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Enhancing the quality of life of GLBT older adults through service, advocacy and community awareness.

Introduction

The SAGE Care Partner program is established to increase equal access to services for the gay, lesbian, bisexual, and transgender (GLBT) community by working in collaboration with the health, social service, and business community. The SAGE Care Partner program is based upon the “community standards of practice” developed by the GLBT Health Access Project and widely accepted as best practices for providing equal access and nondiscrimination for the GLBT community.¹

The SAGE Care Partner program is a process designed to assist organizations with reviewing internal policies and providing training for organizational staff to better meet the needs of the GLBT community. SAGE is available throughout this process to provide organizations with the tools and technical assistance needed to help ensure equal access to services by the GLBT community with a focus on access, safety, and respect throughout the organization.

Importance of SAGE Care Partners

The aging of the baby boom generation has created a great deal of attention within the health and social service industry. A segment of this aging generation includes GLBT older adults, their families, friends and caregivers. Estimates indicate that 3-8% of older adults over the age of 65 identify as GLBT.² For the greater St. Louis Metropolitan area we estimate adults 55+ includes upwards of 86,000 GLBT older adults.³ These older adults are often referred to as an invisible segment of the community. The cause and risks of GLBT older adult invisibility include:^{4,5}

- Heterosexuality is viewed as the norm
- Ageism within GLBT community
- Remaining or returning to “closet” to avoid discrimination based on ageism and homophobia
- Lack of GLBT recognition in social policy and service system outreach
- Limited GLBT friendly services
- Lack of support/recognition for GLBT families and relationships
- Housing Discrimination
- Lack of income/asset protection for same-sex couples
- Continued institutionalized homophobia
- Rejection of GLBT clients by service providers

The SAGE Care Partner program is designed to decrease the need to remain invisible by working collaboratively with community organizations to ensure equal access to programs for GLBT older adults.

Risks of Not Responding

As the baby boom generation ages, more and more demands will be placed on the health and social service system. GLBT older adults are recognized as a “marginalized” population. This marginalization is in part due to GLBT people being less likely to seek health and support services due to reluctance to seek care out of fear of discrimination.⁶ This reluctance can lead to supportive and preventative care being delayed until a crisis arrives.

Additionally, GLBT older adults face a number of barriers. In Missouri it is legal at a state level to discriminate on the basis of sexual orientation and gender identity. The practice of discrimination, when it occurs, can lead to limited access in health care, housing, social services, and employment. Discrimination can and does occur, leading to increased isolation and for some, not seeking the supportive services when needed. A 2006 study found that more than one-fourth of GLBT individuals are greatly concerned about discrimination as they age

and less than half reported confidence that the health and social service system will treat them with dignity and respect. This same report indicates that 1 in 5 could not identify who would care for them as they age.⁷

The risks of not responding at a community and organizational level leads to continued marginalization and invisibility of GLBT older adults. The result is a segment of our population who is marginalized and under served across the lifespan, leading to increased risk of chronic illness and disability among GLBT older adults.

SAGE Care Partners Purpose

In a little over two years, over 60 health and social service organizations have joined the SAGE Referral Network. The SAGE Care Partner program is the next step in eliminating the barriers to access and creating partnerships between the GLBT community and health and social service organizations.

By becoming a SAGE Care Partner, your organization is at the forefront of GLBT aging services in Missouri. Through this program, SAGE will work with your organization and provide ongoing technical assistance to help ensure equal access for GLBT older adults, their families, friends and caregivers.

SAGE is optimistic for the support and positive response from the community to date. Ending discrimination and marginalization requires a community-wide collaborative response by individuals, provider networks, and GLBT service and advocacy organizations. SAGE looks forward to continuing this collaborative work through the SAGE Care Partner program.

Process for Becoming an SAGE Care Partner

The 'GLBT Community Standards of Practice' encompass the following policy, procedure and service areas within an organization:

- I. Personnel**
- II. Client's Rights**
- III. Intake and Assessment**
- IV. Service Planning and Delivery**
- V. Confidentiality**
- VI. Community Relations and Health Promotion**

Each of the 6 identified areas has corresponding standards and indicators. Organizations are asked to conduct an internal review of their policies, procedures and services based on the standards and indicators.

To begin the process, we ask that each agency review their policies and procedures. A self-review form for this process can be found at www.sagemetrostl.org then click on the SAGE Care Partner tab. Review each standard, describing how your agency meets each standard and provide supporting documentation such as policies, procedures, intake forms, marketing materials, etc. It is suggested that agencies form an internal review team for this process to ensure that all levels of management are in agreement with adopting the 'Best Practices.' If your agency does not meet a standard, please provide justification and describe steps your agency will undertake to meet the standard along with an estimated time-line for completion in the notes section following each standard on the self-review form.

Once your organization has completed the self-evaluation form, please submit to SAGE via email along with supporting documentation for each standard. The SAGE Quality Assurance Team will review your agencies self-evaluation and documentation and notify you of your status for becoming a SAGE Care Partner.

**For National Business and Health organizations, any fortune 500 companies and large health organizations have undergone a similar Quality Index review conducted by the Human Rights Campaign. If your organization has conducted this review, feel free to indicate this in an email to SAGE and SAGE will substitute the Human Rights Campaign review in lieu of the SAGE Care Partner Self-Review.*

Benefits of becoming a SAGE Care Partner

SAGE Care Partners will stand out amongst the field of health, social service and business organizations as you adopt these standards of practice. SAGE will recognize your organization on the Referral Network and all printed network guides with the LGBT Care Partner logo. You will be granted permission to use this logo on your website and marketing materials, signifying that your organization is GLBT friendly and welcoming. SAGE will continue to be your partner offering opportunities for staff trainings, workshops and technical assistance.



As you review the ‘GLBT Community Standards of Practice,’ feel free to contact SAGE for consultation and assistance. Again, this is a process and we do not anticipate that all organizations will achieve each and every standard immediately. But your willingness to increase the cultural competency of your organization is a step toward creating equal access for the GLBT community.

Instructions for Completing the SAGE Care Partner Review:

- Review the ‘GLBT Community Care Standards’
- Implement needed changes to internal policies and procedures in accordance with the standards
- Gather supporting documentation that indicates compliance with standards and indicators
- Complete the SAGE Care Partner – (Self Assessment found at www.sagemetrostl.org then click on the SAGE Care Partner tab) and submit via email to SAGE Metro St. Louis. (If you agency does not currently meet criteria within one of the standards – please use the notes section to explain why and steps your agency may take to meet the standard in the future.)
- Email or mail supporting documents to SAGE Metro St. Louis.
- The SAGE Care Partner Quality Team will review all submitted materials. We may ask for a site visit to go over your documentation and self-assessment.
- The SAGE Care Partner Quality Team will notify you upon successful completion of our review and acceptance into the SAGE Care Partner Program.

How will this data be used?

SAGE will develop a report providing results from the self-evaluation. The report will be available on the SAGE website and available to the general public in order to promote consumer awareness when selecting services from the community that are GLBT friendly.

This is a voluntary program and your organization can request to be removed from the program at any time.

STANDARDS AND INDICATORS¹

I. Personnel

Standard 1. The agency shall establish, promote and effectively communicate an inclusive, non-discriminatory work place environment for gay, lesbian, bisexual and transgender employees.

INDICATOR 1.1: Written policies, including but not limited to non-discrimination, diversity and non-harassment policies that explicitly include gay, lesbian, bisexual and transgender employees.

INDICATOR 1.2: Inclusion of policies in all new employee orientation programs and materials; inclusion of policies in employee handbook.

INDICATOR 1.3: Written sign-off on policies by all employees.

INDICATOR 1.4 : Discussion of polices with job applicants during interviewing process.

INDICATOR 1.5: Posting of polices in all of agency's facilities.

INDICATOR 1.6: Annual review of all policies, and opportunities for ongoing employee input and training.

Standard 2. The agency shall support and encourage visibility of gay, lesbian, bisexual and transgender employees.

INDICATOR 2.1: Active employment recruitment of gay, lesbian, bisexual and transgender employees, including outreach to GLBT organizations, and advertising in GLBT media.

INDICATOR 2.2: Development and implementation or revision of existing policies to ensure effective procedures for dealing with employee complaints of discrimination or harassment based on sexual orientation or gender identity.

INDICATOR 2.3: Written notice to all employees that discrimination or harassment of other employees on the basis of sexual orientation or gender identification is grounds for appropriate levels of discipline, up to and including dismissal.

Standard 3. The agency shall work towards ensuring that gay, lesbian, bisexual and transgender employees of all ages are subject to the same terms and conditions of employment, including the same benefits and compensation, as all other employees.

INDICATOR 3.1: Written policies explicitly stating that the agency does not discriminate on the basis of sexual orientation or gender identity in providing compensation and benefits, including but not limited to family and medical leave, bereavement leave, and such other benefits as the agency offers its employees.

INDICATOR 3.2: Written policies explicitly extending the same benefits to all families, including the families of gay, lesbian, bisexual and transgender employees. Such policies may allow employees to designate who shall be considered their "family" members. If the agency offers health, life, disability insurance and pension benefits to its employees, the agency shall work towards including full and equal coverage for its gay, lesbian, bisexual and transgender employees and their families.

INDICATOR 3.3: Comprehensive ongoing training of all human resource and other appropriate personnel in sexual orientation and gender identity issues with regard to employee benefits.

INDICATOR 3.4: Mechanisms to appropriately convey GLBT-related policies and make relevant training accessible to all employees at all levels, including those with disabilities, and those for whom English is not their primary language.

II. Client's Rights

Standard 4. The agency shall assure that comprehensive policies are implemented to prohibit discrimination in the delivery of services to gay, lesbian, bisexual and transgender clients and their families. The agency shall ensure that all staff use, and all written forms and policies employ culturally appropriate language when dealing with gay, lesbian, bisexual or transgender clients and their families. For the purpose of these standards the terms "family" and "families" shall be broadly construed, and shall include but not be limited to relatives by blood, adoption, marriage or declaration of domestic partnership.

INDICATOR 4.1: Written policies that explicitly state that the agency does not discriminate on the basis of sexual orientation or gender identity in the provision of services. Such policies shall specifically include families of all clients.

INDICATOR 4.2: Conspicuous posting of non-discrimination policies in all languages appropriate to the populations served by the agency, and inclusion of policies in agency brochures, informational and promotional materials.

INDICATOR 4.3: Mechanisms to ensure that non-discrimination policies and procedures are appropriately conveyed to all clients, including those with disabilities and those for whom English is not their primary language.

INDICATOR 4.4: Explicit sign-off on policy by all employees.

Standard 5. The agency shall ensure that it has comprehensive and easily accessible procedures in place for clients to file and resolve complaints alleging violations of these policies.

INDICATOR 5.1: Written complaint procedures.

INDICATOR 5.2: Designation of one or more persons responsible for ensuring agency compliance.

INDICATOR 5.3: Written notice to all employees that discrimination in the delivery of services based on sexual orientation or gender identity violates standards of good care, and is subject to appropriate discipline.

INDICATOR 5.4: Conspicuous posting of complaint procedures, inclusion of procedures in informational materials given to agency clients and their families.

INDICATOR 5.5: Translation of procedures into and provision of information in all languages appropriate to populations the agency serves.

III. Intake and Assessment

Standard 6. The agency shall develop and implement or revise existing intake and assessment procedures to ensure that they meet the needs of gay, lesbian, bisexual and transgender clients of all ages and their families.

INDICATOR 6.1: All reception, intake and assessment staff are trained to use culturally appropriate language.

INDICATOR 6.2: Development and implementation of intake and assessment forms which provide for optional self-identification in all categories of gender identity, sexual orientation, marital, partnership and family status, and provide clients with the option and opportunity for further written explanation.

INDICATOR 6.3: Develop mechanisms to ensure that all reception, intake and assessment staff are familiar with providers within the agency with expertise in and sensitivity to gay, lesbian, bisexual and transgender issues, and appropriately convey this information to clients.

INDICATOR 6.4: Development and implementation of training for all intake and assessment staff to assure medically and culturally appropriate referrals for gay, lesbian, bisexual and transgender clients and their families to providers within and outside of the agency.

IV. Service Planning and Delivery

Standard 7. All agency staff shall have a basic familiarity with gay, lesbian, bisexual and transgender issues as they pertain to services provided by the agency.

INDICATOR 7.1: Development and implementation or revision of agency training and programs on diversity, harassment, and anti-discrimination to assure explicit inclusion of gay, lesbian, bisexual and transgender issues.

INDICATOR 7.2: Development and implementation of training for all intake, assessment, supervisory, human resource, case management and direct care staff on basic gay, lesbian, bisexual and transgender issues.

Standard 8. All direct care staff shall routinely provide general care to gay, lesbian, bisexual and transgender clients. All direct care staff shall be competent to identify and address, within the scope of their field of expertise, specific health problems and treatment issues for gay, lesbian, bisexual and transgender clients and their families, to provide treatment accordingly, and to provide appropriate referrals when necessary

INDICATOR 8.1: Comprehensive ongoing training provided for direct care staff to identify and address basic health issues within their field of expertise that may particularly or uniquely affect gay, lesbian, bisexual and transgender clients.

INDICATOR 8.2: Creation and implementation of mechanism for identification of staff with special expertise in and sensitivity to gay, lesbian, bisexual and transgender issues.

INDICATOR 8.3: Provision of training for direct care staff on how, when and where to make appropriate referrals for gay, lesbian, bisexual and transgender clients and their families.

INDICATOR 8.4: Development of a comprehensive resource list for appropriate referrals for special gay, lesbian, bisexual and transgender health concerns.

INDICATOR 8.5: Outreach to and development of relationships with other agencies and providers with expertise in gay, lesbian, bisexual and transgender health issues.

INDICATOR 8.6: Evidence of agreements or other appropriate mechanisms to ensure cooperation with other agencies and providers to whom gay, lesbian, bisexual and transgender clients and their families may be referred for specialized care and treatment.

Standard 9. All case management and treatment plans shall include and address sexual orientation and gender identity where it is a necessary and appropriate issue in client care.

INDICATOR 9.1: Provision of training for all case management and direct care staff on gay, lesbian, bisexual and transgender health, treatment and cultural issues.

V. Confidentiality

Standard 10. The agency shall ensure the confidentiality of client data, including information about sexual orientation and gender identity issues. Gay, lesbian, bisexual and transgender clients shall be informed about data collection that includes references to sexual orientation and/or gender identity, including in what circumstances such information may be disclosed, whether it may be disclosed as aggregate or individual information whether personal identifiers may be disclosed, and how and by whom such information may be used.

INDICATOR 10.1: Written confidentiality policies which explicitly include sexual orientation and gender identity, indicating that such information is to be considered highly sensitive and treated accordingly.

INDICATOR 10.2: Designation of sexual orientation and gender identity is at client's option on forms and records.

INDICATOR 10.3: Comprehensive training for appropriate staff on data collection and reporting issues as they relate to confidentiality.

INDICATOR 10.4: Written disclosure to clients explaining when information may or must be disclosed to third parties for payment or other reasons, and in what circumstances such disclosures may include information regarding sexual orientation and gender identity.

Standard 11. The agency shall provide appropriate, safe and confidential treatment to gay, lesbian, bisexual and transgender minors, unless the agency's services are inappropriate for all minors. All clients who are minors shall be informed of their legal rights, and advised of the possibility and possible consequences of any statutory or otherwise mandated reporting.

INDICATOR 11.1: Staff training regarding the legal rights of minors.

INDICATOR 11.2: Development and implementation of procedures for intake, assessment and treatment of minors that is sensitive to gender identity and sexual orientation.

INDICATOR 11.3: Written and oral notice to minors of various mandated reporting laws and their implications, and of the minor's rights regarding confidentiality and treatment without parental consent.

INDICATOR 11.4: Reception staff trained to be sensitive to issues of gay, lesbian, bisexual and transgender youth.

VI. Community Relations and Health Promotion

Standard 12. The agency shall include gay lesbian, bisexual and transgender people and their families in outreach and health promotion efforts.

INDICATOR 12.1: Agency advertising and promotional materials clearly indicate nondiscrimination policies regarding sexual orientation and gender identification.

INDICATOR 12.2: Agency outreach efforts to social service, medical and other providers promote services to gay lesbian, bisexual and transgender clients and their families.

INDICATOR 12.3: Agency outreach and promotional efforts accurately reflect the level and quality of services available to gay lesbian, bisexual and transgender clients and their families.

Standard 13. The composition of the agency Board of Directors and other institutional bodies shall encourage representation from GLBT communities.

INDICATOR 13.1: The process for electing or appointing members of the Board of Directors and other institutional bodies includes outreach to and inclusion of gay, lesbian, bisexual and transgender candidates.

Standard 14. Agency community benefits programs shall include gay, lesbian, bisexual and transgender people in the communities the agency serves.

INDICATOR 14.1: Development of criteria for community benefits programs that provide for inclusion and promotion of issues of concern to gay lesbian, bisexual and transgender people and their families.

Additional Resources for Self-Evaluation

The following documents are provided as a resource to assist in your internal review.

They include:

- GLBT Supportive Environment Questionnaire
- Example of GLBT inclusive nondiscrimination statement
- Example Questions for making intake and assessment forms GLBT friendly
- Conditions for Removal as an SAGE Care Partner

GLBT Supportive Environment Assessment

Think about your agency or organization, or take a walk around your facility with a heightened awareness. Respond to the following questions that reflect either your opinion or represent what is publicly visible. False or Unsure Answers indicate area that your agency may want to spend additional time evaluating.

Check the appropriate response for each of the following items:

1. My agency/organization is GLBT friendly.
True _____ False _____ Unsure _____
2. We display items reflective of diversity (e.g., art, posters, religious icons, holiday decorations and magazines).
True _____ False _____ Unsure _____
3. Participants/Clients are encouraged to express individuality and diversity.
True _____ False _____ Unsure _____
4. Our agency's affirmative action statement for staff and clients includes a statement of nondiscrimination based on sexual orientation and gender identity.
True _____ False _____ Unsure _____
5. Our agency has an anti-harassment policy that specifically forbids homophobic or heterosexist comments or harassment.
True _____ False _____ Unsure _____
6. My agency's publicity materials are welcoming to GLBT people (i.e., pictures of same sex couples are displayed).
True _____ False _____ Unsure _____
7. There are, or have been, openly GLBT staff at this facility.
True _____ False _____ Unsure _____
8. There are prominently displayed materials (e.g., books, pamphlets, signs, photos, and posters) that are GLBT affirmative.
True _____ False _____ Unsure _____
9. GLBT residents would find my agency a warm and supportive place to be in, or receive service from.
True _____ False _____ Unsure _____
10. There are, or have been openly GLBT people on participant advisory committees or boards.
True _____ False _____ Unsure _____
11. My long-term care facility (if relevant) supports the right to privacy for same-sex couples.
True _____ False _____ Unsure _____
12. Any information about lesbian and gay issues would not be defaced in our facility.
True _____ False _____ Unsure _____

13. If I were an openly GLBT administrator, staff member or participant/client in my agency, I would feel safe and supported enough to be open about who I am.
True _____ False _____ Unsure _____
14. I would feel comfortable speaking in support of GLBT issues in my agency.
True _____ False _____ Unsure _____
15. The partner of a GLBT participant/client is treated with the same respect as a heterosexual spouse when visiting the agency or participating in a client's plan of care.
True _____ False _____ Unsure _____

Adapted from material developed by Doreen D. Corrado, CSW-R & Barbara Munstein, CSW; Gay, Lesbian, Straight Education Network (GLSEN).

Example of a GLBT inclusive nondiscrimination statement

(Agency Name Here) does not discriminate in employment and/or services based on race, ethnicity, sex, age, religion, disability, marital status, veterans' status, **sexual orientation**, or **gender identity**.

Example Questions for making intake and assessment forms GLBT friendly

The following websites provide examples of questions that can be added to your intake and assessment forms to make them more GLBT Friendly.

http://www.acponline.org/acp_press/fenway/sample-new-patient-intake-form.pdf

<http://www.kingcounty.gov/healthservices/health/personal/glb/IntakeForm.aspx>

http://www.glma.org/data/n_0001/resources/live/GLMA%20guidelines%202006%20FINAL.pdf

Conditions for Removal as an SAGE Care Partner

Providers may be removed from the referral list for the following reasons:

- 1) Contact information for a provider is no longer accurate and has not been updated.
- 2) Three or more general complaints have been received by SAGE regarding services rendered, and these issues have not been resolved in an adequate manner.
- 3) If one or more complaints regarding sensitivity to the lesbian, gay, bisexual or transgender communities are reported, the organization must participate in a 2 hour GLBT sensitivity training course provided by SAGE within 3 months. The organization will be suspended from the list until training is completed satisfactorily.
- 4) SAGE Metro St. Louis ultimately reserves the right to remove any agency or clinic from the list at any time.

(Adapted from Affirmations Lesbian and Gay Community Center www.goaffirmations.org)

¹ GLBT Health Access Project, *Community Standards of Practice For Provision of Quality Health Care Services For Gay, Lesbian, Bisexual and Transgendered Clients*. www.glbthealth.org

² Cahill, S., South, K. & Spade, J. (2000). *Outing age public policy issues affecting gay, lesbian, bisexual and transgender elders*. New York: The National Gay and Lesbian Task Force.

³ “*American Community Survey 2007*”, U.S. Census Bureau (2008).

⁴ Brotman, S., Ryan, B., & Cormier, R. (2003). The health and social service needs of gay and lesbian elders and their families in Canada. *The Gerontologist*, 43(2), 192-202.

⁵ Hash, K. M., & Cramer, E. P. (2003). Empowering gay and lesbian caregivers and uncovering their unique experiences through the use of qualitative methods. *Journal of Gay & Lesbian Social Services*, 15(1/2), 47-63.

⁶ U.S. Department of Health and Human Services. *Healthy People 2010*. 2nd ed. With Understanding and Improving Health and Objectives for Improving Health. 2 vols.

⁷ MetLife Mature Market Institute (2006). Out and Aging The MetLife Study of Lesbian and Gay Baby Boomers. <http://www.asaging.org/networks/LGAIN/OutandAging.pdf>