



Learning Community on Safe and Effective SOGI Data Collection: Resource Guide

The presentations offered through this learning community provided guidance on creating affirming spaces, documenting SOGI in electronic medical records, navigating anti-LGBTQ+ climates, discussing SOGI with youth and families, organizational change efforts, and so much more. This Learning Community was facilitated by the National SOGIE Center and was funded by the National Association of State Mental Health Program Directors (NASMHPD). Check out our recorded sessions and important tools below!

Learning Community on Safe and Effective LGBTQ+ Data Collection: Kick Off Video

During this video, viewers will hear about the importance of SOGI data collection and the disparities faced by LGBTQ+ people across the lifespan. This session also includes an animation which describes the terminology that will be used throughout the Learning Community.



Angela Weeks, DBA
(she/her)

Director, National SOGIE Center; Project Director, Center of Excellence on LGBTQ+ Behavioral Health Equity

Favorite Tips from the Learning Community

During this final SOGI data collection office hour, facilitators spent 30 minutes sharing their favorite tips and tools from each session in this series. This session is a great option for those who want to know what important topics and lessons were discussed throughout the Learning Community.



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Director, National SOGIE Center; Project Director, Center of Excellence on LGBTQ+ Behavioral Health Equity



Lyndsay Smith, MS
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Senior Program Specialist, The National SOGIE Center & The Center of Excellence on LGBTQ+ Behavioral Health Equity





Supervising & Coaching Providers on Discussing SOGI in Affirming & Appropriate Ways

Many providers report wanting to talk about SOGI and knowing why collecting this data is important. However, a lack of confidence in addressing topics about sexuality, gender, family, and beliefs may prevent them from collecting the information. This session helps attendees, and particularly those who supervise providers, understand how to support others in building confidence around these important discussions.



Ashley Austin, PhD, LCSW

(she/her)

Professor, School of Social Work, Barry University



Shelley Craig, PhD, RSW, LCSW

(she/her)

Canada Research Chair in Sexual & Gender Minority Youth; Professor, Factor-Inwentash Faculty of Social Work, University of Toronto

Let's Talk to Families About SOGIE

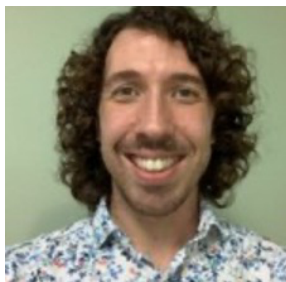
Talking to families about SOGIE is something that many practitioners have questions about. How should you approach the topic? What if families are angry that you are asking about SOGIE? How do you work with families and address concerns about their LGBTQ+ youth? Presenters in this session bring best practices learned over several different types of clinical programs for families. Addressing these concepts with culture and family backgrounds is also addressed.



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Director, National SOGIE Center; Project Director, Center of Excellence on LGBTQ+ Behavioral Health Equity



Dusty Jepkema, LMSW

(they/them)

Clinical Social Worker, Integrated Services of Kalamazoo



Darquita Fletcher, LCSW-C

(she/her)

Project Director, National Quality Improvement Center on Family-Centered Reunification





Supervisor's Guide

During this session, we discuss a recently developed Supervisor's Guide that supervisors in provider organizations can use to make a major impact working with staff around implementing SOGI data collection. This conversation guides supervisors through navigating common fears their staff may have about asking SOGI questions, frequently asked questions, and example role plays for supervisors to use in group coaching.



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[Click here to download the accompanying tool: Supervisors' Guide to Coaching Staff on Talking about Sexual Orientation and Gender Identity](#)

Experiences with Implementing SOGI Data Collection at an Organizational Level

This session reviews considerations for the process of implementing SOGI data collection in an organization. Collecting SOGI data involves more than just the act of collecting information; it needs to be a coordinated effort across multiple stakeholder groups. Our presenter shares their experiences preparing for collection and implementing agency processes to ensure that collection is culturally humble and trauma-informed. They also address various systems partners who can be helpful in this process, along with their strategies for getting those partners to the table.



Dusty Jepkema, LMSW
(they/them)

Clinical Social Worker, Integrated Services of Kalamazoo

Creating a Client Experience that Communicates Safety & Respect

When clients do not feel affirmed, they are much less likely to tell you they identify as LGBTQ+. The client experience is about their first learning of an organization, the website, pamphlets, the office space, the resources provided, the interactions with staff, the questions they are asked, and many other circumstances. This session goes into detail about how to foster and communicate an affirming environment so that LGBTQ+ clients feel safe enough to disclose their SOGI status.



Nia Desiré Clark, MSW
(she/her)

Expert Trainer, Human Rights Campaign's All Children – All Families Project; National LGBTQ+ Mentoring Coach, Big Brothers Big Sisters of America; Board Member & External Investigator, Nebraska Center for Research on Children, Youth, Families & Schools





[SOGI Data Collection Self-Assessment](#)

Our office hours are an opportunity for participants to ask questions and get technical assistance from experts in the field. During this session, presenters discuss a recently developed self-assessment tool that behavioral health providers and organizations can use to measure their readiness to safely collect SOGI data. This assessment guides users to examine explicit affirming practices, HR policies, staff training standards, forms, and data storage systems.

Click here to download the accompanying tool: *Readiness to Safely Collect Sexual Orientation & Gender Identity (SOGI) Data*



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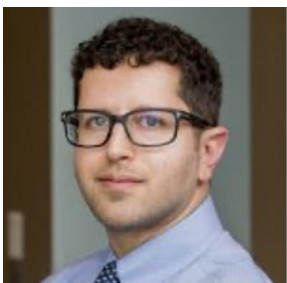
Christopher Bellonci, MD, FAACAP

(he/him)

Assistant Professor, Harvard Medical School; Senior Policy Advisor, Baker

[Documenting SOGI on Intake Forms & Electronic Medical Records](#)

This session describes how to de-gender tools, language, and forms to foster safe SOGI data collection. Example forms are provided to demonstrate gender neutral or inclusive options for honorifics, pronouns, and questions about family structures. Best practices on safely entering and using this information in an electronic medical record are also covered.



Alex Keuroghlian, MD, MPH

(any pronouns)

Associate Professor of Psychiatry, Harvard Medical School; Director, Division of Education & Training, The Fenway Institute; Director & Michele & Howard J Kessler Chair, Division of Public & Community Psychiatry, Massachusetts General Hospital

Additional Tools:

- SOGI information for clients in 13 languages: [Sexual Orientation and Gender Identity Questions: Information for Patients » LGBTQIA+ Health Education Center](#)
- Ready, Set, GO! Guidelines and Tips for Collecting SOGI Data: [Ready, Set, Go! Guidelines and Tips For Collecting Patient Data on Sexual Orientation and Gender Identity \(SOGI\) – 2022 Update » LGBTQIA+ Health Education Center](#)
- Videos demonstrating asking about SOGI questions and common concerns: [SO/GI Data Collection Demonstration Videos » LGBTQIA+ Health Education Center](#)





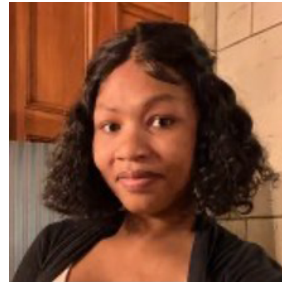
Conversations About SOGI, Privacy & Navigating Partial Disclosure

In this session, providers gain skills and language to talk about SOGI in respectful ways. In some cases, clients may not want to disclose their SOGI to everyone in their lives, or even to everyone in the provider organization. This session goes over strategies that will help providers support clients during partial disclosures.



Jessie Fullenkamp,
LMSW

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Education & Evaluation
Director, Ruth Ellis
Center



Kamora Dawson, CNP
(she/her)

Community Engagement
Manager, Ruth Ellis
Center

Safeguarding SOGI Data in Anti-LGBTQ+ Climates

There are many providers who are supporting LGBTQ+ clients in environments that are anti-LGBTQ+. This may be a home, town, or even a state that does not have comprehensive protections for LGBTQ+ people. This session covers how to balance asking about SOGI while maintaining the client's privacy and safety.



Elliott Hinkle
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Principal & Founder,
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Discussing SOGI With Children & Youth

In this session, providers gain skills and language on having discussions about SOGI with children, youth, and their families. Gender identity can be declared as early as two years of age and sexual orientation as early as age six. Knowing how to discuss SOGI in age-appropriate ways is essential to providing LGBTQ+ affirming services.



Antonia Barba, LCSW

(she/her)

Licensed clinical social worker; co-founder and co-chair, National Child Traumatic Stress Network SOGIE Collaborative Group



Johnny Cole, MAT

(he/him)

Director of Equity & Student Support, Lexington Public Schools; Facilitator and instructor, Initiatives for Developing Equity & Achievement for Students

