queer networks, researchers aren't satisfied that data collection can proceed safely in partnership with government agencies, they should reconsider the collaboration or at least avoid any data-sharing aspects. Data protection principles and the rights of data subjects are revisited in Chapter 5: Emerging Issues.

2.2 SOGIESC-specific Safety Issues and Risk Analysis

Safety and related risks can arise when conducting research on SOGIESC-diverse people, and are especially important within development and humanitarian settings. Key considerations include:

- Privacy
- Consent
- Retraumatisation
- Safeguarding

Privacy: Closeting as a Right

Privacy is paramount in any research involving SOGIESC-diverse people. Many queer people choose to remain closeted entirely, or within certain settings, such as at work, or during different periods of their lives. Researchers and those supporting government agencies with technical support must treat these choices with the utmost respect and care. The benefits of data collection never justify outing LGBTQIA+ people. Putting LGBTQIA+ people in the position of internally debating whether they should or should not take on risks of participation could itself create trauma.

The de facto criminalisation of diverse SOGIESC identities in many countries raises serious concerns about encouraging state actors to collect sensitive personal data. In addition to outright bans on same-sex consensual sex, anti-LGBTQIA+ laws manifest in various forms across different contexts and can include laws on public order, pornography, public decency, trafficking, and sex work. [25]

Even in less hostile legal contexts, research involving SOGIESC-diverse people carries heightened risks in the eventuality that data is hacked, leaked, or otherwise falls into the wrong hands. These risks escalate if stringent measures are not in place for data gathering, management, storage, and destruction (see Chapter 5.4 for key principles and suggestions). The relatively small number of LGBTQIA+ individuals in a given context also heightens the risks of deductive disclosure, where individuals can be identified even without directly identifying information.

Access controls should limit who has access to data, and for what purposes data can be used – this is especially important for photos. Clear communication about the measures taken to safeguard confidentiality should be provided to all relevant partners and stakeholders. Training sessions should

ensure that everyone involved in the project is familiar with these policies and processes, actively implements them, and fully understands the serious potential consequences of a data protection breach for marginalised and/or criminalised populations.

Consent

Informed consent is a critical ethical and safety component of conducting research with SOGIESC-diverse individuals, especially in development and humanitarian settings. Ensuring consent is informed requires numerous considerations to protect participants' rights and well-being, as outlined in ACFID/RDIN's 2021 Principles and guidelines for ethical research and evaluation in international development.[26]

Researchers must provide clear, comprehensive information about the study's purpose, procedures, risks, and benefits in accessible language and formats suitable for varying literacy levels and cultural contexts. Participants should know their participation is voluntary and they can withdraw at any time without repercussions.

Given the heightened vulnerability of SOGIESC-diverse individuals, privacy and confidentiality aspects of consent procedures are paramount. Researchers should securely store consent forms and restrict access to authorised personnel. Participants need to be informed about how their data will be used, who will access it, and how their privacy will be protected. To accommodate those uncomfortable with signing (or unable to sign) documents, verbal consent should be an alternative.

Ethical informed consent from a SOGIESC-responsive perspective also involves recognising and mitigating power imbalances between researchers and participants. Researchers should be mindful of their own positionality[27] and the potential impact on the consent process, ensuring they approach participants with respect and without coercion. Furthermore, continuous consent should be practiced, where participants are reminded of their rights and the details of the study throughout the process. It can involve regularly reaffirming participants' agreement to participate in a study, ensuring they remain informed and comfortable with their involvement throughout the research process.

Psychological Safety and Retraumatisation

SOGIESC-diverse people in humanitarian and development settings are at a higher risk of re-traumatisation due to hostile environments and heightened levels of discrimination, violence, and social exclusion. Researchers often ask SOGIESC-diverse people to recount traumatic experiences, potentially exacerbating existing trauma. Creating a psychologically safe experience and environment during a data collection project means embedding the broader epistemic justice principles described throughout this reference guide, and applying them to both participants and researchers.[28]

Specific efforts should also be made to ensure data collectors are fully briefed on the topics and adopt a trauma-informed and SOGIESC-responsive approach to recruitment and fieldwork. For instance:

- **Trust** is central, for example working in collaboration with a trusted LGBTQIA+ partner organisation and being transparent about the purpose of the data collection project.
- **Choice** must be genuine, especially in relation to informed and ongoing consent. Avoid pressure to relate traumatic experiences that a) participants do not wish to discuss or b) are not relevant to the research project.
- Consider in advance how to respectfully approach **pronouns** (of the interviewer, participant/s and interpreters).
- Consider the **positionality** of researchers in relation to participants: is it appropriate for researchers from outside the community or region to conduct interviews? For example, where someone is being interviewed about intimate subjects such as sexual behaviours or past traumatic experiences, is it necessary to have responses relayed to an interpreter and then live translated for the benefit of a foreign researcher? If so, why?
- **Contextual knowledge** is paramount, ensuring interviewers are sensitive to the particular realities and preferred terms of LGBTQIA+ people in the setting.
- **Comfort** is emphasised, for example by choosing a safe, welcoming and discreet space such as a closed room within the office of a local LGBTQIA+ CSO. The area should be calm and quiet, and interruptions should be avoided. Consider supporting the comfort of participants by adding cushions, placing tissues within reach, and by offering water and locally appropriate snacks.
- **Engage** with participants on a human level. Be kind. Validate their feelings and concerns, rather than acting as a robot in the pursuit of 'objectivity.' For instance, it's appropriate to recognise and acknowledge when a participant shares a challenging experience, expressing empathy while maintaining professional boundaries.
- **Check on participant well-being:** Do not hesitate to deviate from the interview schedule to ask if the participant is feeling okay, if they'd like to pause, or if they wish to stop the interview altogether.
- There must be clear **referral pathways** for people who experience distress during a data collection activity. In the absence of friendly LGBTQIA+ mental health and wellbeing services locally, consider engaging local LGBTQIA+ CSOs who have suitably qualified staff, or engaging a specialist for the duration of the data collection project.

Safeguarding

All parties involved in a data collection project must have, or be supported to develop, safeguarding policies and processes that are sensitive to the needs of LGBTQIA+ individuals. Evaluating existing safeguarding policies especially relating to protection from sexual exploitation, abuse and harassment (PSEAH) for their relevance and inclusion of SOGIESC-diverse people is essential in contexts where these communities face persecution or prosecution. Where SOGIESC-diverse youth are engaged as participants or researchers, stringent Child Protection policies should also be applied.

It's crucial to ensure participants aren't subjected to further harm, such as homophobic or transphobic violence, hate speech, or discrimination, due to their involvement in the research. Additionally, all individuals involved in reporting pathways for safeguarding concerns must be LGBTQIA+ affirming.

Some settings have laws requiring mandatory reporting of suspected violence cases to local authorities. Researchers may be exempt from this requirement in certain areas but not in others. Regardless of the legal status of researchers, they must understand the local legal framework before starting a study. This is especially important for protecting LGBTQIA+ participants, as linking them with authorities without their consent can lead to serious consequences and constitutes a further violation of their rights.[29]

2.3 Engaging with LGBTQIA+ networks for intentional inclusion

"Nothing About Us Without Us" is a principle capturing the demand for the meaningful involvement of marginalised people in development and humanitarian programs including research, training, policy and program designs that affect their lives. Researchers can address this call by engaging individual LGBTQIA+ people within their stakeholders and teams, but often a local LGBTQIA+ CSO will be a better option. Local CSOs champion the rights and well-being of LGBTQIA+ people, providing essential services, support, and safe spaces. They are usually well versed in conducting community-based research, which is vital for informing programs that address the specific needs of LGBTQIA+ people.

Beyond being an ethical principle and a cornerstone of epistemic justice, the participation of LGBTQIA+ people and their representative CSOS or networks in a chosen context can be crucial to ensuring that a data collection project is effective and robust. This section outlines strategies to foster meaningful participation from the outset of a project.

Advantages of LGBTQIA+ community participation & accountability

"While [researchers from] countries dedicated to promotion of LGBTI equality may have notions of how equality was achieved at home and how it can be achieved elsewhere, it is important to remember that every country and even locality is different."[30]

LGBTQIA+ civil society movements and grassroots networks should be at the heart of decision-making for research to be called SOGIESC-responsive. Ideally, they may also be engaged in designing and implementing activities. Most countries have some form of LGBTQIA+ movement, although in more hostile contexts this movement may take the form of less formal or informal groups or networks of

activists. Establishing partnerships with LGBTQIA+ organised groups and informal networks may require a more flexible approach that standard aid sector protocols require. For example, these groups may not be formally registered or have bank accounts, they may not pass standard due diligence processes, or have ways of working that resemble formal humanitarian and development organisations. However, rigidly sticking to protocols may not be an option if aid organisations truly wish to reach the most marginalised.

In some contexts aid organisations may struggle to identify and engage with LGBTQIA+ organised groups or informal networks. Sometimes these groups have good reasons to operate covertly or to treat approaches from non-LGBTQIA+ organisations with caution. Aid organisations need to show resilience in their efforts to engage with LGBTQIA+ organised groups or informal networks. Alongside that, they also need to show empathy, respect and humility: an aid organisation that barrels into a local context with the expectation that local LGBTQIA+ organised groups or informal networks will immediately welcome them, or have the same priorities or speak the same technical language, amongst other things, is likely to be disappointed. However other options exist even if local engagement proves impossible, or if local conditions means that direct engagement with LGBTQIA+ people may be unsafe. There are many regional and global LGBTQIA+ organisations that may assist to make connections or to suggest alternative groups. In the breach those regional and global LGBTQIA+ organisations may also be able to provide some relevant LGBTQIA+ expertise. A combination of local, regional or global organisations may offer a valuable mix of capacities.[31] However regional and global LGBTQIA+ organisations are unlikely to be a solution on their own.

"Community-based organisations bring deep knowledge of and connections to the LGBTQIA+ population that can strengthen data collection efforts by enhancing participation rates and ensuring cultural sensitivity."[32]

Responsive research practices that actively involve local LGBTQIA+ experts, including civil society organisations and activists will boost the relevance, legitimacy, and authenticity of finding and recommendations. This may follow from:

- **Context-Specific Knowledge:** Local organisations know the unique issues and needs of their LGBTQIA+ communities. They offer crucial insights into language, cultural norms, and challenges, ensuring your research questions and objectives hit the mark.
- **Facilitated Access:** CSOs have built trust and connections within their communities, helping researchers connect with participants safely and ethically.
- **Safe Spaces and Processes:** CSOs may provide safe, secure, and supportive environments for conducting research, where participants feel comfortable and protected, and can participate without fear of discrimination or harm. Using interpreters from within LGBTQIA+ organisations and networks may reduce risks of sensitive information being described poorly or shared outside of the community.[33]
- **Cultural Appropriateness:** Local organisations can help create culturally appropriate data collection tools and methodologies.
- **Ethical Guidance:** CSOs can provide invaluable guidance on context-specific risks, protecting participants and ensuring respectful engagement.
- **Accurate Analysis:** Including LGBTQIA+ voices in the analysis phase ensures that findings are

interpreted robustly within the context of lived experiences.
- **Validation of Research:** CSOs can support with validating research questions and methodologies, aligning them with community needs and challenges.

Some considerations when engaging LGBTQIA+ CSOs

When working with LGBTQIA+ organisations, visible activists, and informal networks, partnerships should ideally be long-term and established before specific projects arise. When aid organisations have ongoing presence though country offices or partners there is often ample opportunity to establish such relationships. This will help to avoid transactional relationships or tokenistic engagement (see 2.4 for examples of how research collaborations can work in practice).

When approaching partnerships, power dynamics must be considered both among local LGBTQIA+ organisations and between them and your own organisation/agency. Conducting a power analysis of the local context regarding financial, decision-making, and convening power is especially crucial for global actors.

Your organisation may need to engage with more than one LGBTQIA+ organised group or network. LGBTQIA+ organisations may represent part of the LGBTQIA+ community but not others. For example, some organisations with roots in HIV projects may have deeper community engagement with gay and bisexual men and trans women. Other organisations may have stronger relationships with LBQ women. Reaching intersex people, who are often poorly represented by LGBTQIA+ organisations, may require another strategy again. Some organisations are urban focused and may not have networks elsewhere. Others may align with ethnic divisions. In some situations an intersectional feminist organisation or other ally may be an appropriate partner. The array of organisations and the dynamics of the community will vary from place to place and your organisation will need to develop sufficient awareness to understand the ramifications of partnering with one organisation over another.

Specific methods for facilitating meaningful engagement with SOGIESC-diverse CSOs and networks will always be context and project specific, but might include:

- **Advisory boards:** LGBTQIA+ advisory boards can guide research projects, ensuring ethical and respectful conduct, and serve as a tool to maintain accountability to the local queer community.
- **Community-based participatory methods:** This approach involves LGBTQIA+ individuals in all stages of the research process, from design to dissemination, ensuring that their needs and perspectives are prioritised, respected, and promoted.
- **Feedback mechanisms:** Sharing research findings with LGBTQIA+ communities and seeking their feedback helps validate the results and ensures that the research benefits the community.

Finally, engaging local but non-LGBTQIA+ organisations or research groups to conduct research is rarely a solution for responsive LGBTQIA+ research. Just because organisations are local does not mean that they have awareness of LGBTQIA+ issues, contacts within the diversity of LGBTQIA+ organisations and communities, or the capacity to analyse LGBTQIA+ focused research data. If your organisation chooses to engage a general local research partner there will still be a need for an LGBTQIA+ inclusion strategy, and that strategy is almost certain to require direct engagement with LGBTQIA+ organised groups and networks.

2.4 Designing Research Objectives and Questions

The principles and practices discussed throughout this chapter provide a foundation for developing SOGIESC-responsive research that is ethically sound and transformative. Such research should be underpinned by objectives that not only include LGBTQIA+ individuals, but also actively address the conditions that lead to their marginalisation. For instance, this might include rejection by their family, bullying at school, discrimination at work or when accessing public services, and so on.

As highlighted in the 'intersectional inclusion' principle (Chapter 2.1.2), it is also essential to consider how other aspects of identity—such as ethnicity, caste, class, gender, disability, and migration status—intersect with SOGIESC diversity. Research questions should be designed to explore these intersections, uncovering how they influence the vulnerabilities and resilience of SOGIESC-diverse individuals. This nuanced approach can reveal complex layers of marginalisation and support more targeted and effective interventions.

Facilitating genuine participation in research design: Leaving it open?

An interesting first step and decision point when designing SOGIESC-responsive research is the degree to which key aspects of the research design should be 'left open' to foster meaningful co-creation and co-design with local LGBTQIA+ people. This will be project- and context-specific, but local participation must be 'baked in' to be effective and so this should always be thought through at the outset.

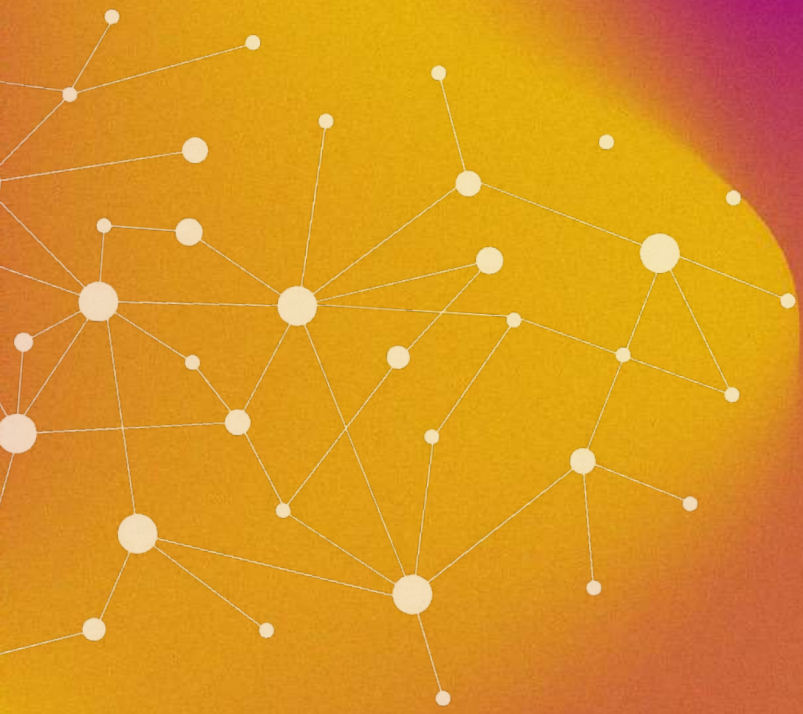
Consider a large-scale quantitative or traditional qualitative study about gender-based violence in the aftermath of a natural disaster. The stated core research objective is to examine whether rates of violence have increased across the whole population, but the researchers wish to be inclusive of and responsive to SOGIESC-diverse people.
One strategy might be to develop the research design, for example the objectives, methodology, research questions, and instruments (e.g., including survey response categories) based on established good practice and desk research. Local LGBTQIA+ experts could then be invited to provide input in relation to each aspect of the research design to improve its quality, safety and overall responsiveness. They should of course be compensated for their time and expertise!

Researchers using a participatory methodology may need to leave aspects of design even more open. For example, inviting 'co-creation' of a research project with community members is inappropriate if key aspects of the research design (such as the research objectives and questions) have already been finalised by internal researchers. This problem can occur because donors or organisations require complete designs and budgets prior to the commencement of research. Resist this wherever possible, and build flexibility into early stages of community engagement and design. One way of achieving this can be to sketch out a 'holding' or 'dummy' design, but it must be explicitly acknowledged by all stakeholders that there is genuine room for community experts and/or action researchers to re-develop core aspects of the research. This is important in order to avoid conducting only surface-level consultation while claiming to facilitate 'co-creation.'

Action researchers should be appropriately compensated, and should be empowered to take genuine control over as much of the research design process as possible. This includes key aspects such as the initial overarching objectives and questions (a task made much less meaningful if these have been designed in advance and are realistically just being tweaked).

Research instruments, methods and even analytical approaches should similarly be co-designed through this process of ongoing knowledge exchange. Doing participatory research in such a way is often more complex and time-consuming. However, research that recognises and empowers local LGBTQIA+ people as having the agency and ability to construct new knowledge is preferable to engaging them as 'silent enumerators' who have little say in the research scope, design and uptake.

Consider participatory research design process as a knowledge exchange from the outset.[34] Through such a mutual learning relationship, professional researchers receive invaluable insights about the lived experiences of LGBTQIA+ people that can challenge preconceptions and greatly enrich the quality and validity of the project. Community researchers, on the other hand, (often called 'action researchers') receive technical support via training to undertake research on issues affecting their own lives.



Chapter 3

Data Collection & Sampling

3.1 What is Data

Many different forms of data can be collected in development and humanitarian settings, each with its own characteristics and implications for privacy and ethics. Some data is collected as raw material for specific detailed processes of analysis, of generating findings and of making recommendations. Other data may be recorded more procedurally, for example workshop attendance and particular details of individuals that might feed into MEAL reporting. Other data may be collected along the way, such as photos and their metadata, that may not always be understood as 'data'. In short, humanitarian and development organisations may end-up holding relatively large amounts of data, of many different types, for many different purposes and in many different systems. Understanding this range of data is important for designing safe and impactful SOGIESC-responsive research and data policy and processes.

Some Data that Aid Actors Collect

Survey data: Collected through administration of structured questionnaires that may seek respondent biodata along with quantitative or qualitative data in the form of responses to standardised questions. The wording, ordering and explanation of biodata questions can be important for gathering SOGIESC data that is respectful, safe and actionable. Sensitive design of questions and response options may be needed to ensure that questions are understandable for all respondents (for example if questions address SOGIESC directly) and that they reflect local SOGIESC identities and dynamics. Administration modes for surveys – online, guided or self-filled – may have significant impact on completion, accuracy and safety. How surveys are administered may generate additional data such as email addresses or attendance records if surveys are completed at a community event.

Experiential or opinion data: Data gathered from various kinds of interviews, or focus group discussions often providing deeper insights into personal experiences and perspectives. These processes often collect participant biodata (directly through attendance records/parallel survey or indirectly through interview analysis) and may generate contemporaneous notes, recording in audio and video formats, transcriptions of recordings and other data such as photos taken at the event.

Administrative data: Organisations may collect data for a range of administrative purposes ranging from MEAL reporting to information for making payments or justifying payments, or data collected through contacting participants to take part in data collection exercises. Sometimes organisations collect such data for specific reasons, while at other times data may be collected out of official habit or

assumed need. Some of this data collection may not be obvious to researchers or program staff, or may need to be shared within organisations.

Metadata: Data about data may be collected, often in the background and invisible to data collectors and participant providers. For example, photographs may provide information about where and when they were taken. Digital files may include data on the device user who created a file, which might include community-based data collectors.

Biodata: Different processes may collect varying amounts of biodata, or biographic data about participant providers of data. This can include identifying information such as names, date of birth, age, gender, disability, and possibly SOGIESC status, amongst other data such as contact details, official ID information and bank details.[35]

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Biometric data: Biometric authentication technology identifies people based on their physical characteristics, and generally falls into two categories: biological (fingerprints, facial characteristics, iris, veins) and behavioural (keystroke dynamics, gait, signature, voice).[36] A more detailed exploration of sensitive biographic data, biometric data and digital data rights can be found in Chapter 5, Emerging Issues.

3.2 Qualitative Methods

LGBTQIA+ focused research often relies heavily on qualitative methods, and with good reason. These methods can include various kinds of interviews ranging from highly structured interviews with set questions, through more loosely structured interviews in which promising avenues may be followed more intently, all the way to story-based methods in which the interviewer uses minimal prompts and feedback to encourage the participant to continue sharing what the participant thinks is most important through minimal prompts and feedback. Similar approaches may be used in group interviews or more careful constructed focus group discussions (FGDs). While interviews and FGDs are the most common qualitative methods, researchers can also employ a range of prompt activities in association with those methods, or as standalone data collection methods. Examples include drawing mental maps, or sharing/taking photographs, keeping diaries or many other methods that often involve participation of LGBTQIA+ people.

These methods are powerful as they may capture the complexity and messiness of everyday life. This is particularly important for understanding queer lives that may be lived in the margins, in response to specific pressures and outside of the dynamics and opportunities that shape the lives of those in majority groups. The nature of those different experiences and the ways that LGBTQIA+ people respond to those different experiences is called 'lived experience'. Accessing lived experience is essential for understanding queer lives and the relevance, accessibility and likely impact of specific development or humanitarian interventions.

Lived experience may involve stories and explanations that vary considerably from the stories told about LGBTQIA+ people by others, and may challenges assumptions of non-LGBTQIA+ community members or researchers themselves. These stories that may have origins in religious ways of understanding the

world and may position LGBTQIA+ people as sinners. Or they may have roots in medicalised discourses, seeking to explain LGBTQIA+ people and their problems. Or they may have roots in perception of community good and orderly society, in which LGBTQIA+ people may come to represent disturbances or threats to established norms. Stories told about LGBTQIA+ people are not always negative, but there certainly is a long history of these kinds of stories being pushed on to LGBTQIA+ people. These stories are sometimes internalised by LGBTQIA+ people and may be repeated in data collection. Sometimes specific stories are tactically acceded to by LGBTQIA+ people to achieve a specific end, such as knowing what story to tell a psychologist in order to jump hoops toward a specific diagnosis. At other times those stories are resisted and the genuine lived experience of LGBTQIA+ people may emerge.

However, this genuine lived experience is not necessarily a fixed truth, simply sitting a little out of sight and waiting for the right researcher to come along and discover. Lived experience may emerge through a process of dialogue and discovery and between a researcher and a participant. An interview can be much more than a data collecting exercise, it can be a process of sense-making for the participant themselves. Indeed, their re-telling of experiences to a researcher or within a group discussion may be the first time they have told their story or told it in a way that brings new levels of self-awareness and insight.

Qualitative methods that put more power in the hands of LGBTQIA+ people to tell their own stories are more likely to trigger that sense-making process. Highly structured interviews that push LGBTQIA+ people into existing narratives about their lives or that make the LGBTQIA+ person feel ill-at-ease may not create the space for that sense-making process. It is more likely to emerge in less structured interviews and using prompts such as maps and photos through which LGBTQIA+ people feel more genuinely engaged and feel more in control of telling their own story. Researchers who are LGBTQIA+ people themselves may find it easier to connect with participants and go through this process. However other people can play this role with suitable reflexivity. However, understand that this process requires much from the researcher and may be a charged experience for them as well.

Some limitations and challenges remain, even while qualitative methods can encourage genuine participation from LGBTQIA+ people. Various ways can be used to publicise the opportunity to take part in qualitative research, including direct outreach to community members (for example, through social media channels or service providers used by LGBTQIA+ people) or through the networks of LGBTQIA+ organisations. Even where every effort has been made to communicate the safety, ethics, purpose and other aspects of the research, some LGBTQIA+ people may be more likely to take part than others. This may include people who have reached a level of self-confidence or people with specific experiences that they feel compelled to share or people who happen to know someone else who is attending. Once in the process some LGBTQIA+ people may be more confident narrators of their own lives and their data may seem more compelling or may more easily be extracted in the form of quotes. Their experiences may or may not be as significant as someone who seems reticent about sharing and is less quotable.

Qualitative research often has limited participant numbers as the research process is more complicated, requires staff with specific expertise and as a result take more time and money to complete. It may seem unsuitable if your research scope is limited and more outcome focused from the beginning. Your choice of research methods may need to balance practical constraints and the power of participatory processes. However, if your research adopts more structured and controlled methods be aware of the potential for impact on your research findings.

You may have also concerns about the subjectivity of qualitative research, whether the research is more structured or in a less structured engagement with an LGBTQIA+ person that is itself a meaning-making process. Such subjectivity may involve aspects that researchers bring to the process or the ways that participants engage. There is often a bias toward quantitative data in evidence-based decision-making and researchers may fear that their qualitative research will be downplayed as 'just anecdotal stories or opinions' that are unrepresentative and a poor basis for decision-making. One response is that qualitative research is often insightful, even if a single story is not representative. A second response is that some reliability can be achieved through saturation. This occurs when further interviews or engagements with LGBTQIA+ people are generating more of the same insights rather than generating new insights. While there are some rules of thumb about the number of interviews required to achieve saturation, in practice it is preferable to discover this boundary.[37] An assessment of whether you have reached saturation also requires consideration of known potential variations amongst the LGBTQIA+ community. For example, reaching saturation in a sample skewed toward gay and bisexual men may not constitute saturation for other identity groups.

Case Study: Down By the River'[38] - qualitative methods including interviews with limited structure, mapping as a prompt for story-sharing and group sense-making as part of the data collection process.

In 2017 researchers from Edge Effect and Fiji's Rainbow Pride Foundation gathered data from Fijians with diverse SOGIESC about their experiences before, during and after 2017's Tropical Cyclone Winston.

"It is forbidden to be a lesbian in my church and the pastor preaches against it. After the [cyclone], the church pastor said that [it] was caused by our sin, and I felt bad. It is not us who they should blame ..."

Data collection took place at three locations in Fiji, with LGBTQIA+ community members gathering at safe locations for a combination of individual and group sessions. These sessions were community events in themselves. For example in Lautoka 20 people met to share their stories, including one who attended despite threats from her family. For another, it was the first time she'd joined a workshop with other diverse SOGIESC community members. In obtaining informed consent, participants were briefed on all project aspects. They opted in knowing they could opt out at any time, with no repercussions and with their data returned or destroyed. Participants chose whether or not to be photographed. All data was anonymised at the earliest opportunity, identifying documentation and original audio recordings were destroyed, and transcribed story fragments did not identify specific participants or locations.

At each location, activities included an overview and consent process, community mapping, individual story-sharing sessions, and an evening talanoa session. The maps were drawn collectively and highlighted where people grew-up, where they met up with each other, places of varying safety and danger and other places of significance. These maps sometimes provided starting points for the very loose structured interviews with each person, or provided opportunities to clarify or deepen discussion. The evening group sessions brought the individuals together, usually with a meal and with kava, and provided an opportunity for participants to share aspects of their experiences (voluntarily) or to comment on the themes and to reflect on the process. This discussion was loosely structured and driven by the participants, and also served as data alongside the individual stories.

This approach allowed a deep exploration of participants' experiences, uncovering themes of violence, insecurity, exclusion, and solidarity.

Pros and Cons of Key Qualitative Methods:

Method	Pros	Cons
Interviews: In-depth, Semi-structured, Unstructured	A powerful tool for capturing rich insights into the lived experiences of SOGIESC-diverse people, enabling researchers to uncover nuances other methods may overlook.	Interview settings must be chosen to protect confidentiality and make participants feel safe. Interviewers should be trained in sensitivity and trauma-informed approaches.
Focus Group Discussions	Group dynamics can stimulate discussion and bring out collective experiences and shared understandings. Can also foster a sense of community among participants.	Significant risk of unintentional disclosure & confidentiality breaches. The presence of others can limit willingness to openly share. Establishing clear ground rules and ensuring confidentiality is paramount.
Ethnography	Involves immersion in community contexts to gain a deep understanding of SOGIESC issues. Can provide comprehensive, context-specific insights into cultural, social, and environmental factors.	Heightened ethical concerns include informed consent and anonymity. Building trust with communities and being aware of positionality and power is essential. A significantly time-intensive method.
Case Studies	Thorough investigations of specific instances or individuals are particularly useful for understanding complex SOGIESC experiences, including resilience strategies and coping mechanisms.	Often one of the least 'generalisable' methods, case studies can be criticized for being cherry-picked or otherwise unrepresentative examples.
Participatory Action Research (PAR)	Involves active participation of queer people, from defining questions to data collection/ analysis. An empowering approach that ensures research is relevant; it fosters ownership and agency.	Meaningful participation requires significant time, resources, and trust-building. Maintaining confidentiality and managing the expectations of participants can also be challenging.
Narrative Inquiry	Focuses on the stories people tell about their lives. A powerful method for capturing complex personal experiences that can reveal how people interpret their identities in their own contexts.	Ensuring the authenticity and integrity of the narratives while protecting privacy is crucial. Researchers must be skilled in eliciting/ interpreting stories in a way that respects participants.

Other qualitative methods that are particularly suitable for collecting qualitative data involving SOGIESC-diverse people include: photovoice, life histories, arts-based research, and forum theatre.

3.3 Quantitative Methods

"If you refuse to register non-binary people like me with birth certificates, and exclude us in everything from creating bank accounts to signing up for mailing lists, you do not have the right to turn around and say that there are not enough of us to warrant change."[39]

Quantitative methods allow for the analysis of large datasets, leading to findings that are more likely to be considered generalisable to broader populations. While generalisability remains difficult for SOGIESC-diverse populations given their relatively small size, larger-scale analysis can still reveal patterns and correlations more effectively than smaller-scale qualitative approaches can.
Quantitative methods are often said to result in more reliable and objective findings. Quantitative methods tend to involve larger numbers of respondents than qualitative methods, as data collection instruments – such as surveys – are easier to administer and as data can be collated and prepared for analysis more quickly. However the apparent objectivity and efficacy of quantitative methods may be overstated in research involving LGBTIQA+ people, with questions raised about practicality and appropriateness.

One practical question regards the usefulness of quantitative methods for gaining data from hard-to-reach populations, LGBTQIA+ people may have good reasons to question why data about is being collected from them, whether the data collection is itself safe, and who will access the data and for what purposes. While these questions are relevant for qualitative and quantitative research, the research process and the instruments used for data collection are often less personal in quantitative research. This may exacerbate refusal rates or lead LGBTQIA+ people to choose against revealing this aspect of their lives, or may result in more perfunctory answers to other questions. There is a clear contrast to the earlier discussion of qualitative methods that seek to capture the depth of personal stories and relevance of context, and that ways in which qualitative methods uncover meaning and empower research participants.

Other challenges can arise if questions and answer options need to be phrased in ways that are understandable by non-LGBTQIA+ people or where non-LGBTQIA+ people may object to the inclusion of LGBTQIA+ questions and answer options. Specific collection methods may also result fail to include LGBTQIA+ people. For example, household surveys that take data from a head of household may fail as the household head may choose to avoid mentioning LGBTQIA+ members of the household. Where surveys or other instruments require individual responses LGBTQIA+ people may choose to not share that information about themselves or may refuse participation entirely. Enumerators may not understand LGBTQIA+ inclusive aspects of the instrument sufficiently well to explain those, or may feel embarrassed themselves. In some contexts such data collection may be unsafe for both enumerators and respondents. All of these factors can lead to low numbers of LGBTQIA+ respondents and may create insurmountable barriers to the inclusion of LGBTQIA+ respondents in research seeking population representative findings. While there are some ways to address these challenges while maintaining research integrity – see section 3.4 below – at times the only option is to revert to separate data collection with LGBTQIA+ people.

The disadvantages of quantitative methods are likely to be more challenging in research that seeks to include LGBTQIA+ within a broader data collection process. They may be less present and easier to mitigate in quantitative data collection that occurs only with LGBTQIA+ people, using LGBTQIA+ enumerators and perhaps within controlled contexts (such as an event organised by an LGBTIQA+ organisation). LGBTQIA+ organisations and researchers often use quantitative methods and instruments in those controlled ways to generate statistical data about LGBTQIA+ people. The results of such methods are often easier to summarise for advocacy purposes and carry the sheen of reliability attached to quantitative data – even though the data is not part of a population representative sample and even if the sample is not necessarily representative of all LGBTQIA+ people in that context. For example, some large-scale and longitudinal health surveys have been conducted through engagement with LGBTQIA+ people at community events. Alternatively. LGBTQIA+ people may be reached over social media used by LGBTQIA+ communities and encouraged to complete online surveys. This method can help reach LGBTQIA+ people who would not take part in in-person processes though at the risk of a sample skewed towards internet users.

A deeper challenge to quantitative methods comes in the form of critiques of positivism and its commitment to knowledge as specific aspects of lives that can be observed or measured through processes that can be repeated and verified. LGBTQIA+ community weariness about quantitative methods and their positivist foundation have both historical and philosophical dimensions.

Historically, LGBTQIA+ people have been left out of quantitative data collection because of assumptions built into the framing of questions and answers and assumptions involved in heteronormative, cisnormative and gender binaristic and endosexist ways of understanding the world. Or, because the purpose of data collection seems discriminatory, involving framing of LGBTQIA+ people as deviant and the collection of data intended to frame, circumscribe and control their lives. Or because attempts at inclusion have been ham-fisted, such as the other inclusion of an 'other' option in gender questions as if ticking that option is respectful to diverse identities or likely to result in actionable data. These are all examples of positivist tendencies to privilege data collection that fits within existing normative and power structures.

Philosophically, LGBTQIA+ people may feel that the requirement to answer questions that cannot be challenged by choosing from preset answer options forces them to simplify, reduce or corral their lives in ways that feel uncomfortable, disrepectful or irrelevant. This includes identity-based questions that may force them to choose from LGBTQIA+ options that do not reflect their understanding of their SOGIESC. The regional LGBTQIA+ organisation ASEAN SOGIE Caucus explains that such schemes may be "inappropriate," because "the subjects of our research may not live in a context where these specific identities are relevant. A person does not always know, for example, if they are a "lesbian" or a "transgender man", if the cultural distinctions aren't clear or relevant. We see such blurred distinctions of SOGIESC across Southeast Asia."[40] This is not idle speculation: an LGBTQIA+ inclusive census in Nepal was undermined by the failure to include vernacular language terms for LGBTQIA+ people used in Nepal. The design of other questions and the available answers may also contain bias or assumptions that undermine the respectfulness and usefulness of the collected data and subsequent analysis and recommendations.

Some of these historical and philosophical challenges can be overcome if LGBTQIA+ experts, organisations and participants are involved in design of the research methods and instruments and other in aspects of data collection and analysis. However there is often an underlying tension and belief that qualitative methods provide essential opportunities to engage with researchers, to challenge assumptions, to co-create meaning and to generate insights that are more authentic, that reflect the messiness of lives and that challenge injustices.

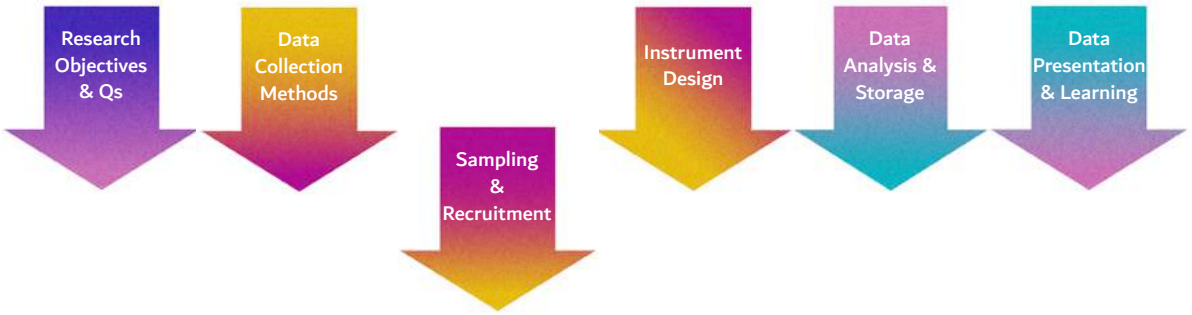
Pros and Cons of Key Qualitative Methods:

Method	Pros	Cons
Cross-Sectional Household Surveys	Face-to-face interaction can improve response rates and the accuracy. Useful where internet access is limited or unreliable. Can reach individuals without access to digital or telephone communication.	Time-consuming and resource-intensive. Ensuring privacy is challenging in densely populated areas. Some may not wish to disclose sensitive information re: SOGIESC with family members present.
Self-Selection Online Surveys	Convenient and cost-effective, allowing researchers to reach a large and relatively diverse audience quickly. Participants can complete the survey at their own pace and in a comfortable setting, which can increase response rates.	Self-selection can lead to selection bias limiting representativeness, especially in development contexts where internet access and digital literacy can vary. The lack of control over who completes the survey can result in non-response bias.
CASI - Computer-Assisted Self-Interviewing	Asking face to face interview participants to complete some questions on a computer or tablet can encourage honest responses from SOGIESC-diverse individuals who may not feel comfortable talking openly about sensitive topics.	Requires access to technology and digital literacy, which may exclude some participants. Setting up CASI systems can be resource-intensive, ensuring the user-friendliness of the interface to avoid technical issues that might affect data quality.
Telephone Surveys	Can effectively reach individuals in remote or low-internet-access areas, providing a personal touch that may increase response rates. Allow for real-time clarification of questions, which can help ensure respondents fully understand the survey.	Ensuring privacy can be challenging, e.g. if others are within earshot. Some participants may not feel comfortable discussing sensitive topics re: SOGIESC over the phone.

Pros and Cons of Key Qualitative Methods (Continued):

Method	Pros	Cons
Intercept Surveys	Conducted by approaching respondents in public spaces like events or clinics, can quickly gather data from a diverse range of people.	Difficult to ensure privacy in public settings, which may inhibit honest responses re: SOGIESC. Risk of selection bias, as the sample is limited to individuals present at specific locations and times.
Panel (Longitudinal) Surveys	Repeatedly surveying the same group of respondents over time can be valuable for tracking changes in LGBTQIA+ people's experiences. Useful for evaluating effects of policies & programs as it provides insights into long-term impacts & trends.	Maintaining respondent participation over time can be challenging, leading to attrition and potentially biased samples. Repeated nature of surveys requires strong data management and ongoing consent, which can be resource-intensive.
Census and Administrative Data	Provide demographic information and large sample sizes, valuable for understanding broad trends and patterns among LGBTQIA+ people. Offer extensive coverage making them an effective resource for large- scale analysis and policy development.	May underrepresent or misclassify SOGIESC-diverse individuals, leading to biased or incomplete insights. Informed consent issues can play out where personal data is provided in order to sign up for social protection benefits or for refugee/IDP registration purposes.
Population Based Surveys (Demographic, Health, Labor, or Cluster)	Large-scale, nationally representative surveys conducted periodically to gather detailed information, for instance on health, nutrition, and population demographics. More detailed than a census, it can provide insights into aspects of people's lives, including health and social issues.	Requires significant financial and logistical resources, including trained personnel and data collection infrastructure. Normally co-led with government agencies, incorporating questions on SOGIESC usually relies on a request from the government steering committee.

3.4 Sampling



Research rarely involves all members of a population and researchers must choose which people within a population to engage and seek data from. Research that seeks to make findings and recommendations across whole populations often uses probability sampling, an approach ensuring each member of the population has an equal chance of being selected. Non-probability sampling involves selection of participants based on factors such as other characteristics or availability – that mean that their chances of being selected are significantly higher than people without those factors. In statistical terms the findings from research using such a sample cannot be generalised to the whole population or even the whole LGBTQIA+ population.

Probability Sampling Approaches

"Historically, samples of LGBs were non-probability samples drawn from locations such as mental institutions, prisons, or bars. Not surprisingly, data from these samples were biased in ways that stigmatised LGBs and supported arguments made by some that they were inherently "sick." With the advent of probability samples, many but not all of these myths have been dispelled."[41]

Probability sampling can be complex, time-consuming and resource-intensive. However the results of research using probability sampling are often considered more reliable and inferences can be made about whole populations.[42] Creating probability-based samples involving of LGBTQIA+ people is challenging. This is due to the covert lives of LGBTQIA+ people in many places, and the relatively small percentage of LGBTQIA+ people within an overall population. First, researchers may struggle to accurately estimate the overall prevalence of LGBTQIA+ individuals in a given population, meaning that it is hard to know how many LGBTQIA+ people should be within a probability sample. Second, LGBTQIA+ people may refuse surveys or not identify themselves for many reasons, or it may be unsafe to collect their data. As a result, even if an accurate target number of LGBTQIA+ people is known it can be difficult to know if that target has been reached or not.

Key approaches to estimating the prevalence of SOGIESC-diverse people.

	Population-based Surveys	**Census Data**
Description	Conduct large-scale, representative surveys selecting respondents randomly from the entire population.	Incorporate questions about SOGIESC into national census data collection.
Method	Use simple random sampling or stratified sampling to ensure that the survey sample mirrors the overall population structure. This way, the proportion of LGBTIQ respondents in the sample can be extra-polated to estimate their prevalence in the entire population.	Conduct periodic national census ensuring it reaches a very large proportion of the population to provide an accurate count.
Strategy	A government's national statistics body, or a relevant ministry such as health or planning, might conduct a national health or other demographic survey where respondents are asked about their SOGIESC status. This will likely be conducted with technical support from bilateral and/or multilateral donors.	Adding specific questions related to SOGIESC identities in the national census. SOGIESC questions should be voluntary and there should be no penalty for non-completion.[43]
Example	For instance, Demographic and Health Surveys (DHS) are USAID-funded nationally-representative household surveys providing data "for a wide range of monitoring and impact evaluation indicators in the areas of population, health, and nutrition." At the time of writing, DHS surveys do not routinely collect information on SOGIESC, with some exceptions [see case study on page X]. Challenges facing the DHS as a model for gathering SOGIESC data include the following: • Governments must request the integration of SOGIESC in DHS survey instruments. • A public health initiative, many questions are deeply rooted in biology, e.g. about fistula or cervical screenings, complicating SOGIESC inclusivity. • Ethical questions about asking about SOGIESC in hostile legal contexts.[44]	"The 2011 Nepal Census was the first attempt by any national government to count its people by three genders – male, female and third gender." [45] While this change was activist-driven and appeared promising, several issues interrupted the process: • The lack of a clear, printed definition of the third gender in the enumerator handbook; • Limited training and awareness among enumerators as to how to collect this data; • Reluctance to record people who identified as third gender and some reported cases of harassment by census enumerators; • Lack of software compatible with data disaggregated by three gender categories. Further, while "third gender" is sometimes used, "many other terms used in Nepal also express sexual orientation and gender identity." [46]This highlights the need to thoroughly sensitise enumerators, and design questionnaires that are responsive to the context-specific identities of SOGIESC-diverse people.

These challenges, however, can often be overcome. When participant safety and data security can be guaranteed, steps should be taken to address these barriers rather than dismissing SOGIESC-diverse needs as too difficult to study or assess.

LGBTQIA+ sampling challenges, along with specific strategies for addressing them, are highlighted in the following guidance to EU member states:

"[One challenge is that of] small sample sizes that limit statistical power. In most population-based surveys, LGBTIQ people represent less than 10% of the sample. This can be a challenge for data disaggregation and statistical power. It may result in LGBTIQ people being excluded entirely from the reported findings or being included with large confidence intervals. It can also limit any substantial intersectional analysis.

This can be countered through increasing overall sample sizes, oversampling LGBTIQ people, using booster samples, or conducting dedicated surveys, although these approaches all entail extra costs." [47]

These techniques for overcoming sample size issues are summarised briefly below:

Increase overall sample sizes: Collect data from more people overall to increase the number of SOGIESC-diverse individuals in the sample.
Oversampling LGBTIQ people: Intentionally include a larger proportion of SOGIESC-diverse individuals in the sample than would naturally occur, and then use statistical weighting techniques to avoid their over-representation.
Using booster samples: Add an extra group of SOGIESC-diverse individuals to the main sample, and then use weighting techniques to avoid their over-representation.
Conducting dedicated surveys: Using existing large-scale lists of LGBTQIA+ people, conduct separate surveys specifically targeting SOGIESC-diverse populations using methods that ensure each member of the SOGIESC-diverse population has a known chance of being selected.
Pooling SOGIESC data for statistical power: Where the same standardised sexual orientation identity questions have been adopted in a range of surveys, data is combined across years or across data collection efforts.[48]

Probabilistic sampling is not always suitable or practical for involving diverse-SOGIESC people in development or humanitarian research contexts. The most appropriate strategies for probabilistic sampling involving SOGIESC will vary across contexts. However some researchers maintain that use of these techniques extends the 'gold standard' of sampling to research involving LGBTQIA+ people.

"From a methodological perspective, sexual and gender minorities can be surveyed with confidence. Whether... evaluating a new intervention; or providing health or other services, the impact on sexual and gender minorities can always be assessed. Always.
Despite... challenges... I want to mention how optimistic I am about the future. We can now show empirically that these data can be collected. Investigators and society just need to prioritise the collection of this information as they do with race and ethnicity." [49]

The below case study of the 2016 Demographic Health Survey (DHS) survey in Colombia underscores how public health data experts are grappling with how to integrate SOGIESC diversity into established tools.

Case Study: Challenges integrating diversity of SOGIESC into the Colombia

"Gender-diverse individuals are not excluded from DHS surveys. They are, however, rendered invisible in the data through misclassification, lack of detail, and bias in questions that presume male/female partnerships." [50]

In Colombia, transgender individuals over the age of 18 were granted the right to change their legal gender in 2015, and marriage equality was achieved in 2016. The 2015 DHS attempted to integrate sexual orientation and gender identity into its data collection, marking a significant step towards inclusivity. However, the implementation revealed several challenges that hindered its effectiveness and highlighted areas for improvement.

The first question in the 2015 Colombia DHS individual questionnaire was "Since we are surveying both men and women, I need to ask you the following question to determine the type of questionnaire to administer. Are you a man or a woman or a transgender woman or a transgender man?"

Primarily, the survey faced limitations in its questionnaire design: The DHS included a household questionnaire with four gender options for respondents in the opening question: 'man', 'woman', 'transgender woman', and 'transgender man'. This is in itself problematic because these are not mutually exclusive response categories: after all, a transgender woman is a woman.

A better approach is that of the two-step method as applied by the Williams Institute and others, where respondents are asked their current gender identity, and separately, their assigned sex at birth.[51]

Secondly, DHS surveys are designed to capture comprehensive information about public health. In 2015, only two types of questionnaires were issued: one for cis- and transgender women, and one for cis- and transgender men.

Dividing the surveys in this way without additional tailoring was insufficient, in large part due to the nature of dozens of questions deeply rooted in biology. For instance, such an approach fails to overcome the challenge of ensuring that questions on mammograms, cervical screenings, vaginal fistula, and so on, are targeted appropriately.

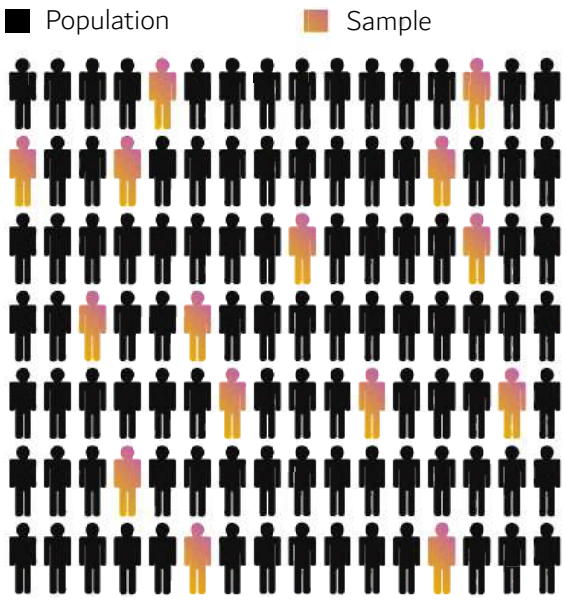
Finally, while individual questionnaires included a direct question on sexual orientation with response options of 'heterosexual', 'homosexual', or 'bisexual,' the questions asking participants about recent sexual activity assumed heterosexual relationships via the gendered terms used in Spanish.

While these challenges highlight areas for improvement, they also present valuable opportunities for learning. As the authors of a 2024 analysis brief from the DHS Program put it: "To ensure meaningful inclusion and representation of LGBTQIA+ individuals in DHS surveys, survey steering and technical committees, along with USAID and The DHS Program staff, must consider and contend with competing data needs and priorities while managing the complexities of adapting survey instruments originally designed to measure fertility, to be inclusive of individuals with diverse [SOGIESC]."

Non-Probability Sampling Methods

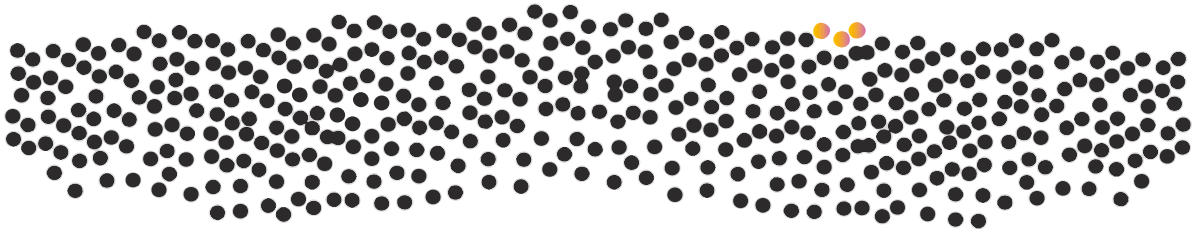
Non-probability sampling methods are widely used in research involving SOGIESC-diverse populations and can be used for qualitative and quantitative research where LGBTQIA+ people are the only intended respondents. These methods offer ways of engaging with marginalised and hard-to-reach communities through existing life patterns and social networks.

Sampling Overview



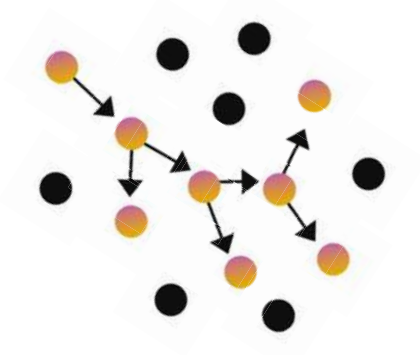
Some key non-probability sampling techniques and their relevance to SOGIESC-inclusive research are set out below:

Convenience sampling involves reaching an existing group of LGBTQIA+ people that involves little additional work by researchers to reach into the community. For example, LGBTQIA+ CSOs may have social groups or connections with LGBTQIA+ people who are easy to reach because of where they work or where they socialise. Some other service providers may also have LGBTQIA+ groups within their existing operations, such as health service providers. Another route to a convenience sample may be an online community or users of an app that is popular within the LGBTQIA+ community. Gaining access to this convenience sample will often require the agreement of an intermediary individual or organisation and then an opt-in process for LGBTQIA+ people. Convenience sampling may be sufficient when only small or highly targeted sample is required.

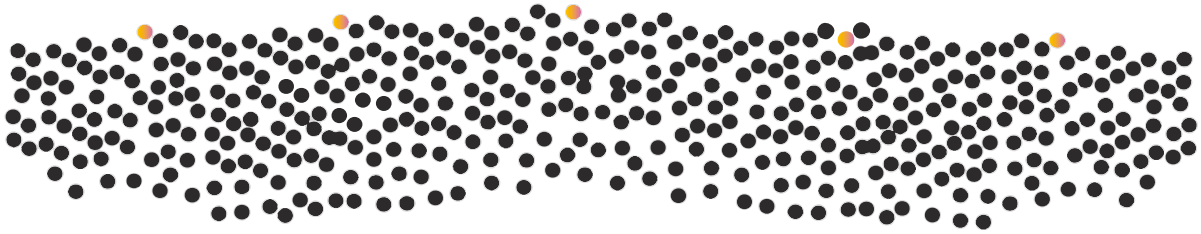


Snowball sampling is an option when larger and more diverse samples are required. Like a snowball growing as it rolls down a hill picking up more and more snow, snowball sampling builds a larger sample by rolling through social networks of LGBTQIA+ people and picking up more respondents as those networks fork and expose more potential respondents. Snowballing usually starts with a small number of individuals known as seeds. Each of those people talks with other LGBTIA+ people to share details about the research and how to participate. Those people may then join the research and are also encouraged to share details about the research and how to participate with LGBTQIA+ people that they know. Some snowball sampling involved limited controls: it may start with seeds from a convenience sample and amy be allowed to roll on any way it can until enough respondents are identified. This can result in a sample heavily skewed toward particular characteristics of the seeds and their social networks – for example, people of a certain age, or location, or education, or work-type.

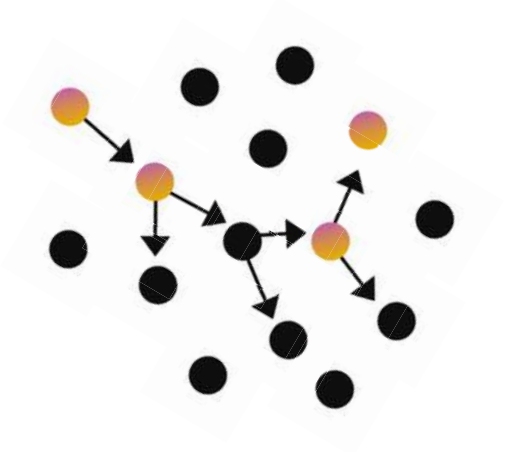
Additional methods can be added to snowball sampling to create samples that meet specific needs or that are more representative of a larger LGBTQIA+ community. These methods do not transform non-probablistic samples into probabilistic samples, but may assist to implement research that is considered sufficiently reliable for decision-making:



- Respondent Driven Sampling (RDS) seek to increase the diversity of a snowball sample by starting with a larger number of more diverse seeds and by limiting the number of new respondents that each seed (and subsequent recruits) can add to the sample – for example giving three spots only. This creates diversity by tapping into different social networks and by limiting the influence of any one social network in a sample. Seeding may occur in different places or in multiple waves. For example, rather than a sample being created through seeds who are all gay men, researchers could choose seeds who represent different parts of the LGBTQIA+ community. RDS adds complexity and time, but may deliver a sample that can be relied upon more clearly for qualitative and quantitative research.



- Purposive Sampling involves choosing additional characteristics or profile of the desired sample and filtering the total snowball sample to eliminate people who do not contribute to that overall profile. For example, researchers may only want to engage with people of a specific age group who live in specific area. They use snowball sampling (with or without RDS) to reach a larger pool of people out of which they select the ones that meet their criteria.

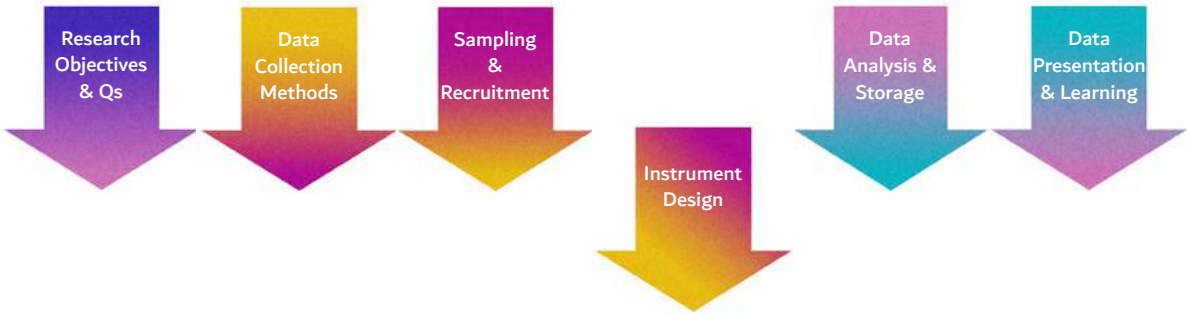


- Quota Sampling may be considered as a specific variation of purposive sampling where the desired sample has specific numbers or proportions, for example, equal numbers of people from different LGBTQIA+ identity groups. Again, a large pool developed through snowball sampling (with or without RDS) can be filtered to meet the quotas.

Non-probability sampling methods offer practical and ethical approaches to recruiting SOGIESC-diverse people as research participants, Some considerations for non-probability sampling in research involving SOGIESC-diverse people include:

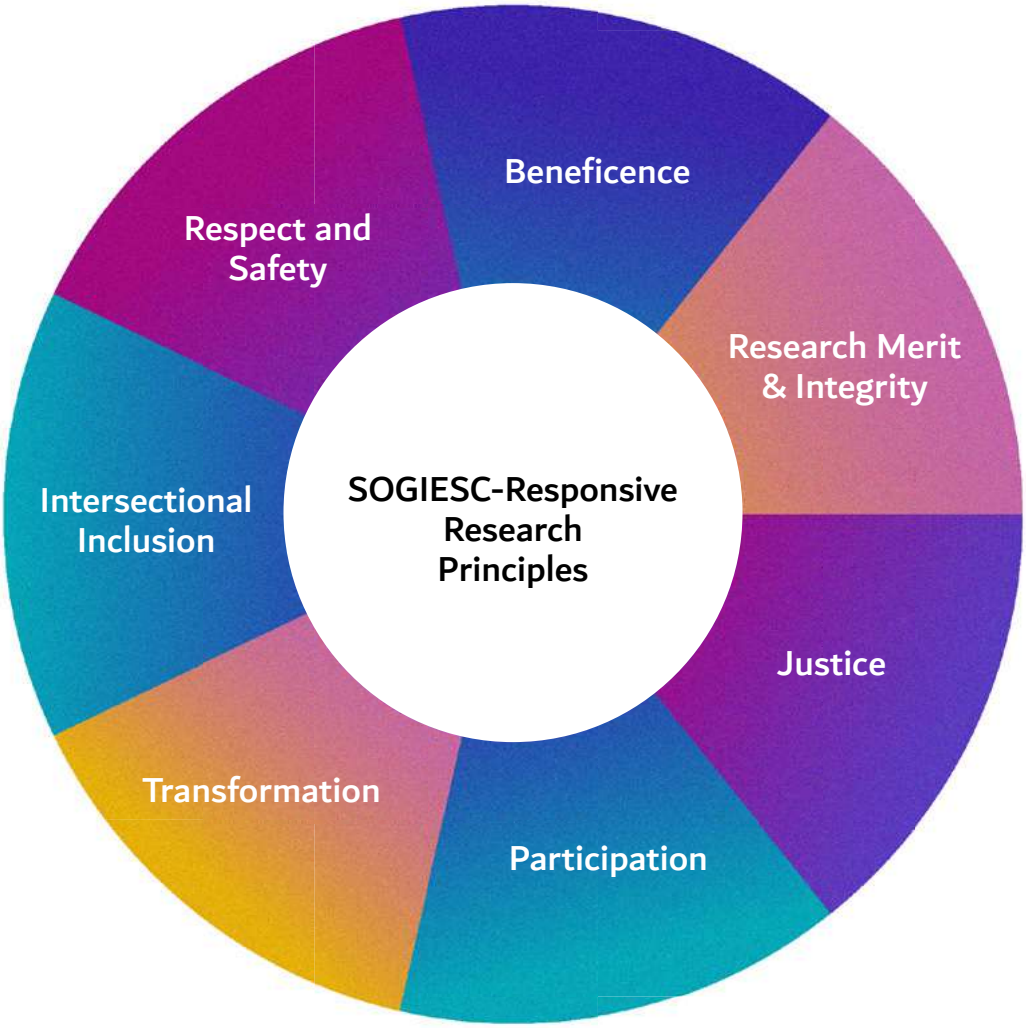
- **Sample Skewing**: Convenience sampling and snowball methods can lead to samples that are unrepresentative of the LGBTQIA+ population as a whole. For example, if convenience sampling starts with LGBTQIA+ people who engage with service providers then that may be a very specific kind of LGBTQIA+ person. Or if snowball sampling begins with relatively well educated LGBTQIA+ activists in urban areas then the sample may skew young, urban and educated in ways that do not reflect the broader LGBTQIA+ community. Care must be taken to state such limitations and to avoid excessively general claims about resulting research findings.
- **Ethical Concerns:** Ensuring confidentiality and informed consent is crucial when recruiting among SOGIESC-diverse populations. LGBTQIA+ people may feel pressure to take part In research if they are approached at a location where they receive services or if their friends are taking part. Researchers must be sensitive to the potential risks of inadvertently pressuring or outing people.
- **Community Engagement:** Involving local LGBTQIA+ experts in the sampling and recruitment process is recommended.

3.5 Instrument Design



Researchers will need to consider the particular research objectives, overall methodology, and the local context when designing research instruments. These factors will influence the specific shape that the research instruments will take (such as surveys or semi-structured interview schedules), the questions included and response categories provided, and indeed the overall process of instrument design. For instance, in a participatory methodology, community action researchers will most likely take the lead in the development of instruments and tools to gather data, with technical support provided.

Whatever approach is undertaken, it can be helpful to recall the Seven Principles of SOGIESC-Responsive Research outlined in Chapter 2, and to ensure that the instrument design process and the instruments themselves are in alignment with these principles.



1. Respect for SOGIESC-Diverse Individuals and Concern for Their Safety: Ensure questions are phrased respectfully and considerately, safeguarding participants' identities and experiences. Pay special attention to privacy, especially in hostile environments, and be adaptable to the specific needs and risks faced by SOGIESC-diverse individuals.

2. Beneficence: Design instruments to not only avoid harm but to actively benefit SOGIESC-diverse people. Aim for questions and methodologies that can lead to positive change for the communities involved. Avoid harm by screening or piloting the survey with local LGBTQIA+ experts to ensure that questions are not inadvertently distressing, judgemental or intrusive.

3. Research Merit and Integrity: Ensure every question has a clear purpose and is directly related to the research objectives. Avoid redundant questions and respect participants' time. Apply principles of researcher reflexivity and positionality to screen for biases in question design and language choices.

4. Justice: Design instruments that recognise and show an appreciation for the knowledge and experiences of SOGIESC-diverse individuals. Use open-ended questions to allow participants to share their stories in their own words. Avoid hierarchical language and ensure the instrument is accessible to all literacy levels. Use visual aids or simplified language if necessary.

5. Participation: The level of participation or co-creation in the design of surveys will depend on the chosen methodology. However, it can often be considered good practice to involve local SOGIESC-diverse experts in designing the survey. Focus groups or workshops to gather input on question relevance and phrasing can be useful, provided the space to revise or rework the instruments is genuinely open – this can avoid feelings related to tokenism and extraction where consultations are only performed to tick boxes. Compensate participants for their time and expertise in contributing to the design process, and ensure they understand their right to decline participation without any negative consequences.

6. Transformation: Ensure that survey instruments are designed to be action-oriented, by including questions that gather data on systemic issues, such as policy barriers or social attitudes. This data can be used to inform advocacy efforts, promote social justice or improve programme design. When possible and appropriate, share preliminary findings with community stakeholders to gather feedback and co-develop advocacy strategies.

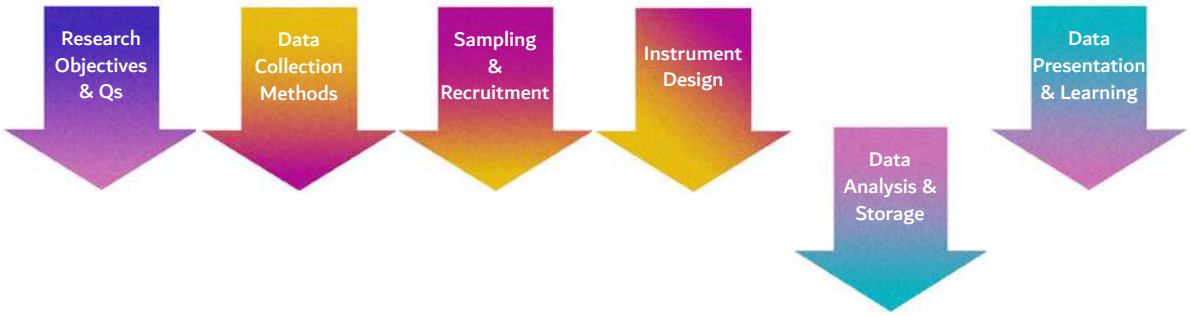
7. Intersectional Inclusion: Ensure the instruments sensitively capture multiple aspects of identity by including questions about ethnicity, socioeconomic status, disability, etc., alongside SOGIESC identities. Reflect throughout the design process on your own intersecting identities, and how these may influence the nature of the questions included.

Chapter 4

Analysis, Learning and Uptake

SOGIESC-responsive research design is more successful when there is a 'through-line' connecting research questions to data collection to data analysis. In Chapter 1 this 'through-line' started with awareness of the reasons why LGBTQIA+ people may be excluded in research, the risks and consequences of being included or excluded, and the importance of aiming at epistemically just research. In Chapter 2 this 'through-line' was traced within choice of data collection methods, sampling strategies and community engagement options. This 'through-line' continues into more the analysis stage. Engagement with the fullness of LGBTQIA+ lives may be achieved through choice of analysis methods, through community engagement in designing and verifying analysis, or through more active participation of LGBTQIA+ people as researchers and analysts. Their participation can help to ground the analysis in lived experiences, foster a sense of ownership, and enhance the overall quality and credibility of the findings.)

4.1 Analysis of Qualitative Data



Researchers have the choice of many methods developed within academic social sciences and humanities disciplines for analysing qualitative data. Many of these involve coding and content or thematic analysis at their core, though undertaken in different ways or with additional processes. Academic researchers may have reasons for choosing one specific method, especially if research will be published in journals that require explanation and justification of methods. Staff and consultants of development and humanitarian agencies may be less concerned with the details of methodological rigour and more concerned with getting actionable findings within time and budget. So, to what extent does research involving LGBTQIA+ people influence choice of analytical method, if at all? The combination of qualitative data and some form of content or thematic analysis can help tease apart the complexities of LGBTQIA+ lived experience. However, the interpretive nature of qualitative analysis can be an entry point for assumptions. Additionally, the process of implementing any of these methodologies, including how and when LGBTQIA+ people are involved in analysis, remains critically important.

Content Analysis, Thematic Analysis and Related Methods

These methods seek to identify features and patterns within qualitative data. Typically, researchers review and label qualitative data using a set of codes or 'coding schemes'. Codes may be textual elements – such as keywords or phrases – that appear in (transcripts of) interviews, FGDs or other content such as traditional or social media. Codes may also be identifiable elements within visual data, including features within maps or photographs or videos, or comparable elements of any other kind of data. These forms of analysis may be deductive, using codes that are established prior to analysis that draw

upon an established understanding of what is likely to be important. Or, thematic analysis may be more inductive, in which codes are identified iteratively as the data is analysed and as the interpretive process starts to surface themes. This process may be manual or software assisted, and the results may be tables of frequencies or blocks of text or associations between codes. So where in this process is there anything specific to qualitative data involving diversity of SOGIESC? An immediate concern is the process for choosing codes. Within the deductive process to what extent do existing theories or assumptions or unconscious bias regarding LGBTQIA+ people's lives influence the choice of codes? The inductive process of iteratively identifying codes within data might also be shaped by assumptions about LGBTQIA+ lives. Additionally, differences of local context, the extent of cultural competency, and local language use by LGBTQIA+ people may all be relevant for establishing codes. Processes that involve local LGBTQIA+ organisations and people or other LGBTQIA+ expertise are less likely to make assumptions, to misinterpret data, or to miss important aspects of data that could be central to coding, to the identification of themes and for building theories that account for these aspects of the world.

The many variations of content and thematic analysis may be less relevant for implementation research in the development and humanitarian sectors. However, some tactics and different approaches offer strengths for analysis of LGBTQIA+ content. For example, thematic analysis may use multiple independent coders and comparison between coders to improve reliability, and this could include use of LGBTQIA+ people as coders. Variations such as Reflexive Thematic Analysis contest that 'the truth' can be approached through adopting more rigorous methods and leans into coding as an inherently interpretive process that itself is a source of meaning. As with the discussion of lived experience in Chapter 3, the acceptance of multiple interpretations aligns with the complexity of LGBTQIA+ lives and the ambiguity of inherent in many queer lives. Operationalising this approach could include diverse groups of coders using collaborative processes to review codes and emerging themes or the use of validation workshops that expose interpretations to questioning. Grounded Theory approaches pay more attention to the inductive building of theories out of thematic analysis; for LGBTQIA+ focused research this may require deeper sensitivity to LGBTQIA+ issues and a longer research process. Interpretive Phenomenological Analysis requires researchers to put aside – or 'bracket' – their perspectives and undertake coding and theme development that makes sense from the perspective of people whose experiences make up the data. This approach may be attractive to LGBTQIA+ communities in which lived experience is prioritised (see chapter 3) and may be especially useful when research informs the development of LGBTQIA+ led activities. However, research using this and other more participant centred methods may face challenges based on the transferability or scalability findings. Narrative Analysis may also use some form of coding of interviews and other data but focuses on some or all of a single person's life course. This approach is particularly useful for LGBTQIA+ responsive research as the experiences and responses of LGBTQIA+ people at a moment in time may be strongly conditioned by their lifelong experiences.

Analysis of interviews, FGDs and non-textual data collected within those processes dominates research involving LGBTQIA+ people. However other forms of qualitative analysis may offer difference insights. Community Asset Mapping may highlight strengths (and gaps) within LGBTQIA+ communities. Social Network Analysis (which may also used quantitative data) explores relational characteristics within groups rather than analysing information about individuals. Informal networks amongst LGBTQIA+ people are often essential for coping or making sense of the world, as well as for sharing information and other resources. Discourse Analysis might be used to understand the role of language deployed

when outsiders are discussing LGBTQIA+ people or to understand the dynamics of communication within LGBTQIA+ groups, all of which may highlight power structures and perpetuation of harmful assumptions.

4.2 Analysis of Qualitative Data

There are many forms of quantitative data analysis. Like qualitative data analysis, humanitarian and development sector usage of quantitative tends toward simpler forms of analysis rather than the complex statistical methods available to researchers in academia or dedicated research institutes. This Guide is not a research methods manual and so only brief accounts of methods follow, along with considerations for research involving LGBTQIA+ people.

Descriptive Statistics

Descriptive statistics are the dominant form of analysis of quantitative data by humanitarian and development organisations and by LGBTQIA+ organisations. Descriptive statistics summarises and describes features of a dataset, focusing on single variables and possible correlations between variables. Steps may include calculating averages (or more specifically, measures of central tendency including mode, median and mean), measures of dispersion (including ranges, deviation and variance) and frequency distributions (such as subtotals of responses or proportions). Spreadsheet software and online tools provide simple ways to visualise this analysis, such as graphs and charts. Much research of this kind within the humanitarian and development sectors makes broad claims about the world-at-large based on such analysis. However, these forms of analysis are better suited to describing the available dataset rather than drawing inferences about broader populations. Such datasets may be drawn from non-probability samples as well as probability samples.

Descriptive statistics can provide profound insights into the lives of LGBTQIA+ people and comparisons between LGBTQIA+ people and other parts of populations for which researchers have data. Cautions that apply to all research apply to research involving LGBTQIA+ people: causation is not provable and apparent correlations should be carefully interrogated to take into account the direction of correlation or other potential factors that might play important roles in the relationship between variables. Analysis of data is only as good as the input data. Cautions discussed in Chapter 3 – including the limitations of reducing LGBTQIA+ lives to quantifiable categories – should also be considered during analysis. Care is also needed in drawing broad conclusions about 'LGBTQIA+ people' when data may really only allow conclusions about particular identity-based subcommunities or conclusions caveated for other limitations in the source data (such as a sample that skews toward urban rather than rural, or older rather than younger, or that does not include people whose experiences might reasonably be different).

Inferential Statistics

Inferential statistical methods are used to draw conclusions about the whole population from the sample population represented in the dataset. Inferential statistics moves beyond descriptions of (and correlations between) individual variables and analyses relationships between one or more dependent and independent variables. Inferential statistics can be exploratory, but often involves testing hypotheses

against the data collected, leading either to no statistically significant relationship (proving the null hypothesis) or supporting hypotheses by demonstrating statistical significance between variables. Such statistically significant results can be generalised to the whole population under study. However, this form of analysis requires a probability sample. There are many inferential methods, depending on the number and kind of variables within hypotheses, such as various forms of regressions to establish relationships and various tests for hypotheses. By considering multiple variables researchers using inferential methods may be better placed to reflect the complexity of LGBTQIA+ lives. The differences between these methods are a step beyond the scope of this Guide and are less likely to be used in operational research by humanitarian and development organisations or LGBTQIA+ organisations. Many other reference guides exist, and expert support could be sought for the use of specific methods for research involving LGBTQIA+ people and issues.

Inferential statistics may be valuable within the humanitarian and development sector when considering LGBTQIA+ dimensions of large-scale health, economic or other research involving large populations and where LGBTQIA+ people are appropriately included in that data. It may also be valuable in contexts where larger datasets based on probability samples are available for LGBTQIA+ people. However, access to such datasets is often limited in the contexts in which humanitarian and development programs are implemented. Assuming inferential analysis is possible, many of the cautions from descriptive statistics still apply, including risks of reductionism and categorisation when engaging with complex and sometimes fluid lives. Specific care is needed in the design of hypotheses that include options that challenge assumptions and norms about LGBTQIA+ people. Hypotheses could also interrogate aspects of society that may be responsible for discrimination, violence and exclusion, as well as analysing relationships between characteristics of LGBTQIA+ people themselves.

4.3 Some Tips Regarding SOGIESC

About which LGBTQIA+ people can you make findings and recommendations?

Even well-designed community engagement and data collection processes may result in samples that are skewed in ways that limit analysis and restrict findings and recommendations. If parts of the LGBTQIA+ community are missing or under-represented in your data then your analysis may miss important patterns that are associated primarily with those missing parts of the community, or you may misinterpret the significance of code frequency or patterns that are linked to over-represented groups. Consider both SOGIESC and other factors. For example, in a country where sexual diversity is criminalised and highly stigmatised but in which trans and non-binary identities are tolerated, your best efforts to reach gay, lesbian and bisexual people may have failed. Or, if your research partner was a local organisation that specialises in HIV programs that organisation may have struggled to reach LGBTQIA+ people such as LBQ women who are not key populations for HIV programs. Or intersex people may be very hard reach and not known to local organisations. In such situations acknowledge limitations and avoid making findings about the LGBTQIA+ community as a whole. Other factors in data may also skew your analysis, such a sample that is primarily younger people or people living in urban areas or that includes no-one with a disability or from a minority ethnic group. Ensure interpretations based on frequencies and patterns in your data take into account the presence of some people and the absence of others, and avoid blanket findings about LGBTQIA+ people that eschew other relevant diversity.

Limits of categorisation

There is much diversity amongst LGBTQIA+ people that includes diversity within 'letters' in the acronym, individuals belonging to more than one 'letter' of the acronym, the existence of identities and behaviours outside of the LGBTQIA+ acronym, and the blurring of boundaries between identities and fluidity of SOGIESC over shorter and longer time frames. Researchers may need to reflect on questions such as:

- To what extent is the use identity categories such as 'lesbian' effective within analysis? Is there sufficient coherence amongst circumstances and experiences of lesbians in the research context to make that a relevant category?
- How will identities such as those of culturally gender diverse groups be addressed? While these groups may superficially resemble transgender people, they often have unique aspects of their identities and may resist being rolled into the 'T' of LGBTQIA+.
- What analysis is possible when a wider range of identities are included in identification options or if a write-in option is provided? Is some form of aggregation into a smaller range of categories – based on identities or on grouped characteristics such as 'sexually diverse people' - helpful or possible?
- If someone has identified differently over the course of their lives, is that relevant for analysis?

These are posed as questions as the answer is often specific to a particular research context or research topic. Answers to these and similar questions may require engagement with local LGBTQIA+ and other organisations or context-specific technical assistance, and may ultimately be a judgement call.

What SOGIESC does and does not explain

Researchers may face challenges in determining the extent to which the SOGIESC of LGBTQIA+ people explains their reported experiences or a notable statistical difference. LGBTQIA+ people have many other characteristics or aspects of their lives that might also explain those experiences or differences. For example, consider discrimination experienced by a lesbian travelled from one country to undertake low-wage migrant work in another country. That discrimination could be attributed to that person being a lesbian, but it is also possible that she was discriminated against because she is a women or because she undertakes low-wage work or because she is a migrant, or some combination of all those and other factors. Researchers who anticipate this range of variables in the research design phase may have adjusted their data collection, such as asking the LGBTQIA+ people additional questions about their experiences or interpretations of their experiences, or to collect additional attitudinal data from groups of people who have been identified as perpetrators. Such adjustments may or may not result in data that offers more clarity. For example, LGBTQIA+ people may report specific statements from perpetrators that make the relevant factor clear, but at other times they may not have clear insights into the motivations of perpetrators. Researchers may also need to guard against the risk that participant responses in interviews or surveys were influenced by their awareness that the research is focused on LGBTQIA+ people and their experiences.

4. Victimhood, agency and structural discrimination

Analysis that highlights the many challenges faced by LGBTQIA+ people may inadvertently position those

people as victims only. Structural discrimination can be overwhelming and some LGBTQIA+ people may get to the point where they do not know where to turn or may feel helpless. However, many LGBTQIA+ people resist the discrimination they face, and in ways that may be more or less visible to outsiders. During the analysis phase researchers can review their coding system and the range of emerging themes to assess whether potential agency of LGBTQIA+ people is being recognized. Such efforts will be more fruitful if researchers considered the agency of LGBTQIA+ people in earlier research design process and data collection processes. Researchers may also review the extent to which their analysis is associating LGBTQIA+ people with problems versus associating problems with the norms, attitudes and actions of other parts of society. Framing of LGBTQIA+ issues that highlights heteronormativity, cisnormativity, gender binarism and endosexism as root causes (see preface) may prompt the development of coding schemes and thematic reviews that seek to understand where discrimination, violence and exclusion are coming from, along with who it is heading toward and how it manifests in their lives and responses.

Avoiding Cherry-picking

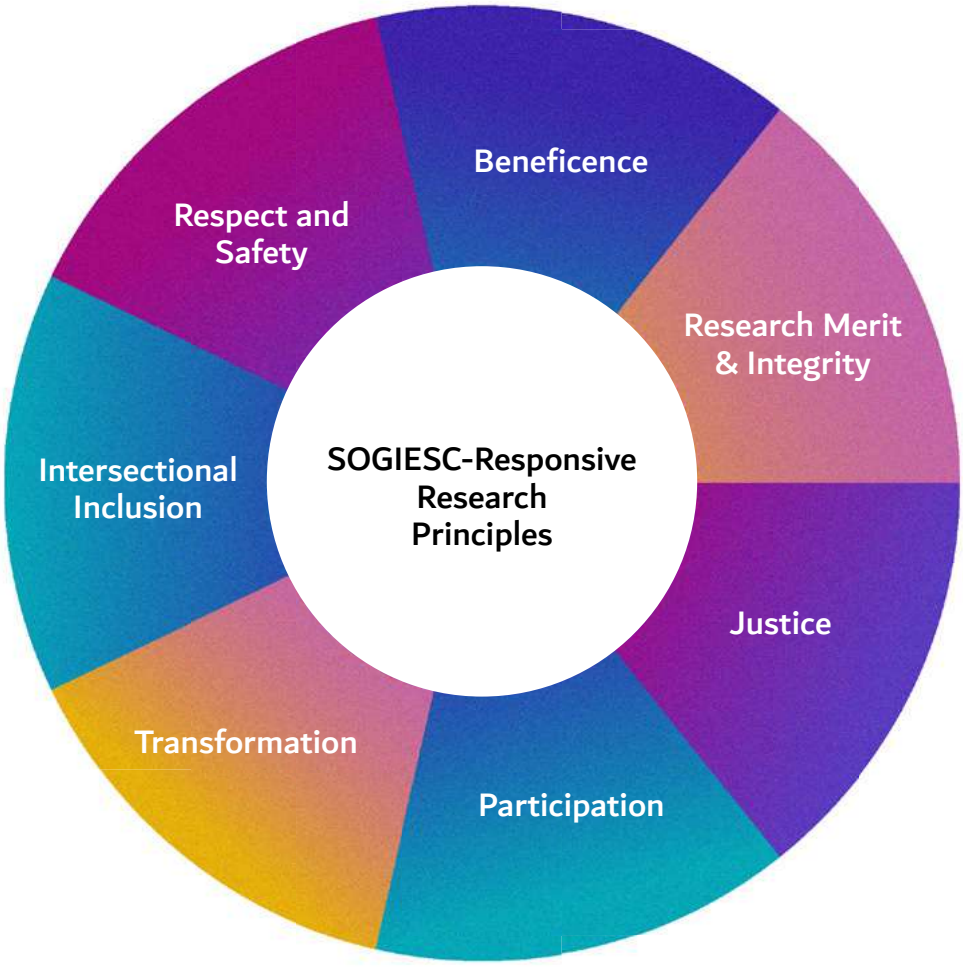
Researchers need to bring standard expectations of fairness and rigour to analysis involving LGBTQIA+ people and issues. It is all too easy to focus on the most evocative or disturbing statements that emerge from analysis of qualitative data and to highlight these as quotes within narrative presentations of analysis and findings. Some interview participants may offer particularly vivid accounts, or their views may dominate and drown out other views within focus group discussions. At worst, researchers can cherry-pick data to fit narratives that they want to be true or that fits a preconceived theory, leaving out data that may complicate those narratives or theories, or support other conclusions. Using multiple researchers and some form of peer review may help avoid unconscious selectivity and offer more reliability to users of reports.

Lack of existing data and analysis

Analysis is often informed by literature reviews, including consideration of contextual analysis, or thematically relevant data and findings form previous research. However, researchers may find little or no evidence regarding experiences LGBTQIA+ people or the societal circumstances within which they live. Available contextual information is often limited to criminalisation of sexual acts, other legal context and other broad statements about societal acceptance or stigma. Beware of making assumptions or of over-emphasising certain information simply because it is all that is available. The criminalisation of specific sex acts is very important for LGBTQIA+ people, but may or may not have practical impact on the potential for inclusion of various LGBTQIA+ people in development and humanitarian programs. For example, laws criminalising same sex sexual acts may not be policed, or may affect only some LGBTQIA+ people, or it may be unclear if those laws reflect or influence broader societal attitudes. Limited thematically relevant data and findings may also hinder analysis, including when analysis tools encourage or require use of existing data and findings. Where those tools are used for assessing the situations of different groups researchers may inevitably emphasise other marginalised groups for whom there is existing data. Researchers facing historical research gaps may find that local LGBTQIA+ people and organisations can provide relevant information even if it is not in published reports. Finally, solace may be taken in the fact that your LGBTQIA+ inclusive research will be context or baseline information for a future researcher.

However, it's important to recognise that SOGIESC-diverse people, including those working or volunteering for grassroots CSOs, are not simply available to analyse data or validate findings whenever needed.[52] This type of engagement requires careful planning well in advance, as well as deep respect for their time and contributions.

Whatever particular method or approach to analysis is undertaken, it can again be helpful to recall the Seven Principles of SOGIESC-Responsive Research outlined in Chapter 2, and to ensure that the process is in alignment with these principles.



1. Respect for SOGIESC-Diverse Individuals and Concern for Their Safety:

- **Confidentiality:** Ensure the analysis process maintains confidentiality. Use anonymised data and secure storage methods to protect participant identities, especially in hostile environments.
- **Respectful Interpretation:** Avoid interpretations that reinforce stereotypes or stigmatise SOGIESC-diverse individuals. Be sensitive to the language and categories used in the analysis.

2. Beneficence: Design:

- **Community Benefits:** Consider how the approach to analysis can be of benefit to community members, for instance via their participation or leadership in the process.
- **Doing no harm:** Uphold high ethical standards throughout the analysis, including transparency about the analysis methods and any limitations of the study. Ensure informed consent covers the analysis phase as well.

3. Research Merit and Integrity:

- **Rigorous Methods:** Use robust analytical methods to ensure the validity and reliability of the findings. Employ techniques like triangulation to cross-verify data from multiple sources.
- **Reflexivity:** Analysts should regularly reflect on their positionality and potential biases, considering how these may influence their interpretations. This can be facilitated through reflexivity exercises such as journaling or group discussions, where analysts critically examine their assumptions and perspectives. In certain methods, such as thematic analysis, reflexivity should be openly explored within the publication.
- **Transparency:** Clearly documenting the analytical process and decisions can involve explaining the rationale behind method choices, data interpretation, and any adjustments. Sharing findings with SOGIESC-diverse communities for validation and feedback can improve accuracy, foster trust, and allow the community to provide overlooked insights.

4. Justice:

- **Power Dynamics:** Be aware of and address power dynamics in the analysis process. Take steps to ensure the voices of SOGIESC-diverse individuals are central to the interpretation of data.
- **Fair Representation:** Avoid overgeneralisations and ensure that the diversity within SOGIESC-diverse populations is meaningfully represented. Consider where possible using stratified analyses to explore differences within subgroups.

5. Participation:

- Collaborative Analysis: Community participation can enhance the analysis by grounding it in the lived experiences of marginalised people, ensuring the findings are relevant and authentic. Additionally, involving local action researchers in data analysis, rather than solely as enumerators, builds local research capacity and aligns with a core principle of epistemic justice: "nothing about us without us."

6. Transformation:

- **Action-Oriented** Findings: Perform the analysis in a way that allows researchers to identify systemic issues. Focus the analysis on identifying actionable insights that can benefit SOGIESC-diverse communities. Highlight areas where interventions can improve the lives of participants through policy or practice changes.

7. Intersectional Inclusion:

- **Intersectional Analysis:** Explore how various identities and experiences intersect and impact SOGIESC-diverse individuals. Use intersectional frameworks to analyse data on multiple axes of identity, such as race, gender, and socioeconomic status, and to explore the context-specific nature of discrimination and privilege.
- **Holistic View:** Ensure the analysis reflects the complex realities of participants' lives, recognising the multiple, overlapping factors and strengths that shape their experiences as queer individuals in challenging circumstances.

4.4 Emergence of AI in Analysis

Artificial intelligence (AI) is increasingly used within development and humanitarian programs and within the domestic government systems that may be assisted through those programs. AI encompasses many tools, including machine learning, natural language processing, knowledge representation and automated reasoning. These tools may expedite analysis that human researchers previously undertook or be used for new analysis made possible by collecting, digitising, and cross-referencing ever-increasing amounts of data about individuals. Proponents of AI claim improvements in the efficiency and effectiveness of service delivery across a wide range of programs, including enhancement of service delivery for vulnerable populations. Examples include using AI to replace or augment traditional socio-economic assessments within social protection systems. In countries as varied as Colombia, Canada and Togo AI has been used to assess overall poverty levels, to identify geographic areas of higher poverty to narrow down the search for eligible people in need, and to identify specific individuals who may be eligible for support under government programs. This has involved used of datasets including credit ratings agency records, proxy indicators for assets and income, data on mobile phone and internet usage, and satellite geo-data.[53]

Previous sections in this chapter identified points in analysis – such as the creation and application of coding schemes – where assumptions about LGBTQIA+ people and issues could result in distortions or gaps in analysis. While in theory the use of AI might reduce the potential for individual human bias to influence results, there are ways in which AI can replicate or exacerbate assumptions about LGBTQIA+ people or other people who experience marginalisation.[54] Algorithms through which patterns are identified or decisions made may include those assumptions. This may result from coding by humans who may have those assumptions or through training learning systems on data that embody stereotypes, assumptions or bias. Additionally, analysis or decision-making in specific projects is only as good as the input data which such a system can process, whatever rules it is applying or patterns it may be able to identify. Many datasets do not include information about LGBTQIA+ people. AI systems may make mistakes or omissions for these reasons but without having a human in the loop to potentially identify mistakes or omissions. Similarly, opportunities to seek review of analysis or decision-making may be limited. These are just some of the challenges of integrating AI into development and humanitarian programs – see Edge Effect's more extensive review of AI in a separate report within the We See You project.[55]

The use of AI may present challenges for researchers or program managers seeking to ensure non-discrimination and inclusion, especially given that these systems may operate 'behind-the-scenes' and

with little obvious opportunity for review. Where possible, researchers or program managers who know that AI is utilised could seek information about steps taken to mitigate risks that those systems result in discrimination or exclusion. Engagement with LGBTQIA+ CSOs and communities may highlight concerns specific to local systems and contexts, or may surface evidence that individuals or groups with protected characteristics are not being included in safe, effective and dignified ways.

4.5 Data Management During Analysis

Upholding confidentiality is crucial in SOGIESC-responsive data analysis. Management of data requires careful planning, policy, procedures and training and consideration of specific research design and data involved.

In qualitative research, ensure confidentiality by anonymising transcripts or using pseudonyms and codes that cannot be easily traced back to individuals. Consider all data that may identify individuals, such as maps that may have been produced as a prompt activity or photos that may show people or contain revealing metadata. Securely store data both digitally and physically. Limit data access to only those directly involved in the analysis and ensure all team members are trained in confidentiality protocols. Encrypt data and store it on secure servers to prevent unauthorised access.

In quantitative research, take all steps necessary to maintain confidentiality, for instance by removing or coding any identifying information before analysis, stripping datasets of names, addresses, or other personal identifiers and using aggregated data where possible to minimise identification risks.

In both qualitative and quantitative research, it is vital to let participants know how their data will be protected and to obtain their consent for the specific methods used. Regular audits of data security practices and continuous training for researchers can help ensure that confidentiality is upheld throughout the research process.

By way of a practical example, USAID-funded DHS surveys follow strict privacy measures:

How the Privacy of DHS Respondents is Protected[56]

- **Procedures and questionnaires for standard DHS surveys have been reviewed and approved by the ICF[57] Institutional Review Board (IRB).**
- **Survey-specific DHS survey protocols are reviewed by the ICF IRB and an IRB in the survey country.**
- **Informed consent is obtained before each interview or biomarker measurement.**
- **Within each household, an eligible respondent may not be interviewed in the presence of another eligible respondent. Results of interviews and biomarker testing are strictly confidential. Data collection is monitored for adverse events and to ensure data quality.**
- **Each data collection team includes a supervisor who is responsible for the safety and well-being of team members and respondents. Each respondent's interview and biomarker data files are identified only by a series of numbers, including cluster number, household number, and individual number.**
- **Data are encrypted and all personally identifiable information is destroyed and geographic coordinates of each survey are displaced at a random distance and in a random direction prior to the public release**

DHS Privacy Measures. Adapted from USAID (2024) Collecting Diverse Data on Gender and Sexuality in Demographic and Health Surveys: An Overview.

4.6 SOGIESC-responsive MEL

Many of the considerations for other forms of research also apply to the design of monitoring, evaluation and learning (MEL) systems, and the data collection, data management and data analysis required for MEL. However, SOGIESC responsive MEL also:

- Avoids use of categories such as 'other' which provide no basis for disaggregation and no actionable data for addressing inclusion gaps or other progam limitations.
- Involves LGBTQIA+ organisations and people in determining what 'success looks like' at the start of programs and, therefore, what indicators, data and collection methods may be needed.
- Employs adequate theories of change or logic models that integrate the rights, needs and strengths of people with diverse SOGIESC. LGBTQIA+ issues are often difficult to address within the time-frame of development and humanitarian projects; consider intermediate outcomes that involve steps

towards longer-term change in societal conditions, support mechanisms or agency of LGBTQIA+ people.
- Ensures that context and risk analysis informs MEL design and practices such that MEL is LGBTQIA+ responsive wherever it is possible and to the greatest extent possible, short of creating safety issues.
- Is sufficiently adaptive to allow changes in success measures as challenges facing LGBTQIA+ organisations and people change during programs. MEL that includes genuine learning can support local LGBTQIA+ partners and avoid penalising them for circumstances beyond their control.
- Provides for participation of LGBTQIA+ organisations or people in implementation of MEL.
- Allows for flexible reporting including videos, photos, diaries, voice messages, text messages and other formats that be less formal than standard MEL.
- Requires output indicators to specify disaggregation by SOGIESC where safe and relevant. However, avoid unnecessary emphasis on counting participants in contexts where this may lead development or humanitarian actors to record administrative data that places LGBTQIA+ people at risk.
- Emphasises outcome indicators and impact measures that measure meaningful changes in the lives of LGBTQIA+ people.
- Involves a budget large enough to support all of these measures.

Centring Safety and Security in MEL: Learnings from the Count Me In (CMI) Consortium. [58]
"Safety and Security Come First."

Donors often ask for data that may put activists and human rights defenders in danger, such as the names and contact information of at-risk activists who attended a meeting or pictures of events, which activists would prefer not to take in the first place.

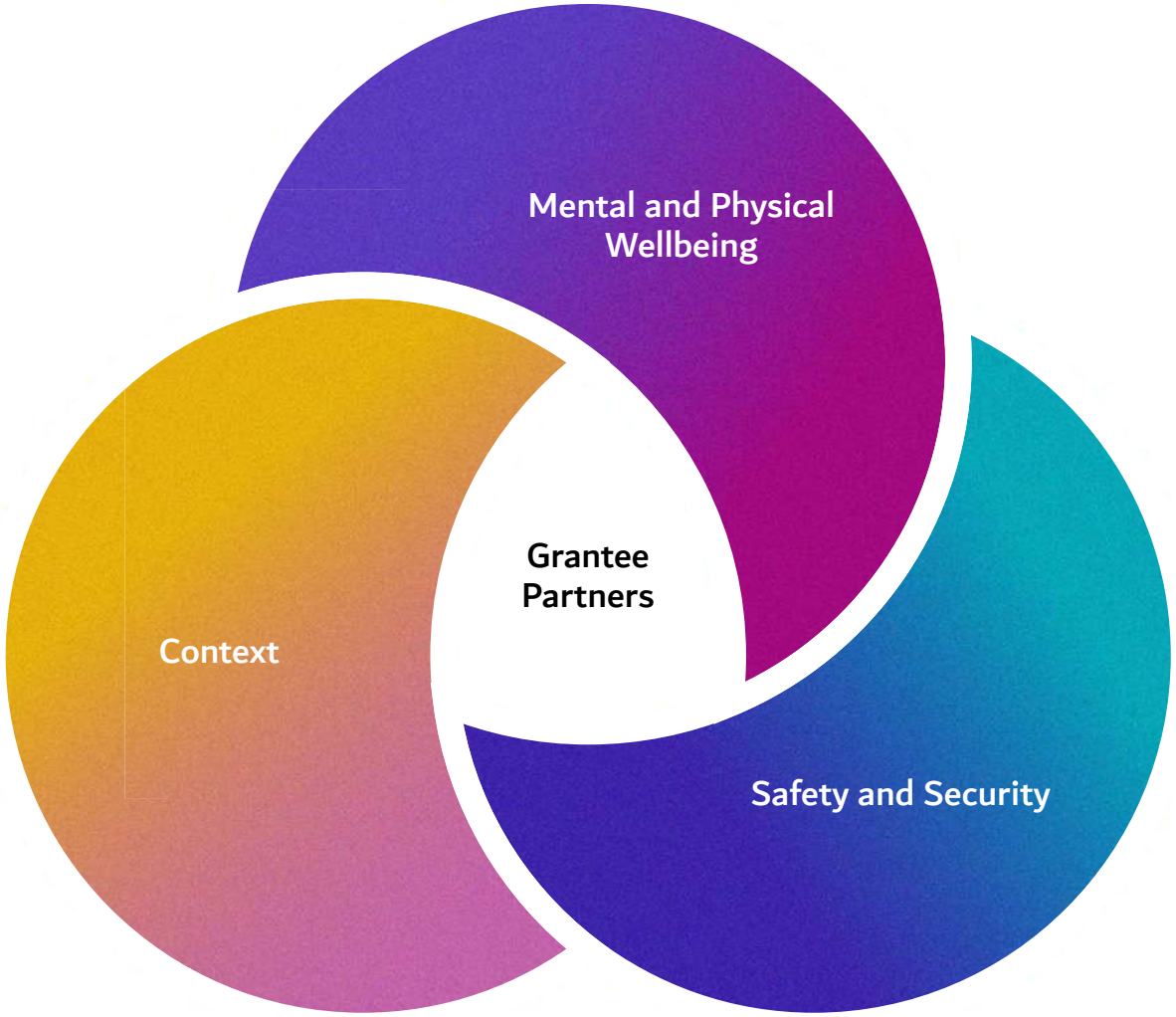
Contrarily, the UAF Sister Funds prioritise the safety and security of their grantee partners in all MEL processes. For example, reporting never requires activists to share pictures as "proof" that events occurred and asks activists which sections of their reports should be kept confidential. They never share information on the location where the intervention happened to showcase impact unless they have permission from activists.

The Funds also use more secure email or text platforms with enhanced safety features, such as end-to-end encryption and two-factor authentication, or take the lead of the applicants in using what they consider more secure in their local context.

Feminist MEL recognises that activists are the real experts and that reporting, evaluation and learning processes should centre them rather than the needs and demands of donor agencies.

We hope, someday, that donors promoting gender equality, democracy, and human rights will recognise and implement this vision of MEL that cares.

Image: Feminist MEL recognises that the needs of activists must be at the centre. Therefore, it puts their well-being, safety and security at the forefront.



MEL based on care, trust and flexibility

Concluding Thoughts

Addressing Limitations: Awareness, Acknowledgement, Advocacy and Attainment

The lack of data regarding LGBTQIA+ people in the development and humanitarian sectors could lead to a view that any new data is better than none. Researchers undertaking any LGBTQIA+ data collection and analysis may already be exceeding expectations and the available time and money may constrain the potential nuance of their efforts. Advocates for inclusion of LGBTQIA+ people in data and analysis may be faced with a conundrum: should they be grateful for any efforts to redress the gaps regardless of the limitations of those efforts? Or do researchers need to be aware of the complexities within the LGBTQIA+ world and to rise to higher standards? There is a risk that LGBTQIA+ advocates make data collection and analysis so complicated that the development and humanitarian sectors throw up their arms in a collective shrug. To avoid this response but to create a pathway towards higher standards choose as many of these 4 A's as possible:

- **Awareness.** Being aware of the diversity that does exist, even if that diversity cannot yet be accommodated in your research, is an important starting point.
- **Acknowledgement**. Ensure that the limitations of your research are clearly explained, so that the finding and recommendations are used appropriately and so that future researchers who review your work might design research that fills gaps.
- **Advocacy.** Make it clear to funders and colleagues that you support the development of awareness, methods and resourcing need to better address LGBTQIA+ diversity.
- **Attainment.** Reach higher standards of awareness, apply more nuanced methods and obtain greater resourcing to better address LGBTQIA+ diversity.

Endnotes

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