



Transitioning at Work: Resources and Information

Checklist for Transitioning in the Workplace

The following information is adapted from: tgender.net/taw/tggl/checklist.html

This checklist outlines some usual steps in an on-the-job transition to a new gender in a supportive company. It is often appropriate to adapt this general process to fit the local situation of an individual person or a specific organization. Unless otherwise specified, these steps should be initiated by the person undergoing the transition.

Advance Preparation

- Come out to your local or regional Employee Resource Group (ERG) if you have one. This will generally be a receptive group. Share your intent to transition. The ERG may have someone who can advise you, and may know people in HR or other parts of the company who can support you in your transition; the bottom line, seek support!
- Come out to your Human Resources representative. Share your intent to transition. You may find it helpful to involve a supportive co-worker and have materials (see resource list) available to leave with your HR staff. For many, HR can be an important resource and ally for your transition; for others their may be different leadership or management staff you would prefer to reach out to.
- Come out to your boss, and share your intent to transition. This is usually best in a face-to-face, one-on-one meeting. If you are uncomfortable or fearful of your bosses reaction, you may find it helpful to include one or two allies from HR or your ERG in the meeting. Note: this step is vital; it is best not to surprise your boss by transitioning without an advance discussion. Bringing your boss into the planning process is important, you often need your boss as an ally if you are to have a successful transition on the job.
- Your boss will probably share your plans with a small portion of your management team. Your management and others involved in the planning should become familiar with educational resources, including company policy and books/online resources on the subject.

Plan your workplace transition

- Involve a local transgender expert (staff from a local LGBT Center or community group, or an expert consultant.)
- If necessary, involve others as appropriate. Examples of persons who may need to be involved are staff from Security and IT, especially if a new ID badge or computer login is required.
- Establish a time line for the transition, including the date for an announcement to your work group, and the date of your transition. Generally these dates are a week or two apart.
- Discuss and plan the solutions to the usual issues (restroom, new name, pronouns, etc.)
- Involve all the behind-the-scenes people in the planning process, to ensure they are aware of the plan.
- You may choose to privately come out, one-on-one, to anyone you work with closely or know well and feel comfortable confiding in.

The Day of the Announcement

- Hold a department meeting, or include this in an already-scheduled face-to-face meeting. It is OK to use a teleconference for any non-local people. Everyone in your work group who you interact with often at work should be there. Many experts recommend that you *do not* do this by e-mail. However, it is OK to have a written letter in conjunction with the face-to-face meeting.
- The manager of the work group (the department head, for example) should make the announcement.
- It is important for the highest level manager in the group to show support. The manager should:
 - ⇒ Make it clear that the person transitioning is a valuable employee and has management's full support in making this transition.
 - ⇒ Explain company policy and recommendations.

- ⇒ Stress that on such-and-such day the employee will be a woman (MtF) or man (FtM) and should be called by the new name and new pronouns.

Answer people's questions, if you wish (you may set the parameters!)

After the Announcement

- Consider providing some general education on the subject for the employees. Resources are often available from local LGBT groups or organizations. The transgender employee should choose whether to be present at this meeting, depending on comfort level. If the employee agrees, colleagues may ask brief questions about their experience, within preset parameters.
- Make arrangements with HR and your bank to ensure that payroll checks to your new name can be deposited in your existing account. This may be just a matter of adding a new signature to the bank card.

The Day of Transition

On the day of transition, your manager/HR should take these steps, as they would for a new or transferred employee:

- Issue a new company identification badge with the new name and photo.
- Arrange for a new name tag on door/desk/cubicle. Order new business cards.
- Update any organization charts, mailing lists, and other references to the old name.
- Issue paperwork for the HR employee database, effective the day of transition, to change the following:
 - ⇒ New name.
 - ⇒ Change the gender marker ("M" or "F".)
 - ⇒ Computer logins and email account and IDs may be changed if the old ID is inappropriate.
- Address restroom use and communicate the decision, as planned earlier. The preferred recommendation is to use the restroom corresponding to the gender being presented (e.g. use the women's restroom starting the first day of presenting as a woman.) If someone objects, they should be reminded that this valued employee has the same rights to the restroom as all other employees.
- The first few hours on the first day will involve many new introductions. It is especially nice if any informal social groups are inclusive, especially those relevant to the new gender. The novelty usually wears off by mid-morning and work returns to normal. Over time, as people get to know the person in the new gender role, it will become old news.

Useful resources about transitioning at work:

Transsexual Workers, An Employer's Guide by Janis Walworth

Transgender Workplace Diversity: Policy, Tools, Training Issues and Communication Strategies for HR and Legal Professionals by Jullian T. Weiss, J.D, Ph.D.

The Complete Guide to Transgender in the Workplace, by Vanessa Sheridan



transequality.org/Resources/EmploymentKnowYourRights_May2012.pdf

lambdalegal.org/publications/trans-toolkit/



hrc.org/resources/entry/transition-in-the-workplace

hrc.org/resources/entry/transgender-americans-a-handbook-for-understanding

hrc.org/resources/entry/resources-for-transgender-employees



Need more information?

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