

WORKPLACE TRANSITION PLAN GUIDANCE

It is appropriate to adapt this plan to fit an individual or a specific location.

ADVANCE PREPARATION

1. The transgender individual meets with the immediate supervisor, a Human Resource (HR) specialist, or other responsible official and shares his/her transgender status and intent to transition.
2. The transgender individual (together with the supervisor, if appropriate) will meet with the Human Capital Office (HCO) and Office of Equal Employment Opportunity (OEEO) or other responsible official to share the employee's intent to transition.
3. Additional meetings with the employee's management chain may be necessary to inform and assist in the announcement of the transition.
4. The employee, supervisor, HCO, and OEEO representatives should identify stakeholders. This should include the employee, their manager, co-workers, contractors, HCO, OEEO and others such as employee affinity groups.
5. Outline what information, if any, should be shared with each stakeholder group by developing a communication plan. The plan should address the needs of management, the transitioning employee and co-workers.
6. The communication plan should not address issues that the transitioning employee is uncomfortable addressing or issues which do not impact the workplace (e.g., it is not a workplace concern as to whether the transitioning employee will be undergoing medical treatment).
7. The communication plan should be prepared with the intent of dispelling rumors, promoting open view points, and clarifying misinformation, with the end goal of garnering a better understanding of workplace issues.
8. Consider specific issues that need to be addressed, for example:
 - The date of the transition, i.e., the first day of the change of gender presentation, pronoun usage and name. Recognize that the date of the transition will be driven primarily by the employee's situation and concerns.
 - Who, how and when the employee's workgroup, clients and/or vendors will be informed of the change.
 - Determine how much information will be shared at the meeting between the transitioning employee and the supervisor.
 - Decide if, before the general announcement, the transitioning employee wants to speak with co-workers to disclose the plan to transition.

- Determine whether there will be an educational workshop (a “Transgender 101”) provided to the staff.
 - What changes will be made to records and systems, and when.
 - How the current policies against discrimination, harassment, and benefits will protect this individual.
 - The expected plan for use of gender-specific facilities, such as restrooms and locker rooms.
 - Any time off required for medical treatment, if known.
 - What benefits and services are available to support the transition.
 - Consider the timeframe for completing personnel transactions (e.g., legal name changes in human capital systems, directory, etc.).
9. Outline the arrangements for name changes to be effective on the day of transition, so that nameplates, badges, etc. will be available on the first day.
10. The transition plan should discuss general expectations of all stakeholders including the transgender employee.
11. The plan should address any reasonable accommodations required.

THE DAY OF THE ANNOUNCEMENT (*This is an optional activity*)

Conduct a team meeting, or include this issue in an already-scheduled face-to-face meeting. All individuals with whom the transitioning employee interacts with often should be included in the announcement meeting. Do not do communicate the transition via e-mail.

A handout is optional in conjunction with the face-to-face meeting. The transitioning employee may choose whether to be personally present at the meeting, depending on the employee’s comfort level. The manager of the team should make the announcement, in conjunction with the highest level manager, to show support. The manager should:

- Make it clear that the transitioning employee is valued and has management’s full support in making the transition.
- Explain the Department’s policy, guidance, and recommendations.
- Stress that on the transition day the transitioning employee will present him/herself consistently with their gender identity and should be treated as such; for example, using the new name and new pronouns.
- Lead by example. Use the new name and pronouns in all official and unofficial communication.
- Make it clear that the process of transitioning should be viewed with respect, while maintaining dignity for the employee and that work will continue as before.
- If a “Transgender 101”workshop is part of the transition plan, announce it at this meeting and not before. The workshop should be offered before the day of transition.

THE FIRST DAY OF FULL-TIME WORKPLACE GENDER TRANSITION

On the first day of transition, the transitioning employee's supervisor should make best efforts to ensure the following steps are taken, just as they would for a new or transferred employee:

- Issue a new identification badge with a new name and photo.
- Place a new nameplate on door/cubicle.
- Update any organization charts, mailing lists, email directory and other references to the new name.
- Follow-up on any name change related issues (email, etc.).

The supervisor should plan to be on site with the transitioning employee the first day to make introductions, support the employee, ensure respectful and inclusive treatment and make sure that work continues as normal.