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Agency Self-Assessment Tool

for Serving LGBTQ+ Newcomers

January 2025

*This tool builds on* [*LGBT Refugee Resettlement Guidelines and Agency Self-Assessment*](https://www.switchboardta.org/resource/lgbt-refugee-resettlement-guidelines-and-agency-self-assessment/) *(published by Heartland Alliance’s Rainbow Welcome Initiative in October 2013) and was created by* [*Episcopal Migration Ministries*](https://episcopalmigrationministries.org/)*’ (EMM’s)* [*Rainbow Initiative*](https://episcopalmigrationministries.org/rainbowinitiative/) *in partnership with* [*Switchboard*](https://www.switchboardta.org/)*. Switchboard provides free, personalized technical assistance to organizations in the United States that support Office of Refugee Resettlement (ORR)-eligible newcomers. These services include resource lists, data and research, consultation calls, webinars and workshops, in-person training, and more. To submit a request for assistance, complete* [*this form*](https://www.switchboardta.org/technical-assistance/)*.*

Introduction

Every group of newcomers includes people who are lesbian, gay, bisexual, transgender, queer, or questioning (LGBTQ+). They come from every part of the world and live in every region of the United States. Some seek protection after persecution directed against them because of their sexual orientation or gender identity, while others flee because of war, natural disasters, or extreme poverty. Still others cross borders in search of work or educational opportunities. Some travel with children, spouses, and parents. Many arrive as individuals.

Given their diversity, LGBTQ+ newcomers may step through the door of any organization at any time without advance notice. In fact, it is likely that you have served LGBTQ+ clients without being aware of it.

Using This Tool

This document is intended to:

* Help organizations that focus on serving newcomers identify their strengths and areas for growth with respect to LGBTQ+ clients
* Provide access to materials that can help organizations enhance their capacity to serve LGBTQ+ newcomers
* Enable newcomer serving agencies to identify affiliates that are best suited to provide services to LGBTQ+ clients

After an initial assessment, organizations may use this tool annually or biannually to monitor their progress and plan new programming. Regular review enables you to stay up to date with shifting legal, social, and political climates, while also ensuring that new terms, policies, and practices are effectively integrated into service delivery. As staffing and other factors change, conducting this self-assessment periodically can help your organization remain responsive and inclusive.

Each of the following eight overlapping categories is the subject of a matrix presented below. At the end of the document, you will find an assessment tracking chart categorized by topic area:

1. Public Welcome
2. Community Context and Partnership Potential
3. Organizational Infrastructure
4. Terminology and Shared Knowledge
5. Intake and Confidentiality
6. Belonging and Leadership
7. Partnerships
8. Monitoring, Evaluation, and Continuous Improvement

Once you have identified areas for growth, you can use the accompanying [Supplemental Resource List](https://www.switchboardta.org/resource/agency-self-assessment-tool-for-serving-lgbtq-newcomers/) to identify tools and guides to help you determine next steps.

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| 1. Public Welcome   Does our organization publicly demonstrate its welcome to LGBTQ+ newcomers? | | | |
| When we feel welcome, we are more likely to trust the people we encounter, be honest about our needs, and follow through on program involvement. Creating a welcoming environment is essential to the success of our clients and our organizations. It’s important to recognize that your agency’s welcome shouldn’t merely be a friendly statement but instead should be backed up by the good practices reflected throughout this document. | Existing Agency Quality | | |
| Low | Med | High |
| *Physical environment:* Would someone entering our offices be aware of our welcome through visual cues (rainbow flags, posters, or other images)? |  |  |  |
| *Mass communications:* Does our agency include LGBTQ+ content in its social media posts, annual reports, and public presentations? |  |  |  |
| *Public events:* Does our agency participate in Pride events, and does it mention LGBTQ+ people on World Refugee Day? |  |  |  |
| *Staff presentation:* Do staff and volunteers communicate their acceptance of gender differences by clarifying their own pronouns (e.g., he, she, they) or salutations (e.g., Mr., Ms., Mx.)? |  |  |  |

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| 1. Community Context and Partnership Potential   How will LGBTQ+ newcomers likely be received in the local area? | | | |
| Cities and states differ with respect to the legal protections they extend to LGBTQ+ people. They also differ as to the presence of agencies that are able to provide culturally and linguistically appropriate services to LGBTQ+ newcomer clients who have low or moderate incomes. (The categories below are also addressed in the matrix devoted to partnerships.) | Existing Community Quality | | |
| Low | Med | High |
| *Legal context:* Do laws in this state specifically provide legal protections to LGBTQ+ people concerning nondiscrimination, identity documents, relationship recognition, youth, health care, religious exemptions, and criminal justice? |  |  |  |
| *Local government:* Do city and other local government agencies reach out to LGBTQ+ communities specifically, for example through police liaison units or city hall initiatives? |  |  |  |
| *Community organizations:* Are there LGBTQ+ community organizations in the area, and are they culturally/linguistically competent to work with our clients? |  |  |  |
| *Health care:* Are specialized health care services made available to LGBTQ+ people, including newcomers? |  |  |  |
| *Mental health and substance abuse:* Are specialized mental health and substance abuse services made available to LGBTQ+ people, and do they welcome newcomers? |  |  |  |
| *Legal services:* Are specialized legal services made available to LGBTQ+ people, and do they cover a wide range of issue areas potentially important to our clients, e.g., immigration, workplace, housing, harassment, etc.? |  |  |  |
| *Housing:* Are housing services made available to LGBTQ+ people, and would they be able to serve our clients well? |  |  |  |
| *Education:* Are there educational institutions that are affirming of LGBTQ+ people and accessible to our clients? |  |  |  |
| *Employment:* Are there potential employers in the area that are prepared to appropriately engage LGBTQ+ newcomer clients? |  |  |  |

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| 1. Organizational Infrastructure   Does our organization have the policies and other infrastructure that we need? | | | |
| Strong infrastructure can help our organization ensure that we are able to provide effective services to all our clients on a consistent basis. | Existing Agency Quality | | |
| Low | Med | High |
| *Organizational policies:* Has our agency adopted policies that support equal access to services and employment for LGBTQ+ people? |  |  |  |
| *Staff Knowledge:* Does our agency have in-depth training materials and procedures to train and onboard staff on LGBTQ+ newcomers and case management procedures relevant to LGBTQ+ clients? |  |  |  |
| *Supervision:* Do we have clarity on how we would handle allegations that LGBTQ+ clients or others have been treated unfairly by staff, as well as how we would recognize and acknowledge exemplary performance? |  |  |  |
| *Preparedness to respond to discrimination:* Do we have clear, accessible procedures for addressing harassment or discrimination within our organization (including from other clients), within our referral network, and in the wider world? |  |  |  |
| *Trauma-informed care:* Are we prepared to offer trauma-informed care that is responsive to the distinctive needs and experiences of LGBTQ+ newcomers, e.g., abuse from within their families and communities, history of social isolation, etc.? |  |  |  |
| *Children and youth:* Are we prepared to work with LGBTQ+ children and youth, either alone or in a family setting? |  |  |  |
| *Client opt-out rights:* Are LGBTQ+ clients able to opt out of employment, educational, and other opportunities if they have reason to fear harassment or discrimination? |  |  |  |
| *Exemptions:* Do we have clarity on how we would respond to our team members[[1]](#footnote-2) if they express reservations about working with LGBTQ+ people based on their deeply held beliefs? |  |  |  |
| *Point person:* Do we have a point person with special knowledge about LGBTQ+ newcomers who can serve as a resource for other members of our team? |  |  |  |

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| 1. Terminology and Shared Knowledge   Do we share a baseline understanding of LGBTQ+ newcomers? | | | |
| Creating a shared culture of welcome for LGBTQ+ newcomers requires clarity and consistency in our organization’s approach to working with them. | Existing Agency Quality | | |
| Low | Med | High |
| *Clarity on terminology:* Has our agency clarified how people with various sexual orientations and gender identities should be referred to? |  |  |  |
| *Team knowledge base:* Is there a system in place for providing our team members with the basic knowledge they need about LGBTQ+ newcomers, for example through orientations and periodic training? |  |  |  |
| *Distinctive features of LGBTQ+ newcomers:* Does our shared knowledge base include attention to social isolation, religious involvement,[[2]](#footnote-3) confidentiality, trauma, transitioning, pronouns, intersectionality, and other challenges that distinguish LGBTQ+ newcomers, as well as the diversity of individuals from different countries and backgrounds? |  |  |  |
| *Professional translators and interpreters:* Have we communicated with our professional translators and interpreters about using terminology that is accurate and respectful, and have we provided them with relevant glossaries? |  |  |  |
| *Client knowledge base:* As part of their intake and/or continuing educational process, are all clients made aware of our agency’s welcome to LGBTQ+ people, as well as expectations for respectful behavior? |  |  |  |

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| 1. Intake and Confidentiality   Are LGBTQ+ people recognized, and do we demonstrate respect for their privacy? | | | |
| It’s important to create an environment in which LGBTQ+ clients can share their private information with staff and volunteers while also being reassured that their confidentiality will be respected. Sharing information has important safety and mental health repercussions for them. Some LGBTQ+ clients may never choose to disclose their status to you, but your affirmations of their identity could nevertheless be extremely important to them. | Existing Agency Quality | | |
| Low | Med | High |
| *Intake:* Does our intake process give clients the opportunity to identify their sexual orientation and gender identity, for example, by asking about their pronouns or salutations and their relationships status? |  |  |  |
| *Confidentiality:* Can clients be assured that when they share their LGBTQ+ status, that information will be shared only as legally required and/or as they themselves choose? |  |  |  |
| *Storytelling:* Is everyone on our team clear that LGBTQ+ people should not be pressured to share their personal information or stories[[3]](#footnote-4)? |  |  |  |
| *Translators and interpreters:* Do our LGBTQ+ clients have access to professional translation and interpretation services if they are not comfortable with other community members, and are those professionals trained on terminology and confidentiality? |  |  |  |

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| 1. Belonging and Leadership   Are we helping LGBTQ+ clients determine their own priorities, develop mutually supportive relationships, and exercise leadership? | | | |
| Newcomers who are LGBTQ+ are more likely to have migrated as individuals and to lack strong support from their families and other members of their ethnic or linguistic communities. This social isolation can limit their leadership development. Research shows that it can also be detrimental to their mental health and serve as a barrier to integration. | Existing Agency Quality | | |
| Low | Med | High |
| *Social opportunities:* Are we arranging activities like outings and shared meals where LGBTQ+ newcomers can be safe and supported, without having to hide their sexual orientation or gender identity? |  |  |  |
| *Cultural humility:* Do we demonstrate an understanding that LGBTQ+ newcomers need to determine their own priorities, given the unique context of their lived realities? |  |  |  |
| *Giving back:* Are we providing opportunities for LGBTQ+ newcomers to build mutual support with others (e.g., volunteering, encouraging peers to partner on projects, identifying and finding expression for underutilized skills)? |  |  |  |
| *Leadership opportunities:* Are LGBTQ+ clients being cultivated to serve as leaders, e.g., participating in leadership training, serving on boards and advisory groups, etc.? |  |  |  |
| *Organizational leadership:* Are LGBTQ+ people, including newcomers, engaged as leaders of our organization, e.g., serving in board, staff, volunteer, and management positions? |  |  |  |
| *Psychotherapeutic groups:* Are we able to provide access to specialized support groups for those who are interested, either online or in person? |  |  |  |

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| 1. Partnerships   Do we have the referral networks we need to provide our clients with all the services and opportunities they should have? | | | |
| The needs of newcomers are so diverse that no one organization can provide them with all that they need. LGBTQ+ clients often need specialized services that are best addressed by partnering agencies. All referral agencies should be culturally and linguistically competent to work with these clients. | Existing Agency Quality | | |
| Low | Med | High |
| *Local government:* Are we able to confidently refer LGBTQ+ clients to any specialized local government resources that might be available, such as police liaison units or city hall initiatives? |  |  |  |
| *Community organizations:* Are we able to confidently refer clients to LGBTQ+ community organizations? |  |  |  |
| *Health care:* Are we able to confidently refer LGBTQ+ clients to specialized health care services, for example, transition-related care? |  |  |  |
| *Mental health and substance abuse:* Are we able to confidently refer LGBTQ+ clients to specialized mental health and substance abuse services? |  |  |  |
| *Legal services:* Are we able to confidently refer LGBTQ+ clients to specialized legal services that address challenges such as discrimination, changing name and gender on identity documents, family reunification, and seeking asylum? |  |  |  |
| *Housing:* Are we able to confidently refer clients to housing options where they will be able to live safely as openly LGBTQ+ people? |  |  |  |
| *Education:* Are LGBTQ+ clients referred to educational programs where they can feel welcomed and safe? |  |  |  |
| *Employment:* Are LGBTQ+ clients referred to employment opportunities that have been pre-screened as welcoming and supportive to them? |  |  |  |
| *Partnership documents:* Are our policies regarding LGBTQ+ inclusion part of our memoranda of understanding (MOUs), contractor agreements, etc.? |  |  |  |
| *Partner education:* Do we have educational materials about LGBTQ+ newcomers to share with partners, and can we invite them to participate in our periodic training sessions? |  |  |  |

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| 1. Monitoring, Evaluation, and Continuous Improvement   Are we ensuring that LGBTQ+ clients are well served? | | | |
| Organizational infrastructure doesn’t exist in a vacuum. It must respond to the needs and opportunities of a specific environment, and then it has to be put into practice. This practice and infrastructure then need to be periodically monitored and evaluated, with the results serving as information to be used to continuously improve the agency’s operations. | Existing Agency Quality | | |
| Low | Med | High |
| *Client voice:* Do LGBTQ+ clients have opportunities for their voices to be heard in the organization, for example through surveys, focus groups, and incident-reporting processes that protect their confidentiality? |  |  |  |
| *Monitoring and evaluation:* Are the concerns of LGBTQ+ clients included as a standard practice in the monitoring and evaluation of our agency, programs, partnerships, and team members? |  |  |  |
| *Use of monitoring and evaluation results:* Are lessons learned about our effectiveness with LGBTQ+ clients used to improve our infrastructure, programs, partnerships, and supervision? |  |  |  |
| *Self-assessment:* Are we scheduled to use this self-assessment tool on an annual or biannual basis? |  |  |  |

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| Assessment Tracking Chart | | | |
| Assessment Dates | | Point  person/s | Notes |
| Beginning | Completion |
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1. In this document, “team members” refers to people who are working to support the organization’s mission, e.g., staff, board members, volunteers, consultants, and foster parents. [↑](#footnote-ref-2)
2. LGBTQ+ newcomers often struggle with what has been called “religious trauma,” resulting from abuse or persecution motivated or justified by religious rhetoric. At the same time, many LGBTQ+ newcomers are themselves religious or spiritual, and much of the help that they receive is provided by people who cite religious motivations. These complex dynamics are explored in [We Shall Overcome: A Case Study of the LGBT Asylum Task Force, a Parish Ministry](https://link.springer.com/chapter/10.1007/978-3-031-23379-1_7). [↑](#footnote-ref-3)
3. Depending upon the context, it can be empowering, dangerous, or traumatizing for LGBTQ+ newcomers to tell stories about their lives, including the traumatic experiences that often motivate their migration. While it is important to give them opportunities to share their personal stories, you should not pressure them in obvious or subtle ways, although some cases might require difficult disclosures. See [Supporting LGBT Asylum Seekers in the United States](https://www.switchboardta.org/resource/supporting-lgbt-asylum-seekers-in-the-united-states/), pp. 33–34, for more information. [↑](#footnote-ref-4)