



# Transgender Guidance for Managers and Employees

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## **INTRODUCTION**

This guidance is designed as a resource for managers to support someone who is considering transitioning to their preferred gender, is in the process of transitioning, or has transitioned. It can also be used to increase employee awareness of gender identity issues and combat discrimination against transgender people.

There is increasing public awareness of transgender issues but there may be some anxiety about what to do and how colleagues will respond. Failure to respond positively and supportively can have consequences where current employees:

- may feel they cannot transition openly, despite being deeply unhappy in their current gender
- may feel they have to leave Post Office (without requesting references) and make a fresh start somewhere else to coincide with their new gender identity
- may inadvertently discriminate unlawfully against a transgender colleague

The aim of the guidance is to ensure that there is a consistency in procedures and that no current or prospective employees are subjected to discrimination or victimisation as a result of them being transgender.

## **CONFIDENTIALITY**

Post Office treats all personal data, including data related to someone's gender identity as strictly confidential. All employees are required to undertake training related to information security which highlights the importance of confidentiality. Post Office recognises that section 22 of the Gender Recognition Act 2004 makes it illegal to disclose an individual's gender identity

or history internally/externally without their consent. Such disclosure constitutes a criminal offence liable to a fine.

## **THE PROCESS OF TRANSITION**

Transitioning is a term used to describe the process of presenting in a gender different to that assigned at birth. A Transgender person may wish to pursue a number of changes to live in a gender role that matches their true gender identity rather than their assigned gender. For instance, by changing the name that they want to be known as, by dressing differently, by obtaining voice training, by accessing endocrinology services to affect hormones or by having surgery to change primary or secondary sex characteristics (e.g. chest or genitals).

Not everyone that identifies as a transgender person will choose to transition in the same way. Each person's journey to transitioning is unique. Each person's situation and the period of time to transition will vary depending on a range of factors, including whether or not they want medical assistance and whether they are receiving this privately or via the NHS. Some people may wish to transition periodically, in which case they should also be supported the same as someone who has decided to transition permanently.

It is therefore difficult to outline a definitive process to support the transitioning process, however this section aims to ensure that the journey of gender assignment is facilitated and supported fully at Post Office through outlining points for consideration.

Transitioning employees are very much in control of their transitioning and their line manager will be helping to manage their experience within Post Office.

## **SHOWING RESPECT TO TRANSGENDER EMPLOYEES**

The following informal guidelines on how to treat transgender people may be

useful for a transgender persons' colleagues:

- Consider the language you use – research what is acceptable or not and if you're unsure speak to the employee.
- Think of the person as being the gender they want you to think of them as.
- Use the name and pronoun that the person asks you to. If you aren't sure what the right pronoun is, ask. If you make a mistake with pronouns, correct yourself and move on. Don't make a big deal out of it, you probably won't have been the first person to make the mistake.
- Respect people's privacy. Don't ask what their 'real' or 'birth' name is. Those who are, have or intend to undergo gender reassignment are often sensitive about revealing information about their past, especially if they think it might affect how they are perceived in the present.
- Similarly, respect their privacy. Do not tell others about a person's transgender status. If documents have to be kept that have the person's old name and gender on them, keep them confidential.
- Respect people's boundaries. If you want to ask a personal question, first ask if it's ok to do so. Questions such as 'Are you on hormones?' can be considered personal and offensive.
- Listen to the person, and how they want to be treated and referred to.
- As an Employer we will be more visible around significant days in the Trans calendar to help build better tolerance and understanding towards Trans people - E.g. IDAHOBIT Day, Trans Memorial Day.

### **APPROPRIATE TERMINOLOGY**

The following points should be followed for people who are transitioning.

Once a transgender person has made known their chosen name, this name should be used in all circumstances, rather than their birth name. It is never appropriate to put quotation marks

around either the transgender person's chosen name or the pronoun that reflects their gender identity.

A person who identifies as a certain gender, whether or not they have taken hormones or had surgery, should be referred to using the pronoun (he or she) appropriate for that gender. For example, if the person wears a dress and uses a woman's name, the feminine pronoun is appropriate. If you are not sure what the correct pronoun is, ask the person what they prefer.

It is not appropriate to use the terms 'sex change' or 'pre-/post-operative'. These imply that the process of transition must involve some form of surgery, which may not necessarily be the case.

If you're not sure which pronouns to use it is fine to respectfully ask what name and pronouns you should use.

### **INFORMING POST OFFICE**

When beginning the transition journey an employee should contact their line manager.

If the employee is not comfortable to discuss with their manager they can also speak to a member of the HR team or the PRISM Network who will help them work through how best to discuss with their manager and support them in this journey. The sooner the employee notifies their manager, the easier it will be to support them through the transition.

The line manager, should arrange a meeting with the employee and reassure them that Post Office will support them through the transition. The employee may be accompanied at such a meeting by a colleague or Trade Union Representative to provide support

Wherever possible a period of notice (e.g. not more than 3 months) should be given by the employee of the date when they wish to start their transition so that the necessary plans can be put into place

It is important to note transitioning is a very personal journey and therefore it is not a prescriptive process. Any action or decision should be made in discussion and agreement with the person transitioning. The steps a person who is transitioning wishes to take should never be assumed. The process should be led by the person who is transitioning and the way they wish to manage this

## **FIRST MEETING**

Your support as the line manager will be critical in helping support your employee through gender transition.

An employee informing you of their intentions is likely to be a significant step for them. You may not be familiar with how to manage gender transition and hopefully this guide will help to answer some of your questions. What Post Office expects is for you to be understanding and supportive. If you are unsure of something you should ask your employee questions (they probably will not mind if the intention is to be supportive). You should be open-minded and not feel like you need to have all of the answers available immediately. There are plenty of places to go for support, many are listed at the end of this document.

When an employee informs you of their intentions to gender transition, the following points should help the discussion. It is unlikely that you will get through them all in one meeting:

- Consider the location and setting for the meeting, allow the employee to be in control of these as much as possible. This is likely to be a difficult conversation for them to have.
- Immediately reassure the employee that you and the company will be as supportive as possible.
- Acknowledge that this will be a learning curve for you and you may not have all of the answers but you are committed to working with the employee to support them.
- Ask the employee to suggest ways in which they would like to be supported, offer to involve them in

the communication process but make sure they do not feel coerced into doing this.

- Confirm that you as the manager will be their main point of contact for support during the transition and that your conversations are confidential, you will only share information where it is needed to ensure that the employee is supported (for example, with HR).
- Agree timings for communication to colleagues and agree who should do these and how it should happen (face to face, email, conference call).
- Ask if the employee intends on changing their name and if so when their new name should be used from.
- Discuss the expected timeline and any time off that may be needed and how these will be handled (in line with our standard Attendance Management Policy).
- Agree the timing that the employee will begin their transition at work. This is likely to be when they present consistently in their acquired gender.
- Discuss any facilities requirements (e.g. dress code, washrooms and changing rooms)
- If the employee has concerns about continuing in their current position, discuss what options may be available to adjust working styles and practices or potentially alternative positions that the employee may find more suitable

## **THE ACTION PLAN**

It will be necessary to agree an action plan, including timescales, to ensure that appropriate steps are taken during the employee's transition. The action plan should be confidential and discussion should take place to agree where copies are kept and who should have access to them.

The action plan and timescales will need to be reviewed periodically with the employee concerned. The action plan should cover:

- What time off the employee might need for medical appointments or procedures and/or the possible side

effects of medication (absence should be treated the same as anyone who is absent for reasons of sickness or injury).

- The date when the person intends to start any real-life experience, which may include the expected point for a name change, personal details and gender. It will include the steps needed to prepare for that point and what amendments are required to records and systems
- Whether the employee wishes to inform colleagues in person or would prefer this to be done for them
- If and when the employee intends to start hormone therapy and/or undergo surgery, or wants to transition without medical intervention
- What emotional support can be put into place for the employee if they feel that they require it e.g. Employee Assistance Programme, counselling, support from Occupational Health
- How the employee is covered by the existing policies on issues

### **MANAGING THE REACTIONS OF COLLEAGUES**

An important part of the action plan is the communication about the employees transitioning to colleagues and other people they work with. As people transition, the process itself may present challenges for other employees who have fixed notions of gender. It is important to remember that Post Office is supportive of people going through gender transition and expects all employees to be. Instances of transphobia, bullying or harassment will not be tolerated. Often these are likely to stem from a lack of knowledge and understanding of the issues. As a manager you need to address these quickly. You can do this through (and with permission of the transitioning employee):

- Providing forums for safe and open discussion on the topic;
- Making clear your expectations to the team or specific employees.

- Provide education sessions to dispel myths or rumours on the topic.
- Invite the PRISM Network to talk to the team.
- Seek advice from HR.

### **UPDATING RECORDS.**

No records should be changed without the permission of the employee concerned. If an individual discloses their status as a transgender person, or gives notification of their intention to transition during their employment, a date will need to be agreed with them from which their gender is changed on all personnel records and public references, such as identification passes, contact details, email addresses, formal records, website references, payroll details and so on.

It is very important to ensure a transgender person's file reflects their current name and gender. Any material that needs to be kept that is related to the person's transgender status, such as records of absence for medical assistance, birth certificate and documentation of name change, should be placed in a sealed envelope and attached to a new file with instructions such as, 'Confidential: 'HR only'. HR and the data protection team will allow a manager to view the information only if they require it to perform their specific duties and with the permission of the person concerned.

When a transgender person receives a gender recognition certificate, they have the right to request that all references to their former name and gender are removed from old records to ensure their former identity is not revealed. All records held on paper file must be found and replaced with new records, and relevant information transferred to a new cover. For example, a person's old birth certificate will need to be replaced with their new one; if the person has changed their name, their original offer letter will need to be replaced with an offer letter in their new name. Nothing should remain on the file that would disclose to a third person that a change has occurred.

In order for these changes to take place, it may be necessary to discuss with others in Post Office the fact that a person is transitioning. However, it is essential that the individual grants permission before their status is discussed with others.

With the exception of pension schemes, a written notification of intent to transition is sufficient for the gender and names on employee personnel records to be changed.

It will constitute gender reassignment discrimination to refuse to change a transgender person's title, name and gender on employee records. Asking employees for medical evidence is not appropriate, as transgender people do not have to be under medical supervision in order to be protected by the law.

**An employee does not need a gender recognition certificate (GRC) in order to change their name and title and it is unlawful to ask for one.**

Employees should be aware that they will have responsibility for informing external agencies (e.g. the HMRC).

## **OTHER AREAS TO CONSIDER**

### **IDENTIFICATION**

A full gender recognition certificate (GRC) gives a transgender person the means to obtain a new birth certificate, but a transgender person can get other official identification that is reflective of their preferred gender without a full GRC, including a passport and driving licence. Bank account details can also be changed without a full GRC. To obtain official documentation that is reflective of their preferred gender, a transgender person without a full GRC is required to provide a doctor's letter stating their intention to transition permanently to their preferred gender and, if appropriate, a statutory declaration of name change.

As not all transgender people will be under medical supervision, we will not ask employees to provide a doctor's letter. During transition, a transgender person may use more than one legal identity, which is perfectly acceptable as long as they do not use their different identities for fraudulent purposes.

### **FACILITIES**

A transgender person should have access to 'men-only' and 'women-only' areas – such as changing rooms and toilets – according to the gender in which they present. This may mean that a person changes the facilities they use at the point when they start to live in their acquired gender. In some situations, it may be helpful to explain the situation to work colleagues who use the facilities; however, this should only be done following full consultation with the transgender person, and if the transgender person concerned wants this conversation to take place. It is not acceptable to restrict a transgender person to using disabled toilets or other unisex facilities.

### **DRESS CODE**

A transgender employee can dress consistently with their chosen identity and is required to comply with the same standards of dress and appearance as all other employees in their workplace. Gender transition is a gradual process and employees may need additional support and understanding as their appearance transitions.

### **PENSIONS**

#### **State**

Everyone born since April 1955 receives their state pension at 65; however, women born before 1950 can claim their state pension when they reach 60. Transgender people without a gender recognition certificate (GRC) are treated as the sex recorded at birth for the payment of state pensions. If a person has not obtained a full GRC and retires earlier or later than other employees of

the same gender because their preferred gender has not been legally recognised, Post Office should keep the reasons for this confidential. Transgender women who gain a GRC after turning 60 can have their state pension backdated to their 60th birthday.

### **Occupational**

Almost all occupational pension schemes offer both a death-in-service lump sum and a dependent's benefit. The death-in-service benefit should be able to be paid to anyone, without proof of dependence required. It is therefore important that transgender people review their expression of wish forms (or equivalent, depending on the scheme) which, in the event of death, inform the trustees of the member's wishes. These forms are confidential, and are kept unopened unless the person dies. The definition of 'dependent' will vary from scheme to scheme according to its rules. A person who has had their marriage annulled or civil partnership dissolved to receive a full GRC will need to review their pension arrangements.

The date of change for pension purposes should be agreed with the employee. HM Revenue & Customs will be informed that a full GRC has been issued, either by the gender recognition panel or by the transgender person. This will lead to a change in national insurance records to reflect the person's acquired gender. Name changes to national insurance and private pension records can be made with a statutory declaration of name change.

### **HEALTHCARE BENEFITS**

Our healthcare benefit does not currently allow employees to claim for gender transition treatment. Our Employee Assistance Programme however does provide counselling and support to employees going through transition themselves, their managers or any employee.

### **TIME OFF**

The law recognises that someone under medical supervision who is transitioning may require periods of time off work to attend medical appointments or undergo medical procedures. Where an employee wishes to proceed to surgery the extent of the surgical procedures may vary according to the needs of the individual. Most surgical procedures will require an absence from work of between 2 weeks and 12 weeks.

A transgender person under medical supervision who has time off work relating to their transition has the right to be treated in the same way as someone who is absent from work for reasons of sickness or injury.

There may also be possible side-effects of medication which may adversely affect work performance and transgender people may need reduced hours or duties for a temporary period when they return to work following surgery.

Should the amount of time off exceed what was expected at the beginning of the individual's journey, then the manager will need to review the time off and discuss with the employee how they manage any additional time needed. Managers should be as flexible as possible to meet reasonable requests for leave or changes in working patterns within the needs of the service.

Employees need to feel confident and supported throughout their journey and should not be left feeling vulnerable or that they have been disadvantaged.

### **RECRUITMENT OF NEW EMPLOYEES**

Our resourcing decisions are made based on merit. We do not discriminate on the grounds of Gender, Race, Religion, Belief, Disability, Age, Sexual Orientation or Gender Identity.

There is no requirement for a transgender person, non-binary/gender fluid person to disclose their status as a condition of employment. It is not a



question that should ever be asked at interview – just as, for example, a woman should not be asked whether she plans to have children. If a disclosure is made as part of the recruitment process this must be kept confidential by all those involved.

If formal documents are required before commencing employment Post Office should emphasise their Confidentiality Policy when asking for a birth certificate. If a person has not yet received a gender recognition certificate, or has not yet been issued with new identification, the birth certificate will clearly show that the person was born with a different name (and gender).

### **CRIMINAL RECORD CHECKS FOR EMPLOYEES**

The Criminal Records Bureau (CRB) has implemented a process specifically for transgender people who do not wish to disclose their transgender status to their employer. Transgender applicants are not required to put their former names or gender on their CRB application form, but they must contact the CRB's sensitive applications team, ideally before their application is sent to the CRB. The transgender person will need to send evidence of their previous name and gender with a covering letter confirming their current name, full address and a contact telephone number. The sensitive applications team will then monitor the CRB application and deal with any queries that arise.

Where a conviction or other relevant information has been recorded in a previous name, this will be revealed. The person's former name and gender should remain confidential as long as the CRB has been advised of the conviction, or other relevant information, in advance by the applicant.

### **REFERENCES**

References for current or former employees who have transitioned must make no reference to the person's former names or gender, and must use the appropriate pronoun. Failure to do so

without the individual's consent would be a breach of the Data Protection and the Gender Recognition Acts.

### **DISCRIMINATION AND HARASSMENT**

Bullying, harassment and discrimination are unlawful and will not be tolerated. Our policies protect the rights of transgender people to dignity at work.

**To "out" someone without their permission is a form of harassment and may also be a criminal offence.**

**Examples of unlawful direct discrimination include:**

- Refusing to support an employee who is transgender
- Verbally or physically threatening a transgender person or spreading malicious gossip about them
- Refusing to associate with or ignoring someone because they are a transgender person
- Refusing to address the person in their acquired gender or use their new name
- The sexual harassment of a transgender person
- Revealing the transgender status of a person to others by disclosing information to individuals or groups – in other words "outing" someone
- Passing judgement on how convincing a transgender person is in their acquired gender
- Refusing to acknowledge the rights of a transgender person and failing to acknowledge that a transition has occurred

### **COMPLAINTS**

Transphobic abuse, harassment or bullying (name calling/derogatory jokes, unacceptable or unwanted behaviour and intrusive questions) will be dealt with under the [Dignity at Work Policy and Procedure](#).

In the interests of investigating a complaint it will be necessary to disclose the person's transgender status to other named persons involved. This will only

be done with the written permission of the transgender person. If the transgender person feels unable to agree to such a disclosure it must be explained to them how this will impact on the investigation of the incidents and the limits on any action that might be taken

Post Office undertakes to ensure a prompt response to all complaints and to treat them with due respect, relevant confidentiality and fairness. In some instances they may be dealt with informally. In others there may be grounds of disciplinary action, including dismissal.

## **LEGISLATION**

Although the law protects all those in the UK that propose to undergo, are undergoing or have undergone gender reassignment, Post Office will go above and beyond what legislation recognises as everyone deserves dignity and respect regardless of their transgender status or gender identity, including non-binary or pangender identities. In the workplace it is illegal to treat someone differently or discriminate against them because of their transgender identity.

### **THE EQUALITY ACT 2010**

The act offers more far-reaching protection from discrimination on the grounds of gender reassignment than existing equality law as it protects:

- transgender people who are not under medical supervision
- people who experience discrimination because they are perceived to be transgender
- people from discrimination by association because of gender reassignment. For example, it would protect the parents of a transgender person from being discriminated against because their child is transitioning

There are is a specific "Protected Characteristic" which applies to transgender people.

The Act covers direct discrimination, victimisation and harassment in employment or training on the grounds of gender reassignment. It protects a person who intends to undergo, is undergoing, or has undergone gender reassignment from unfavourable treatment on the grounds of their gender reassignment. This includes people preparing for medical treatment. Protection applies from the moment when the person indicates their intention to start the reassignment process, even if they subsequently change their mind.

Any reference to discrimination in employment or training against men or women in the Act also applies to individuals who have gender dysphoria. A claim can therefore be brought against Post Office or an individual person for any unlawful discrimination, including harassment. Post Office is automatically liable for discriminatory actions taken by anyone acting on their behalf, whether or not it was done with their knowledge, unless they can show that they had taken all reasonable steps to prevent such actions.

If a transgender person has obtained a full gender recognition certificate (GRC), they are deemed in law to be of the gender to which they have transitioned, and must be treated in that gender with respect to jobs and course placements where GOQs apply. If a transgender person does not hold a GRC, or is transitioning while in post or on a course that involves placements where GOQs apply, it is essential that Post Office and the individual meet to discuss the situation as soon as possible, with the individual's trade union representatives present, if required.

### **THE GENDER RECOGNITION ACT 2004**

The legal protection for a person who has fully transitioned (with or without medical intervention) is clear and unequivocal. The Gender Recognition Act 2004 allows transgender people who are able to satisfy the act's evidence requirements to apply to the gender recognition panel in order to seek full

legal recognition of their acquired gender. The panel, which consists of lawyers and doctors, requires applicants to demonstrate that they:

- have, or have had, gender dysphoria
- have lived in the acquired gender for at least two years, ending with the date on which the application is made
- intend to continue to live in the acquired gender for the rest of their life
- can provide medical reports containing specified information

If an applicant is successful, they will be issued with a full or interim gender recognition certificate (GRC). Thereafter, the Equality Act 2010 applies to this person in the same way as it would to anyone else.

### **THE DATA PROTECTION ACT 1998**

Under the Data Protection Act 1998, transgender identity and gender reassignment constitute 'sensitive data' for the purposes of the legislation. Therefore information relating to a person's transgender status cannot be recorded or passed to another person unless conditions under schedule 3 of the Data Protection Act for processing sensitive personal data are met.

### **THE HUMAN RIGHTS ACT 1998**

The Human Rights Act 1998 provides protection to transgender people, principally under the right to a private life. The courts have interpreted the concept of 'private life' in a very broad way to cover, among other things, a person's right to express a sexual identity, to live a particular lifestyle and to choose the way they look and dress. It also means that personal information (including official records, photographs and letters) should be kept securely and not shared without the permission of the individual concerned. In addition, the right to privacy states that unless a public authority is acting in accordance with the law, there should be no interference by a public authority with a

person's exercise of their right to a private life.

## **ADVICE AND SUPPORT**

### **EMPLOYEES ASSISTANCE PROGRAMME**

For both managers, employees and colleague's gender identity and transition can be unsettling. We're committed to supporting all of our people. We offer professional counselling and independent, confidential advice through our Employee Assistance Programme. Any employee can use the service which is available 24 hours a day, 7 days a week, 365 days of the year.

The contact details for the EAP service are:

FREEPHONE: 0800 688 8772

EMAIL: [askus@ppcworldwide.com](mailto:askus@ppcworldwide.com)

WEBSITE: [www.postoffice.helpeap.com/](http://www.postoffice.helpeap.com/)

### **PRISM**

Within Post Office we have a Lesbian, Gay, Bisexual and Transgender + Network which is open to everyone, whether they identify as LGBT+ themselves or not. It connects and supports our LGBT employees and it supports non-LGBT employees who may need advice or guidance. The network can be contacted confidentially through the PRISM mailbox [prismsupport@postoffice.co.uk](mailto:prismsupport@postoffice.co.uk)

### **If an employee is not comfortable to discuss gender identity with their manager**

If at any point an employee feels uncomfortable speaking to their line manager, another manager within their department, the PRISM Network or EAP. The Diversity and Inclusion Manager has been identified as the final point of contact for help and support and can be contacted directly.

### **Places to go for help**

If you have questions about gender transition there are a number of places to go for help:

- Employee Assistance Programme
- Your HR Representative
- Trade Union Representative
- PRISM Network

## APPENDIX 1: EXTERNAL RESOURCES

<a href="http://www.gendertrust.org.uk">www.gendertrust.org.uk</a>	The Gender Trust is recognised as an authoritative centre for professional people who encounter gender identity-related issues in the course of their work. In particular, this group included employers, human resource officers, health workers and information services. National Helpline: 0845 231 0505
<a href="http://www.equalityhumanrights.com">www.equalityhumanrights.com</a>	Equality and Human Rights Commission is a statutory body with responsibility for protecting, enforcing and promoting equality across nine protected characteristics – age, disability, gender, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion and belief and sexual orientation
<a href="http://www.depend.org.uk">www.depend.org.uk</a>	Depend is an organisation that offers free, confidential and non-judgemental advice, information and support to all family members, partners, spouses and friends of transgender people.
<a href="http://www.gires.org.uk">www.gires.org.uk</a>	Gender Identify Research and Education Society initiates, promotes and supports research, particularly to address the needs of people who have a strong and ongoing desire to live and be accepted in the gender in which they identify
<a href="http://www.mermaidsuk.org">www.mermaidsuk.org</a>	Mermaids UK provides support and information for children and teenagers who are trying to cope with gender identity issues, and for their families and carers.
<a href="http://www.gendertrust.wordpress.com">www.gendertrust.wordpress.com</a>	The Gender Trust supports all those affected by gender identity issues.
<a href="http://www.transgenderzone.com">www.transgenderzone.com</a>	Transgender Zone is an online resource that covers all aspects of transgender issues, including a section specifically for female-to-male transgender people.
<a href="http://www.stonewall.org.uk">www.stonewall.org.uk</a>	Stonewall is a charity that works with organisations to support LGBT staff by offering inclusive, equal and inspiring working environments, see Supporting Transgender Staff in the Workplace Guidance.
<a href="http://www.equalityadvisoryservice.com">www.equalityadvisoryservice.com</a>	Equality and Advisory Support Service (EASS). EASS has a helpline that advises and assists individuals on issues relating to equality and human rights, across England, Scotland and Wales.
<a href="http://www.transgenderni.com">www.transgenderni.com</a>	Supports transgendered people in Northern Ireland.
<a href="http://www.transgenderwales.bravepages.com">www.transgenderwales.bravepages.com</a>	Supports transgendered people in Wales.
<a href="http://www.translondon.org.uk">www.translondon.org.uk</a>	Trans London is a discussion/support group for all members of the transgender community, whatever their gender identity.

<a href="http://www.northernconcord.org.uk">www.northernconcord.org.uk</a>	Northern Concord is a Manchester based transvestite, transgendered and transsexual support and social group.
<a href="http://www.blgbt.org">www.blgbt.org</a>	Supports the LGBT community in Birmingham.
<a href="http://www.scottishtrans.org">www.scottishtrans.org</a>	The Scottish Transgender Alliance works to improve gender identity and gender reassignment equality, rights and inclusion in Scotland.
<a href="http://www.pfc.org.uk/">www.pfc.org.uk/</a>	The UK's leading experts in Transgender law.

## APPENDIX 2: DEFINITIONS/GLOSSARY

It can often be uncomfortable to talk about gender transition and people can be worried about using the wrong terminology. These definitions will help but if you are unsure most people will be happy to answer questions (where your intention is to offer support) or you can speak to the LGBT & Colleague Network (Prism) for further guidance.

Transgender	<p>Transgender people are individuals whose gender identity and/or gender expression differs from the sex they were assigned at birth. Transgender is an umbrella term that includes people of different gender identities and gender presentations and includes people who are transsexual, cross-dressers or otherwise gender non-conforming.</p> <p>Many transgender people wish to live as a member of the gender with which they identify and this may involve changing names, hormone therapy or surgery. The process is referred to as 'transition' (see below). Not all transgender people wish to transition. Some people do not identify as either male or female; some identify as both (non-binary gender/or gender fluid). The term 'transgender' can generally be used as shorthand.</p> <p>Someone who is a male transitioning to be a female is a transgender female and will generally expect you to use female pronouns (she, her etc.). Someone who is a female transitioning to be a male is a transgender male and will generally expect you to use male pronouns (his, him etc.).</p>
Cisgender	<p>Cisgender is considered to be the opposite term to 'transgender'. It refers to people whose gender identity and/or expression aligns with the sex they were assigned at birth. It is considered preferable to using terminology such as 'real' or 'normal' male or female. It can be shortened to 'cis'.</p>
Gender	<p>Gender identity refers to a person's innate, deeply felt psychological identification as male or female, which may or may not correspond to the person's body or designated sex at birth (meaning what sex was originally listed on a person's birth certificate).</p> <p>Gender identity is distinct from the term "sexual orientation." Transgender people may identify as straight, gay, lesbian or bisexual.</p>
Gender Expression	<p>Gender expression refers to all of the external characteristics and behaviours that are socially defined as either masculine or feminine, such as dress, grooming, mannerisms, speech patterns and social interactions.</p> <p>Social or cultural norms can vary widely and some characteristics that may be accepted as masculine, feminine or neutral in one culture may not be assessed similarly in another</p>
Sexual Orientation	<p>'Sexual orientation' is the preferred term used when referring to an individual's physical and/or emotional attraction to the same and/or opposite gender. "A person's sexual orientation is distinct from a person's gender identity and expression.</p>
Gender Dysphoria	<p>Gender dysphoria is a condition where a person experiences discomfort or distress because there's a mismatch between their biological sex and gender identity. It's sometimes known as gender incongruence.</p> <p>While biological sex and gender identity are the same for most</p>

	<p>people, this isn't the case for everyone. For example, some people may have the anatomy of a man, but identify themselves as a woman, while others may not feel they're definitively either male or female.</p> <p>This mismatch between sex and gender identity can lead to distressing and uncomfortable feelings that are called gender dysphoria. Gender dysphoria is a recognised medical condition, for which treatment is sometimes appropriate. It's not a mental illness.</p>
Transitioning	<p>Transitioning is a process through which some transgender people begin to live as the gender with which they identify, rather than the one assigned at birth. Transition might include social, physical or legal changes such as coming out to family, friends, co-workers and others; changing one's appearance; changing one's name, pronoun and sex designation on legal documents (e.g. driving license or passport); and medical intervention (e.g. through hormones or surgery).</p> <p>A medical transition may include hormone therapy, sex-reassignment surgery and/or other components and is generally conducted under medical supervision based on a set of standards developed by medical professionals. The transition process typically includes a two-year "real-life experience" in which the individual lives and presents consistently with their gender identity under medical supervision, though in some cases two years can be reduced or extended, as private healthcare providers typically have shorter waiting lists.</p>
Trans or Transsexual	<p>A Transsexual person identifies as 'opposite' to the sex assigned to them at birth. The term connotes a binary view of gender, moving from one polar identity to the other. The term 'transsexual' is contentious. Historically the term was used to describe a transgender person who has had gender reassignment surgery. However many transgender people reject the term, given it can be incorrectly interpreted as focusing on sexuality or sexual behaviour rather than "gender identity"</p>
Cross-dresser	<p>A cross-dresser wears the clothing and/or accoutrements, such as makeup and accessories that are considered by society to correspond to the "opposite sex." Cross- dressers (also known as transvestites) typically do not seek to change their physical characteristics and/or manner of expression permanently or desire to live full-time as the opposite gender.</p> <p>Employees who cross-dress some of the time may fear that discovery of their cross-dressing, even when on personal time, may lead to discrimination or harassment at work.</p>



Gender Reassignment / Transitioning	<p>A process that is undertaken under medical supervision for the purpose of reassigning a person's sex by changing psychological or other characteristics of sex, and includes any part of such a process including:</p> <ul style="list-style-type: none"> <li>▪ Telling their family, friends and/or colleagues.</li> <li>▪ Changing their name.</li> <li>▪ Changing their gender on legal documents.</li> <li>▪ Living in their acquired gender.</li> <li>▪ Hormone therapy.</li> <li>▪ Surgical alteration.</li> </ul>
Gender Recognition Certificate (GRC)	<p>A certificate which shows that a person has satisfied the criteria for legal recognition in the acquired gender. A full GRC also gives the holder the means to obtain a new birth certificate.</p>
Gender Fluid	<p>Gender fluid is a gender identity which refers to a gender which varies over time. A gender fluid person may at any time identify as male, female, neutrois, or any other non-binary identity, or some combination of identities. Their gender can also vary at random or vary in response to different circumstances. Gender fluid people may also identify as multi-gender, non-binary and/or transgender</p>
Non Binary	<p>Someone who does not subscribe to the customary binary approach to gender, and who may regard themselves as neither male nor female, or both male and female, or take another approach to gender entirely, for example Mx.</p>

## APPENDIX 3: ACTION PLAN TEMPLATE

1.	<p><b>Responsible Person</b></p> <p>Who is the person responsible for immediate support for the employee transitioning who will take the lead on the Action Plan?</p>	
2.	<p><b>Timetable</b></p> <p>What is the likely timetable for transition? Consider for example, the date for:</p> <ul style="list-style-type: none"> <li>▪ Name change</li> <li>▪ Communicating with others</li> <li>▪ Use of facilities (toilets, changing rooms)</li> <li>▪ Change of records.</li> </ul>	
3.	<p><b>Name Change</b></p> <p>Which identification cards/badges will need to be changed? Consider for example:</p> <ul style="list-style-type: none"> <li>▪ Identification Pass</li> <li>▪ Name badge</li> <li>▪ Others</li> </ul>	
4.	<p><b>Record/document changes</b></p> <ul style="list-style-type: none"> <li>▪ HR online records – SuccessFactors (for HR, Finance and Staff Development etc.)</li> <li>▪ People Search records (telephone, location, job title)</li> <li>▪ Local personnel records</li> <li>▪ Contact lists</li> </ul>	
5.	<p><b>Informing relevant people</b></p> <p>If appropriate and with the agreement of the employees the following people may need to be informed:</p> <ul style="list-style-type: none"> <li>▪ Colleagues</li> <li>▪ Occupational Health</li> <li>▪ Human Resources</li> </ul>	
6.	<p><b>Training</b></p> <p>Is training needed for managers or colleagues</p>	
7.	<p><b>Other issues to discuss</b></p>	