# Section 4. Checklists for supporting staff who are transitioning

This checklist is intended to signal some of the main areas to be considered when an individual states that they intend to transition. Detailed arrangements should be agreed between the individual, department and college.

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| **STAFF** | **Transition support checklist** | |
| **Main contact** | | |
| Identify a single point of contact to support the individual and agree an action plan. This would normally be a manager, HR professional or senior member of the department, who would liaise with HR if the point of contact is not the HR officer. For staff holding a joint college appointment, a college contact should be identified for liaison. | |  |
| **Timetable** | | |
| Agree dates when any actions will be implemented e.g. changes to records, announcements/communication, use of gendered facilities, but remember that transition may be a gradual and incremental process. | |  |
| **Name and gender changes in University records** | | |
| *Changes made by University officers* | | |
| The individual and department should agree what records need changing, including updating the CORE HR personnel management system, liaising with Payroll and the Pensions Office, obtaining a new University card and changes to department websites. | |  |
| *Changes normally made by the individual* | | |
| The individual is likely to have to have to contact external organisations such as HMRC and the Home Office personally. Communication with other organisations such as funding bodies should be agreed with the individual. | |  |
| **Issues to be considered** | | |
| Is the individual taking any extended time off? Is additional paid/unpaid leave needed? | | |
| Is time off needed for medical appointments (which may require travel to a Gender Identity Clinic)? | |  |
| How can ongoing non-medical procedures be accommodated? People may have other appointments relating to transition, such as laser hair removal, or sessions with a speech therapist; an individual transitioning female-to-male may require structured programme of exercise to maximise the effect of hormone treatment. Consider whether these could be accommodated by working flexible hours and/or homeworking. | |  |
| Is the individual having any planned surgery?  Recovery periods may be short or extended, depending on the surgery, and any complications, and several surgeries may be needed. Staff will receive standard sickness leave, but may wish to negotiate additional paid/unpaid leave. | |  |
| What arrangements have been made to ensure the individual is able to return to work? The Occupational Health Service may help to plan a phased return to work. | |  |
| Are any temporary adjustments needed to duties during hormone treatment or following surgery? E.g. avoiding heavy lifting. Individuals may experience fatigue or mood fluctuations. | |  |
| Are any permanent changes to duties needed following medical treatment (for example in the case of a job where physical strength is required)? | |  |
| Are there any risks to the individual e.g. in relation to third parties or media intrusion, and how will they be handled? | |  |
| Has workload during transition been discussed with the manager? There may need to be some flexibility on deadlines, especially if there are unexpected side effects or surgical complications. | |  |
| **Support for the individual** | | |
| Does the individual have a support network? Be sensitive to the fact that transitioning is a time that family/friendships/personal relationships may be strained and some individuals may be isolated from their previous support network. | |  |
| Is the individual receiving gender identity counselling through a specialist clinic? | |  |
| Is the individual aware of the LGBT+ Staff Network? | |  |
| Is the individual aware that support may be available through trade unions? | |  |
| **Communication** | | |
| How will colleagues and students in department and college be informed? Can a statement be agreed? | |  |
| How and when will external contacts be informed? | |  |
| Is there a training need? | |  |
| May there be media interest in a high-profile individual? The Press Office can help. | |  |
| **Overseas travel** | | |
| Does the role require travel? A risk assessment should be carried out to determine whether the individual may be at risk because of their trans status. How will the individual get medical care, including obtaining medication? Heads of Department delegate the responsibility for risk assessment to individual managers, with advice from department safety officers. | |  |