

PERSONNEL AND
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Department of Defense
OFFICE OF PREPUBLICATION AND SECURITY REVIEW

MEMORANDUM FOR DIRECTOR OF THE OFFICE OF MANAGEMENT AND BUDGET

SUBJECT: Sexual Orientation and Gender Identity Data Action Plan for the Department of
Defense

This memorandum transmits the attached Sexual Orientation and Gender Identity (SOGI) Data Action Plan for the Department of Defense (DoD) required by section 11(c) of Executive Order 14075, "Advancing Equality for Lesbian, Gay, Bisexual, Transgender, Queer, and Intersex Individuals (LGBTQI+)," June 15, 2022.

The SOGI Data Action plan outlines the Department's learning questions that will improve DoD's ability to make evidence-based decisions related to programs, policies, operations, and/or regulations for the LGBTQI+ individuals. In this plan, the Department identifies evidence-building activities, infrastructure (e.g., policies, processes, and staff to execute the activities), and activities to ensure measurable progress. In addition, this plan emphasizes the Department-wide focus to cultivate a workplace culture steadfast on ensuring every member feels valued and respected.

The Department will continue to keep your office apprised of our efforts in this area. The Department's point of contact for this matter is (b)(6) Director, Studies, Analysis, and Decision Support; Office of the Executive Director, Office of the Under Secretary of Defense for Personnel and Readiness; at (b)(6)

A handwritten signature in black ink, appearing to read "Gilbert R. Cisneros, Jr.", written in a cursive style.

Gilbert R. Cisneros, Jr.

Attachment:
As stated

Sexual Orientation and Gender Identity (SOGI) Data Action Plan for the Department of Defense (DoD)

The Department of Defense's (DoD) mission includes programs, policies, and regulations related to the Economic Security topic identified in the Federal Evidence Agenda on Lesbian, Gay, Bisexual, Transgender, Questioning, and Intersex (LGBTQI+) Equity. Answers to the following Learning Questions would improve DoD's ability to make evidence-based decisions related to programs, policies, operations, and/or regulations:

1. Do Department-wide surveys collect data on Sexual and Gender Minority (SGM) populations that can be leveraged for identifying disparities and evaluating effectiveness of DoD policies to promote LGBTQI+ equity?
2. Are researchers across DoD equipped to collect, review, and approve sexual orientation and gender identity (SOGI) data collection as well as leverage existing data to inform equity efforts?
3. Do military and civilian members of the DoD workforce who identify as SGM face barriers to equal participation at any level of the workplace?

Evidence-Building Activities

In order to **build** evidence related to Learning Question 1 listed above, DoD will engage in the following activities over the next 6 to 18 months:

- In the next six months, the Office for the Undersecretary of Defense for Personnel and Readiness (OUSD(P&R)) will submit a data call to owners of all DoD-wide surveys currently conducted on its behalf for statutory requirements and/or for decision-making in order to identify which surveys currently collect SOGI data and which would be good candidates for collecting SOGI data to answer research questions in the Federal Evidence Agenda in the future.
- In the next six months, OUSD(P&R) will identify all policies requiring revisions to facilitate SOGI data collection for the purposes of analysis.
- In the next eight months, OUSD(P&R) will work with the DoD Office of People Analytics (OPA) to provide standardized questions for the collection of SOGI data to be used on DoD-wide surveys as part of the question bank being created by the Office of Force Resiliency (OFR) to meet requirements specified in DoDI 6400.11, "DoD Integrated Primary Prevention Policy for Prevention Workforce and Leaders."
- In the next nine months, OUSD(P&R) will require all DoD-wide surveys identified to start/continue to collect and report out data on sexual orientation and gender identity using the standardized question bank to inform decision-making.

- In the next 18 months, any new DoD-wide surveys identified that need to start SOGI data collection will submit their individual surveys for approval to the Office of Management and Budget (OMB) approval.

In order to **build** evidence related to Learning Question 2 listed above, DoD will engage in the following activities over the next 12 to 18 months

- In the next 12 months, the Office for Diversity, Equity, and Inclusion (ODEI) will leverage a newly formed Community of Interest (COI)¹ on LGBTQI+ research as well as the DoD Inter-Service Survey Coordination Committee (ISSCC) to educate, track, monitor, facilitate, and employ SOGI research across the force in alignment with the recommendations in the Federal Evidence Agenda.
- In the next 12 to 18 months, OUSD(P&R) will release guidance on how to collect, review, and approve SOGI data with the appropriate tools at various levels for the health and well-being of the force.

In order to **build** evidence related to Learning Question 3 listed above, DoD will engage in the following activities over the next 6 to 18 months:

- In the next six months, ODEI will examine available evidence from existing Department-wide data collections to identify unique barriers or risks faced by SGM populations that can be used to inform future research priorities.
- In the next six months, OUSD(P&R) will identify Department-wide data collection efforts that include SGMs as well as data collection efforts that could be expanded to collect SOGI data.
- In the next 12 to 18 months, DoD offices under OUSD(P&R) will conduct secondary analyses of available Federal Employee Viewpoint Survey (FEVS) and the Department of Defense Civilian Employee Workplace and Gender Relations Survey (WGRC) data to identify barriers faced by the civilian workforce to inform actions that can mitigate harmful or discriminatory experiences faced by LGBTQI+ DoD civilian employees.
- The Department will also conduct SOGI analyses from other available military datasets, such as the Workplace and Gender Relations of Active Duty Members (WGRA), the Workplace and Gender Relations or Reserve Component Members (WGRR), and Workplace and Equal Opportunity Survey (WEO), in accordance with the Independent Review Commission on Sexual Assault (IRC) recommendations, to identify harmful experiences experienced by LGBTQI+ military members.

Evidence-Building Infrastructure

Evidence-building activities often require infrastructure – policies, processes, staff, etc. – to successfully execute them. In order to support the evidence-building activities described above, the DoD will engage in the following activities over the next 12 to 24 months:

¹ The COI includes researchers, policy officials, and affinity group members from across the DoD.

- Current DoD policies limit the collection of SOGI data for military populations in the absence of an official and legitimate military purpose in order to protect and respect to privacy of SGM Service members. We will review these existing policies and recommend which OUSD(P&R) policies should be rescinded, revised, and/or expanded to facilitate the collection of SOGI data in accordance with the same protections for the collection and use of other demographic data across the Department to inform decision-making aligned with the recommendations in the Federal Evidence Agenda as well as DoDI 6400.11.
- Current research staffing at OUSD(P&R) should be sufficient to support the inclusion of SOGI data elements in the data collection instruments, researcher education, and additional analyses.

Evidence Use Activities

To ensure that evidence related to the Learning Questions listed above is used in decision-making, DoD will engage in the following activities over the next 12 to 24 months:

- In the next 12 to 24 months after the issuance of this Action Plan, OUSD(P&R) will:
 - Release a memo identifying which DoD-wide survey data collections should assess and report SOGI data and provide instructions for additional researchers seeking to collect SOGI data in alignment with DoDI 6400.09, DoDI 6400.11, DoDI 8910.01, and the Federal Evidence Agenda.
 - Analyze datasets that already include SOGI items to identify barriers faced by the total force. Examples of such datasets may include:
 - The Federal Employee Viewpoint Survey (FEVS)
 - Workplace and Gender Relations Surveys (WGR)
 - Workplace and Equal Opportunity Survey (WEO)
 - The Status of Forces (SOFs)
 - Health Related Behaviors Survey (HRBS)

Monitoring Progress

Milestones or metrics: DoD will use the following milestones or metrics to ensure progress is made in implementing the activities laid out in this SOGI Data Action Plan.

Inputs

- Number of surveys conducted Department-wide that include SOGI items
- Number of administrative datasets Department-wide that include SOGI items
- Number of surveys considered for the addition of SOGI items
- Number of administrative datasets considered for the addition of SOGI items
- Number of policies that may prohibit or increase burden of SOGI data collection

Outputs

- Number of additional surveys Department-wide that should add SOGI items
- Number of additional administrative datasets Department-wide that should add SOGI items
- Number of analyses conducted that include disaggregated SOGI data
- Number of barriers identified for action by the Department to improve LGBTQI+ equity through the evaluation of existing research, policies, and statutes
- Number of positive support structures identified for action by the Department to improve LGBTQI+ equity through the evaluation of existing research, policies, and statutes.

Milestones

- Every six months following the issuance of this Action Plan, OUSD(P&R) will assess whether we are on track to meet our goal of analyzing outcomes from SOGI data collection initiatives
 - Expected milestones within 12 to 18 months after issuing this action plan:
 - Identify measures of protective factors and risks associated with inclusion and equity of the SGM population, leveraging Department-wide datasets
 - Expected milestones within 24 months after the issuance of this action plan:
 - OUSD(P&R) will release guidance on how to collect, review, and approve SOGI data collection with the appropriate questions and protections
 - OUSD(P&R) will release findings from its Department-wide data analysis to identify pathways for advancement and any barriers faced by SGMs related to hiring, promotion, retention, and other areas of interest as specified in the Federal Evidence Agenda
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