
Guidelines for Managers on Transgender Identity Transition in the Workplace

Transgender individuals are those who live or wish to begin living in the gender role associated with the other sex from the one in which they were born and raised. With the growing number of people choosing to openly change their gender, without changing their jobs, employers will increasingly be faced with helping manage transgender employees' transitions in the workplace.

Our Company supports building and promoting diversity and inclusion throughout our organization and our standard policy and procedure prohibits discrimination and harassment on the basis of an individual's gender identity. The following guidelines are provided to assist managers in facilitating a transgender employee's transition, should this situation present itself.

It is in the employee's as well as the organization's best interest to assist and facilitate a smooth transition, with minimal interruption to the job and quality of work life.

When an employee discloses his/her transgender status and intent to undergo a gender change, the following guidelines will help ensure a smooth transition.

FIRST STEPS

- Contact your HR representative. HR will confirm the authenticity of the information and will request official documentation from the medical professional treating the employee prior to your taking steps toward addressing workplace identity transition issues.
- Be aware that it's medically recommended that a person live for at least one year full-time in the new gender role prior to undergoing gender reassignment surgery. Therefore, your transgender employee will likely begin living and coming to work in the new gender identity long before he/she undergoes surgery. Additionally, some transgender persons change their identity without ever undergoing a surgical change. Once you have received confirmation from HR of the pending gender identity change, you can proceed with facilitating the transition at work.
- Keep in mind that confidentiality and respectful disclosure should be a primary concern in the early stages of the transition planning. The timing of the

disclosures to co-workers and clients and manner of communication is critical in making the transition progress smoothly.

- Remind your employee that our Company has an employee resource group, which supports, gay, lesbian, bi-sexual, transgender employees.

COMMUNICATIONS PLAN

You and HR, with input from the transitioning employee, can establish a transition/communication plan:

1. Identify the employee's needs and discuss a timeframe. Allow time for planning and implementing the necessary logistics as well as giving colleagues and clients time to adjust to the new reality.
2. Establish a plan around issues such as restrooms and new name. Restroom issues are a very important topic to get right, and much will be determined by your local office facilities. Employers should find solutions that are safe, convenient and respect the transgender employee's dignity.
3. At a mutually agreed upon time (e.g., several weeks to several months prior), well before he/she begins living and coming to work in the new gender role, you should facilitate informing peers and clients. This will include assessing whether immediate co-workers need a facilitator present at the meeting to help address concerns. Colleagues in the employee's immediate work group should ideally be informed in person where possible (or via teleconference if necessary). The employee can be given the option of informing their colleagues themselves or, if they prefer, having you handle in his/her absence.
4. Other employees with whom the employee has minimal contact may be informed closer to the time of the change (e.g., one to two weeks prior) either live or via memo.
5. All communications should convey the message that the transgender employee will continue to perform his/her job competently and that it is expected that employees will treat him/her with respect.
6. Our EAP, is an experienced resource should anyone need help in processing their concerns about the pending transition.
7. Arrangements should be made to have documents and official records changed (e.g., ID cards, e-mail addresses, etc.) and reflect the employee's new identity on the first day he/she reports to work in the new gender role.

For additional information relevant to transgender persons who are changing their gender identity and available resources you can request a copy of ["Transgender Issues in the Workplace"](#) from the Human Rights Campaign Foundation.

For An Employee Transitioning To A New Gender Role: A Workplace Checklist

Our Company supports building and promoting diversity and inclusion throughout our organization. We also have a standard policy that covers all our employees that prohibits discrimination and harassment on the basis of an individual's gender identity. We hope we can be a positive part of your transition to a new gender role.

This checklist outlines keys steps that may apply in an on-the-job transition at our Company. It is, of course, flexible and can be adapted to fit your local business unit situation.

Advance Preparation

1. Come out to your local GLBT employee group and / or Diversity representative (or HR if no Diversity specialist is available) and share your intent to transition. They can be a great resource and ally and connect you with resource options for you and your household members.
2. Have medical documentation on hand showing your intent to transition – this can consist of a letter from a medical or mental health professional providing treatment and/or care who can attest to your transgender status and intent to undergo the gender change. It's normal for your employer to ask for this documentation.
3. Come out to your boss, and share your intent to transition. This should be in a face-to-face meeting. If you are uncomfortable or fearful of your boss' reaction, you may find it helpful to include in the meeting one or two allies from Diversity, Human Resources, or your GLBT Group. This meeting is vital -never surprise your boss by transitioning without advance notice. Your boss can be an ally and should be part of the planning process for a successful transition.
4. Maintaining confidentiality will be a primary concern, however, your boss may want to share your plans with a small portion of your management chain. You and your manager should openly discuss who this group is as part of the planning process.
5. Work with your manager and HR to plan your transition:

- a. Establish a time line for the transition, including the date for an announcement to your co-workers and clients, and the date of your transition. Generally these dates are several weeks apart.
 - b. Plan the solutions to the usual issues (restroom, new name, I.D. badges, login, etc.)
 - c. Plan the “day of the announcement”. The announcement can be made in a department meeting, or included in an already-scheduled face-to-face meeting. It is OK to teleconference in any non-local people. Everyone on your team who you interact with often at work should be included. While you can also do this via email, face-to-face is always better. Plan with your manager in advance who will deliver the message.
6. Welcome to your new gender! And thank you for helping assist in a smooth transition at the workplace.