

| Item # | Equal Access Goal | Agency/Project has a Written Policy | Staff, Volunteers and Vendors are Trained to Comply with the Written Policy | All Clients are Aware of the Agency/Project Policy |
|--------------------------|--|-------------------------------------|---|--|
| | Sample Response Options and Scoring | Yes | Yes | No |
| 1 | Agency is committed and intends to comply with HUD's Equal Access Rule. (If your agency receives HUD funding for shelter or services, your agency is required to meet these standards) and State and municipal laws. | | | |
| 2 | For an agency legally permitted to segregate services based on gender, the agency serves all eligible clients that identify with that gender. | | | |
| 3 | For an agency legally permitted to segregate services based on gender, the agency will not deny access because the client identification documents have a different gender marker than the client or potential client presenting for service. | | | |
| 4 | The agency or project will not consider a client or potential client ineligible because their appearance or behavior does not conform to gender stereotypes. | | | |
| 5 | Agency or project does not ask questions or seek information concerning a person's anatomy or medical history beyond elements necessary for the purpose of providing services. | | | |
| 6 | For an agency not permitted to segregate services based on gender, the agency will serve all individuals that are eligible for the project. | | | |
| 7 | If the Agency operates a family shelter, the Agency does not expel or decline a client of any gender if they are otherwise eligible for services. | | | |
| 8 | If the Agency operates a family shelter, the Agency does not expel or decline clients based on their male gender identity, regardless of age. | | | |
| 9 | Agency uses appropriate, inclusive language in communications, publications, trainings, personnel handbooks and other policy documents that affirms the agency's commitment to serving all eligible clients in adherence with the Equal Access Rule. | | | |
| 10 | Agency makes Equal Access Rule policies and procedures publicly available on the agency's website and through other commonly used public notification processes. | | | |
| 11 | Agency ensures staff, volunteers and contractors are provided a copy of the Agency's policies and practices regarding Equal Access requirements. | | | |
| 12 | Agency includes "gender identity" and "gender expression" to list of attributes that are protected from discrimination in the Agency's Policies and Procedures. | | | |
| Harassment Policy | | | | |
| 13 | Agency includes transgender and non-gender conforming in the list of groups vulnerable to harassment and/or list of protected groups. | | | |

| | | | | |
|--|---|--|--|--|
| 14 | Agency identifies harassment as a range of behaviors that are experienced as offensive, aggressive, or intimidating regardless of physical location or proximity to the project. For the LGBTQ clients, this can include: consistently or maliciously not using the client's affirmed gender pronoun, asking any questions about a client's body or appearance, disclosing that a client is transgender or gender non-conforming, or physical intimidation. | | | |
| 15 | Agency ensures the client understands their rights if they are experiencing harassment and discrimination; expectations for non-harassment and non-discrimination behaviors, respect for other clients and the importance of maintain confidentiality. | | | |
| 16 | Agency requires project staff, contractors, volunteers and clients to use client's preferred gender and pronoun. | | | |
| Managing and Resolving Violations | | | | |
| 17 | Agency has a formal grievance process that is prompt, transparent and consistent. The grievance process will be resolved in ___ [timeframe]. | | | |
| 18 | Agency takes immediate action to resolve inappropriate behavior, harassment, or equal access issues by any person (staff, volunteers, contractors or clients). Staff training includes role play on interventions (staff to staff, staff to resident, and resident to resident). | | | |
| 19 | Agency mediates and resolves conflicts between clients in a way that is respectful, fair and equitable. | | | |
| 20 | Agency has policy that if a client needs to be moved for harassment and safety concerns, the agency will have a preference to move the client with a bias. | | | |
| 21 | Agency has a sanction process for violations committed by staff, volunteers or vendors (For example, formal documentation in employee's file, suspension, firing or legal action based on the type(s) and severity of harassment). Sanctions are enforced every time there is a violation and sanctions are consistently applied. | | | |
| 22 | Agency develops partnerships with organizations that can provide expertise around the process of changing gender markers on identification and benefit applications or ensures subject matter expertise among staff. | | | |
| 23 | Agency ensures the clients without ID understand the resources available to obtain ID, as IDs are required for obtaining employment, accessing benefits and many other services important to self-sufficiency. | | | |
| 24 | Agency has policy to correct any misinformation or inaccurate conclusions that transgender clients threaten the health or safety of other clients solely based on their non-conforming gender expression during risk-based conversations. | | | |
| Confidentiality Practices | | | | |
| 25 | Agency keeps a client's transgender status confidential, unless the client gives permission to share this information. | | | |
| 26 | Agency ensures that only essential staff, identified by administrators, are told about a client's transgender status to ensure equal access and safety. | | | |

| | | | | |
|-------------------------|--|--|--|--|
| 27 | Agency ensures that when a client's gender identity and sex assigned at birth differ, that difference is treated as confidential medical information and may not be disclosed without specific, time-limited written client consent | | | |
| 28 | Agency supports all clients in understanding their privacy rights and the implication of releasing information. | | | |
| 29 | Agency ensures staff, volunteers and contractors understand that a client's sex assigned at birth is confidential information and the potential impact that disclosure can have on a client's progress to self-sufficiency. | | | |
| 30 | Agency is committed and complies with federal, state and local privacy laws. | | | |
| 31 | Agency keeps the client's legal name and/or sex at birth confidential unless the client gives written permission otherwise. Written and verbal consent are different. Written consent is a document that articulates the manner and extent to which the client's information will be shared and the client signs the document to confirm their permission. The staff should make sure the client understands the written permission they are giving. Verbal consent requires the staff and client to discuss the manner and extent to which the client's information will be shared in a way that is understood by the client and the client verbally affirms some level of sharing. | | | |
| Data Collection | | | | |
| 32 | Agency permits clients to request a private space to complete intake and data collection. | | | |
| 33 | Agency ensures that gender identity is not required to match the gender listed on the ID or documents | | | |
| 34 | Agency ensures staff, volunteers and contractors understand that a client may not present as the way they identify; staff, volunteers and vendors will respect the client's identity. | | | |
| 35 | Agency intake materials allow for client's to indicate their legal name and the name they prefer to go by. | | | |
| 36 | If intake materials include preferred gender identity, that gender identity is supported by the Agency. | | | |
| Safety Practices | | | | |
| 37 | Agency ensures that clients with prescribed hormones or other medications as part of their gender-affirming healthcare regime have access to those medications. | | | |
| 38 | Agency will respect the client's evaluation of their own safety with regard to proposed housing options and accommodate reasonable client requests regarding safety. For example, a transgender man that does not feel safe in a men's congregate sleeping area could request assignment to the bed closest to staff. Staff, volunteers and contractors should reasonably defer to client's request. | | | |
| 39 | Client has a right to request accommodations based on their personal safety and privacy concerns. | | | |
| 40 | Staff will recommend accommodations based on safety concerns to residents. | | | |

| | | | | |
|------------------------------|--|--|--|--|
| 41 | Agency ensures that if a physical search or urine test is required for admission, the client can choose the gender of the staff person conducting the search. If someone of that gender is not available, the Agency will select a staff person that understands the concerns of the client, will be respectful and will uphold the agency's policies and procedures with regard to transgender clients. | | | |
| Facility Enhancements | | | | |
| 42 | Agency will take measures to create a safe environment for transgender clients. When possible the Agency will ensure construction or rehabilitation of the physical property, including sleeping area, bathrooms, and showers promote privacy and safety. | | | |
| 43 | Agency has a single check-in area for both genders. | | | |
| 44 | If the Agency only offers congregate bathrooms, all urinals/toilets have individual stalls to support client safety. | | | |
| 45 | If the Agency only offers congregate showers, each shower head will have individual stalls to support client safety. | | | |
| Additional Areas | | | | |
| 46 | Agency offering services and shelters will offer individual gender-neutral bathrooms for all clients. | | | |
| 47 | Agency offering services and shelters will offer individual gender-neutral shower rooms for all clients. | | | |