

# HCI Guidelines for Gender Equity and Inclusivity

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This is a living document. We encourage feedback, suggestions, conversations, and criticisms. We are also looking for authors/collaborators in writing two new sections: For Educators and For Reviewers. Feel free to email us at [genderguidelines@gmail.com](mailto:genderguidelines@gmail.com) or comment on the Medium version of this document.

You can use the [Table of Contents](#) below to navigate to specific sections, or the navigation menu on the right to navigate to major sections. [You can also download a PDF instead.](#)

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† Reviewers and editors provided feedback that helped shape this document.

## Table of Contents

[About this Document](#)

[Context and Motivation](#)

[Limitations](#)

[For Writers](#)

[Gender Terminology and Concepts](#)

[General Guidelines](#)

[Defining Gender in Your Writing](#)

[Transgender](#)

[Transgender Women and Men](#)

[Non-Binary](#)

Transgender and/or Non-Binary vs. Binary and Non-Binary  
Trans People

Cisgender

Intersex

Gender Non-Conforming

Terms to Avoid

Incorrect or Inappropriate Ways to Refer to Transgender People

Preferred Pronouns

Medicalized and Stigmatized Terms

The Dynamics of Gendered Language

Masculine vs. Male and Feminine vs. Female

Pronouns and Gender Identity

“Identify As” vs. Identity

Gender vs. Sex

Racial, Ethnic, and Cultural Intersections with Gender

A Glossary of Useful Terms

Misgendering

Passing

Passing Privilege

Hormone Replacement Therapy (HRT)

Gender Affirmation Surgery

Gender Transition

Gender Euphoria

Transphobia, Transmisogyny, and Transmisogynoir

For Researchers

Gender Inclusive Research Methods

Research Methods

Interviews and Ethnographic Studies

Social Media Data Analysis

Surveys

Research Settings

Private Research Settings

Group Settings

Research Focus

Research Projects About Gender, Broadly

Research Projects about Transgender and/or Non-Binary Populations

Research Projects about Health and/or Medicine

Research Projects Not Focused on Gender

Reporting Gender in Research

- Participant Gender May Change During Research Study
- Disclosure of Participant Gender
- Reporting Gender Multiplicity
- Gender Visualization
- Gender Inclusivity Throughout the Research Process
  - Initiating Research Projects
  - Theoretical Underpinnings
- For Organizers
  - Gender Inclusivity at Conferences and Professional Gatherings
    - Code of Conduct
    - Technical Programmes
    - Logistics
      - Restrooms
      - Registration
      - Experience Surveys
- Revisiting Gender (Gender is Constantly Changing)
- References
- Change Log

## ABOUT THIS DOCUMENT

This document has been collectively generated by members of the SIGCHI community whose research addresses gender representation in technology and the activist goal of gender equality. We outline a pragmatic approach to fostering a research community that is inclusive of people with a variety of genders. We are particularly focused on creating space in our research methods, publications, professional gatherings, and pedagogy for people who do not identify with the binary gender designations—men and women—that are pervasive in Western cultures, and for people whose genders change and/or are fluid over time. In this document, we offer guidelines for [Writers](#), for [Researchers](#), and for [Organizers](#).

We humbly recognize that gender is culturally, materially, and temporally situated, and that it is experienced differently by those with intersecting identities. Rather than a set of universal prescriptions, this document is intended to provide inroads to approaching gender in an inclusive way. This document is situated within a specific present, geographically and culturally-influenced (most of the authors work and/or live in the United States). Hence, it does not provide a set of absolute and essential rules for inclusivity, but rather offers opportunities for reflecting on gender in different contexts.

The primary purpose of this document is to **encourage people to continue doing this work** by providing helpful tools to refer back to. We acknowledge that mistakes happen (and the authors of this document also make mistakes), sentiments change, and cultural concepts and social norms evolve. We also acknowledge that the authors had differing views on certain subjects and concepts throughout the creation of this document, showcasing that gender is a difficult and highly personal subject that needs to be handled with care.

## **Context and Motivation**

Gender plays a crucial role in all societies, scripting everyday social interactions and our personal narrative identities. The concept of gender is being increasingly discussed as a complex and fluid facet of human identity in numerous fields, ranging from the social sciences—such as feminist and queer studies [7,18,29]—to the medical field [23,24,30], and in computing and HCI (Human-Computer Interaction)(e.g. [1,13,35]). Alongside increased public awareness about transgender rights movement across the globe (e.g. [3,42–44]), the academic conversation around gender increasingly involves transgender identity.

Human-computer interaction researchers have interrogated the experiences of gender in technology design and use (e.g. [39]), as well as feminist orientations towards equitable research and interaction design (e.g. [15]). As a field, through our choice of research topics (e.g. [36]) and professional activities (e.g. [SIGCHI's Internationalisation, Diversity and Inclusion events](#) [45]), we are increasingly signaling our collective value of developing more inclusive, critical, and intersectional frameworks and approaches towards gender and other identities.

Yet, this type of cultural change takes concerted leadership efforts to affect “deep” transformation. Along the way, there have been and will continue to be situations in which our community caused harm and subsequently has been called out to reflect and do better (e.g. [11,46]). This document was born of one such reflective effort: a rejected workshop proposal turned informal “[lunchshop](#)” hosted during [CSCW 2018](#) by the [authors](#) [31]. We hope this document will take a small but practical step—in the tradition of Cavendar, Trewin and Hanson’s “[Accessible Writing Guide](#)” [10]—in support of a more gender inclusive HCI, that intentionally addresses inclusion for transgender individuals.

## **Limitations**

While recent movements have led to increased formal recognition for some trans people in modern North America and Europe, more expansive views of gender are not new; there are myriad cultural contexts, both historical and current, where gender is not seen as a binary, biologically-rooted phenomenon (e.g. [40]). Racism and colonialism have often led to their suppression and the associated entrenchment of binary gender norms [26].

The authors, contributors, and editors of this document recognize that we do not mirror the diversity of people across a range of gender identities. Further, we are not the originators of critical gender discourses. Thus, we recognize that our perspectives are incomplete.

We highly encourage your feedback and recommendations for how to continuously improve this document. Please send all comments, questions, and recommendations to [genderguidelines@gmail.com](mailto:genderguidelines@gmail.com).

## **FOR WRITERS**

### **Gender Terminology and Concepts**

Language is a powerful tool—for inclusion and exclusion. The words and phrases we choose to describe certain individuals or groups can contribute to increased marginalization of already underrepresented groups. Our language choices may reflect biases and may reinforce hegemonic structures of power that are already in place. Adopting inclusive language practices when discussing identity characteristics like gender ensures equitable representation for people of all genders.

As has been noted by other scholars [2,34,50], the way that we talk and write about gender is encased in powerful mechanisms for changing perceptions, attitudes, and actions. We do not expect researchers to be able to transition to inclusive participant sampling the day after these guidelines are published. But, at a minimum, they should be able to write in a way that indicates (if, for example, they have only included people of binary genders) that they are aware of possible limitations in their sampling and/or gaps in the generalizability of their work.

The following section of this guideline document outlines some ways of respectfully talking and writing about gender, and highlights some common terms surrounding

transgender identity. We also highlight some issues about writing and discussing gender appropriately and equitably in current ACM guidelines and ways to best tackle these constraints.

## **GENERAL GUIDELINES**

When talking or writing about gender, there are many important steps one can take to make their writing more gender inclusive. Primarily, these guidelines are meant to help authors write about gender as a complex construct rather than a simple binary category, and to avoid positioning some genders as more “normal” than other genders.

The following guidelines summarize some general points we believe can be used to more accurately write about gender:

- ★ **Guideline A-1:** Always identify people in the way they self-identify (without pressuring participants to out themselves). Other guidelines delve into more complexity and nuance surrounding gender, but you can rely on this basic principle.
  
- ★ **Guideline A-2:** Use “they” as a gender neutral pronoun, rather than “he or she,” “he/she,” or “s/he” (particularly when referencing a generic person instead of a specific one.) Using explicitly gendered pronouns excludes non-binary individuals (see definition) and people who do not use solely binary “he” or “she” pronouns.
  
- ★ **Guideline A-3:** Try not refer to gender as sex-based (female/male). (See [Gender vs. Sex](#) for more detail.) Instead, try to use identity-first language. For example, instead of writing "Female participants were more likely to disagree" you could write "Women were more likely to disagree."
  
- ★ **Guideline A-4:** Use gender meaningfully in your writing. Define what you mean by gender in your writing or research question. Tell the reader why it is important or insightful to these contexts. Are you discussing gender as a concept, gendered experiences, or societal notions of gender?
  
- ★ **Guideline A-5:** Do not refer to cisgender people as “normal.” This positions transgender and/or non-binary individuals as unhealthy or abnormal. Similarly, quotes around “transgender” and “non-binary” are to be avoided, as they insinuate they are not real experiences.

✧ **Guideline A-6:** Do not position cisgender individuals as the default in comparison to trans individuals. For example, using “women and trans women” implies that cisgender women are actually women, but transgender women are not. This invalidates a transgender person’s identity. Instead, you can just refer to them as “women.” If it is necessary to distinguish between cisgender and transgender women, state “cisgender and transgender women.”

✧ **Guideline A-7:** Avoid binary language. This includes things like “both sexes” or “opposite genders.” This language implies that genders exist on an oppositional binary spectrum, although gender is much more complex.

✧ **Guideline A-8:** Do not define demographics of participants by the “outlier.” For example, only stating that “47% of our participants were women” without also defining the remaining 53%, which could be made up of men, non-binary and/or agender people, is a problematic statement. This positions men as the default within a binary understanding of gender and even then posits women as an exception. Instead, report complete gender demographics (see [Reporting Gender in Research](#) for more detail).

✧ **Guideline A-9:** Be transparent about your work’s limitations. Address gender diversity in your limitations and how it may have impacted your findings.

✧ **Guideline A-10:** When describing study participants, only use trans identity as an extra description if it is relevant to the study. For example, if a participant in your non-gender-related user study is a trans man (which he may or may not disclose to you), you can just describe him in your paper as a man, unless he requests otherwise (more on this in the [Reporting Gender in Research](#) section).

## ***DEFINING GENDER IN YOUR WRITING***

For different individuals, the following terms may overlap, be used interchangeably, or be consciously avoided or disliked. There is nuance in writing about individuals with diverse gender identities that cannot be encapsulated discretely or concretely in a “How To” guide. We outline some common terms and definitions for those terms to help writers and researchers formulate a starting point.

✧ **Guideline B-1:** When describing study participants, only use trans identity as an extra description if it is relevant to the study. For example, if a participant in

your non-gender-related user study is a trans man (which he may or may not disclose to you), you can just describe him in your paper as a man, unless he requests otherwise (more on this in the [Reporting Gender in Research](#) section).

✦ **Guideline B-2:** When discussing gender—and researching gender, as seen in the [For Researchers](#) section—do not limit your scope to binary and cisgender experiences. Remember to include transgender and non-binary into your definitions of gender.

## Transgender

Transgender (also shortened to trans) refers to an individual whose gender differs from the one which they were assigned at birth. Transgender individuals may use many terms to more granularly define their genders.

### *Transgender Women and Men*

Transgender women may refer to themselves as one or more of the following:

- AMAB (assigned male at birth)
- MTF / M2F (male to female)
- Trans female
- Trans woman
- Trans feminine (trans fem or trans femme)
- Female or woman (without any reference to their previously-assigned gender)

Transgender men may refer to themselves as one or more of the following:

- AFAB (assigned female at birth)
- FTM / F2M (female to male)
- Trans male
- Trans man
- Trans masculine (trans masc)
- Male or man (without any reference to their previously-assigned gender)

✦ **Guideline B-3:** There is no universal term that can be applied to binary trans identities. Individuals may be offended by some terms others find acceptable. Using some terms risks respectful relationships with participants. For example,



you cannot refer to all trans women as MTF; MTF is a term that may be offensive to some trans women. It is important to ensure individuals are able to define their own identities.

Furthermore, some of the above terms are not necessarily tied to binary gender; non-binary individuals may refer to themselves as trans fem, trans masc, or other traditionally “feminine” or “masculine” terms.

### ***Non-Binary***

Non-binary identities do not align with binary conceptions of male and female. Non-binary individuals also do not identify with the gender they are assigned at birth, thus are often considered to fall under the larger “trans umbrella.” However, some non-binary individuals do not identify as trans. Non-binary individuals may refer to themselves as one or more of the following:

- “Enby”
- Trans masc or trans fem
- Non-binary butch / non-binary femme
- Bigender (identifying with two genders / gender expressions)
- Androgyne
- Genderless
- Gender Neutral
- Neutrois
- Agender (not subscribing to any gender)
- Genderfluid (moving between different genders)
- Genderqueer (actively subverting a binary notion of gender)

Non-binary people might additionally or separately identify as any number of different genders.

### ***Transgender and/or Non-Binary vs. Binary and Non-Binary Trans People***

Some argue that writing “transgender and/or non-binary” positions non-binary individuals outside of the transgender community, which actively erases the identity and belonging of non-binary individuals, and suggest referring to “binary and non-binary trans people,” if the difference is relevant. Others feel that this may inaccurately place a trans identity label on some non-binary people who themselves would not claim such an identity, thus going against [Guideline A-1](#). We encourage researchers to carefully consider these distinctions and classifications in research and writing. In this piece, we

have decided to use “transgender and/or non-binary” but acknowledge there are differing opinions and experiences on this matter.

★ **Guideline B-4:** When using the term “transgender,” “trans,” and referring to the trans umbrella, be cognizant that this includes both binary and non-binary trans people. Be mindful of the different experiences and perspectives binary and non-binary trans people have. For example, [avoid generalizing binary trans perspectives to those of trans people as a whole](#) [21].

### **Cisgender**

The above genders contrast with [cisgender](#), which refers to an individual whose gender reflects the one they were assigned at birth [4].

### **Intersex**

Intersex people have genetic, chromosomal, anatomic and hormonal variations that [misalign with binary conceptions of male or female characteristics](#). Often, intersex people are subjected to genital mutilation at an early age to make them fit to a potential binary gender assignment [12].

Intersex individuals may identify as either cisgender or transgender and/or non-binary, dependent upon their alignment with the gender they were assigned through medical or social intervention, if any.

### **Gender Non-Conforming**

Gender non-conformity describes different actions, mannerisms, presentations, and/or genders that do not necessarily conform to a specific social set of rules for the binary of man or woman. Someone may describe themselves as gender non-conforming, but it is not necessarily used as an identifier. Anyone of any gender identity may be gender non-conforming. A cisgender person may identify as gender non-conforming because of their presentation, while a non-binary person may identify as gender non-conforming because their gender does not align within the binary. Gender non-conforming is a broad and fluid term that can be used by people to describe many aspects of their identity.

### ***TERMS TO AVOID***

While there are some transgender individuals who may use or identify with these terms, they are generally documented as unacceptable terms to use, or are becoming less accepted [20,47,48]. Thus, we advise avoiding using these terms unless an individual uses them to describe themselves, and if so, to explain this is the case.

## **Incorrect or Inappropriate Ways to Refer to Trans People**

There are numerous words that are viewed as inappropriate and offensive ways to refer to transgender individuals, many of which are outdated terms once utilized by medical professionals (see the section on [Medicalized and Stigmatized Terms](#) for specifically medical terms to avoid). In the following guidelines, we define some of these terms and why they should be avoided unless directly quoted from participants:

★ **Guideline C-1:** *Transgendered* is considered an incorrect and offensive way of referring to a transgender individual, due to its insinuation that being transgender is something that happens to someone. It centers an individual's gender transition (and assumes all trans individuals choose transition), rather than an individual's identity.

★ **Guideline C-2:** *Transgenderers* (or "a transgender") is similarly incorrect and offensive. Choosing to use transgender as a noun, rather than an adjective, removes "people" or "individuals," thus dehumanizing transgender people. It would be much like referring to gay or queer individuals as "the gays" or "the queers," which is now also viewed as inappropriate.

★ **Guideline C-3:** *Transsexual* is a term that was once more popularly used in psychological and medical literature to describe people who have physically transitioned. While some individuals may still identify as transsexual, it is not considered an umbrella term in the way that transgender is, and should thus be avoided to describe transgender people broadly. Many transgender individuals find this term offensive due to its centering of surgical procedures and binary gender expectations.

★ **Guideline C-4:** *Transwoman* or *transman* are also terms to broadly avoid save for instances where an individual self identifies. Transgender is viewed as an adjective to describe a person. For example, conflating trans and woman to transwoman insinuates a transgender woman is a separate and new gender. This is seen as insinuating a transgender woman is not actually a woman. Instead,

separate “trans” (the adjective) from the individual (the noun). For example: “trans woman,” “trans men,” “trans people.”

✳ **Guideline C-5:** *Transvestite* refers to a person who is not necessarily transgender, but rather a trans or cis person who “cross-dresses.” Both cross-dresser and transvestite are terms that should be used only if an individual uses them to describe themselves.

### ***Preferred Pronouns***

The term “preferred pronouns” is being phased out of trans terminology due to the inference that using a person’s correct pronouns is a “preference,” rather than a matter of respect.

✳ **Guideline C-6:** It is best to ask, “What pronouns do you use?” or “What are your pronouns?” instead of “What are your preferred pronouns?”

### ***Medicalized and Stigmatized Terms***

Some terms are considered to be heavily stigmatizing to transgender individuals, particularly terms that have ties to historical medicalization and dehumanization of transgender individuals [28]. It is best to avoid using these terms unless quoted directly from participants. We provide two examples of medicalized and stigmatized terms in the following guidelines:

✳ **Guideline C-7:** Do not refer to the state of being trans as *transgenderism*. The ism postfix carries connotations that being transgender is a choice and that trans people can simply avoid being trans. It can also be read as a medicalized or prescriptive term for being trans.

✳ **Guideline C-8:** *Gender Identity Disorder* is a now-defunct term for *gender dysphoria*, the psychological term for the experience of gendered dissonance between one’s physical form and how one expects it to be. In the event that you are referring specifically to dysphoria, “gender dysphoria” alone is an acceptable term, but note that being dysphoric is not the same as being trans, and avoid equating the two. Regardless, one should avoid “Gender Identity Disorder,” since the term “disorder” carries substantial stigma.

## ***The Dynamics of Gendered Language***

### **Masculine Vs. Male / Feminine Vs. Female**

Although many people who identify with the term “masculine” may also identify as men, not all people who are masculine are necessarily male. Masculine people may be non-binary or women as well. Similarly, not everyone who identifies with the term “feminine” may be a woman. Feminine people may be non-binary or men.

★ **Guideline D-1:** We advise avoiding conflating masculinity with men and femininity with women. While discussing masculinity and femininity and its societal relationships with certain genders may be necessary, one cannot assume that a woman is feminine, or is not masculine, and so forth.

### **Pronouns and Gender**

Like masculine and feminine, pronouns may not always align with gender in societally expected ways. For example, a trans woman might use they/them, rather than she/her.

There are many different pronouns, including neopronouns. [Neopronouns are non-binary pronouns that replace the use of the singular “they,” such as ey/em or xe/xir](#) [49]. The non-binary alternative to the gendered honorifics (Mr., Ms., Mrs.,) is Mx.

★ **Guideline D-2:** It is best to clarify with individuals what their pronouns are, rather than assuming they indicate their identity. We discuss ways to do this with participants in the section on [Gender Inclusive Research Methods](#).

### **“Identify As” vs. Identity**

Discussing the ways people identify can be tricky. While it is appropriate to ask for a participants’ gender, we recommend avoiding statements that may position a trans person’s gender as inauthentic. For example, “Celine (a trans woman) identifies as a woman” or “Celine is female-identified” may insinuate that Celine is not actually a woman, but simply identifies as one.

★ **Guideline D-3:** Whether to use the phrase “identifies as” can be highly contextual; we encourage authors to think critically about these statements before using them. Because “identify as” usually connotes that trans people’s genders are not to be taken as seriously as cis people’s genders, this term should

generally be avoided unless participants use it themselves (e.g., “I identify as trans.”)

### **“Gender Identity”**

People are a certain gender, which is part of their identity. Sometimes, using a term like “gender identity” implies that trans people’s genders are less real than cisgender people’s genders.

★ **Guideline D-4:** Refrain from using “gender identity” to refer to trans people if you would not use it for cis people (unless participants specifically use that language themselves). The word “gender” will usually serve the same purpose.

### **Gender vs. Sex**

The language surrounding gender and sex is extremely complex, nuanced, and often political. While some view gender and sex as separate ideas (in which gender is internal and sex is biological), many trans people believe that differentiating between the two can be seen as transphobic and genital essentialist. Many trans people do not view their biological sex as separate from their gender identity, regardless of first and secondary sex characteristics. This can also be regarded as a form of intersex erasure.

★ **Guideline D-5:** We suggest only referring to sex when the context is relevant, and to define its relevance to the study (for example, in [medical studies](#)). When referring to sex, use the term “sex assigned at birth” when referring to transgender individuals. Do not use terms such as “born a man.”

### ***Racial, Ethnic, and Cultural Intersections with Gender***

Another crucial aspect of discussing and writing about gender is the way that gender intersects with other social identities. Racial, ethnic, and cultural identity is often intricately intertwined with gender and the way gender is experienced and discussed. Thus, it is key to address concepts of gender from an intersectional lens to acknowledge the overlapping ways that gender, race, skin color, ethnicity, ability, class, and other marginalizations impact one another [8].

It is also important to consider the ways that gendered terms and concepts may vary by race, skin color, ethnicity, and culture. For example, some non-binary trans people prefer to use terms such as Latine or Latinx, over gendered terms like Latina or Latino.

Other cultures also do not necessarily share the same binary views on gender as the dominant Western culture featured in much HCI research [51]. It is always best to familiarize oneself with the gendered culture of a study site to best understand these differences.

★ **Guideline E-1:** To respect the racial, ethnic, and cultural differences in how gender is conceptualized, experienced, and discussed, refer to participants' descriptions of their own identities and define these terms when necessary.

## ***A Glossary of Useful Terms***

### **Misgendering**

Misgendering refers to the (intentional or unintentional) misidentification of a person's gender. A person may misgender a trans person by using the wrong pronouns or the wrong gender for them. For example, a trans masculine person may use he/him but be called she/her. Or a non-binary person may be referred to as a woman.

Although this may seem like a small issue, it is not; because of the ubiquity of the experience, and the way that misgendering invalidates and delegitimizes trans peoples' existences, it can have substantial effects. Research has shown that misgendering decreases self-worth, increases felt stigma and reduces overall wellbeing [25,33].

### **Passing**

Some transgender individuals may refer to the concept of "passing": being read as a specific gender by other people (this concept stems from histories of "racial passing" [16]). Some individuals may discuss passing as their correct gender. For example, a transgender woman may discuss passing as a cisgender woman in the eyes of others. Others may talk about passing as the incorrect gender, often to discuss the experiences they have being perceived as that gender. For example, a transgender woman may discuss passing as a cisgender man in her everyday life, and her thoughts and feelings about that experience. This highlights the difference between gender (one's actual gender identity) and being gendered (the way one's gender is perceived).

### **Passing Privilege**

"Passing Privilege" is a term used to describe the privilege and safety binary trans individuals are awarded when they pass as cisgender (and their actual gender, as in,

they are not misgendered). Passing is a disputed concept within trans circles due to the pressure and expectation for trans individuals to fit into binary gender roles [38]. While coveted by some binary trans individuals, passing is often inaccessible to many trans people, particularly non-binary individuals living within binary societies. Meaning, non-binary trans people often cannot “pass” as their true non-binary gender.

### **Hormone Replacement Therapy (HRT)**

Hormone Replacement Therapy is a medical process which some, but not all, transgender and/or non-binary individuals choose to undergo. This process involves the administration of hormonal medications to induce specific secondary sexual characteristics. It is often shortened to HRT.

### **Gender Affirmation Surgery**

Some binary and non-binary transgender individuals may choose to undergo gender affirmation surgery, a medical process in which an individual undergoes surgery to align their body more with their gender identity. Some individuals may still use the older term “sex reassignment surgery,” but it is less accepted among the spectrum of trans individuals.

### **Gender Transition**

The concept of transition or gender transition may be discussed in various ways. Some binary and non-binary trans individuals may choose to undergo medical transition, which may involve HRT and/or gender affirmation surgery. This may go hand-in-hand with social transition, transitioning gender in one’s social life by adopting different pronouns and/or a different name, and so on. Furthermore, some individuals may have access to legal transition, the process of changing one’s gender on legal documentation, such as IDs and birth certificates (this process is often inaccessible to many due to financial and lawful constraints).

Social transition does not necessarily require medical transition. Some binary and non-binary trans individuals choose to never undergo medical transitional procedures, or may opt for only one or a few options.

✦ **Guideline F-1:** Do not discuss transition as either an end goal of all trans people or a linear, fixed experience.



## **Gender Euphoria**

In contrast to Gender Dysphoria, *Gender Euphoria* describes the affirmative and often euphoric emotions trans and/or non-binary people experience when adopting markers of their gender. For example, the affirmative feeling when a trans masc person might feel when getting their haircut. The feeling can also occur when others recognize a person's correct gender or use the correct pronouns unprompted.

## **Trans Feminine**

Some people adopt the term trans feminine if they identify with femininity. However, a trans feminine person may not identify with the label “woman.”

## **Trans Masculine**

Some people adopt the term trans masculine if they identify with masculinity. However, a trans masculine person may not identify with the label “man.”

## **Transphobia, Transmisogyny, and Transmisogynoir**

Transphobia describes discrimination and prejudice against transgender people, and may include negative feelings such as dislike, discomfort, disgust, and anger.

Transphobia may be internalized by transgender people, leading to expectations of transnormativity—specific, acceptable, and normalized behaviors on the part of trans people. Transphobia may be targeted specifically at certain groups, including specific discrimination against non-binary trans individuals. Transmisogyny describes the specific discrimination and prejudice experienced by transgender women and trans feminine individuals [37]. Transmisogynoir, (built off Dr. Moya Bailey's concept of misogynoir [5]) describes the intersecting discrimination and prejudice experienced by transgender women of color [41].

## ***Continued Reading Inclusive Gender Terms***

For a [helpful glossary of LGBTQIA\\* terms](#), see [27].

## **FOR RESEARCHERS**

### **Gender Inclusive Research Methods**

Different types of study contexts require asking about and reporting participants' genders in different ways. Several of the factors that influence how to request and report gender in HCI research are research methods, research setting, and research focus.

### ***Research Methods***

HCI researchers use many different types of methods, and each of them require different techniques for respectfully asking participants about gender and then reporting gender in the research write-up. In the following sections, we provide guidelines for requesting gender from participants based on different research methods.

### **Interviews and Ethnographic Studies**

In interviews and ethnographic studies, while researchers have close contact with participants and it may seem simple to ask about gender, asking about demographics (including gender) may feel invasive and may break the rapport that the interviewer or ethnographer has built up with participants. If that is the case, consider this guideline.

★ **Guideline G-1:** Ask interviewees or participants from an ethnography or design study to fill out a short demographic survey (via email or other means) at some later point after interacting with them, which provides a less obtrusive way of asking about gender. Provide an open-ended text box for gender.

### **Social Media Data Analysis**

In social media data analysis, researchers may have no contact with research participants at all, and may instead rely on inferring gender by making assumptions based on people's names or pictures, or even algorithmically. Research has shown that these practices can be particularly harmful for trans and/or non-binary people [14,22]

★ **Guideline G-2:** In social media data analysis, always use user-generated gender descriptions if available. If user-generated genders are not available, don't assume users' genders based on name, username, or appearance. Do not assume gender based on pronouns, or pronouns based on gender. If gender and pronouns are unknown, assign a gender-neutral identifier (e.g., "P2") and use gender-neutral pronouns like they/them.

## Surveys

How to respectfully report gender on surveys has been a tricky question for many HCI researchers [17]. While the specifics of how exactly to do this for every case is beyond the scope of these guidelines, we direct readers to Spiel et al.'s forthcoming Interactions article which will detail best practices in gender inclusive survey design and [Stevens' Open Demographics resource](#). In brief, here are a few guidelines:

- ★ **Guideline G-3:** For surveys with a small sample size (i.e., reasonable to manually code), provide an open-ended text box.
  
- ★ **Guideline G-4:** For surveys with a large sample size (i.e., not reasonable to manually code), a good survey instrument (suitable for most Western contexts) includes the following gender options: woman, man, non-binary, prefer not to disclose, prefer to self-describe: \_\_\_\_\_. Surveys should allow participants to choose multiple options (e.g., some people are both woman and non-binary).
  
- ★ **Guideline G-5:** Avoid using the term “Other” on surveys, as it implies gender norms that are othering to non-binary participants.
  
- ★ **Guideline G-6:** Make it optional for participants to report their gender on surveys.

## Research Settings

This section provides guidance on how to respectfully request gender from research participants also varies depending on the research setting.

### Private Research Settings

In 1:1 settings with researchers and participants (e.g., interviews), it is possible to respectfully ask the participant their gender and what pronouns they use (see [Research Methods](#) above for strategies). It can be helpful to build rapport with participants before asking for this information.

### Group Settings

In group settings, such as participatory design sessions and focus groups, give people the opportunity to share this information at the beginning of the session and make sure to use and respect people's names and pronouns. At the same time, allow people the

option of sharing gender information privately with the researchers rather than publicly with the group. Gender is usually not considered sensitive information, but it may be for those who are in transition.

✦ **Guideline G-7:** Facilitate name and pronoun go-rounds at the beginning of group research activities, but do not make pronoun sharing mandatory. Use and respect participants' names and pronouns and correct other participants if they refer to people incorrectly.

### **Research Focus**

How to request gender information and report about gender does vary some based on the research project's focus. We place these into four main categories: 1) research projects about gender broadly (e.g., "differences in user behaviors between genders"); 2) Research projects about trans and/or non-binary populations (e.g., "binary and non-binary trans experiences using a system"); 3) Research that requires specific personal health data dependent on "biological" sex characteristics; and 4) Research not focused on gender.

### **Research Projects about Gender, Broadly**

For research projects looking at gender differences, it is imperative to ask participants about gender, using the following guidelines:

✦ **Guideline G-8:** In research projects about gender, include non-binary genders (e.g., do not simply report "differences in how men and women use a system").

✦ **Guideline G-9:** Do not assume a participant is trans unless they disclose this to you. If a participant asks you to not disclose their trans identity, do not disclose it.

✦ **Guideline G-10:** When reporting participant gender, only report as trans those who openly identified as trans, which will essentially be a lower bound of actual trans participants in your study. For example: "3% of participants openly identified as trans; we did not know whether other participants were trans or cisgender."

### **Research Projects about Transgender and/or Non-Binary People**

For research projects about transgender and/or non-binary populations, it makes sense to ask and report about gender in much more complex ways than for other studies. For

studies with a small sample size, allow people to self-identify however they choose, and report genders this way (just as you would for any other study). We recommend using a two-step or multidimensional gender question for trans-focused studies with large sample sizes. A two-step or multidimensional procedure asks the participant their assigned sex at birth, followed by their current gender and/or lived gender. For the latter, use Guideline G-11:

★ **Guideline G-11:** For studies with a large sample size that are specifically focused on binary and non-binary trans populations, use a two-step or multidimensional method to identify different types of trans participants.

### **Research Projects about Health and/or Medicine**

In studies that require specific personal health data dependent on “biological” sex characteristics (prominent in health and medicine fields but relatively rare in HCI studies), it may be necessary to distinguish between cisgender and transgender participants. In these cases, a well-designed two-step survey procedure can enable researchers to identify between cisgender, binary trans, and non-binary trans participants. However, it is important to note that many trans bodies change over time, and a gender question on a survey will not tell you which body parts and hormone levels each person has. If you need that data, it is best to ask those questions directly.

★ **Guideline G-12:** For health or medical-related HCI studies that require personal health data dependent on “biological” characteristics, you may consider using a two-step or multidimensional survey question method to distinguish between cisgender and trans participants. Understand that this question will not give you accurate data about hormone levels or body parts. If these are relevant, you should inquire into these explicitly.

### **Research Projects Not Focused on Gender**

For research not focused on gender, researchers should still carefully evaluate whether and how they should ask participants about gender. We recommend still requesting and reporting participants’ genders even if a study is not specifically focused on gender. This allows gender diversity to remain visible and enables readers to evaluate the gender diversity of the study sample. For instance, a study’s participants may be 80% men, which should be reported, so that readers and reviewers can assess the limitations of a given study appropriately and note the lack of gender diversity represented.

✧ **Guideline G-12:** Even for research not focused on gender, we recommend still requesting and reporting participants' genders. Include non-binary genders, and also follow [Guideline A-1](#).

## ***Reporting Gender in Research***

### **Participant Gender May Change During Research Study**

Gender is complex, personal, and changing. Just because a participant in your study is a certain gender now, does not mean that they will still be that gender during the next phase of your study, or when your paper is published. Thus, consider the following guideline when writing your results:

✧ **Guideline G-14:** Consider that research participants' genders may be fluid and impermanent. Acknowledge this explicitly when reporting on their gender.

### **Disclosure of Participant Gender**

Disclosure is another important matter when considering how to report trans and non-binary participants' genders. Because you may have relatively few trans participants in your study, even if you give these participants pseudonyms, you risk "outing" participants by reporting their gender along with other characteristics. For example, let's say that in a qualitative study you report that one of your participants is "Sid (pseudonym), a non-binary 27 year old baker from Columbia, Missouri." There may only be one 27 year old non-binary baker in Columbia, so it becomes clear to some readers who your participant is, which compromises their confidentiality as a research participant. Additionally, if Sid has not disclosed their non-binary identity to certain people who end up reading your research paper, this puts them in a precarious and possibly dangerous position.

✧ **Guideline G-15:** When reporting participant characteristics and demographics, take extra care to anonymize and pseudonymize trans participants' identities. When in doubt, ask participants how they would like their identity and demographics reported in the paper.

### **Reporting Gender Multiplicity**

Another part of gender's complexity is its multiplicity. Some people identify as multiple gender categories (e.g., a non-binary trans woman), or people's identity and gender

presentation may differ in different settings. Attempting to contain each person into only one category reduces people's complex experiences, which does not benefit research. The following two guidelines address this:

★ **Guideline G-16:** When reporting research participants' genders in aggregate, allow gender categories to add up to greater than 100%.

★ **Guideline G-17:** When including gender as a variable in statistical models, allow people to be part of multiple categories if this best describes their identity as they have reported it to you. If this is not possible for statistical or mathematical reasons, describe it as a limitation.

### **Gender Visualization**

Finally, gender's complexity beyond the binary is important to consider when visualizing research results:

★ **Guideline G-18:** When visualizing data, including using visual mechanisms to represent research findings or participant demographics, [avoid using stereotypically coded male/female symbols](#), including icons, colors (e.g., pink/blue), and patterns that have historically been used to reinforce a binary and/or fixed view on gender [19].

Note: Many of these guidelines have similarities with other demographic categories, such as race/ethnicity [32].

### **Gender Inclusivity Throughout the Research Process**

It is important to consider gender inclusivity at each step of the research process. In this section, we offer guidelines on gender-inclusive practices when initiating HCI research projects and considering gender's role in a project's theoretical underpinnings.

While these guidelines are most relevant to the first two categories of research projects described in the [Research Focus](#) section (i.e., research projects about gender broadly and research projects about binary and/or non-binary trans populations), they can also inform interdisciplinary research that is not specifically focused on gender but considers human experiences more broadly in relation to technology.

### ***Initiating Research Projects***

Thinking about gender equity should begin early on in the research process when research questions are formed, rather than as afterthoughts. It is important for researchers to be aware of the large and dynamic body of research on gender and its different aspects and to ensure that their research both draws on current and relevant understandings and also contributes to this larger discourse by addressing meaningful and relevant questions. One approach is to consult with other researchers and practitioners who work in relevant areas. Additionally, discussing research questions with representative members of a participant community can provide insights into what elements are relevant from their perspectives. An important consideration when consulting others about research questions is to strive to get feedback from people with perspectives other than one's own.

✦ **Guideline H-1:** If you are a non-trans person considering how to do research involving binary and/or non-binary trans populations, it makes sense to critically reflect on: 1) how and why you want to approach this research topic; 2) how to meaningfully include trans people as part of your research team; and 3) how you can lead a project respectfully while acknowledging your privilege.

✦ **Guideline H-2:** Get early feedback on your Research Questions from trans researchers and practitioners. However, it is important to (formally) recognize the labor trans individuals may have to put into providing this feedback [6]. Furthermore, many trans researchers may not be formally out in different research or workplace settings. If a trans individual is unable or unwilling to give you feedback or guidance on your work, it may be appropriate to: (1) ask them to recommend other trans researchers to reach out to or (2) reach out to other researchers who do work with transgender individuals.

✦ **Guideline H-3:** When working as part of a research team, it is important that everyone respects one another's choices about whether or not to disclose their gender. In other words, there should not be pressure or expectation that researchers or practitioners self-disclose, even if this is relevant to the research project. Never assume a status of disclosure when writing about trans people, even if you know them well.

### ***Theoretical Underpinnings***

As described in the For Writers and Researchers chapter of this document, gender is multifaceted and dynamic and researchers should not assume a common, simplified understanding when discussing it. Current ways of thinking about gender are the result



of many years of gender research and theory across different disciplines. Researchers should be transparent about the theoretical underpinnings of key concepts in relation to gender that they draw on in their research.

Research has shown that many engineering and design projects have historically ignored nuanced theories of gender, leading to harmful outcomes [14,22]. Thus, it is important for HCI researchers whose topic focuses on gender to situate their work in the wider ongoing research discourse beyond technical fields, including fields like Gender Studies, Communication, Design, Media Studies, Psychology, Sociology, Health, Medicine, Education, etc. Currently, efforts are underway to develop resources, such as the [Digital Trans Reading List](#) and the [Bibliography of Transgender Media Studies](#).

✦ **Guideline H-4:** When conducting research that involves gender, present clear definitions, explain the aspects of gender you are researching, and, if necessary, justify the language you are using (see [Gender Terminology and Concepts](#)).

When consulting previous literature, researchers should be aware that many studies have historically relied on erroneous, outdated or problematic theoretical underpinnings with respect to gender. Relying on these previous work can impair current projects and introduce bias. Given this possibility, researchers should investigate the sometimes implicit, definitions and conceptualizations of gender present in previous work. They should question why these conceptualizations are used, why they are problematic, and how can they be addressed in their own research.

## For Organizers

The following chapter addresses how to approach gender inclusively when organizing professional and academic events, gatherings, and conferences.

## Gender Inclusivity at Conferences and Professional Gatherings

### *Codes of Conduct*

Codes of conduct are meant to create safer spaces, particularly for marginalized populations attending a conference or professional event. The [ACM Policy Against Harassment at ACM Activities](#) as well as the guideline regarding [Reporting Unacceptable Behavior at ACM Activities](#) provide basic guidance, but are often not directly referenced on event pages or buried in other documents. Hence, awareness of

how to appropriately report harassment tends to be nonexistent. As harassment is mostly targeted at marginalized members of our community, they additionally might fear retribution and, if new to an event, might also have difficulty trusting in organizers that appropriate action will be taken.

★ **Guideline I-1:** The current default of addressing “event organizers (e.g., event chair, a SIG leader, or an onsite ACM staff member)” is inappropriate considering hierarchical and access barriers to these groups at certain levels. We suggest that event organizers provide an easily accessible code of conduct including expected behaviour, a standard harassment reporting and handling policy as well as a range of different individuals and groups that can escalate in case this code of conduct has been violated.

★ **Guideline I-2:** Anonymous modes of reporting harassment should be available, for example, an online form that is closely monitored by dedicated volunteer or professional staff.

★ **Guideline I-3:** It is essential to be transparent about the actions taken (or not taken) and to follow-up with the person reporting an incident.

### ***Technical Programmes***

Not all authors and volunteers at conferences and other events who create the technical programme share the same understanding of gender, sex, disability, race and further identity structures. For example, technology regarding menstruation is relevant not only to cis women, but also to trans and/or non-binary trans people.

★ **Guideline I-4:** We suggest including a potential Equity Chair in the creation of sessions and session titles, or hiring paid professionals for a sensitivity check.

★ **Guideline I-5:** **Session chairs** should ask about the pronunciation of names and authors’ pronouns.

★ **Guideline I-6:** For Keynotes and Panels, we suggest organizers pay close attention to representation and vet the viewpoints of speakers. Speakers with negative or problematic views on transgender and/or non-binary individuals should not be invited. While we talk particularly about gender inclusivity in these guidelines, we also deem it crucial to ensure that people of color are represented in the selection of and as keynotes and panel speakers. Speakers should be

sensitized towards the values of our community. During the keynote, the audience should ideally also have more than one opportunity to engage in the conversation with the speaker, i.e., through different technologies, portable microphones etc.

✦ **Guideline I-7:** When assigning rooms to sessions, technical programme chairs should consider the message it sends when putting identity-related topics in remote areas (basements, rooms far away from the center) and ensure that this is not systematically the case (even if it happens accidentally).

## ***Logistics***

### ***Restrooms***

SIGCHI already provides several guidelines for making an event venue gender inclusive. One effort is to provide [an all-gender restroom](#). Below are some guidelines for doing so inclusively.

✦ **Guideline I-8:** The inclusion of an all-gender restroom should be included in all venue contracts.

✦ **Guideline I-9:** At least one all-gender restroom must be accessible ([ADA compliant](#)) to ensure all individuals may access it. All-gender restroom signage should be accessible.

✦ **Guideline I-10:** Especially in larger events such as conferences, an all-gender bathroom should be available at every floor.

✦ **Guideline I-11:** Bathroom signage should refrain from using gendered symbols. One suggestion is to simply use a [toilet](#), potentially accompanied with written text (such as: “All-Gender Restroom” or “Gender Neutral Restroom”).

✦ **Guideline I-12:** Smaller conferences might consider booking an additional private hotel room that can be used as a private restroom. This room would be available after disclosure to a specified individual (preferably a trans individual). Similar privacy should be afforded to a lactation room.

## ***Registration***

✧ **Guideline I-13:** During registration, participants should have the option to choose a different name to be printed on the badge than the one they register with. This is already practice for many SIGCHI conferences.

✧ **Guideline I-14:** When asking for gender, people should be able to self-describe or opt-out.

✧ **Guideline I-15:** We highly recommend that pronouns are displayed on badges. If organizers choose to do so, the pronouns should be readable and further distinguished by either color or optional stickers in bright colors (which should avoid pink/blue and have enough contrast for colorblind people to discern).

✧ **Guideline I-16:** People should also be able to opt-out having their pronouns displayed or choose a neopronoun for themselves. These choices should be honored, which includes [ensuring that "other" is not printed by the system](#) [11].

### ***Experience Surveys***

Once the event ends, if there is a survey for attendees, it should allow for detailed feedback on their accessibility for different marginalized groups.

✧ **Guideline I-17:** This survey should ask specific questions about initiatives to make the conference or event more inclusive. Ask specific questions pertaining to experiences. Have a section asking for feedback about gender inclusion.

✧ **Guideline I-18:** It might also be helpful to let attendees rate how essential certain initiatives were for their participation and well-being. However, in interpreting the data, numbers might be less meaningful than qualitative responses. For example, even if there is only one participant who found a specific initiative necessary for their attendance, event organizers should still consider institutionalizing this effort.

### **Revisiting Gender (Gender is Constantly Changing)**

These guidelines will need to be updated frequently as definitions, theories, identities, and language related to gender change over time. We make the commitment to update these guidelines, or to delegate the updating task to qualified SIGCHI gender researchers, every several years for the foreseeable future.

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## CHANGE LOG

1. May 22, 2019 - removed reference to D'ignazio after its problematic history was pointed out.
2. May 24, 2019 - changed the description of "intersex people" to "Intersex people have genetic, chromosomal, anatomic and hormonal variations that misalign with binary conceptions of male or female characteristics."
3. July 28, 2019 - replaced term "gender identity" with "gender" throughout document and added section "Gender Identity"