

WORKPLACE GENDER TRANSITION PROTOCOLS & FAQ

FAQ

1. Why do we need the workplace gender transition protocol?

Purpose

This guide is designed to support an inclusive and productive workplace environment for all employees. Specifically, this document addresses the needs of transgender and gender non-conforming employees (see “Definitions” on page 2) and provides guidance to supervisors and managers on how to protect the legal rights and safety of such employees.

The protocols do not anticipate every situation that might occur. The needs of transgender and gender non-conforming employees must be assessed on a case-by-case basis, and this includes how best to apply these guidelines. The goal is to ensure the well-being of these employees within their professional workplace and to ensure that all employees are treated fairly regardless of their orientation or gender identity. This includes promoting adherence to the City’s Non-Discrimination Policy, maximizing workplace inclusion, and minimizing harassment. As such, these protocols are designed to help supervisors and managers maintain a respectful and non-discriminatory work environment for all City employees.

2. How do I use this document as an employee in transition or supervisor of an employee in transition?

Introduction

This information is intended to be a resource for supervisors and managers so they can assist employees who are undertaking (or considering) a workplace gender transition. This document also provides information and support for these employees; however, it is hoped that all City employees find this tool useful.

A lack of knowledge about gender transition and transgender issues has the potential for creating misunderstanding and tension within the workplace. The likelihood of negative reactions can be reduced by upholding the City of Dallas’ core values of Empath, ethics, excellence, and equity [insert 4Es image].

The City of Dallas is committed to a Dallas where no person shall, on the grounds of race, color, national origin, disability, sex, or protected classes. Sex discrimination covers sexual orientation,

gender identity, and gender expression. Employees of all genders are welcome. The City's Non-Discrimination Policy supports this document.

Workplace diversity is an organizational strength and adds to an organization's resiliency. A diverse workplace means that our employees must be able to work with people of all different backgrounds. It is not required that City employees "believe in" or accept an individual's right to be transgender or undergo a gender transition. Employees are entitled to their beliefs, but we are all required to treat the transitioning employee, and all employees, with equity and respect.

If an employee expresses their intention to transition, the assistance of the department and supervisor is critical. The supervisor's actions will impact the outcome of the workplace transition. Be aware that the employee's decision is likely to have been carefully considered over months, if not years. By the time an employee approaches their supervisor, they are likely to have already gone through a long process of informing family and close friends. It is not a sudden, rash, or overnight decision. It is, rather, a life event on par with becoming a parent or getting married.

If you are transgender and/or are undergoing (or considering) a gender transition, you have the right to openly be who you are and bring your true, most authentic self to work. This means that, while maintaining professional expectations, you may express your gender identity, characteristics, or expression without fear of negative consequences. These protocols are designed to help ensure that the workplace has tools to make sure that your gender transition is successful and understood by your fellow employees and supervisors.

3. I don't know what all the terms mean. I hear them, but don't know what they mean. Can you define them for me?

Definitions

The definitions provided here are not intended to label employees but rather to assist in the reader's understanding of the subject. Employees may or may not use these terms to describe themselves. This is not a comprehensive glossary, but rather an introduction to gender and sexual orientation related terminology.

- **Gender expression:** An individual's characteristics and behaviors (such as appearance, dress, mannerisms, speech patterns, and social interactions) that may be perceived as masculine or feminine.
- **Gender identity:** A person's internal, deeply felt sense of being male, female, or something other or in-between, regardless of the sex they were assigned at birth. Everyone has a gender identity.
- **Gender non-conforming:** Can be used to describe having, or being perceived to have, gender characteristics and/or behaviors that do not conform to traditional or societal expectations. Keep in mind that social expectations for gender vary across cultures and have changed significantly over time.

- **AMAB:** “Assigned Male at Birth” – an individual who, based on external sex characteristics, is designated male at the time of birth. This assignment may or may not match the individual’s gender identity.

- **AFAB:** “Assigned Female at Birth” – an individual who, based on external sex characteristics, is designated female at the time of birth. This assignment may or may not match the individual’s gender identity.

- **Intersex:** A general term used for a variety of conditions in which a person is born with a reproductive or sexual anatomy that doesn’t seem to fit the typical definitions of female or male.

- **LGBTQ:** A common abbreviation that refers to lesbian, gay, bisexual, transgender, and queer communities.

- **Sexual orientation:** A person’s physical or emotional attraction to people of the same and/or different gender. Straight, gay, bisexual, and queer are some ways to describe sexual orientation. It is important to note that sexual orientation is distinct from gender identity and expression. Transgender people can be gay, lesbian, bisexual, straight, or queer just like cisgender people.

- **Cisgender:** The opposite of transgender. Describes the identity held by the majority of people, in which an individual’s experiences of gender agree with the sex they were assigned at birth

- **Transgender:** Having a gender identity and/or gender expression that is different from the sex assigned at birth. This can manifest in various ways:

- When the sex assigned at birth is male, but the individual identifies as female (sometimes referred to as a transgender woman or a male-to-female (MTF) transgender person)
- When the sex assigned at birth is female, but the individual identifies as male (sometimes referred to as a transgender man or a female-to-male (FTM) transgender person)
- When a person’s gender identity is both (male and female), neither, or something else (sometimes referred to as genderqueer, third gender, gender fluid, or as having a non-binary gender identity).

NOTE: Some people described by this definition don’t consider or label themselves transgender. They may use other words or may identify simply as a man or woman or as both or neither. Regardless, the protocols in this document apply.

- **Transition:** The process of changing one’s gender from the sex assigned at birth to one’s gender identity. There are many different ways to transition. A transition can be social, legal, and/or medical.

- For some people, the gender transition takes place over a long period of time. For others it is a process that happens more quickly.
- Transition may include “coming out” (telling family, friends, and coworkers), changing the name and/or sex on legal documents, and/or accessing medical treatment such as hormones and/or surgery.

4. I am a supervisor or manager and I need more information on what I need to do to support my employee.

Overview – For Supervisors and Managers

Employees who transition their gender on the job will need the assistance of their supervisor, managers, and Human Resources. Each individual will have a unique set of needs which will require a customized approach. Use the Workplace Transition Plan and checklist to prepare for the workplace transition. Be sure to consider the following:

- Who will help the transitioning employee plan and manage their workplace transition?
- What can a transitioning employee expect from their supervisor and managers?
- What is expected of other staff (team members, coworkers, etc.)?
- Who will take the lead on ensuring personnel and administrative records are updated?

Due to existing stereotypes both in the workplace and society in general, many transgender individuals face difficult situations and interactions in their personal, professional, family, and financial lives simultaneously. This can lead to high stress levels, particularly when individuals are in the initial stages of transitioning.

In addition, the employee would like to feel confident that the individuals who will help plan their workplace gender transition will take steps to inform themselves about transgender issues. If you are unfamiliar or uncomfortable with workplace gender transitions, a list of helpful items can be found later in this document. You can check with the City's Human Resources department to see whether any City employees who have previously undertaken a workplace gender transition might be available to coach you or your employee as well. Also, work with the transitioning employee to learn about their individual transition timeline, concerns, and needs.

Keep the following in mind when talking with a transitioning employee:

- The transitioning employee may choose you – their supervisor, someone up the management chain in their department, another employee who has transitioned on the job, or an HR representative – as their first point of contact.
- It is crucial that you make it clear that the conversation will be held in confidence. This is key to ensuring the employee's rights are protected. Maintaining confidentiality will also help you avoid inadvertent violations of the employee's right to medical privacy.
- Obtain permission from the employee prior to discussing the transition with (or seeking further assistance from) anyone, including other staff, your own supervisor, other managers, or Human Resources (HR).
- Listen carefully to what the individual is telling you about how they want the workplace transition to proceed.
- Become more informed. Let the employee know that you are taking steps to educate yourself about how you can assist their workplace gender transition. Also let the employee know that you welcome their input as well.

- Use a sensitive approach and demonstrate support for an inclusive workplace when discussing their needs and concerns.
- Remind them about the additional resources available to them (ex: EAP, FMLA, benefits coverage, etc.)
- Explain any questions and concerns you might have and ask for their input.
- **Do not** ask the employee about their medical decisions. Medical information is private and protected by law. If the employee needs time off for medical care or recovery, follow the same steps used for any request for time off for medical reasons.
- Make sure the employee is aware of these protocols. Ask for their opinion on matters covered in this document.

5. I am an employee in transition. What do I need to do as a City of Dallas employee?

Overview – For Transitioning Employees

As a valued member of the City of Dallas family, this information is provided to help ensure your well-being and to provide assistance during your workplace transition. You have probably been considering this step for some time. You may have done a lot of research, talked with people you trust, and perhaps connected with support groups locally or online. At this point, you may feel nervous – but more than ready – to complete your workplace gender transition.

The City supports you. We want your transition to be as smooth as possible and for your rights to be protected. As you start on this process, it may help to keep the following in mind:

- You may feel very vulnerable right now and may be worrying about how your supervisor and coworkers will react. Keep in mind – you are not the first person to transition at their workplace, and this document is prepared with the experiences of those who came before you in mind.
- Be sure to read about how you can prepare ahead of time for your workplace transition (“How Transitioning Employees Can Prepare”). It will help you think things through and prepare to talk with your supervisor and Human Resources.
- Things might not always proceed as smoothly as you would like but planning ahead and working with a team will help pave the way to a successful workplace transition. It is important to keep your supervisor advised of any challenges or issues that may arise.
- You get to decide who to approach first to begin discussing the needed workplace preparations for your gender transition. It could be your supervisor, a manager up the chain in your department, other employees who has transitioned on the job, or an HR representative. It’s your choice.
- Keep in mind that some aspects of your workplace transition will take longer than others. Estimate a reasonable timeline (at least six weeks) so that everything can be ready on the first day of your workplace transition.
- It’s possible that very few supervisors, managers, and employees in your department have experience with or knowledge about workplace gender transitions. This does not mean you have to train them, but you can help by making sure they know about these protocols and by referring them to any other resources you believe will be helpful.

- You have a right to privacy ... and at the same time, a number of people in the organization will need advance knowledge of your transition (with your consent) to ensure changes can be made (like updating your email address and name badge). Work with your supervisor to determine how and when others will be told.
- You **do not** need to discuss your medical decisions. Medical information is private and protected by law. If you need time off for transition related medical care or recovery, follow the same steps used for any request for time off for medical reasons. If a doctor's note is needed, the note should explain the workplace implications (e.g. amount of time off needed and any work restrictions upon returning to the job), but it should not list the diagnosis or treatment. Work with your doctor to ensure your privacy.

Initial Conversations

Anytime we anticipate sharing plans of change, there can be a great deal of apprehension surrounding how others may react. It can be quite stressful and frightening for an employee to share their intention to transition their gender at work. They may feel vulnerable discussing their plans with a person upon whom their job depends.

When an employee contacts their supervisor, department director, another employees who has transitioned at work, or HR to explain they are planning to transition and want to start presenting in accordance with their gender identity, this contact person should assure the employee that they will work with them to help make the workplace transition as smooth as possible. It is often with great anxiety that the individual has come to this point. They have likely heard stories about individuals who were treated poorly in their workplaces, so receiving this type of assurance is important.

Additionally, the contact person should assure the employee that the information shared will be treated with utmost confidentiality. The employee has probably taken great care to safeguard their status and wants to be sure this information will be disclosed at an appropriate time and in a respectful manner. It is important to let them know that their supervisor will work closely with them on how and when to inform coworkers, managers, and HR about the workplace gender transition.

The transitioning employee should be assured that they will have input into planning the steps of their transition at work. The employee will be the main voice in determining the timing of beginning to work in their new gender role. If any changes in workplace routine need to occur, the employee will coordinate these changes with their supervisor to ensure the employee is able to perform the essential functions of their job.

Confidentiality

The transgender status of an individual is confidential and should only be disclosed on a need-to-know basis and only with the consent of the individual. Information about an employee's transgender status (such as the sex they were assigned at birth) can constitute confidential medical information under privacy laws like HIPAA. Supervisors, managers, HR, and coworkers may not

disclose information that might reveal an employee's transgender status or gender non-conforming presentation to anyone without consent from the individual.

Only the transgender employee has the right to discuss their gender identity or expression openly. Alternately, they may choose to keep that information private. We will respect their wishes and follow their lead on all communications.

Names/Pronouns

An employee has the right to be addressed by the name and pronoun of their choice. Our addressing the employee by their chosen pronoun is a sign of respect for them as an individual.

City employees are expected to respectfully use the transitioning employee's preferred name and pronouns, regardless of whether or not they "believe in," approve of, or accept an individual's right to be transgender or undergo a gender transition.

A legal name or gender change is not required to update the employee's name and gender in many aspects of the workplace. The supervisor should work with the employee, administrative staff, ITS, and HR to ensure information is updated by the first day of an employee's workplace transition. Typically, up to six weeks' notice will be needed to complete these steps.

- The employee's work station name plate, name tag, and access/identification card should reflect their new name.
- Organization charts, team rosters, City webpage listings, and phone directories should reflect their new name.
- The employee's email address should reflect their new name.
- Photographs on their access/identification card and photographs on display in the workplace should portray the individual according to their gender identity.
- Every reasonable effort should be made to update the individual's name/gender with contractors, third-parties, and vendors used by the employee's department. If the individual interacts with a third-party, vendor, or contractor on a regular and direct basis, Human Resources and the employee's direct supervisor will, in collaboration with the employee, determine the best course of action on a case-by-case basis.

Some City records must match the employee's legal name and cannot be altered until a legal name change has been achieved.

Some employees are legally required to have a current and valid professional license to function in their role. At some point, their legal name may change and no longer match the name on their license. The employee must sign reports, plans, etc. with the name on the license until their license has been updated to reflect their new name by the applicable licensing body.

Certain types of records, like those relating to payroll, insurance, and retirement accounts, require a legal name change before the person's name can be changed. When any employee changes their

legal name for any reason, they should notify HR. After the employee provides HR with official notification of a legal name change, HR will update personnel and administrative records accordingly. Documentation is not required to update the employee's name and gender in many other aspects of the workplace.

6. I am concerned about which restroom an employee will or should use. How do I know if I will be safe with them in the restroom with me?

Restroom Accessibility

All employees have a right to safe and appropriate restroom facilities, including the right to use a restroom that corresponds to the employee's gender identity, regardless of the employee's sex assigned at birth. Some City facilities have single-user, all-gender restrooms, which are available for use by any employee, regardless of the underlying reason.

Currently all-gender, single-user restrooms are not available in several municipal buildings; however, some locations have family restroom facilities.

Facilities Accessibility

All employees have the right to use locker rooms or other sex-segregated facilities that correspond to their gender identity. Ultimately, the decision should be left to the transgender employee to determine the most appropriate and safest option.

7. As I transition, will I get in trouble for expressing my gender through my attire?

Dress Codes

Transgender and gender non-conforming employees have the right to comply with dress codes and professional appearance standards in a manner consistent with their gender identity or gender expression. For clarification, please note that the following do not constitute reasons to deny a transitioning individual the right to dress according to their gender identity:

- Working with the public, vendors, and/or outside agencies
- Coworker, supervisor, and/or manager preferences or comfort level
- Public, vendor, and/or outside agency preferences or comfort level

8. I am an employee or am a coworker of an employee that is being harassed based on their gender expression. What can I do?

Discrimination/Harassment

The City of Dallas is committed to providing a workplace free of discrimination. City employees are entitled to work in a positive and civil environment in which harassment, discrimination and/or hostility towards an individual or group is not tolerated.

Discrimination and/or harassment based on gender identity or expression is a violation of the City's policies on Non-Discrimination. Examples of non-tolerated behaviors of discrimination include, but are not limited to, the following acts:

- Termination or the attempted termination of an employee as a result of stated or unstated discomfort with the employee's actual or perceived gender identity or expression;
- Refusal to hire or failure to promote a person on the basis of their actual or perceived gender identity or expression;
- Denying an employee access to locker rooms and/or restrooms which correspond to their gender identity;
- Prohibiting an employee from dressing according to their gender identity.
- Refusing to respect an employee's gender identity by intentionally referring to an employee by a name or by pronouns that do not correspond to the employee's gender identity.
 - It is understood that during the initial stages of an employee's transition, there are likely to be some infrequent and unintentional references to the employee's former identity. Said unintentional references can be expected due to habit or human error. However, managers are responsible for ensuring that other employees in the workplace adjust to using the new name and pronoun(s) as soon as possible.
- Acts of retaliation against any employee or person objecting to or supporting the enforcement of legal protections against gender identity and/or gender expression discrimination in the workplace.

An employee who has experienced or witnessed discrimination or harassment based on gender identity or expression may file a formal complaint with the Office of Equity & Inclusion or the City's Human Resources Department. All complaints will be investigated. Any employee(s) found to be in violation may be disciplined up to and including termination.

Health Insurance Benefits

All of the City of Dallas' active and retiree benefit plans cover transgender-inclusive services. This coverage is explained in detail in the Blue Cross Blue Shield paperwork.

A copy of the Medical Coverage Policy can be found on the Benefits page of the City's website. For additional questions related to coverage, providers, or navigation of the benefits provided, please contact the Benefits Office.

9. In addition to the AS, is there other guidance for me as I transition?

Workplace Transition Plan

This section addresses many of the processes that may occur during an employee's gender transition. The Workplace Transition Plan should be revised with input from the supervisor and the transitioning employee to meet the needs of employee and the organization/work team. Also see Appendix A for a helpful Transition Plan Checklist.

BEFORE THE WORKPLACE TRANSITION BEGINS

1. The transitioning employee should meet with their selected first point of contact to begin discussing the needed workplace preparations for their transition. The employee might choose their supervisor, someone up the management chain in their department, another employee who has transitioned at work, or an HR representative as their first point of contact.

2. At that initial meeting or a subsequent meeting, the employee and first point of contact should discuss forming a transition team and setting a timeline for the workplace transition.

a. The transition team will include all of the individuals who will play a role in implementing the employee's workplace transition. At a minimum, the transition team should include the employee, the first point of contact, and the employee's supervisor. The employee may also decide to include someone from HR and/or a trusted ally (from within the organization or outside of the workplace). All members of transition team should familiarize themselves with the protocols and resources in this document and any other relevant resources that provide educational information about transgender issues to ensure a safe, productive work environment.

b. The timeline should address when each person in the transition team needs to become involved in the employee's transition process; not all individuals of the transition team need to be brought on board at once. The timeframe should recognize that some stages of the workplace transition process will require more lead time than others. The timeline needs to be realistic (likely at least six weeks) to ensure everything is ready on the first day of the workplace transition. Work with HR to develop a sufficient timeline.

3. If the transitioning employee's supervisor was not the first point of contact, a meeting between the transitioning employee and the employee's supervisor (and other transition team members, if desired by the transitioning employee) should be scheduled to ensure the supervisor knows of the employee's planned transition. Note: With the transitioning employee's consent, managers beyond the supervisor will also need to be made aware of the employee's planned transition so that leaders can express their support for an inclusive workplace when the employee's transition is made known to the employee's work team. The supervisor should work with the transitioning employee to determine how and when to inform the management chain in their department.

4. If the first point of contact is not HR, then the transitioning employee should meet with HR (and other members of the transition team, if desired by the transitioning employee) to ensure HR knows of the employee's planned transition. HR will also be instrumental in helping to develop a sufficient timeline to allow preparations to be made for the first day of the workplace transition.

5. The supervisor and employee (and other members of the transition team, if desired by the transitioning employee) should work together to write the Workplace Transition Plan. They should make sure it addresses all of the following areas:

a) The date when the workplace transition will officially and formally occur. This means the date that the employee will change their gender expression, name, and pronouns. This date should provide enough time (likely at least six weeks) for updating the employee's email address, name plate, organization charts, etc. The transitioning employee may choose to begin using the restroom and locker room associated with their gender identity on this date as well. The transitioning employee will know best when the transition date should occur as they will be able to determine all relevant factors to be considered when choosing this date.

b) Decide how, when, and in what format other managers will be made aware of the change.

c) Decide how, when, and in what format the transitioning employee's coworkers and/or any vendors will be made aware of the employee's transition. It is up to the transitioning employee to decide if they would like to make some coworkers aware of their transition on a one-on-one basis before it is officially announced. The transitioning employee will also decide whether the official announcement should be made in writing or verbally and who will make the announcement. The employee will decide if and how they will participate in making the announcement. See "The Day the Transition Will Be Made Known to the Work Team" when planning the announcement.

d) Decide what, if any, mandatory training will be offered to coworkers and plan for training, if needed, to take place prior to the employee's return to work.

e) Determine where workplace references to the employee's name and photographs need to be updated and when they will be made. Provide sufficient notice (about six weeks) and work closely with administrative staff, HR, ITS, and others as needed to ensure that updates are made by the first day of the employee's workplace transition.

f) Schedule dates of any leave that may be needed for pre-scheduled medical procedures. (There is no need to discuss which procedures or what they entail.)

g) Discuss how the employee would like to handle name and pronoun mistakes that may occur in the first few months. Discuss how the supervisor will address persistent and/or intentional misuse of names and pronouns that may occur.

THE DAY THE TRANSITION WILL BE MADE KNOWN TO THE WORK TEAM

1. If the transitioning employee has decided the announcement will be made in a meeting:

a. Include the transitioning employee (if they wish to be present), the employee's supervisor, management up the chain in their department, the employee's coworkers, and any other team members or leaders if they are able to attend in person. Arrange for remote conferencing for any members of the transition team or the employee's work team that cannot be there in person. The employee will decide whether (or not) to attend all or part of the meeting.

b. If the employee thinks it would be helpful, a handout about transgender issues can be distributed at this meeting.

c. The supervisor of the employee's work team should announce the transition, along with any other high-level managers who are there to demonstrate that they support an inclusive work environment.

d. The speaking supervisor should cover the following information in the meeting:

i. Clarify that the following announcement is confidential. The information should only be disclosed to others on a need-to-know basis and only with the consent of the individual concerned.

ii. Explain that the employee formerly known as _____ (old name) will be _____ (new name) and will be referred to using _____ (male/female/gender neutral) pronouns as of _____ (workplace transition date).

iii. Emphasize the transitioning employee's importance at the City and management's complete support of an inclusive work environment.

iv. Review the City's nondiscrimination policies and indicate that all employees are invited to review this document.

v. Indicate that the transitioning employee will be presenting themselves in accordance with their gender identity. Indicate the expectation that everyone will behave respectfully and use the new name and pronouns as of _____ (date), regardless of any personal views they may hold.

vi. Make a point that continued professionalism within the workplace is expected, that the transition will not change expectations of appropriate workplace behavior, and that work should go on as it did previously.

vii. Solicit any questions. Refer questions the supervisor cannot answer to HR.

viii. Explain that _____ (new name) would prefer not to discuss the details of their transition at work or with people outside of their closest circle of friends and family. Indicate that everyone is welcome to direct any further questions to the supervisor and/or HR.

ix. The date for mandatory team training should be announced at this meeting. This training shall occur before the date of the employee's workplace transition.

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e. Be a behavioral model by using the transitioning employee's new name and pronouns during the announcement and in all communication (written and oral, formal and informal) after the first day of the employee's workplace transition.

2. If the employee has decided they wish the announcement to be made in writing:

a. Work with the employee to craft a written communication (see d. below for details) for distribution to the employee's coworkers and any other team members, managers up the chain in

their department, or professional peers selected by the employee. Determine whether the announcement will be distributed by email or as hard copies in sealed envelopes.

b. If the employee thinks it would be helpful, a handout about transgender issues can be distributed.

c. The supervisor of the employee's work team should sign the letter, unless the employee prefers to sign it or have it signed by someone further up the management chain in their department.

d. The communication must explain:

i. Clarify that the following announcement is confidential. The information should only be disclosed to others on a need-to-know basis and only with the consent of the individual concerned.

ii. Explain that the employee formerly known as _____ (old name) will be _____ (new name) and will be referred to using _____ (male/female/gender neutral) pronouns as of _____ (workplace transition date).

iii. Emphasize the transitioning employee's importance at the City and management's complete support of an inclusive workplace.

iv. Review the City's nondiscrimination policies and indicate that all employees are invited to review this document.

v. Indicate that the transitioning employee will be presenting themselves in accordance with their gender identity. Indicate the expectation that everyone will behave respectfully and use the new name and pronouns as of _____ (date), regardless of any personal views they may hold.

vi. Make a point that continued professionalism within the workplace is expected, that the transition will not change expectations of appropriate workplace behavior, and that work should go on as it did previously.

vii. Explain that _____ (new name) would prefer not to discuss the details of their transition at work or with people outside of their closest circle of friends and family. Indicate that everyone is welcome to direct their questions to the supervisor and/or a representative from HR. If the transitioning employee wishes, the letter can include the items listed in the "Resources" section.

viii. Indicate the date mandatory training will take place. This training shall occur before the date of the employee's workplace transition.

e. Be a behavioral model by using the transitioning employee's new name and pronouns in the announcement and in all communication (written and oral, formal and informal) after the first day of the employee's workplace transition.

THE FIRST DAY OF THE EMPLOYEE'S WORKPLACE TRANSITION

With an adequate timeline (about six weeks), the employee's supervisor will work with administrative staff, HR, ITS and others as needed to ensure that all elements (particularly those listed below) are in place by the first day of the employee's workplace transition.

- The employee's workstation name plate, name tag, and access/identification card should reflect their new name.
- Organization charts, team rosters, City webpage listings, and phone directories should reflect their new name.
- The employee's email address should reflect their new name.
- If the employee interacts with third-parties or vendors on a regular basis, a plan should have been drafted regarding how to handle these interactions.
- Photographs on their access/identification card and photographs on display in the workplace should portray the individual according to their gender identity.
- If the employee has provided documentation of a legal name change, their official records should be updated (payroll, insurance, retirement, etc.) as well.

10. I want to transition as a City employee. What do I do?

How Transitioning Employees Can Prepare

This section focuses on helping you, the transitioning employee, prepare for your workplace gender transition.

1. You can contact Human Resources to see if they are aware of any employees who have transitioned in the workplace who might be willing to be a sounding board and offer support and advice.
2. You are encouraged to write out how you'd like your workplace transition to proceed. Things might not always proceed as smoothly as you would like but planning ahead and working with a team will help pave the way to a successful workplace transition.
 - a. Timeline – When do you want to begin working openly in your true gender? As you consider this, keep in mind that your supervisor will need to work with administrative staff, HR, ITS and others to make sure everything is ready on the first day of your workplace transition. Some processes will require more time than others. To be on the safe side, you should assume that the timeline will need to be at least six weeks long, but you may opt for a longer timeline if you choose.
 - b. First point of contact – Who would you like to talk with first about preparing the workplace for your transition? You can choose your supervisor, someone up the management chain in your department, another employee who has transitioned at work, or an HR representative – whomever you feel most comfortable starting the process.
 - c. Transition Team – Who will be on your transition team? Include the individuals who will play a role in helping you achieve a workplace transition. At a minimum, your transition team should include you, your first point of contact, your supervisor, and/or another employee who has transitioned at work. You may wish to include a representative from HR. You can also include a

trusted ally (from within the organization or from outside the workplace). All members of the transition team should familiarize themselves with these protocols and other relevant educational information about transgender issues.

d. Coming out – When do you want to start telling people about your workplace gender transition? Do you want to start by talking with a few trusted coworkers one-on-one in confidence? When will you tell your supervisor? When will you talk with the LGBTQ Liaison? When and how do you want your supervisor to inform other managers up the chain of command in your department? When and how do you want your immediate work team to be informed? How about other coworkers or professional peers in outside agencies?

e. Official announcement – How do you want your workplace transition to be made known to your work group and/or department? Do you want it shared by email or in a printed letter from you or your supervisor or another manager further up the chain of command? (Keep in mind, emailing your announcement could result in it existing online for a long time; additionally, it potentially could be forwarded beyond your intended audience). Would you rather your supervisor tell people in a meeting? If so, do you want to be present? Do you want to be there in the beginning and leave after the announcement? Would you prefer not to attend?

f. Time off for treatment – Will you need time off for transition related medical treatment? How much time? Have you accrued enough sick time and/or vacation time? Keep in mind that you do not need to explain any treatments, but you will need to follow FMLA protocols to schedule medical time off.

g. Training – Mandatory training will be provided to your immediate coworkers prior to your first day transitioned in the workplace. Do you wish to attend this training? Is there specific information to your job/department/role that you would like to see addressed?

h. Name/pronoun adjustment – How would you like to handle occasional name and pronoun mistakes that may occur (especially in the first few months)? If someone unintentionally but persistently uses your former name or pronouns, how would you like this dealt with? If someone appears to intentionally misuse names and pronouns, how would you like your supervisor to address this?

i. Other considerations – What worries you the most at this point? Who might be able to help? Also, where might your previous identity show up later when you least expect it? Look for team rosters, organization charts, and old photos. Keep a list of these items so you can ask later about whether they can be changed.

3. When you are ready, talk with your supervisor about your intent to transition. This should be in a face-to-face meeting. Explain that it is a confidential discussion. If you would be more comfortable, you can bring someone with you – a coworker, a manager, or an ally from outside the organization that that you trust. Your supervisor can be an ally and should be part of the planning process for a successful transition.

4. When you are ready, talk with HR about your intent to transition. This should be in a face-to-face meeting. Explain that it is a confidential discussion. If you would be more comfortable, you can bring someone with you – a coworker, a manager, or an ally from outside the organization that you trust. This person should be an ally and be included in the planning process for a successful transition.

5. Maintaining confidentiality will be a primary concern. However, with your consent your supervisor will need to share your plans up the management chain in your department so that leaders can express their support of an inclusive workplace when your transition is made known to your work team. Be prepared to discuss with your supervisor who will be told and how and when they'll be informed.

6. Work with your supervisor or first point of contact to begin planning your transition:

a. Identify the members of your Transition Team.

b. Establish a time line for the transition, including dates for informing the management chain in your department and HR. Set the date for the official announcement to your co-workers and the first day of your workplace transition (usually several weeks apart). Remember that your supervisor will likely need at least six weeks to ensure everything is updated. Before finalizing the timeline, work with HR to ensure you have allowed enough time for everything to be ready by the first day of your workplace transition.

c. Plan the announcement (meeting or written communication).

d. Discuss appropriate timing for mandatory training to be provided to your colleagues. This will likely occur after your transition has been announced, but prior to the first day of your workplace gender transition.

e. Plan for the first day of your workplace gender transition.

f. Discuss how you want name/pronoun slips (or misuse) to be addressed.

Gender Transition in the Workplace

Workplace Transition Plan

This document provides human resources (HR) professionals with a roadmap and framework to support an individual's transition in the workplace.

Employee Information

| | |
|----------------|------------------|
| Chosen name: | Gender pronouns: |
| Job title: | Job class: |
| DSW number: | Department: |
| Division/Unit: | Supervisor: |
| Manager: | Dept. HR person: |

Communications Plan

Only pertinent information, such as the individual's chosen name and pronoun, will be communicated with others as part of this plan.

| | | | | | | | | |
|---|------------|------------|-------|------------|-------|------------|-------|------------|
| Who will communicate the individual's transition: | | | | | | | | |
| What information will be communicated: <input type="checkbox"/> Chosen name (if different from before) <input type="checkbox"/> Gender pronouns (if different from before) <input type="checkbox"/> Other information, to be decided by the transitioning individual: | | | | | | | | |
| Who will be told about the transition: <input type="checkbox"/> No one <input type="checkbox"/> Direct supervisor <input type="checkbox"/> Immediate co-workers in division/unit <input type="checkbox"/> Co-workers in department <input type="checkbox"/> Group selected by transitioning individual <input type="checkbox"/> Co-workers outside department (e.g. vendors and contractors) | | | | | | | | |
| How will they communicate the transition: | | | | | | | | |
| If individual selects a group: <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">Name:</td> <td style="width: 50%;">Job title:</td> </tr> <tr> <td>Name:</td> <td>Job title:</td> </tr> <tr> <td>Name:</td> <td>Job title:</td> </tr> <tr> <td>Name:</td> <td>Job title:</td> </tr> </table> <p style="text-align: center;"><i>(Repeat on separate paper if needed)</i></p> | Name: | Job title: | Name: | Job title: | Name: | Job title: | Name: | Job title: |
| Name: | Job title: | | | | | | | |
| Name: | Job title: | | | | | | | |
| Name: | Job title: | | | | | | | |
| Name: | Job title: | | | | | | | |

Timeline

The dates in this timeline will remain flexible based on the transitioning individual's expectations and comfort level.

| Projected timeline | Desired date | | Actual date of completion |
|---|----------------------------|---------------------------|---|
| Notify supervisor and/or HR person about transition | | | |
| HR professional and transitioning individual meet <ul style="list-style-type: none"> HR professional complete this workplace transition plan | | | |
| Communication of transition to co-workers and/or others, per communication plan | | | |
| Individual's transition in the workplace begins <ul style="list-style-type: none"> Required action items on HR professional's checklist must be completed by this date | | | |
| Required actions | Estimated time to complete | Actual date of completion | Supporting department |
| <input type="checkbox"/> Provide transitioning individual with copies of the Gender Inclusion Policy Guidelines for the Transitioning Individual, Guidelines for HR and Management --All available on DHR website-- | | | |
| <input type="checkbox"/> Create new City ID badge as needed | | | Department of Human Resources (DHR) |
| <input type="checkbox"/> Update staff directory as needed | | | |
| <input type="checkbox"/> Conduct search of all web and intranet sites to ensure they reflect Individual's chosen name and gender | | | Department of Technology (DT) and Departmental IT |
| <input type="checkbox"/> Update individual's email account and computer username | | | Department of Technology (DT) and Departmental IT |
| <input type="checkbox"/> Update individual's phone line and name in phone directory | | | Department of Technology (DT) |
| <input type="checkbox"/> Update individual's People and Pay information | | | Department of Technology (DT) and Departmental IT |
| <input type="checkbox"/> Replace name plate (if applicable) | | | |
| <input type="checkbox"/> Replace photos on display (if applicable) | | | |
| <input type="checkbox"/> Provide new W-4 form (if applicable) | | | See Department SOP |
| <input type="checkbox"/> Order business cards (if applicable) | | | |
| <input type="checkbox"/> Update parking or bicycle pass (if applicable) | | | Department of Real Estate |

Agreement and Approval

| | |
|--|----------------------------|
| Transitioning Individual | |
| I have collaborated with my HR representative to create this workplace transition plan. I understand its terms and acknowledge that dates will remain flexible. | |
| Full Name: <input type="text"/> | |
| Signature: <input type="text"/> | Date: <input type="text"/> |
| HR Professional | |
| I have collaborated with the individual above to create this workplace transition plan. I understand its terms and the tasks I must implement according to deadline. | |
| Full Name: <input type="text"/> | |
| Signature: <input type="text"/> | Date: <input type="text"/> |
| Supervisor | |
| I have reviewed this workplace transition plan. I understand and agree to its terms and deadlines. | |
| Full Name: <input type="text"/> | |
| Signature: <input type="text"/> | Date: <input type="text"/> |

cc: Transitioning individual's confidential file

Resources

Books

- *Transgender Explained For Those Who Are Not* by Joanne Herman
- *Transgender 101: A Simple Guide to a Complex Issue* by Nicholas Teich

Websites

- “Terminology,” National Center for Transgender Equality, <http://tinyurl.com/qdhk65l>
- “Trans 101,” Sylvia Rivera Law Project, <http://srlp.org/resources/trans-101>

Online Videos

- “Transgender Basics,” Gender ID Project, www.youtube.com/watch?v=UXI9w0PbBXY
- “Transgender Works: Creating a Transgender-Inclusive Workplace,” Northwestern University, <http://tinyurl.com/pxl8t43>
- “An Introduction to Transgender People,” National Center for Transgender Equality, <https://www.facebook.com/TransEqualityNow/videos/vb.40078161989/10153582088701990/>
- “Trans 101,” Sylvia Rivera Law Project, <http://srlp.org/resources/trans-101>
- Out and Equal Workplace Advocates, www.outandequal.org
- Human Rights Campaign (HRC), www.HRC.org/workplace/transgender

Sample way to display pertinent information on City website:

<https://drexel.edu/hr/resources/overview/gender-transition/>