

Recommendations on
DIVERSITY DATA
— in the —
SOCIAL SECTOR

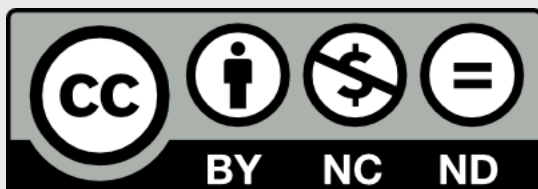


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INTRODUCTION

Administrative records, surveys, and censuses are all important resources for understanding the extent and nature of existing inequities and biases. When individuals, households, and peoples (*pueblos*) are properly identified based on their ethnicity, race, disability status, sexual orientation, migration status, gender identity, or other characteristics, gaps in socio-economic indicators across these groups can be quantified. This enables policymakers to focus efforts and resources towards the most disadvantaged and promote equity.

The lack of disaggregated data representative of diverse groups limits our understanding of their living conditions and economic opportunities. It also poses a significant challenge to institutions such as the Inter-American Development Bank (IDB) that work to improve the quality of life and ensure the development of countries in Latin America and the Caribbean. Globally, this lack of data hampers the achievement of the 2030 agenda of the Sustainable Development Goals. In particular, it risks the ability of states to reach the commitment to leave no one behind in their efforts to eliminate poverty and inequality, regardless of age, sex, disability, race, ethnicity, origin, religion, immigration status, or economic status.

Although there have been advances in the statistical visibility of individuals according to their ethnic origin, race, disability status, sexual orientation, or gender identity in recent years, these have not been consistently applied or understood throughout the region. A systematic effort to generate disaggregated data on diverse populations is more important than ever for the region— particularly if we are to understand the differentiated impacts of the COVID-19 pandemic across diverse populations. Quality data is essential to highlight inequalities, better understand their implications, and to define interventions that can reduce the structural inequalities that characterize the region.

Additionally, there is a need in the region to generate data that can be compared between countries and sources to better understand development gaps, improve the quality of policy monitoring, and bolster the policy relevance of data. Comparable data requires consistent use of terminology and adherence to general principles that enable a higher-level aggregation or generalization. The comparability of diversity data and unique national contexts may appear at first to be objectives that are mutually exclusive. However, based on the IDB's experience with harmonizing race and ethnicity variables, comparisons of indigenous peoples and African descendant peoples have provided deeper insight into regional challenges impacting these populations ([Morrison et al., 2017](#)).

This guide supports individuals interested in collecting or analyzing data on indigenous peoples (IP), African descendants (AD), people with disabilities (PwD), and LGBTQ+ populations by providing conceptual and empirical tools for specialists. The document is organized into four sections with an annex. The first section, describes the overarching principles for best practices in data collection with important considerations for the development of questions to better represent diverse populations. The second section, provides recommendations

specific to each of the groups analyzed, showing examples of ideal questions for quantifying these populations. The third section, discusses specific considerations that should be applied when collecting and interpreting data for diverse populations, and the fourth section is for use when analyzing data sets by sectors. The annex contains two summary tables, Annex A includes the identification of diverse populations in the region's surveys and censuses, and Annex B includes three checklists, one for ethnic and racial groups (indigenous peoples and African descendants), one for persons with disabilities, and one for the LGBTQ+ population, and a list of considerations for users when determining whether the data and variables collected or available on diverse populations are appropriate for reporting disaggregated information.



GENERAL CONSIDERATIONS

This guide is based on six overarching principles and a series of important ethical and methodological considerations for designing questions that are considered best practices in data collection for diverse populations. These practices are international standards identified by the Statistics Division of United Nations, the Population Division of ECLAC (CEPAL in Spanish), the Washington Group, and others. Additionally, these international standards allow for comparability across countries and over time.

The six overarching principles for the development of data on diverse populations are:

- ① ***Increasing response rate.*** Ask identity questions on the administrative record form or survey/census questionnaire after receiving the person's approval, to avoid concerns regarding disqualification or poor-quality service delivery because of identity. Also, allow the interview or registration to be completed by the individual when possible. Other strategies to increase response rates among diverse populations include allowing the participation of community members to gain trust of survey enumerators, the use of interpreters and bilingual enumerators to improve the response rate and quality of responses, including the use of women and young enumerators, and implementing protocols to protect individuals' responses to sensitive questions. No less important, especially at the beginning of an interview or registration, is to declare that information will only be collected for statistical research purposes to ensure the accuracy of responses. Additionally, where applicable, informing participants that questions have been approved by internal review boards can provide additional layers of accountability and trust between interviewers and interviewees.
- ② ***Protecting data privacy.*** Race, ethnicity, gender, sexual orientation, and disability responses can be highly sensitive data. It is of the utmost importance to follow data privacy and protection laws of the countries where data is collected and the IDB Personal Data Privacy Policy. Safeguarding data should also be required.
- ③ ***Ensuring accessibility.*** This requires that reasonable accommodations for persons with disabilities and language access for diverse populations are included in survey design and implementation. For example, to interview people with cognitive, learning or intellectual disabilities one may need a proxy (friend or relative) to respond for them or to assist with responses.² Additionally, survey instruments that allow for responses to device read questions should be adapted and tested for the target populations before use.

² Other tips for interviewing people with disabilities are described in [Washington Group on Disability Statistics \(2020\)](#)

- ④ **Ensuring sufficient sample size.** In the case of probabilistic surveys, ensure that the sample size is large enough that estimates about any given group are statistically representative of that group. This will likely require investing time and effort in the design of the survey and ensuring there are enough resources for oversampling. In terms of analysis, expansion factors may be required.
- ⑤ **Extensive piloting.** Participation by local communities in the design of data collection instruments can be crucial to adapt measurement approaches to local contexts, as well as terms and definitions used.
- ⑥ **Training of enumerators.** Special emphasis on reducing stereotypes regarding gender, ethnicity, race, disability status, sexual orientation, and gender identity will help avoid biases in the information captured. A similar emphasis on how to approach the informant and handle sensitive situations in field work are also important considerations. Training should include individual assessments of each enumerator to ensure he or she meets these standards. The best practice is to train more enumerators than needed so that the final team can be comprised of the best performers. As part of the practices used during the training, it is advisable to calculate reliability estimates (trainer-enumerator and inter-enumerator) so that the team goes in the field only when an acceptable level of reliability is achieved.

While the collection of data on diverse populations is important for the development of evidence-based public policies and identifying the needs of diverse populations, there are several important ethical and methodological considerations for the development of questions. While these considerations vary by the diverse population that is being identified, through IDB experience we have identified several recommended practices that exist across diverse populations.

- **Seemingly small changes in the wording of questions related to identity can result in large changes in the proportion of the population that identifies with a specific group.** Due to frequent changes in questionnaires and the methodology of national surveys and censuses, comparisons of data across countries and across time are difficult and can be inaccurate. Clear examples of changes in wording in questions related to indigenous identity in Bolivia (2001/2012) and Chile (1992/2002) between census rounds resulted in large decreases in the proportions of the population that self-identified as indigenous in these instruments ([Morrison et al., 2017](#); [Ratzlaff, 2015](#)).
- **There is value in using the terminologies familiar to the groups that you wish to identify including community participation in aspects of design.** In many cases, the technical terms used by governments may differ from those used by individuals belonging to specific groups of the population. These terms can be combined to better explain the meaning of the official term. For instance, rather than simply asking questions related to African descendant identity, a term that is not necessarily used by African descendant populations, questions can include terminology that is locally used by members of the population. For example, in Peru one could include categories such as *negro* [black],

moreno [brown], *zambo* [mixed Afro-indigenous], *mulato* [mixed Afro-white], and *pueblo afroperuano* o *afrodescendiente*, while in Colombia, it is better to use *negro(a)*, *mulato(a)*, *afrodescendiente*, *afrocolombiano(a)*.³ Similarly, rather than asking solely about indigenous identity, sexual orientation, and gender identity, providing a list of indigenous peoples within a national context as well as a list of different LGBTQ+ identities can result in greater inclusivity and higher response rates.

- **Questions on identity should be asked to as many people within a household as possible to have information directly from the source, eliminating the need to impute identity due to other characteristics.** If it is possible to ask questions directly to individuals it is best to ask all household members. This was done recently in the population censuses of Colombia and Peru (see table 2 in the next section) for all household members over 3 years old. The information from heads of household should at a minimum ask the head of household to report for all other household members individually (particularly children) to provide greater detail on diverse populations.
- **Data should be collected using self-identification.** The identification of diverse groups follows the agreements of the [Montevideo Consensus on population and development](#) to ensure that national statistics use and respect the right to identity. This approach prioritizes the right of people to define themselves based on individual awareness of belonging and the acceptance of belonging ([Schkolnik 2009](#)).

While some best practices exist across various diverse populations, there are key principles that should be considered when designing questions and using data that are specific to different groups which will be discussed in greater detail in the following sections.

³ Throughout the publication the original term in Spanish or Portuguese is retained because there are not always direct translations, and the terms can have very different connotations in English.



GROUP-SPECIFIC RECOMMENDATIONS

This section provides recommendations specific to each of the groups analyzed in this document, showing examples of questions that can be considered ideal or recommended standards to quantify these populations. Several of these examples are obtained from the population censuses corresponding to the 2020 round.⁴ Censuses—due to their size, volume of resources used, involvement of society, and preparation period—are essential to identify and quantify the size of diverse populations. Many household surveys do not purport to be representative of indigenous people or African descendants due to sampling challenges and the difficulty of accessing these communities because of distance or security considerations.



Indigenous Peoples and African Descendants

A review of the questionnaires and microdata from household surveys in the region spanning from 2017 to 2020 show that in 14 countries it is possible to identify the population by ethnicity or race within the data.⁵ However, the sample size of some of these surveys limits possibilities for making valid statistical inferences for disaggregation of the African descendants (in Bolivia, Guatemala, and Peru), or indigenous peoples (in Brazil, Suriname, and Uruguay).

A review of the questionnaires from the 2010 population census rounds in Latin America and the Caribbean shows that most of the countries use questions to identify and measure the size of indigenous peoples and African descendants based on self-identification. This ensures the comparability of statistics between countries ([Morrison et al., 2017](#)). This contrasts with what was observed in the 1990 census round when only six Latin American countries had questions for indigenous peoples, only one country for African descendants, and only two countries for both groups (Schkolnik & Del Popolo, 2005). It should be noted that the five countries in the region that to date have carried out their population censuses corresponding to the 2020 round (Chile [2017], Peru [2017], Colombia [2018], Guatemala [2018] and Mexico [2020]) incorporated questions based on self-identification to measure the size of indigenous and African descendant populations. In addition to self-identification, three of these countries (Peru, Colombia, and Guatemala) used questions about the native language spoken, understood, or learned in childhood, in order to better characterize indigenous peoples in the 2020 round. Use of a spoken native language is limiting for identifying race and ethnicity, particularly

⁴ The population censuses carried out or to be carried out between 2015 and 2024 correspond to the “2020 round” according to the definition of the [United Nations Statistics Division](#). Therefore, these rounds include the Peru (2017) and Colombia (2018) censuses which were not impacted by COVID-19.

⁵ See the full list of the region’s surveys and censuses using the self-identification approach to identify African descendant and indigenous peoples at the end of this subsection.

as an increasing number of self-identified indigenous peoples do not speak an indigenous language ([World Bank, 2016](#))⁶ and the prevalence of indigenous languages in places like Paraguay make language use an inadequate proxy for ethnicity for indigenous peoples.

Ethnic and racial identities can be difficult to measure given that identities may be fluid and dependent on both the form in which the question is asked as well as on the identity of the person administering the survey, i.e., different race responses based on the race of the *enumerator* ([Morrison et al., 2017](#)). As such, there are a number of best practices that should be considered in questionnaire design with respect to ethnic and racial identity. First, questions on ethnic and racial identity should be based on the self-identification of the individual. This is not only a widely held best practice in survey design, but also has important legal and policy ramifications as many governments and international organizations use self-identification to define diverse populations under law, particularly indigenous peoples. This in turn triggers important protections, rights, and safeguards. In some rare cases, other methods of ethnic-racial identity may be considered, with the understanding that they might not be complete. For instance, although not a best practice, Mexico continues to report results for indigenous peoples based on maternal language in surveys, although in these there is also the question of self-identification. In the 2020 Mexico census questionnaire, there is only the self-identification question for African descendants and only the mother language question for indigenous peoples. In cases such as this, data should also be collected and presented using self-identification. Keeping questions on maternal language in the questionnaire is useful to understand a particular dimension of these populations and to track the survival of native languages – as measured by their prevalence— over time. When making comparisons across countries, self-identification variables should be used.

Self-identification to counterbalance biases

Studies on perceptions of bias have shown that bias is rarely based on self-identification, but on outsider perceptions of identity. As such, in some experimental designs, utilizing interviewer definitions of identity may be used. In these cases, the Project on Ethnicity and Race in Latin America's (PERLA) skin tone pallet (Telles, 2014) has been used in a limited number of national surveys (Rojas et al., 2019). However, even in cases where this is used, questions on self-identification should still be included in the survey. The 2016 Intergenerational Social Mobility Module survey of Mexico asks informants to define their skin tone as well as interviewers. Despite the use of self-identification there were differences between perceptions of skin tone that suggest possible bias.

⁶ For example, according to the results of the 2017 census of Peru, 25.8% of the population self-identified as native or belonging to an indigenous people, and 16.4% declared that the language they learned to speak in their childhood was Quechua or another language native ([INEI, 2018](#)).

An additional challenge in the collection of data on ethnic and racial identity is in the fluidity of identity and the possibility of individuals holding multiple ethnic or racial identities (Balestra and Fleischer, 2018).⁷ People may change how they identify themselves over time or they may identify themselves differently in different contexts, which can be important for the interpretation of data and the dynamics of ethnicity. To avoid having large portions of African descendants and indigenous peoples identify as mestizo (or similar racially mixed categories), a best practice in questionnaire design is to list multiple identities individually before offering the option of a racially mixed identity. One way of doing this is asking a specific question related to identity that enables respondents to self-identify with more than one ethnicity. While this may mean that a portion of the population identifies as Afro-indigenous, it remains a best practice to ask questions in this way to capture diversity within diversity. Uruguay has adopted a separate question practice that allows for a more holistic picture of ethnic and racial identity and can be considered a best practice. In Uruguayan household surveys and the national census, individuals are asked to identify with all categories with which they identify as part of their origin or ancestry (*afro o negra* [afro or black]/ *asiática o amarilla* [Asian or yellow] /*blanca* [white] /*indígena* [indigenous] /*otra* [other])⁸ followed by a question on which identity is their primary identity. This style of question allows for a greater degree of understanding of the racial and ethnic identity of individuals.

TABLE 1

EXAMPLE OF BEST PRACTICE QUESTIONS ON IDENTIFYING INDIGENOUS PEOPLES AND AFRICAN DESCENDANTS

| <i>¿Cree tener ascendencia...</i> | | SÍ | NO |
|-----------------------------------|--------------------------------|-----------|-----------|
| 1. | ... afro o negra? _____ | 1 | 2 |
| 2. | ... asiática o amarilla? _____ | 1 | 2 |
| 3. | ... blanca? _____ | 1 | 2 |
| 4. | ... indígena? _____ | 1 | 2 |
| 5. | ... otra? _____ | 1 | 2 |

Source: [Instituto Nacional Estadística](#), Uruguay, 2019. Encuesta Continua de Hogares (ECH). Actual form with racial and ethnic categories

Two recent examples of questions on ethnicity or race based on the criteria of self-identification were used in the population censuses for Peru (2017) and Colombia (2018). Although these questions do not allow for multiple identities, they have several characteristics that make them promising practices to identify diverse populations according to ethnicity or race. First, both countries have been using these questions in multiple census/survey rounds,⁹ which allow for comparability

⁷ The section 4.3 of “Diversity statistics in the OECD. How do OECD countries collect data on ethnic, racial and indigenous identity?” discusses the issue that identities are dynamic, intersecting and multiple.

⁸ Throughout the publication the original term in Spanish or Portuguese is retained because there are not always direct translations for racial and ethnic terms and the terms can have very different connotations in English.

⁹ For example, in the four previous census rounds in Colombia, both for the indigenous peoples and for African descendants (ECLAC 2009) and in the National Household Survey of Peru (ENAHU for its acronym in Spanish) since the early 2000s, also for both groups.

over time. Second, they have community organizations involved throughout the entire process (design of data collection instruments, awareness campaigns aimed at communities, analysis, and dissemination). These are important steps as they increase the legitimacy of the exercise and recognize that the quality of the self-identification criterion depends on the ethnic awareness of the interviewees, their perception of the census as a legitimate instrument for collecting information, and their level of commitment to the census process. Third, both census questions were adapted to local conditions and realities.

TABLE 2

EXAMPLE OF PROMISING PRACTICE FOR INDIGENOUS PEOPLES AND AFRICAN DESCENDANTS

A personas de 3 y más años:

Por sus costumbres y sus antepasados,
¿Usted se siente o considera:

(Lea cada alternativa y rellene un solo círculo)

1. ☐ quechua?
2. ☐ aimara?
3. ☐ nativo o indígena de la amazonia?
(Especifique)

-
4. ☐ perteneciente o parte de otro pueblo indígena u originario? *(Especifique)*

-
5. ☐ negro, moreno, zambo, mulato, pueblo afroperuano o afrodescendiente?
 6. ☐ blanco?
 7. ☐ mestizo?
 8. ☐ otro *(Especifique)*

A todas las personas:

¿De acuerdo con su cultura, pueblo o rasgos físicos... es o se reconoce como:

1. ☐ indígena?
1.1 ¿A cuál pueblo indígena pertenece ...?
(nombre del pueblo; código)

-
- 1.2 ¿A cuál clan pertenece?
(nombre del pueblo; código)

-
2. ☐ Gitano(a) o Rrom?
2.1 ¿A cuál vitsa pertenece?
(nombre de la vitsa; código)

-
- 2.2 ¿A cuál kumpania pertenece?
(nombre de la kumpania; código)

-
3. ☐ raizal del Archipiélago de San Andrés, Providencia y Santa Catalina?
 4. ☐ palenquero(a) de San Basilio?
 5. ☐ negro(a), mulato(a), afrodescendiente, afrocolombiano(a)?
 6. ☐ ningún grupo étnico?

Source: [Cuestionario de Censo 2017 de Perú](#)

Source: [Cuestionario de Censo 2018 de Colombia](#)

SURVEYS AND CENSUSES USING THE SELF-IDENTIFICATION APPROACH TO IDENTIFY INDIGENOUS PEOPLES (2000-2021)

NATIONALLY REPRESENTATIVE SURVEYS

| | | |
|-------------------|--|----------------------------------|
| Belize | Labor Force Survey | 2001- 2005, 2007, 2012 - 2016 |
| | Multiple Indicator Cluster Survey | 2011 |
| Bolivia | Encuesta Continua de Hogares (ECH) | 2005-2009, 2011+ |
| Brazil | Pesquisa Nacional por Amostra de Domicílios (PNAD) | 1990+ |
| Chile | Encuesta de Caracterización Socioeconómica Nacional (CASEN) | 2006+ |
| Colombia | Encuesta Nacional de Calidad de Vida (ECV) | 2010, 2012+ |
| | Gran Encuesta Integrada de Hogares (GEIH) | 2006-2007, 2014+ |
| | Encuesta Nacional de Demografía y Salud | 2010 |
| | Encuesta Nacional de Ingresos y Gastos | 2007 |
| | Encuesta Nacional de Uso de Tiempo | 2013, 2016-2017 |
| Costa Rica | Encuesta de Hogares de Propósitos Múltiples | 2002 |
| Ecuador | Encuesta Nacional de Empleo, Desempleo y Subempleo (ENEMDU) | 2002+ |
| | Encuesta de Condiciones de Vida | 2006, 2013-2014 |
| Guyana | Demographic and Health Survey | 2009 |
| | Household and Budget Survey | 2005 |
| | Multiple Indicator Cluster Survey | 2006, 2014 |
| Guatemala | Encuesta Nacional de Empleo e Ingresos (ENEI) | 2010+ |
| | Encuesta Nacional de Condiciones de Vida | 2006, 2011, 2014 |
| Honduras | Encuesta Nacional de Hogares sobre Condiciones de Vida | 2004 |
| Mexico | Encuesta Nacional de Ingresos y Gastos de Hogares (ENIGH) | 2010+ |
| | Encuesta Intercensal | 2015 |
| Nicaragua | Encuesta Nacional sobre Medición de Niveles de Vida | 2001, 2005, 2014 |
| Panama | Encuesta de Hogares (EH) - Encuesta de Propósitos Múltiples (EHPM) | 2001+ |
| Peru | Encuesta Nacional de Hogares (ENAHO) | 2005+ |
| | Encuesta Demográfica y de Salud Familiar (ENDES) | 2007, 2008 2018 |
| Suriname | Multiple Indicator Cluster Survey | 2010 |
| Uruguay | Encuesta Continua de Hogares (ECH) | 2006+ |

POPULATION CENSUSES

| | | |
|------------------------------|--|------------------|
| Argentina | Censo Nacional de Población, Hogares y Viviendas | 2001, 2010 |
| Belize | Population and Housing Census | 2000, 2010 |
| Bolivia | Censo Nacional de Población y Vivienda | 2001, 2012 |
| Brazil | Censo Demográfico | 2000, 2010 |
| Chile | Censo Nacional de Población y Vivienda | 2002, 2017 |
| Colombia | Censo Nacional de Población y Vivienda | 2005, 2018 |
| Costa Rica | Censo Nacional de Población y Vivienda | 2000, 2011 |
| El Salvador | Censo de Población y Vivienda | 2007 |
| Ecuador | Censo Nacional de Población y Vivienda | 2001, 2010 |
| Guyana | Population and Housing Census | 2002, 2012 |
| Guatemala | Censos Nacionales de Población y de Habitación | 2002, 2018 |
| Honduras | Censo de Población y Vivienda | 2001, 2013 |
| Mexico | Censo de Población y Vivienda | 2000, 2010, 2020 |
| Nicaragua | Censo de Población y de Vivienda | 2005 |
| Panama | Censo Nacional de Población y Vivienda | 2000, 2010 |
| Paraguay | Censo Nacional de Población y Vivienda | 2002, 2012 |
| Peru | Censos Nacionales de Población y Vivienda | 2017 |
| Suriname | National Census | 2003, 2004, 2012 |
| Trinidad & Tobago | National Population and Housing Census | 2011 |
| Uruguay | Censo de Población, Hogares y Viviendas | 2011 |
| Venezuela | Censo Nacional de Población y Vivienda | 2001, 2011 |

SURVEYS AND CENSUSES USING THE SELF-IDENTIFICATION APPROACH TO IDENTIFY AFRICAN DESCENDANTS (2000-2021)

NATIONALLY REPRESENTATIVE SURVEYS

| | | |
|-------------------|---|-------------------------------|
| Belize | Labor Force Survey | 2001- 2005, 2007, 2012 - 2016 |
| | Multiple Indicator Cluster Survey | 2011 |
| Bolivia | Encuesta Continua de Hogares (ECH) | 2011+ |
| Brazil | Pesquisa Nacional por Amostra de Domicílios (PNAD) | 1990+ |
| Chile | Encuesta de Caracterización de la Población Afrodescendiente de la Región de Arica y Parinacota | 2013 |
| Colombia | Encuesta Nacional de Calidad de Vida (ECV) | 2010, 2012+ |
| | Gran Encuesta Integrada de Hogares (GEIH) | 2006-2007, 2014+ |
| | Encuesta Nacional de Demografía y Salud | 2010 |
| | Encuesta Nacional de Ingresos y Gastos | 2007 |
| | Encuesta Nacional de Uso de Tiempo | 2013, 2016-2017 |
| Costa Rica | Encuesta de Hogares de Propósitos Múltiples | 2002 |
| Ecuador | Encuesta Nacional de Empleo, Desempleo y Subempleo (ENEMDU) | 2002+ |
| | Encuesta de Condiciones de Vida | 2006, 2013-2014 |
| Guyana | Demographic and Health Survey | 2009 |
| | Household and Budget Survey | 2005 |
| | Multiple Indicator Cluster Survey | 2006, 2014 |
| Guatemala | Encuesta Nacional de Empleo e Ingresos (ENEI) | 2010+ |
| | Encuesta Nacional de Condiciones de Vida | 2006, 2011, 2014 |
| Honduras | Encuesta Nacional de Hogares sobre Condiciones de Vida | 2004 |
| Mexico | Encuesta Intercensal | 2015 |
| Nicaragua | Encuesta Nacional sobre Medición de Niveles de Vida | 2001, 2005, 2014 |
| Panama | Encuesta de Hogares (EH) - Encuesta de Propósitos Múltiples (EHPM) | 2015+ |
| Peru | Encuesta Nacional de Hogares (ENAHOG) | 2005+ |
| | Encuesta Demográfica y de Salud Familiar (ENDES) | 2007, 2008, 2018 |
| Suriname | Multiple Indicator Cluster Survey | 2010 |
| Uruguay | Encuesta Continua de Hogares (ECH) | 2006+ |

POPULATION CENSUSES

| | | |
|------------------------------|--|------------------|
| Argentina | Censo Nacional de Población, Hogares y Viviendas | 2010 |
| Belize | Population and Housing Census | 2000, 2010 |
| Bolivia | Censo Nacional de Población y Vivienda | 2012 |
| Brazil | Censo Demográfico | 2000, 2010 |
| Colombia | Censo Nacional de Población y Vivienda | 2005, 2018 |
| Costa Rica | Censo Nacional de Población y Vivienda | 2000, 2011 |
| El Salvador | Censo de Población y Vivienda | 2007 |
| Ecuador | Censo Nacional de Población y Vivienda | 2001, 2010 |
| Guyana | Population and Housing Census | 2002, 2012 |
| Guatemala | Censos Nacionales de Población y de Habitación | 2002, 2018 |
| Honduras | Censo de Población y Vivienda | 2001, 2013 |
| Mexico | Censo de Población y Vivienda | 2020 |
| Nicaragua | Censo de Población y de Vivienda | 2005 |
| Panama | Censo Nacional de Población y Vivienda | 2010 |
| Paraguay | Censo Nacional de Vivienda | 2012 |
| Peru | Censos Nacionales de Población y de Habitación | 2017 |
| Suriname | National Census | 2003, 2004, 2012 |
| Trinidad & Tobago | National Population and Housing Census | 2011 |
| Uruguay | Censo de Población, Hogares y Viviendas | 2011 |
| Venezuela | Censo Nacional de Población y Vivienda | 2011 |



People with Disabilities

Despite the inclusion of people with disabilities in the public information systems of the region, conceptual and methodological factors explain the lack of data over time. Within the framework of the United Nations Statistical Commission, the Washington Group was established in 2001 with the objective of developing a set of questions for censuses and surveys to estimate the prevalence and disaggregation of indicators by disability status and ensure comparability across countries. In 2006, this group produced a [short list of questions](#) on the intensity of disabilities based on 6 domains: vision, hearing, ability to walk, cognitive faculties, self-sufficiency for personal care, and communication. In addition to this short set of questions, the Washington Group has developed a longer form questionnaire as well as additional modules for different issue areas including employment ([adult working-age population](#)), education, and specifically for children ([ages 2-4 years](#), [ages 5-17 years](#)). Our recommendation is that these tools are used to capture information on persons

with disabilities. The Washington Group questionnaires promote a better understanding of the scope of disability for evaluating policies and interventions. They also allow the identification of specific needs so services can be designed, adapted, or implemented to meet those needs. Lastly, they are useful in assessing whether persons with disabilities are participating in social and economic life at the same levels as persons without disabilities. Table 3 shows a recent example of disability questions that fully applies the Washington Group's short list of questions. This questionnaire, considered an international standard, has been applied in censuses and surveys in more than 80 countries ([Lockwood, 2020](#)).¹⁰

For the 2010 census round in the region, after the Population Division of ECLAC (CEPAL in Spanish) recommended the use of these questions, most of the region's countries adopted them ([CEPAL, 2014](#)). However, in many cases they have been implemented incompletely, particularly on questions related to the intensity of disability.

Several countries in the region have conducted Disability Surveys and Social Protection Surveys in recent years. In addition, some regular surveys (such as the ENAHO since 2010 in Costa Rica, ENIGH since 2012 in Mexico, DHS since 2013 in Peru, and CASEN in Chile since 2011) include questions about disability in their questionnaires. The latest review of these surveys indicates that only 4 countries fully followed the reduced list of questions and response options of the Washington Group. Therefore, their results are comparable over time and between countries: ENIGH of Mexico 2010-2018, ENAHO of Costa Rica 2011-2020, CASEN of Chile 2017, and ECH from Bolivia 2016-2018. The questions from the [Argentine census](#) questionnaire that should have been applied in 2020 follow the international standard, but because of COVID-19, it will only be collected in 2022.

¹⁰ See the full list of regional surveys and censuses using the Washington Group approach to identify disability at the end of this subsection.

TABLE 3

BEST PRACTICE QUESTIONS ON IDENTIFYING PERSONS WITH DISABILITIES

Preamble to the WG-SS:

Interviewer read: "The next questions ask about difficulties you may have doing certain activities because of a HEALTH PROBLEM."

VISION - VIS_SS

[Do/Does] [you/he/she] have difficulty seeing, even if wearing glasses? Would you say... *[Read response categories]*

1. No difficulty
2. Some difficulty
3. A lot of difficulty
4. Cannot do at all
7. *Refused*
9. *Don't know*

HEARING - HEAR_SS

[Do/Does] [you/he/she] have difficulty hearing, even if using a hearing aid(s)? Would you say... *[Read response categories]*

1. No difficulty
2. Some difficulty
3. A lot of difficulty
4. Cannot do at all
7. *Refused*
9. *Don't know*

MOBILITY - MOB_SS

[Do/Does] [you/he/she] have difficulty walking or climbing steps? Would you say... *[Read response categories]*

1. No difficulty
2. Some difficulty
3. A lot of difficulty
4. Cannot do at all
7. *Refused*
9. *Don't know*

COGNITION (REMEMBERING) - COG_SS

[Do/Does] [you/he/she] have difficulty remembering or concentrating? Would you say... *[Read response categories]*

1. No difficulty
2. Some difficulty
3. A lot of difficulty
4. Cannot do at all
7. *Refused*
9. *Don't know*

SELF-CARE - SC_SS

[Do/Does] [you/he/she] have difficulty with self-care, such as washing all over or dressing? Would you say... *[Read response categories]*

1. No difficulty
2. Some difficulty
3. A lot of difficulty
4. Cannot do at all
7. *Refused*
9. *Don't know*

COMMUNICATION - COM_SS

Using [your/his/her] usual language, [do/does] [you/he/she] have difficulty communicating, for example understanding or being understood? Would you say... *[Read response categories]*

1. No difficulty
2. Some difficulty
3. A lot of difficulty
4. Cannot do at all
7. *Refused*
9. *Don't know*

Source: Washington Group on Disability Statistics (WG). *Short Set on Functioning*.

Note: Translations of all questions here in Spanish and Portuguese as well as for the expanded questionnaires are available at www.washingtongroup-disability.com.

The Washington Group questionnaire has only been fully adopted in the censuses of two other countries in Latin America. The example below comes from the 2020 Mexican census (Table 4), which together with the 2018 [Colombian census](#) used these questions. The 2017 Peruvian census incorporated identification questions, but not intensity questions. The 2018 Guatemalan census did not include any questions on disability in its questionnaire.

TABLE 4

A RECENT EXAMPLE OF CENSUS QUESTIONS
ON DISABILITY FROM MEXICO

IDENTIFICATION

A todas las personas:

En su vida diaria, ¿(NOMBRE) cuánta dificultad tiene para:

(lea todas las opciones y circule un código para cada opción; para los códigos 2, 3, 4 o 5 aplique la siguiente pregunta)

| | |
|----------------------|---|
| no tiene dificultad | 1 |
| con poca dificultad | 2 |
| con mucha dificultad | 3 |
| no puede hacerlo | 4 |

ver, aun usando lentes?

| | | | |
|---|---|---|---|
| 1 | 2 | 3 | 4 |
|---|---|---|---|

oír, aun usando aparato auditivo?

| | | | |
|---|---|---|---|
| 1 | 2 | 3 | 4 |
|---|---|---|---|

caminar, subir o bajar?

| | | | |
|---|---|---|---|
| 1 | 2 | 3 | 4 |
|---|---|---|---|

recordar o concentrarse?

| | | | |
|---|---|---|---|
| 1 | 2 | 3 | 4 |
|---|---|---|---|

bañarse, vestirse o comer?

| | | | |
|---|---|---|---|
| 1 | 2 | 3 | 4 |
|---|---|---|---|

hablar o comunicarse (por ejemplo: entender o ser entendido por otros)?

| | | | |
|---|---|---|---|
| 1 | 2 | 3 | 4 |
|---|---|---|---|

¿Tiene algún problema o condición mental? (Autismo, síndrome de Down, esquizofrenia, etc.) ...

Sí1 No6

CAUSE

¿La dificultad de (NOMBRE) para (respuesta de pregunta previa) es:

(para cada opción con código 2, 3, 4 o 5 anote un código)

| | |
|---------------------|---|
| porque nació así? | 1 |
| por una enfermedad? | 2 |
| por un accidente? | 3 |
| por edad avanzada? | 4 |
| por otra causa? | 5 |

CÓDIGO DE CAUSA

¿La causa del problema o condición mental de (NOMBRE) es:

Source: [Cuestionario de censo 2020 de México](#)

SURVEYS AND CENSUSES USING THE WASHINGTON GROUP APPROACH TO IDENTIFY THE POPULATION WITH DISABILITY (2000-2021)

NATIONALLY REPRESENTATIVE SURVEYS

| | | |
|-------------------|---|-------|
| Bolivia | Encuesta Continua de Hogares (ECH) | 2016+ |
| Colombia | Encuesta Nacional de Calidad de Vida (ECV) | 2017+ |
| Costa Rica | Encuesta Nacional de Hogares (ENAH) | 2010+ |
| Ecuador | 6ta ronda Encuesta de Condiciones de Vida (ECV) | 2013 |
| Chile | Encuesta de Caracterización Socioeconómica Nacional (CASEN) | 2017 |
| Mexico | Encuesta Nacional de Ingresos y Gastos de Hogares (ENIGH) | 2012+ |
| Peru | Encuesta Nacional de Hogares (ENAH) | 2015+ |
| | Encuesta Demográfica y de Salud Familiar (ENDES) | 2013+ |
| | Encuesta Nacional de Programas Presupuestales (ENAPRES) | 2014+ |

POPULATION CENSUSES

| | | |
|------------------------------|--|------------|
| Argentina | Censo Nacional de Población, Hogares y Viviendas | 2010 |
| Barbados | Population and Housing Census | 2000, 2010 |
| Belize | Housing and Population Census | 2000, 2010 |
| Bolivia | Censo Nacional de Población y Vivienda | 2012 |
| Brazil | Censo Demográfico | 2000, 2010 |
| Colombia | Censo Nacional de Población y Vivienda | 2005, 2018 |
| Costa Rica | Censo Nacional de Población y Vivienda | 2011 |
| Dominican Rep. | Censo Nacional de Población y Vivienda | 2010 |
| Ecuador | Censo Nacional de Población y Vivienda | 2010 |
| El Salvador | Censo de Población y Vivienda | 2007 |
| Guatemala | Censo Nacional de Población y Vivienda | 2018 |
| Honduras | Censo Nacional de Población y Vivienda | 2013 |
| Jamaica | Population and Housing Census | 2011 |
| Mexico | Censo de Población y Vivienda | 2010, 2020 |
| Panama | Censo de Población y Vivienda | 2010 |
| Paraguay | Censo Nacional de Población y Vivienda | 2012 |
| Peru | Censos Nacionales de Población y Viviendas | 2007, 2017 |
| Trinidad & Tobago | National Population and Housing Census | 2000, 2011 |
| Uruguay | Censo de Población, Hogares y Viviendas | 2011 |



LGBTQ+ People

Unlike the other groups described, this is the area that has received the least attention from national statistical agencies, not only from the region, but around the world. Despite advances in LGBTQ+¹¹ rights, the recognition of sexual orientation¹² and gender identity¹³ is still scarce in administrative records, censuses, and official surveys.¹⁴ The lack of questions focused on recognizing these populations is a critical obstacle that prevents addressing the stigma and exclusion of the LGBTQ+ population, eliminating barriers to their opportunities, and their full participation in the economy and in public life. Privacy considerations are particularly important for LGBTQ+ individuals to ensure their safety. Mechanisms must be in place to ensure that information is confidential and that it will not lead to discrimination or exclusion.

Although few countries in Latin America have developed best practices on survey design for questions related to sexual orientation and gender identity, there are countries from other regions that have started to develop questionnaires that attempt to capture the full array of sexual and gender diversity.¹⁵ One of the key components to ensuring that these questionnaires are inclusive and holistic is to develop questions that ask about sexual orientation and gender identity separately.

A recommendation for gender identity is to utilize two separate questions to ask about assigned gender at birth (male/female) followed by a question on current gender identity (*male/female/transgender/other* or *male/female/transmale/transfemale/other*). This two-step model has been used by numerous organizations as a best practice and is attributed to the Gender Identity in U.S. Surveillance (GenIUSS) group. In terms of sexual orientation, questions should be intentionally broad and include an array of options. These should include such categories as *heterosexual/straight, gay/lesbian, bisexual, gender queer, asexual, pansexual*, etc. While all of these categories may be coded as LGBTQ+, it is important that questions remain inclusive of the wide array of sexual orientations that exist.

¹¹ Lesbian, gay, bisexual, transgender/transsexual, queer (not heterosexual or cisgender) population, plus other diverse sexual orientations, and gender identities.

¹² Enduring pattern of romantic or sexual attraction (or a combination of both) to people of the opposite sex or gender (heterosexuality), of the same sex or gender (homosexuality), or of both sexes or more than one gender (bisexuality). Asexuality (lack of sexual attraction to others) is sometimes identified as the fourth category.

¹³ Internal and individual experience of gender as each person feels it deeply, which may or may not correspond to the sex assigned at birth, including the personal experience of the body (transgender, transsexuals, transvestites, people of non-binary gender and those who they are born with both female and male biological characteristics).

¹⁴ An important review of experiences based on surveys executed mainly by private institutions or non-governmental organizations in Latin America and the Caribbean can be found in [Urban et al. \(2020\)](#).

¹⁵ See the full list of regional surveys using the two-step approach to identify the LGBTQ+ population at the end of this subsection.

TABLE 5

BEST PRACTICE QUESTIONS ON IDENTIFYING THE LGBTQ+ POPULATION

GENDER IDENTITY

Assigned sex at birth

What sex were you assigned at birth, on your original birth certificate?

- ☐ Male
☐ Female

Current gender identity

How do you describe yourself? (*check one*)

- ☐ Male
☐ Female
☐ Transgender
☐ Do not identify as female, male, or transgender

SEXUAL ORIENTATION

Do you think of yourself as (*please check all that apply*):

- ☐ Straight
☐ Gay or lesbian
☐ Bisexual
☐ Transgender, transsexual, or gender non-conforming

Source: Badgett et al. 2014. [Gender Identity in U.S. Surveillance \(GenIUSS\)](#).

While Table 5 shows the recommended measures for the “two-step” approach from GenIUSS, Table 6 shows two recent examples that used these recommendations. One is the United Kingdom’s 2021 census, the first in the world to do so to date. The left side of the table below shows how questions were formulated, after various tests and stakeholder involvement to obtain good-quality data with minimal effect on overall response and respondent burden (Office for National Statistics – United Kingdom). The other example corresponds to the questions used in the “European survey of lesbian, gay, bisexual, trans, intersex, and also non-binary, and other gender non-conforming people,” a large-scale survey conducted in 2019 to collect comparable cross-country data on the experiences and views of LGBTQ+ people using an anonymous online questionnaire. This survey, conducted twice (with the first in 2012), was required by the European Commission and it is considered one of the first surveys of its kind, with more coverage of countries and number of participating individuals than any other that has been implemented to date.

TABLE 6

TWO RECENT EXAMPLES OF QUESTIONS ON
SEXUAL ORIENTATION AND GENDER IDENTITY*To people 16 and over:*

What is your sex? (to all people)

[A question about gender identity will follow if you are aged 16 or over]

- ☐ Female
- ☐ Male

Which of the following best describes your sexual orientation? *[This question is voluntary]*

- ☐ Straight or Heterosexual
- ☐ Gay or Lesbian
- ☐ Bisexual
- ☐ Other sexual orientation, write in

Is the gender you identify with the same as your sex register at birth? *[This question is voluntary]*

- ☐ Yes
- ☐ No, write in gender identity

To people 15 and over

What sex were you assigned at birth?

1. Female
2. Male
3. Other, please specify [INSERT TEXT]

How would you describe yourself today?

1. Woman / girl
2. Man / boy
3. Trans woman / girl
4. Trans man / boy
5. Non-binary or Genderqueer or Agender or Polygender or Gender-fluid
6. Do not identify as male, female, trans or non-binary, please specify how would you identify [INSERT TEXT]

Which group best matches your sexual orientation? Select the answer that best matches your sexual orientation:

1. Lesbian
2. Gay
3. Bisexual
4. Heterosexual / straight
5. Other, please specify [INSERT TEXT]
999. Don't know

Source: [United Kingdom Census 2021 Questionnaire](#)Source: [EU LGBTQ+ II Survey Questionnaire \(2019\)](#)SURVEYS AND CENSUSES USING THE SELF-IDENTIFICATION
APPROACH TO IDENTIFY LGBTQ+ (2000-2021)

NATIONALLY REPRESENTATIVE SURVEYS

| | | |
|----------|--|------------------|
| Chile | Encuesta de Caracterización Socioeconómica Nacional (CASEN) | 2015, 2017 |
| | 9na Encuesta Nacional de Juventud | 2018 |
| Colombia | Encuesta Nacional de Consumo de Sustancias Psicoactivas (ENCSPA) | 2019 |
| Mexico | 3ra Encuesta Nacional sobre Discriminación (ENADIS) | 2017 |
| | Encuesta Nacional sobre Diversidad Sexual y de Género (ENDISEG) | 2021 |
| Peru | Encuesta Nacional de Programas Presupuestales (ENAPRES) | 2018, 2019, 2020 |

POPULATION CENSUSES

None.



CONSIDERATIONS FOR COLLECTING AND INTERPRETING DATA ON DIVERSE POPULATIONS

Oversampling to overcome sample size limitations

One of the areas that is particularly challenging for data and diverse populations is that, in some cases, sample sizes may be quite small. This can create both technical challenges (as indicated in General Considerations) and ethical privacy considerations (as the ability to identify individuals or households from the data). As such, when designing surveys, it can be important to oversample diverse populations to be able to better capture and disaggregate data on these populations while maintaining both ethical and methodological rigor. Oversampling is possible in geographical areas with a significant proportion of the target population.¹⁶ Obtaining a representative sample of the population group in such areas makes it possible to focus appropriate policies at the local level.

For countries with small populations of specific groups with respect to the total population of the country, such as Bolivia, Guatemala, or El Salvador where African descendants represent less than 0.3% of the population, oversampling may seem expensive or infeasible. With information from the 2018 Bolivian survey, and assuming a sample of 600 households is sufficient to have representativeness and possibilities to properly disaggregate data (600 is the minimum sample among the 9 representative regions of the survey), oversampling would imply an increase of 5.4%, increasing the sample from 11,200 to 11,800 households. Although, the cost may be higher than this percentage, mainly due to the location of the Afro-Bolivian population throughout the national territory, the sample could be concentrated in the three regions where 82% of Afro-Bolivians reside ([Machaca & Ballivian 2016](#)), thus increasing the ability to conduct this expansion. In addition, since this activity does not need to be done annually, one possibility is to run it two or three times between census years, thereby increasing its feasibility.

Additionally, in the use and interpretation of data,¹⁷ it is worth remembering that sample sizes diminish as additional layers of disaggregation are applied. This is particularly important when analyzing aspects of intersectionality, such as analyzing the conditions of indigenous-disabled women. As such, data users should

¹⁶ It should be noted here that Chile for the LGBTQ + population and Brazil for the indigenous population, with their regular surveys, allow making statistical inferences representative of both groups despite their small size in the total population.

¹⁷ Additional community validation and outreach should be considered to check for potential methodological shortcomings due to sample size errors among others.

always check sample sizes within the population when calculating and interpreting indicators to ensure that the data is representative of the population being analyzed. For more information on recommended minimum sample sizes for reporting, please refer to the checklist section ('Conditions for reporting results' subsection) in the annex of this document.

Household responses for individuals

While it is a best practice to ask all household members for their identity (for race and ethnicity as well for disabilities and sexual orientation and gender identity), this is not the practice in all surveys in the region, particularly as it relates to children (see 'Conditions for using data sets' subsection of checklist section in the annex). This can create a set of challenges for data interpretation as different household members may have different self-identities or identify in different ways. As a general practice, when reporting race and ethnicity indicators for children, the relation to head of household should be verified, and where appropriate and when individual responses are not available for children, the head of household's ethnic or racial identity should in most instances be applied to the child. When examining household level indicators by race and ethnicity, the head of household's ethnic or racial identity should also be used, and it should be noted that these are ethnic or racial group headed households. However, in the case of calculating household level indicators for persons with disabilities, households should be considered as a "Households with a Person with a Disability" for the purpose of analysis with the comparison group being "Households without a Person with a Disability." When these are reported, it is advised that necessary caveats are added to documentation on reporting these figures and appropriately labeled.

In addition to these general considerations that need to be taken when using and interpreting data on diverse populations, there are additional considerations and stipulations that should be taken when developing sector specific surveys. The following sections will provide additional information about some of these specific considerations as well as some common practices within these sectors.



CONSIDERATIONS FOR SPECIFIC SECTORS

Health data for diverse populations

The region is characterized by systematic racial and ethnic inequalities in health with gaps observed in preventive services, treatment, and ultimately in health outcomes ([del Pino et al., 2019](#)). CEPAL (2017) has documented gaps by race in infant mortality rates using the 2010 census. Higher maternal mortality rates have also been documented using vital statistics. Access to prenatal care, has been measured by the number of medical visits in Colombia ([Noreña-Herrera et al., 2015](#)), and a broad set of health characteristics in Brazil ([Leal et al., 2017](#)). Differences in other types of preventive care have also been documented in Brazil and Colombia, specifically in screening for breast cancer ([Bairros et al., 2011](#); [Dias-da-Costa et al., 2007](#); [de Charry et al., 2008](#); Ruiz et al., 2012).

In cases where the purpose of the survey is not to collect data on socio-economic conditions of diverse groups, but rather to collect information on the specific health conditions of different populations, some alternative practices are recommended. One clear example is for persons with disabilities. While the Washington Group model above is used to identify individuals who already live with a disability, when the intention of the survey is not to discuss socio-economic conditions, but rather to aid in the early identification and rehabilitation of persons with disabilities, then the Washington Group Survey is a useful starting point, but insufficient for understanding the challenges faced by persons with disabilities. In these cases, questions should be complimented with the World Health Organization's (WHO) International Classification of Functioning, Disability and Health (ICF) questionnaire. The ICF questionnaire was endorsed by all 191 of the WHO's member states in 2001 and seeks to collect information not only on whether an individual is a person with a disability, but on the context and environmental factors that impact them. The full list of questions can be found at: https://www.who.int/docs/default-source/classification/icf/icfchecklist.pdf?sfvrsn=b7ff99e9_4.

In addition to the need for different surveys based on different purposes, when conducting healthcare surveys, particular attention should be paid to designing questions that examine the specific challenges and gaps faced by diverse populations in access and quality of the health care that they receive. Below are some types of questions that should be incorporated into health surveys as they relate to diverse populations.

Health Data

| Topical Issue/Question | Relevant Populations | Rationale | Examples | Sample Question (if Available) |
|---|----------------------|--|---|---|
| Complimenting Washington Group questionnaire for projects related to diagnosis and prevention | PwD | While the Washington Group questionnaire focuses on the identification of PwD within standard surveys, it is important to also consider contextual and environmental factors that impact the lives of PwD. | https://www.who.int/classifications/international-classification-of-functioning-disability-and-health This has been endorsed by all 191 members of the World Health Organization. http://www.hpoe.org/Reports-HPOE/Equity_Care_Report_August2013.PDF | <p>(1) In your present surroundings, how much of a problem do you have getting done all the work you need to do for your job?</p> <p>(2) Is this problem fulfilling your job requirements made worse, or better, by the way the work environment is set up or the specially adapted tools you use?</p> <p>https://www.who.int/classifications/icf/icfchecklist.pdf</p> |
| Discrimination or violence in access to services or within health sector facilities | IP, AD, PwD, LGBTQ+ | | <p>Indigenous peoples: https://www.paho.org/hq/dmd/ocuments/2009/serviciosSaludEng.pdf</p> <p>Barber, S.L., S.M. Bertozzi and P.J. Gertler. 2007. "Variations in Prenatal Care Quality For the Rural Poor in Mexico." Health Affairs, 26, no. 3: pp. 310-323.</p> <p>LGBTQ+: https://www.americanprogress.org/issues/lgbtq-rights/news/2018/01/18/445130/discrimination-prevents-lgbtq-people-accessing-health-care/</p> <p>African descendant women (U.S.): https://www.ncbi.nlm.nih.gov/pmc/articles/PMC6167003/</p> | <p>At some point in your life, have you felt discriminated against in a hospital, health center, or state health service? due to the following reasons?</p> <ol style="list-style-type: none"> Race or skin color (Yes/no) Language, language, or way of speaking (Yes / No) Physical or mental disability (Yes / No) Gender identity (Yes / No) <p>Source: Estudio Especializado sobre la Población Afroperuana - GRADE</p> |
| Accessible health services are (distances, access to transportation, hours of operation) | IP, AD, PwD, LGBTQ+ | Access to healthcare | <p>Indigenous peoples: https://www.paho.org/hq/dmd/ocuments/2009/serviciosSaludEng.pdf</p> <p>LGBTQ+: https://www.americanprogress.org/issues/lgbtq-rights/news/2018/01/18/445130/discrimination-prevents-lgbtq-people-accessing-health-care/</p> <p>U.S.: https://www.pewresearch.org/fact-tank/2018/12/12/how-far-americans-live-from-the-closest-hospital-differs-by-community-type/</p> | <p>What was the main reason why you did not go to a health center for the illness you had?</p> <ol style="list-style-type: none"> Had no money It is far away They take a long time to see patients I don't trust the doctors It was not serious / it was not necessary Prefer to be cured with home remedies Uninsured I self-prescribed or repeated the previous prescription Lack of time Mistreatment of health personnel <p>Source: Estudio Especializado sobre la Población Afroperuana - GRADE</p> |

| | | | | |
|--|---------------------|--|--|--|
| Ensure that local terminology is used to describe diseases and conditions when relevant, and do not exclusive utilize scientific terminology without definitions | IP, AD, PwD, LGBTQ+ | | Importance of language adaptation within data collection and implementation (from U.S.): https://www.coloradotrust.org/sites/default/files/CT_Race_EthnicityBrief_vFinal2.pdf | |
| Incorporate questions on sexual and reproductive health, which include aspects of health for diverse populations such as the LGBTQ+ population | LGBTQ+ | | NORC Chicago example of developing survey specific on state of LGBTQ+ population (not just health) built up from previous survey respondents (https://www.americanprogress.org/issues/lgbtq-rights/reports/2020/10/06/491052/state-lgbtq-community-2020/) | (For transgender people) Have you used or are you using hormones as part of your transition? Are you receiving or receiving medical care for the use of hormones? Source: INEC Ecuador |
| Include questions on quality of services and perceptions of medical attention | IP, AD, PwD, LGBTQ+ | | Training staff in data collection practices: https://www.hcup-us.ahrq.gov/datainnovations/raceethnicitytoolkit/ca11.pdf Example from U.S.: https://www.nap.edu/catalog/10260/unequal-treatment-confronting-racial-and-ethnic-disparities-in-health-care ; https://www.ncbi.nlm.nih.gov/pmc/articles/PMC6483224/ Perreira, K.M., and E.E. Telles. 2014. "The Color of Health: Skin Color, ethnoracial classification, and discrimination in the health of Latin Americans." Social Science and Medicine 116: pp. 241-250. | In general, you consider that the quality of the service of the social security entity in health to which ... you are affiliated is: 1. Very good 2. Good 3. Bad 4. Very bad 5. Don't know Source: DANE – ECV 2018 |

Best Practices for Social Protection Data

Social protection presents a unique opportunity to examine cultural differences, particularly when analyzing indigenous and traditional peoples. Certain preferences reflect cultural resilience and sustainable lifestyles even though they may be associated with poverty in urban contexts. Considerations should be taken to understand traditional architecture and structures such as ethno-engineering or culturally adapted architecture. These questions are particularly important to clarify aspects of construction materials for floors, access to water, and others that need to be analyzed within the local context.

| Social Protection Data | | | | |
|--|--|--|---|---|
| Topical Issue/Question | Relevant Populations | Rationale | Examples | Sample Question (if Available) |
| Incorporate additional questions on unmet needs analysis that include preferences of some indigenous peoples to retain traditional architecture and structures (ethno-engineering or culturally adapted architecture). These questions are particularly important to clarify aspects of construction materials for floors, access to water, and others | Indigenous peoples | | https://publications.iadb.org/es/pueblos-indigenas-y-programas-de-transferencias-condicionadas-ptc-estudio-etnografico-sobre-la-0 | |
| Highlight the importance of calculating income before cash transfers/government subsidies | Indigenous peoples, African descendants, PwD, LGBTQ+ | Recent studies (ex., Lustig, Morrison, Ratzlaf, 2018; Correa Astea, 2014) have shown that important inequalities exist between ethno-racial groups in access to government programs. | https://publications.iadb.org/es/pueblos-indigenas-y-programas-de-transferencias-condicionadas-ptc-estudio-etnografico-sobre-la-0 | During the last twelve months, did you receive financial aid from institutions in the country or from outside the country? Did the cash grants come from government entities? Source: DANE, 2019 |
| Consider the number of children in the household | Indigenous and traditional rural peoples | Families may be larger than average because they are intergenerational or communal. | Consideration of ethnic preferences | <div>How many children did you have?</div> <div>How many children are alive?</div> <div>How many living children aged < 60 months?</div> <div>Source: Inquérito Nacional de Saúde e Nutrição dos Povos Indígenas</div> |

Best Practices for Education Data

Lower educational attainment rates for indigenous, African descendants, persons with disabilities, and LGBTQ+ populations pose a problem for diverse communities, but also for the development of nations. Bilingual and intercultural educational programs are of interest to marginalized groups and governments, but the design of these programs is limited by poor quality data for their design and monitoring. The role of identity and education is crucial for addressing educational inequalities in primary and secondary systems.

| Education Data | | | | |
|--|---|---|--|--|
| Topical Issue/Question | Relevant Populations | Rationale | Examples | Sample Question (if Available) |
| Include questions on ethnic self-identification and spoken languages of students | Indigenous and African descendants | In addition to the question of ethnic self-identification, it is important that the school administrative records of enrollment and national tests have the variable of indigenous language to assess the need for a bilingual or intercultural education approach to the curricula. | Several household surveys in the region ask the question of spoken language, such as ENEI from Guatemala and ENIGH from México. | Do you speak an indigenous language or dialect? Which indigenous language do you speak? What is the language in which you learned to speak? |
| Include questions on instruction in indigenous languages, bilingual or intercultural education. | Indigenous and African descendants | In some countries the school calendar is not aligned with socioeconomic processes in which indigenous boys and girls participate, in addition, teachers are unaware of indigenous languages and school texts are decontextualized, without the presence of children belonging to these peoples in the school curriculum and discourse (Abarca, 2015). All these can generate the unfavorable differences in the permanence of indigenous people in primary school, compared to the non-indigenous population. | The Brazilian school census collects information on indigenous education | Does the school offer an indigenous education? Is an indigenous language taught in school? Have the teachers taken indigenous education courses? Is the school located in an indigenous territory? Are pedagogical materials used for indigenous education? What is the language in which instruction is delivered? |
| Ask what type of educational institution the child attends (private schools, public schools or community-led special schools). | African - descendants, indigenous people, people with disabilities and LGBTQ+ | Studies show that there are inequalities in educational quality between public and private schools. Therefore, it is important to understand inequalities in access and attainment by type of institution in all the levels. | Several household surveys in the region ask the question of type of educational institution the student is attending. For instance, Encuesta de Calidad de Vida from Colombia. | Question about children below 5 years: What type of institution (community home, kindergarten, child development center, or school) do you attend? Community home Children's home Public Child Development Center Kindergarten or public school Kindergarten or private school |

| | | | | |
|--|---|--|--|--|
| Include questions aimed at identifying and measuring discrimination, violence and bullying within schools for all diverse population groups | African descendants, indigenous people, people with disabilities and LGBTQ+ | Global data on education points that Teachers' expectations differ by students' race (UNESCO, 2020). Regarding the LGBTQ+ population, the most prevalent form of violence reported in Latin American schools is verbal violence, followed by physical violence carried out by peers and educational personnel in public and private schools (UNESCO, 2017). | PISA 2018 asked students about their perception of their teachers' attitudes towards people from other cultural groups. | <p>Do teachers have misconceptions about the history of some cultural groups?</p> <p>Do teachers say negative things about people of some cultural Groups?</p> <p>Do teachers blame people of some cultural groups for problems faced by the country?</p> <p>Do teachers have lower academic expectations for students of some cultural groups?</p> |
| Incorporate questions on sexual and reproductive health, which include aspects of health for diverse populations such as the LGBTQ+ population | LGBTQ+ | | NORC Chicago example of developing survey specific on state of LGBTQ+ population (not just health) built up from previous survey respondents (https://www.americanprogress.org/issues/lgbtq-rights/reports/2020/10/06/491052/state-lgbtq-community-2020/) | <p>(For transgender people) Have you used or are you using hormones as part of your transition?</p> <p>Are you receiving or receiving medical care for the use of hormones?</p> <p>Source: INEC Ecuador</p> |
| Ask about school attendance and accessibility for children with disabilities | Persons with disabilities | The main barriers to inclusion of children and youth with disabilities in schools are (i) late or non-identification of children with disabilities; (ii) lack of teacher training; (iii) physical challenges to access not only school buildings but also routes from home to school (e.g. adapted pathways) and lack of adequate resources and assistive technology; (iv) existing stigmas against inclusive learning environments (Hincapié, 2019) | The National Disability Survey (Enadis) of Costa Rica includes an educational module in which they address different issues related to the type of education and accessibility of people with disabilities | <p>Does the person receive special education?</p> <p>Why is the person not attending school or university?</p> <p>Does the study place have ramps, doors with lever handles, wide doors and corridors, elevators, visual warning lights and audio alarms, grab bars or steps with railing, adapted furniture in all spaces?</p> <p>Do you receive significant curricular adaptation support from your educational center (modification of contents or objectives) or not significant (extension of times or larger print in tests), access to a computer with a large keyboard, specialized professionals such as psychology or pedagogy or tutorials?</p> |

Best Practices for Labor Market Data

There are indications that diverse populations have been particularly hard-hit by changes in labor markets. This has been particularly true for African descendants, indigenous peoples, persons with disabilities, and LGBTQ+ populations that have historically faced systemic barriers to accessing the labor market.

The evidence highlights that structural barriers include race-based biases in labor markets throughout the region. [Moreno et al. \(2012\)](#) found evidence of racial discrimination against individuals with indigenous characteristics in hiring practices in Peru. Similarly, [Galarza and Yamada \(2014\)](#) found that individuals with indigenous names were significantly less likely to be contacted regarding job applications for professional, technical, and unskilled positions than their non-indigenous peers.

In Brazil, response rates for the question concerning race or color within the national public intermediation service database (SINE) are significantly lower than in censuses and national surveys (62% and 99%, respectively). Qualitative research indicates that this may be due to: (i) candidates' unwillingness to identify themselves out of a fear of discrimination in intermediation and (ii) a lack of training and staff stereotypes of intermediation services. However, ethnic populations seem receptive to government interventions to improve job market access and training as demonstrated in a recent Uruguay experiment in behavioral science using nudges and role modeling which significantly increased the participation of ethnic minorities (Ajzenman and Coitiño, 2021; Coitiño, 2021).

Government training programs are often of low quality and they are not necessarily responsive to labor market demands particularly for African descendants, indigenous peoples, and persons with disabilities. In part because these groups are more likely to be informal, outsourced, and/or low-wage workers. Additional data is needed to ensure that skills development takes place in a more equitable manner.

| LABOR MARKET DATA | | | | |
|--|--|--|--|---|
| Topical Issue/Question | Relevant Populations | Rationale | Examples | Sample Question (if Available) |
| Ask questions aimed at measuring experience of exclusion or violence in the job search process (access to networks, mentoring, possible factors for differential treatment and consideration) and in jobs (compensation, and promotion). | African descendants, indigenous peoples, people with disabilities and LGBTQ+ | Besides the traditional forms of discrimination such as gender, race, religion, language and social origin new forms of discrimination have emerged like sexual orientation, age, HIV/AIDS, and disabilities (ILO, 2007) | The Specialized Study on the Afro-Peruvian Population included a module on the experience of discrimination and violence | At some point in your life, have you felt discriminated against when applying for a job or in your workplace for the following reasons: Race or skin color Physical or mental disability Sex or gender identity Language or way of speaking |
| Ask questions about accessibility for people with disabilities in the workplace and in the application for a job | People with disabilities | The inclusion of the population with disabilities in the labor market includes problems with the accessible environment, for example transport to the workplace. There are also problems with intermediation, that is, the connection of the talent of people with disabilities with the needs of employers (Duryea, 2019) | The National Disability Survey (Enadis) of Costa Rica, includes an employment module that addresses different issues related to accessibility for people with disabilities | Does your workplace have all the spaces (ramps, doors with lever handles, wide doors and corridors, elevators, visual warning lights and audio alarms, grab bars or steps with railings, adapted furniture). What is the main reason why you think you have not found a job or have not been able to start an activity of your own? Disability discrimination (among others) |

Best Practices for Migration Data Collection

Research from the United States has shown that immigrants to the country face different barriers depending on their skin color (ex., [Hersch, 2008](#); [Han and Uchikawa, 2020](#)). Despite large and increasing migration within Latin America, many of surveys in the region do not ask about the race or ethnicity of immigrants. This is particularly troubling in that research from Latin America also shows that individuals face discrimination based on their skin color ([Telles, 2014](#)). Given these trends, collecting data on the discrimination faced by migrant communities will be key as the lack of data creates an important barrier for understanding how communities will be accepted.

Better disaggregated data on the diversity of migrants (ethnicity, race, LGBTQ+, and disability status) is helpful to best design policies and programs to address the most vulnerable. There is evidence that race and ethnicity may be a determinant for how immigrants are treated in schools, labor markets, and the health care system. Better disaggregated data on the race and ethnicity of immigrants will enable better targeting of programs and resources to address the most vulnerable populations.

For example, given the racial diversity of Venezuelan immigrants (which includes direct descendants of Europeans, indigenous peoples, and African descendants), better disaggregated race and ethnicity data is needed to analyze their socio-economic conditions and human development opportunities as migrants.

ANNEX A.
INDIGENOUS PEOPLES, AFRICAN DESCENDANTS, PERSONS WITH DISABILITIES (PWD)
AND LGBTQ+ IDENTIFICATION IN SURVEYS AND CENSUSES¹⁸ (2000-2021)

| A.1 Population Censuses | | | | |
|-------------------------|--|--------------------|---------------------|------------|
| Country | Census | Indigenous Peoples | African Descendants | PwD |
| Argentina | Censo Nacional de Población, Hogares y Viviendas | 2001, 2010 | 2010 | 2010 |
| Barbados | Populations and Housing Census | No | No | 2000, 2010 |
| Belize | Population and Housing Census | 2000, 2010 | 2000, 2010 | 2000, 2010 |
| Bolivia | Censo Nacional de Población y Vivienda | 2001, 2012 | 2012 | 2012 |
| Brazil | Censo Demográfico | 2000, 2010 | 2000, 2010 | 2000, 2010 |
| Chile | Censo Nacional de Población y Vivienda | 2002, 2017 | No | No |
| Colombia | Censo Nacional de Población y Vivienda | 2005, 2018 | 2005, 2018 | 2005, 2018 |
| Costa Rica | Censo Nacional de Población y Vivienda | 2000, 2011 | 2000, 2011 | 2011 |
| Dominican Rep. | Censo Nacional de Población y Vivienda | No | No | 2010 |
| El Salvador | Censo de Población y Vivienda | 2007 | 2007 | 2007 |
| Ecuador | Censo Nacional de Población y Vivienda | 2001, 2010 | 2001, 2010 | 2010 |
| Guyana | Population and Housing Census | 2002, 2012 | 2002, 2012 | No |
| Guatemala | Censos Nacionales de Población y de Habitación | 2002, 2018 | 2002, 2018 | 2018 |
| Honduras | Censo de Población y Vivienda | 2001, 2013 | 2001, 2013 | 2013 |
| Jamaica | Population and Housing Census | No | No | 2011 |
| Mexico | Censo de Población y Vivienda | 2000, 2010, 2020 | 2020 | 2010, 2020 |
| Nicaragua | Censo de Población y de Vivienda | 2005 | 2005 | No |
| Panama | Censo Nacional de Población y Vivienda | 2000, 2010 | 2010 | 2010 |
| Paraguay | Censo Nacional de Población y Vivienda | 2002, 2012 | 2012 | 2012 |
| Peru | Censos Nacionales de Población y Vivienda | 2017 | 2017 | 2007, 2017 |
| Suriname | National Census | 2003, 2004, 2012 | 2003, 2004, 2012 | 2012 |
| Trinidad & Tobago | National Population and Housing Census | 2011 | 2011 | 2000, 2011 |
| Uruguay | Censo de Población, Hogares y Viviendas | 2011 | 2011 | 2011 |
| Venezuela | Censo Nacional de Población y Vivienda | 2001, 2011 | 2011 | No |

¹⁸ Note: None references a two-step approach to identify the LGBTQ+ population in Censuses

A.2 Nationally representative surveys

| Country | Survey | African Descendants | PwD | LGBTQ+ |
|-------------------|---|-------------------------------|-------|------------------|
| Belize | Labor Force Survey | 2001- 2005, 2007, 2012 - 2016 | No | No |
| | Multiple Indicator Cluster Survey | 2011 | No | No |
| Bolivia | Encuesta Continua de Hogares (ECH) | 2011+ | 2016+ | No |
| Brazil | Pesquisa Nacional por Amostra de Domicílios (PNAD) | 1990+ | No | No |
| Chile | Encuesta de Caracterización Socioeconómica Nacional (CASEN) | No | 2017 | 2015, 2017 |
| | Encuesta de Caracterización de la Población Afrodescendiente de la Región de Arica y Parinacota | 2013 | No | No |
| | 9na Encuesta Nacional de Juventud | No | No | 2018 |
| Colombia | Encuesta Nacional de Calidad de Vida (ECV) | 2010, 2012+ | 2017+ | No |
| | Gran Encuesta Integrada de Hogares (GEIH) | 2006-2007, 2014+ | No | No |
| | Encuesta Nacional de Demografía y Salud | 2010 | No | No |
| | Encuesta Nacional de Ingresos y Gastos | 2007 | No | No |
| | Encuesta Nacional de Uso de Tiempo | 2013, 2016-2017 | No | No |
| | Encuesta Nacional de Consumo de Sustancias Psicoactivas (ENCSPA) | No | No | 2019 |
| Costa Rica | Encuesta de Hogares de Propósitos Múltiples | 2002 | No | No |
| | Encuesta Nacional de Hogares (ENAHOG) | No | 2010+ | No |
| Ecuador | Encuesta Nacional de Empleo, Desempleo y Subempleo (ENEMDU) | 2002+ | No | No |
| | Encuesta de Condiciones de Vida | 2006, 2013-2014 | 2013 | No |
| Guyana | Demographic and Health Survey | 2009 | No | No |
| | Household and Budget Survey | 2005 | No | No |
| | Multiple indicator Cluster Survey | 2006, 2014 | No | No |
| Guatemala | Encuesta Nacional de Empleo e Ingresos (ENEI) | 2010+ | No | No |
| | Encuesta Nacional de Condiciones de Vida | 2006, 2011, 2014 | No | No |
| Honduras | Encuesta Nacional de Hogares sobre Condiciones de Vida | 2004 | No | No |
| Mexico | Encuesta Nacional de Ingresos y Gastos de Hogares (ENIGH) | No | 2012+ | No |
| | Encuesta Intercensal | 2015 | No | No |
| | 3ra Encuesta Nacional sobre Discriminación (ENADIS) | No | No | 2017 |
| | Encuesta Nacional sobre Diversidad Sexual y de Género (ENDISEG) | No | No | 2021 |
| Nicaragua | Encuesta Nacional sobre Medición de Niveles de Vida | 2001, 2005, 2014 | No | No |
| Panama | Encuesta de Hogares (EH) - Encuesta de Propósitos Múltiples (EHPM) | 2015+ | No | No |
| Peru | Encuesta Nacional de Hogares (ENAHOG) | 2005+ | 2015+ | No |
| | Encuesta Demográfica y de Salud Familiar (ENDES) | 2007, 2008, 2018 | 2013+ | No |
| | Encuesta Nacional de Programas Presupuestales (ENAPRES) | No | 2014+ | 2018, 2019, 2020 |
| Suriname | Multiple Indicator Cluster Survey | 2010 | No | No |
| Uruguay | Encuesta Continua de Hogares (ECH) | 2006+ | No | No |

ANNEX B.

CHECKLISTS: ETHNO-RACIAL, PWD AND LGBTQ+

B.1 Measuring Ethno-Racial Diversity Checklist (Indigenous Peoples and African descendants)

This checklist is designed to serve as a reference on determining if a given data set and variables are appropriate to be used for the purposes of reporting data disaggregated by ethno-racial identity.

| Considerations for Using Data Sets | | |
|---|---|---|
| Best Practices in Ethno-Racial Identification | | |
| ● | <i>Self-Identification vs Language</i> | - Where possible, it is better to rely on self-identification of ethno-racial identity based on self-identification rather than on language. Not only is this considered a best practice, but ensures that a more holistic representation of the population is analyzed. |
| ● | <i>Asking All Household Members</i> | - While not all countries ask all household members to identify their ethno-racial identity, this can result in an undercounting of the population by race and ethnicity, but special care should be taken in considering the identity of those who do not report their identity as it is possible that it is a mixed ethno-racial household. See below. |
| ● | <i>Cases of Multiple Identities</i> | - In some countries there are different peoples who self-identify as a group that is considered both African descendant and indigenous (such as the Garifuna population in Honduras, Nicaragua, and Belize). Similarly, in some countries, individuals are asked to identify their primary identity as well as their secondary identity better reflecting their complete heritage (as in Uruguay). Afro-indigenous can be separated if possible and that is recommended. However, this is only possible if sample sizes are large enough for estimating results. In the case of household surveys where sample sizes for Afro-indigenous respondents are not large enough for calculating representative results. Afro-indigenous respondents are categorized as either African descendants or indigenous depending on what is suggested by the national statistics institute of a given country. |
| Best Practices in Ethno-Racial Identification | | |
| ● | <i>Consistency of Wording</i> | - Verify that the wording of questions is consistent across time and between surveys before reporting results. Changes in wording of questions on surveys can have large impacts on how individuals identify. |
| ● | <i>Consistency of Ethno-Racial Groups</i> | - Verify that the ethno-racial group categories are the same across time and between surveys. |
| ● | <i>Consistency Across Time</i> | - Double check that questions are asked in the same way in all survey years that are being considered and, if reporting in cases where there are changes, make sure to report necessary caveats. |
| Application of Ethno-Racial Identity to Non-Respondents | | |
| ● | <i>Children</i> | - In some countries the race of children below a certain age is not always reported. Before using data, how the question is asked should be verified. While it is recommended that those who are not asked the question be treated as missing values in most cases, for the purpose of reporting statistics on children who fall below the age where these questions are asked, it is recommended that the ethno-racial identity of the head of the household (in the case of the child's parent) be applied to the child. |
| ● | <i>Households</i> | - In the case of reporting household indicators, it is recommended that the ethnicity of the head of the household is applied to the household as a whole. While this may not always be strictly accurate due to mixed ethno-racial households, it serves as an important proxy for measuring ethno-racial inequalities. |

Verifying Sampling Design from INE

| | | |
|---|---------------------------------------|---|
| ● | <i>Urban/Rural Representativity</i> | - Before analyzing data, it is crucial to verify the sample design used by the national statistics institute. Whether data collection is designed to be representative for urban and rural groups is important for ensuring that the measurement of ethno-racial gaps is accurate in many countries. If not representative, it is important to include necessary caveats in analysis. |
| ● | <i>Ethno-Racial Representativity-</i> | - Although rare, it is important to check if the national statistics institute designed surveys to be representative by ethno-racial identity. If not, it is important to note necessary caveats. |

Conditions for Reporting Results

Verify Sample Size and Distribution

| | | |
|---|--|---|
| ● | <i>Minimum Sample Size for Reporting</i> | - Results Should Not be Reported if the sample size is fewer than 30 households |
| ● | <i>Standard Error</i> | - Standard Error: limits based on the value p of the percentage, for percentage indicators $\begin{cases} p^{2/3}/9, & 0 < p \leq 0.5 \\ (1-p)^{2/3}/9, & 0.5 < p < 1.0 \end{cases}$ |
| ● | <i>Coefficient of Variation</i> | - Coefficient of variation: < 30% (for “mean” and “sum” indicators) |

Considerations and Concerns with Reporting Disaggregating Results

| | | |
|---|---------------------------------|---|
| ● | <i>Comparison Groups</i> | - When measuring disparities across ethno-racial lines, it is important to ensure that appropriate comparison groups are used. As such, where possible it is better to compare indigenous peoples and African descendants to the “Non-Indigenous/Non-African Descendant” population as it will provide a better picture of the inequalities by race and ethnicity. However, in cases where surveys do not allow for the capture of the “Non-Indigenous/Non-African Descendant” population, appropriate caveats should be included in the analysis. It is also recommended that National level indicators be reported. |
| ● | <i>Diminishing Sample Sizes</i> | - As additional disaggregation is included in the analysis (age, gender, locale, income, etc.), sample sizes will diminish. As such it is important to verify that sample sizes remain robust as analyses are conducted. Where not of significant scale, results should not be reported. |

Challenges for Specific Indicators

Traditional Communities and Intercultural Considerations

| | | |
|---|----------------|--|
| ● | <i>Income</i> | - In reporting income and labor differences across ethno-racial lines, it is important to ensure that the reporting of income reflects the world view of different ethno-racial groups. As such it is recommended that researchers take a “development with identity” approach by verifying that income is an appropriate measure of well-being for the population being analyzed (such as indigenous and traditional peoples) and, if not, consider reporting other indicators. |
| ● | <i>Housing</i> | - In reporting differences in household “quality” across ethno-racial lines, it is important to ensure that the reporting of income reflects the world view of different ethno-racial groups. As such it is recommended that researchers take a “development with identity” approach by conducting analysis of housing conditions that may be in line with cultural or traditional preferences of the analysis being considered. If traditional communities are opting for more traditional lifestyles, information on housing conditions may be irrelevant and problematic. As such it should be reported carefully and with necessary caveats. |

| Factors Influencing Ethno-Racial Identification | | |
|---|------------------------------------|---|
| ● | <i>Age</i> | - Generational differences may result in changing ethno-racial identity by age cohort. This is an important area to analyze and additional literature of country specifics should be considered in reporting results. |
| ● | <i>Income</i> | - Changes in socio-economic status may change ethno-racial identity in different income groups. As such, additional literature review of country specifics should be considered in reporting results. |
| ● | <i>Social Stigma</i> | - Changes in social acceptance of different ethno-racial identities may lead to changes in how individuals choose to self-identify. Additional literature review of country specifics should be considered in reporting on this issue as well. |
| Ethical Considerations and Alternate Indicators | | |
| ● | <i>Urban/Rural Considerations-</i> | - Given that ethno-racial groups may be more likely to primarily reside in different geographic locations (urban/rural), it may be necessary to report results comparing ethno-racial groups by locale rather than reporting aggregate results. |
| ● | <i>Education Indicators</i> | - Due to discrimination in different areas of society as well as ethno-racial differences in access to different elements of society, it is possible that gaps across ethno-racial lines may be different. For reporting purposes, it is recommended that analysts look and report multiple indicators. |
| ● | <i>Income/Labor Indicators</i> | - Due to discrimination in different areas of society as well as ethno-racial differences in access to different elements of society, it is possible that gaps across ethno-racial lines may be small in some income and/or labor indicators while being particularly large in other areas. As such, for the purposes of reporting on ethno-racial gaps, looking at and reporting on multiples indicators provides a clearer picture of inequalities. |

B.2 Reporting Data on Persons with Disabilities Checklist

This checklist is designed to serve as a reference on determining if a given data set and variables are appropriate to be used for the purposes of reporting data disaggregated for persons with disabilities.

| Considerations for Using Data Sets | | |
|--|---|---|
| Best Practices in Identifying People with Disabilities | | |
| ● | Use Washington Group Questionnaire | <p>-The Washington Group Questionnaire asks people if they have difficulty with performing certain activities (ex. Seeing even if wearing glasses) instead of asking people to self-identify disabilities. This reduces under-reporting due to stigma and lack of diagnosis of disability. The Washington Group of Disability Statistics has developed and tested a questionnaire for children, but countries in the region have not adopted it yet in their surveys.</p> <p>- It is very important that all respondents are asked the Washington Group Questions and not just respondents who report having a disability in a filter question.</p> |
| Comparing Results | | |
| ● | <i>Consistency of Questions between countries and across time</i> | - When comparing results across countries or across time, it is important to ensure that all surveys use the Washington Group Questions. |
| Application to Non-Respondents | | |
| ● | <i>Households</i> | - For developing household level indicators, it is suggested that households that include one person with a disability be treated as a "Household with a Person with a Disability" for the purpose of analysis. The comparison group should be "Households without a Person with a Disability" |

Verifying Sampling Design from INE

| | | |
|---|-------------------------------------|--|
| ● | <i>Urban/Rural Representativity</i> | - Before analyzing data, it is crucial to verify the sample design used by the national statistics institute. Whether data collection is designed to be representative for urban and rural groups is important for ensuring that the measurement is accurate in many countries. If not representative, it is important to include necessary caveats in analysis. |
|---|-------------------------------------|--|

Conditions for Reporting Results

Verify Sample Size and Distribution

| | | |
|---|--|---|
| ● | <i>Minimum Sample Size for Reporting</i> | - Results Should Not be Reported if the sample size is fewer than 30 households |
| ● | <i>Standard Error</i> | - Standard Error: limits based on the value p of the percentage, for percentage indicators $\begin{cases} p^{2/3}/9, & 0 < p \leq 0.5 \\ (1-p)^{2/3}/9, & 0.5 < p < 1.0 \end{cases}$ |
| ● | <i>Coefficient of Variation</i> | - Coefficient of variation: < 30% (for “mean” and “sum” indicators) |

Considerations and Concerns with Reporting Disaggregating Results

| | | |
|---|--|---|
| ● | <i>Aggregating Persons with Disability vs. Reporting by Type of Disability</i> | - While important to identify populations and the challenges faced by groups with a particular type of disability, due to sample size concerns, it is recommended that in reporting other indicators (other than population with specific disabilities) that persons with disability are aggregated for analysis. |
| ● | <i>Diminishing Sample Sizes</i> | - As additional disaggregation are included in the analysis (age, gender, locale, income, etc.), sample sizes will diminish. As such it is important to verify that sample sizes remain robust as analyses are conducted. Where not of significant scale, results should not be reported. |

Challenges for Specific Indicators

Factors Influencing Disability Self-Identification

| | | |
|---|------------------------------------|---|
| ● | <i>Social Stigma</i> | - Changes in social acceptance of different disabilities may lead to changes in whether individuals choose to self-identify. The Washington Group Questions reduce under-reporting due to social stigma as people are asked about their level of functioning in specific domains (vision, hearing, mobility, cognition, self-care, and communication) and not whether or not they consider themselves as having a disability. |
| ● | <i>Lack of Knowledge/Diagnosis</i> | - Further, some individuals might have a disability without a formal diagnosis and may not suspect having a disability despite having clear symptoms. The Washington Group Questions reduce under-reporting due to lack of knowledge/diagnosis as people are asked about their level of functioning in specific domains (vision, hearing, mobility, cognition, self-care and communication) and not about whether or not they consider themselves as having a disability. |

B.3 Reporting Data on LGBTQ+ People Checklist

This checklist is designed to serve as a reference on determining if a given data set and variables are appropriate to be used for the purposes of reporting data disaggregated for LGBTQ+ people.

| Considerations for Using Data Sets | | |
|---|--|--|
| Best Practices in Identifying LGBTQ+ People | | |
| ● | <i>Gender identity Two-step question</i> | To accurately reflect the current gender in which the individual is living and functioning socially, the recommendation is to ask assigned gender at birth (male/female) followed by a question on current gender identity (male/female/transgender/other or male/ female/ transmale/ transfemale/other). |
| ● | <i>Sexual orientation categories</i> | Questions must remain inclusive of the wide array of sexual orientations that exist. These should include such categories as heterosexual/straight, gay/lesbian, bisexual, gender queer, asexual, pansexual, etc. Moreover, the inclusion of the option “Other, please specify” is a common practice. |
| Comparing Results | | |
| ● | <i>Consistency of Wording</i> | Verify that the wording of questions is consistent across time and between surveys before reporting results. Changes in wording of questions on surveys can have large impacts on how individuals identify. |
| ● | <i>Consistency of LGBTQ+ categories</i> | Verify that the LGBTQ+ categories are the same across time and between surveys. |
| ● | <i>Consistency Across Time</i> | Double check that questions are asked in the same way in all survey years that are being considered and, if reporting in cases where there are changes, make sure to report necessary caveats. |
| Considerations and concerns with data privacy | | |
| ● | <i>Mode of Data Collection</i> | Questions related to sex and gender are considered sensitive, therefore, when possible, sex and gender-related questions should be placed on self-administered questionnaires. |
| ● | <i>Survey instructions on data privacy</i> | Specific and clear information about how survey data will be protected is important to include in survey instructions for respondents. Otherwise, participants could be reluctant to respond the items related to sex and gender identity or provide an accurate response. |
| Application to particular population groups | | |
| ● | <i>Youth and adolescents</i> | As youth may not adopt alternative gender identity labels until mid to late adolescence, it is recommended to ask the question only to adults or explore adaptations of the question that are more appropriate for teenagers, for instance, measures based on gender expression, along with assigned sex at birth (The GenIUSS Group, 2014). Moreover, adolescents may have more difficulties than adults with complex terminology and sentences. Therefore, questions designed for adolescents should have extra clarification when defining terminology. |
| ● | <i>People with low educational level</i> | As in the case of adolescents, people with low educational levels may face more problems understanding the questions and the categories, so they might require assistance or an alternative design to respond correctly to this kind of question. Therefore, different terminology may be needed or an introductory text prior to the question to clarify complex terminology. Using an interviewer who assists the respondent is against the strategy of having a self-administered questionnaire that prevents people from feeling uncomfortable and stigmatized by a third party. |

Conditions for Reporting Results

Verify Sample Size and Distribution

| | | |
|---|--|---|
| ● | <i>Minimum Sample Size for Reporting</i> | - Results Should Not be Reported if the sample size is fewer than 30 households |
| ● | <i>Standard Error</i> | - Standard Error: limits based on the value p of the percentage, for percentage indicators $\begin{cases} p^{2/3}/9, & 0 < p \leq 0.5 \\ (1-p)^{2/3}/9, & 0.5 < p < 1.0 \end{cases}$ |
| ● | <i>Coefficient of Variation</i> | - Coefficient of variation: < 30% (for “mean” and “sum” indicators) |

Considerations and Concerns with Disaggregating Results

| | | |
|---|---------------------------------|--|
| ● | <i>Comparison Groups</i> | While important to identify populations and the challenges faced by groups with a particular gender identity and sexual orientation, due to sample size concerns, it is recommended that in reporting other indicators (other than population with specific gender identity and sexual orientation) LGBTQ+ people are aggregated for analysis. |
| ● | <i>Diminishing Sample Sizes</i> | As additional disaggregation is included in the analysis (age, race, locale, income, etc.), sample sizes will diminish. As such it is important to verify that sample sizes remain robust as analyses are conducted. Where not of significant scale, results should not be reported. |

Challenges for Specific Indicators

Factors Influencing LGBTQ+ People Self-Identification

| | | |
|---|--------------------------|---|
| ● | <i>Social Stigma</i> | Changes in social acceptance of different gender identities may lead to changes in whether individuals choose to self-identify. |
| ● | <i>Lack of Knowledge</i> | Some individuals might identify with one of the LGBTQ+ categories without being clear on which is the more accurate for them. |



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