I’ve gone through a number of papers looking at LGBT+ populations and trying to find how to categorize these demographics. Many of the papers used personal interviews which would be far too intensive for most information gathering. However, I have come up with a list of recommendations to include in already existing surveys and outline them below.

Before getting into suggestions, I want to point out an observation made in a paper by Kenneth Mayer titled "Sexual and Gender Minority Health: What We Know and What Needs to be Done" (American Journal of Public Health: Framing Health Matters. Vol. 98, No. 6. June 2008). Starting on page 990 they point out some of the limits that previous studies had placed on themselves in regards to measuring sexual and gender minority populations.

“From the perspective of population- and practice-based research, progress has been made to include sexual orientation as a demographic variable in several government surveys; however, these surveys typically have just one question about sexual orientation and none for transgender identity. Because of the paucity of measures, these data can be misleading and limited in usefulness.”

The first suggestion is from a paper by Alison Cook titled "The Impact of LGBT Policies on Ethnic/Racial and Gender Diversity Among Business School Faculty" that was published in the Journal of Diversity in Higher Education, Vol. 1, No. 3, p. 193-199, 2008. In particular, staring on page 195, it brings forth how information was gathered on policies. Three different policies were examined and assigned to each a value of Yes or No (which the corresponded to the numbers 1 or 0 respectively) and then the total of all policies. The first was domestic partner benefits in health insurance. The second was inclusion of sexual orientation in their nondiscrimination/Equal Employment Opportunity (EEO) policy and the third was inclusion of gender identity in their nondiscrimination/EEO policy. They then totaled this number which had a range of 0-3 to base their later findings on. This approach seems useful, although it is lacking a category for transgender-related health care being included in the health insurance options. As many trans people know and the Transgender Law Center points out, most insurance policies won't cover trans-related health care and even further the majority of them put explicit exceptions saying that they will not cover anything relating to being transgender.

In relation to gender on forms, a study was done (Beemyn, Brett et al. Transgender Issues on College Campuses. New Directions for Student Services, no. 111. Fall, 2005.) that on page 52 attempts to identify trans populations by using check boxes for Male and Female and having a third where a student can fill in a blank to Self-Identify. They also mention that having an option under special needs to include "transgender". Seeing as there are trans people who are male and female and don't feel that their gender itself should be labeled as trans in the "self-identify" box, I would suggest an added binary check-marked question asking if a person is transgender (not comfortable living in the gender assigned at birth) or cisgender (comfortable living in the gender assigned at birth). This can be included in the question asking about sexual orientation as long as the question is phrased as asking about identity. Gender identity and sexual orientation are mutually exclusive psychosocial categories, although the issues surrounding them are similar at this moment in time.
So in conclusion, what would be useful to see when it comes to surveys aimed at individuals within departments to have the following questions added and marked as optional (similar to optional question about race and ethnicity).

What is your gender?
☐ Male
☐ Female
☐ Self Identify: ________________

Do you identify with any of the following? Check all that apply.
☐ Straight
☐ Gay
☐ Lesbian
☐ Bisexual
☐ Cisgender (You are comfortable in the gender you were assigned at birth)
☐ Transgender (You are not comfortable in the gender you were assigned at birth)
☐ Self Identify: ________________

The previous question (Do you identify...) could also include information about race and ethnicity. Pulling everything together under a question asking about identity helps to remove stigma from separating parts of one self. It would also be appropriate to include options such as ‘Disabled’ or other groups of marginalized peoples within this category.

And in surveys aimed at department chairs looking to get information on departmental policies,

Does your department provide domestic partner health insurance benefits for same-sex couples?
☐ Yes
☐ No

Does your department provide health insurance that covers transgender-related health care such as hormone replacement therapy and gender reassignment surgery?
☐ Yes
☐ No

Does your department have "Sexual Orientation" in its non-discrimination policy?
☐ Yes
☐ No

Does your department have "Gender Identity" in its non-discrimination policy?
☐ Yes
☐ No
What are your thoughts on these? If there is anything further I can do to help, please let me know. And thank you for what you are doing to help our community gather much-needed demographics information.

Thank you,
Elena