Is Your Agency Ready to Serve Transgender and Non-Binary Clients?

<table>
<thead>
<tr>
<th>TANGIBLE</th>
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</thead>
<tbody>
<tr>
<td><strong>Forms &amp; paperwork</strong></td>
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<tr>
<td><strong>Intake forms</strong></td>
</tr>
<tr>
<td>o Include name of use (in addition to any request for ‘legal’ name)</td>
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<tr>
<td>o Include pronoun(s)</td>
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<tr>
<td>o Include gender/sex options beyond female/male (or do not ask for gender/sex at all)</td>
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<tr>
<td>o Include partnership status and relationship options (include same-gender-loving relationships, legally recognized and not forms of partnerships)</td>
</tr>
<tr>
<td>o Include gender-neutral honorifics (e.g. Mx. In addition to Mr., Ms.)</td>
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<tr>
<td>o Emergency contact asks for relationship to client</td>
</tr>
<tr>
<td>o Medical information includes N/A options (for those who do not want to disclose)</td>
</tr>
<tr>
<td>o Medical history form organized by organ system or function rather than sex</td>
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<tr>
<td><strong>Office records</strong></td>
</tr>
<tr>
<td>o System for recording name of use and pronoun(s)</td>
</tr>
<tr>
<td>o System emphasizes name and pronoun client uses (so staff will be aware of what name to use)</td>
</tr>
<tr>
<td>o Staff access to transgender information is limited (to protect client privacy)</td>
</tr>
<tr>
<td>o Name and gender health insurance is under is recorded and used to facilitate accurate billing</td>
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</tbody>
</table>

1 Not applicable is to be used if the type of services delivered render the measure not applicable. An example would be a rape crisis hotline that is not visited by clients and so has no waiting room.

2 Don’t know
<table>
<thead>
<tr>
<th>Client/patient bill of rights</th>
<th>Yes</th>
<th>No</th>
<th>N/A¹</th>
<th>DK²</th>
</tr>
</thead>
<tbody>
<tr>
<td>Given to every client</td>
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<tr>
<td>Prominently posted</td>
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<tr>
<td>Available on website</td>
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<tr>
<td>Explicitly includes gender identity/expression non-discrimination pledge</td>
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</tr>
<tr>
<td>Addresses privacy and confidentiality</td>
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<tr>
<td>Outlines complaint procedure</td>
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<tr>
<td>Addresses law enforcement involvement</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Non-discrimination policies</th>
<th>Yes</th>
<th>No</th>
<th>N/A¹</th>
<th>DK²</th>
</tr>
</thead>
<tbody>
<tr>
<td>Explicitly include gender identity and gender expression</td>
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<tr>
<td>Explicitly include sexual orientation</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Consent forms/contracts</th>
<th>Yes</th>
<th>No</th>
<th>N/A¹</th>
<th>DK²</th>
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<tbody>
<tr>
<td>Explicitly Includes gender identity/expression non-discrimination pledge</td>
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<tr>
<td>Addresses law enforcement involvement</td>
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<tr>
<td>Addresses partner/parent access to records, staff, information</td>
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</table>

<table>
<thead>
<tr>
<th>Complaint / grievance policies</th>
<th>Yes</th>
<th>No</th>
<th>N/A¹</th>
<th>DK²</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clients have an anonymous way to express concerns, grievances and complaints</td>
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<tr>
<td>Non-retaliation is guaranteed to those who file a grievance</td>
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<tr>
<td>Staff will work to address all complaints reported</td>
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<tr>
<td>When client is known, staff will work to appropriately address complaint with client and involve them in the solution (as much as client desires)</td>
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<tr>
<td>Staff have a forum for making complaints / grievances against other staff members (including noting when staff are not being respectful of trans/non-binary clients)</td>
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</table>
### Anti-bias policy

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<thead>
<tr>
<th></th>
<th>Yes</th>
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<tr>
<td>Addresses client-client bias</td>
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<tr>
<td>Addresses staff-staff bias</td>
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<tr>
<td>Addresses client-staff bias</td>
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<tr>
<td>Refers to complaint/grievance policy</td>
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<tr>
<td>Given to all clients</td>
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<tr>
<td>Given to all staff (or in agency handbook/policy/procedure manual(s))</td>
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<tr>
<td>Staff receive training on policy and a chances to role-play</td>
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</table>

### Medication policy (generally for residential programs only)

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<tr>
<th></th>
<th>Yes</th>
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</thead>
<tbody>
<tr>
<td>Policy specifically addresses controlled substances or Schedule I, II, III medications (including Testosterone)</td>
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<tr>
<td>Clients maintain access (direct or through staff) to medications, including to hormones they are already prescribed / taking</td>
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<tr>
<td>Clients can access trans-informed physicians who can prescribe medications, including hormones if a client was already on hormones, or wishes to pursue</td>
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<tr>
<td>Sharps (needle) protocols exist for clients who are self-injecting (hormones or other medications)</td>
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<tr>
<td>- Sharps containers are easily accessible to clients using injectable medications and in locations that allow for medical/personal privacy</td>
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<tr>
<td>Policy addresses clients who are on hormones not prescribed from a physician (e.g. May these continue? Or will client be supported in getting connected to trans-affirming medical provider?)</td>
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</table>
### Witnessed or observed urinalysis policy (if required)

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<tr>
<th>Yes</th>
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- If a witness is required, client is allowed to determine the gender of the observer
- System allows clients using testosterone to be charted so that they are not marked positive for steroid use
- Urinalysis policies are discussed with all clients so trans clients do not feel singled out or vulnerable

### Placement policy for sex-segregated or sex-specific services

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<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>N/A¹</th>
<th>DK²</th>
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</table>

- Policy is written
- Is it clear to clients and staff who can be admitted to or included in your programming, shelter, services
- Policy explicitly addresses how placement of trans and non-binary clients will be determined
- Policy explicitly addresses room, roommate placement
- Policy aligns with federal, state, local and funder non-discrimination requirements (e.g., VAWA, HUD, FVPSA, HHS, Title VII, Title IX)
- Client allowed maximum self-determination
- Placement decisions explicitly protected from other clients’ complaints (i.e., trans person won’t be removed or re-assigned due to another client’s gender-based complaint)
- Equal access to services is guaranteed (this can refer to adherence to funder/federal guidance or internal policies that note that all clients entering a program/service will have equal access to services as other clients allowed entrance)
- All staff are trained on this policy and any funder or government non-discrimination polices related to gender identity/expression and sexual orientation.
- If children are accepted and/or placed based on gender, policy includes specific language
<table>
<thead>
<tr>
<th>Addressing trans, non-binary, gender non-conforming children.</th>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
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</tr>
</thead>
<tbody>
<tr>
<td>▪ If there are gender-based age differences around acceptance and/or placement, policy includes specific language addressing trans, non-binary, and gender non-conforming children.</td>
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</table>

### Access to gender-affirming prosthetics and items

- Available supplies include gender-affirming prosthetics and items, including…?
  - Larger sized women’s clothing (including underwear and sleepwear) and shoes
  - Smaller sized men’s clothing (including underwear and sleepwear) and shoes
  - Gender-neutral clothing in a wide range of sizes
  - Make up, including foundation
  - Razors
  - Wigs
  - Gaffing or tucking devices
  - Breastforms and/or hip pads
  - Binders
  - Packers/Packies
  - Menstrual products available to all residents (i.e. not just in women’s restrooms)

### Surveys

- Outreach to trans and lesbian, gay, bisexual populations
- Allows for gender identities beyond female/male
- Includes same-sex partnership questions
- Does not presume gender of victims or perpetrators
### Staff email and other identification

- All staff include pronouns in their email signature file
- Staff with nametags have an option to include pronouns
- Posted/available staffing list includes names and pronouns

### Trans employee inclusion

- Transgender and non-binary employees can smoothly transition on the job
  - A written policy exists, delineating rights, practices and protocols for an employee transitioning on the job
- Transgender and non-binary employees can access bathrooms and locker rooms in line with their gender identity and/or gender expression
- Information provided for background checks is kept confidential [Note: some trans /non-binary people will list prior names. This information will not impact hiring.]
- Human Resources maintains confidential employee records, which may include information about a staff person’s sex assigned at birth, former name, etc.
- Employer-offered health insurance does not exclude trans-related physical or mental health care
- If sex-segregated services are provided, there is clear policy guaranteeing trans women, trans men, and non-binary or gender non-conforming staff have the same access to facilitation roles as non-trans women and men

### Bathroom options

- All gender option is available
- All single-user bathrooms are for any gender user
## Self-Assessment Tool

**Is Your Agency Ready to Serve Transgender and Non-Binary Clients?**

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>o Signage lets bathroom users know that people can use the gendered bathroom that best aligns with their gender (and others should not police bathroom choice)</td>
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<tr>
<td>o Non-harassment policies explicitly include bathrooms</td>
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<tr>
<td>o Available products are unscented or in “gender-neutral scents”</td>
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<tr>
<td>o Colors and art subjects are not skewed toward one gender</td>
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<tr>
<td>o Menstrual products are available in all bathrooms</td>
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### Service models and curriculum

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<tr>
<td>o Acknowledges survivors of all genders</td>
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<tr>
<td>o Includes examples of survivors who have offenders of all genders</td>
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<tr>
<td>o Includes trans-specific content (or awareness that trans people will be clients)</td>
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### Advertising/Publicity

#### Website

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<tr>
<td>o Images include men (straight, gay, bi, trans), Trans people, Lesbian, Gay, Bisexual people</td>
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<tr>
<td>o Service exclusions, if any, are explicitly stated</td>
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<td>o Admission/services determination criteria explicitly stated (including about gender inclusion/exclusion)</td>
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<tr>
<td>o Staff bios and pictures are available, ideally including staff pronouns</td>
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#### Print ads

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### Self-Assessment Tool

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</table>

### Letters/flyers/brochures

<table>
<thead>
<tr>
<th><strong>Yes</strong></th>
<th><strong>No</strong></th>
<th><strong>N/A¹</strong></th>
<th><strong>DK²</strong></th>
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<td>Images include men (straight, gay, bi, trans), Trans people, Lesbian, Gay, Bisexual people</td>
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### Social media/newsletters

<table>
<thead>
<tr>
<th><strong>Yes</strong></th>
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<tr>
<td>Admission/services determination criteria explicitly stated (including about gender inclusion/exclusion)</td>
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<tr>
<td>Newsletter always has Trans/LGB content (even if very small!)</td>
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<tr>
<td>Regular Trans/LGB posts on blogs and social media</td>
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</table>
### Displayed materials

#### Brochures
- Images include men (straight, gay, bi, trans), Trans people, Lesbian, Gay, Bisexual people
- Text refers to Trans and LGB individuals
- Text uses varied pronouns
- Trans and LGB-specific brochures are prominently displayed
- Includes trans pride or rainbow pride flag (or Safe Zone, if appropriate)

#### Posters/art
- Human images are diverse
- Color/subjects are not skewed toward one gender

#### Magazines
- Topics appeal to clients of various genders, races, interests
- Trans and/or LGB-specific magazines and materials are displayed

#### Informational/FAQ sheets
- Recognize perpetrators and victims are of all genders
- Acknowledge same-sex relationships and gender diversity

#### Stickers/flags/signage
- “Bias-free zone” or similar notice prominent
- Trans/LGB-specific and/or rainbow signs displayed

#### Bulletin boards
- Trans/LGB business cards displayed
- Trans/LGB event flyers posted
- Clients encouraged to post materials
<table>
<thead>
<tr>
<th>Bookshelves/library</th>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
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<tbody>
<tr>
<td>o Trans/LGB books displayed</td>
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<tr>
<td>o Books on other types of diversity displayed</td>
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<table>
<thead>
<tr>
<th>Referrals</th>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
<th>DK</th>
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<tbody>
<tr>
<td>• Trans/LGB-savvy referral list available</td>
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<tr>
<td>• All staff have access to Trans/LGB referrals</td>
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<tr>
<td>• All referrals screened for Trans/LGB awareness/knowledge</td>
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<tr>
<td>• Staff does <em>not</em> assume clients must locate their own Trans/LGB-savvy referrals</td>
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<tr>
<td>• Referrals given based on client need – clients are asked if they would like a provider who is trans knowledgeable</td>
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<tr>
<td>• If screening providers for a client, the client’s gender history or identity is only disclosed with explicit consent</td>
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<table>
<thead>
<tr>
<th>Visible feedback/complaint mechanisms</th>
<th>Yes</th>
<th>No</th>
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<tbody>
<tr>
<td>• Explicit feedback/complaint procedures</td>
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<td>• Complaints can be filed anonymously</td>
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<td>• Procedures are “advertised” throughout agency and its materials</td>
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<tr>
<td>• Procedures are included in clients’ rights and consent forms</td>
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<tr>
<td>• Staff promote feedback/complaint procedures</td>
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<table>
<thead>
<tr>
<th>Tracking Trans/LGB clients</th>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
<th>DK</th>
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<tbody>
<tr>
<td>• Gender identity and sexual orientation is asked on forms or interviews</td>
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<tr>
<td>• Gender identity and sexual orientation data is tracked</td>
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<tr>
<td>• Tracked data is used to enhance outreach, prevention, and service provision to Trans/LGB clients</td>
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<tr>
<td>Training</td>
<td>Yes</td>
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<tr>
<td><strong>Transgender cultural competency</strong></td>
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<tr>
<td>o All staff &amp; volunteers have orientation</td>
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<td>transgender cultural competency training</td>
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<tr>
<td>o All staff and volunteers have ongoing</td>
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<td>transgender cultural competency training</td>
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<tr>
<td><strong>Addressing bias</strong></td>
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<td>o All staff and volunteers have orientation</td>
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<td>training on addressing bias in staff and</td>
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<td>other clients</td>
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<td>other clients</td>
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<tr>
<td>o Staff members are coached on addressing</td>
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<td>biased remarks</td>
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<tr>
<td>o Clients are advised agency is a “no bias”</td>
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## INTANGIBLE

### Existing reputation
- Positive experiences serving trans/non-binary clients
- When no experience serving trans/non-binary clients:
  - Check re: who was turned away
- When negative experience serving trans/non-binary clients:
  - Record what you learned
  - Record how problem(s) were rectified
  - Develop written procedures to prevent problem(s) from reoccurring

### Agency name “female”
- Consider changing agency name to one that includes all genders
- Record how service philosophy has changed
- Record how new policy is advertised

### Be present at transgender events
- Attend, participate, table at or are involved at transgender events
- Volunteer to help support transgender events
- Promote trans-focused events to clients and staff

### Develop joint projects with transgender organizations
- Work with transgender individuals/organizations on projects
- Outreach to transgender organizations to see where partnerships could occur
- Offer to cross train with transgender organizations

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3 Not applicable is to be used if the type of services delivered render the measure not applicable. An example would be a rape crisis hotline that is not visited by clients and so has no waiting room.

4 Don’t know
### Community partnerships & events

- Staff booths/tables at Trans/LGB events
- Transgender organizations table at your events
- Agency sponsors transgender events/fundraisers
- Transgender organizations are on agency’s mailing list
- Advertise in Trans/LGB periodicals/community papers
- Staff paid to do transgender networking, attend conferences
- Staff serve on Trans/LGB boards and/or advisory committees
- Staff subscribe to Trans/LGB listservs/social media sites
- Agency leaders have held meetings with transgender leaders
  - Ask about referral lists

### Active monitoring of attitudes/tone

- Transgender issues are regularly discussed at staff meetings
- Challenging/biased situations are reviewed by supervisors
- Employees are evaluated on how welcoming they are
- Staff have support structures
- Client feedback is sought and used

### Client/staff interactions and language

- Body language is open and accepting
- Staff avoid invasive curiosity questions
- Clients are told why questions are being asked
- Questions are open-ended
- Questions are non-gendered
- Staff reflect client’s language
### Out T/LGB staff

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<th>Yes</th>
<th>No</th>
<th>N/A³</th>
<th>DK⁴</th>
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<tbody>
<tr>
<td>1. Staff are comfortable being out as Trans and/or LGB</td>
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<td>2. Staff converses about Trans and/or LGB topics at work</td>
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<td>3. Staff vacancies are advertised in Trans/LGB venues</td>
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<td>4. Staff are active participants in transgender organizations and events</td>
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<td>5. Transgender individuals are on agency Board of Directors/Advisory Board</td>
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<td>6. Transgender individuals are volunteers at the agency</td>
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<td>7. Transgender individuals help make policy</td>
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<td>8. Transgender consultants are hired</td>
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<td>9. Transgender staff receive promotions</td>
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**Comments:**

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