Gender Transition Plan Checklist

*The below list is not inclusive of everything that may need to be addressed and every person’s transitioning journey is unique. These are some items that may need to be discussed with the employee to identify their plan & allow you as a supervisor to help support them in their plan.*

* Create list of who needs to know, when they should be notified, and how they can help navigate change in workplace.
  + Supervisor
  + Ops Leader
  + EDI representative
  + PeopleOps representative
  + Mentor for supervisor/leadership to help navigate change
  + Mentor for employee to help navigate change
  + Coworkers
  + Participants/Residents
* Timeline of transition plan
  + When to start using preferred pronouns, new name, stop using “dead name”, etc.
  + When to start using different restroom
  + When to make coworkers aware
  + When to make clients/residents aware
  + When will time off be needed for appointments/surgeries/mental health days/etc
  + When training should be provided to others and what training will be most impactful
* Discussions to be had:
  + Dress code review
  + Reasonable accommodations that may be needed
  + Appropriate conduct for employees
    - For employee:
      * Appropriate time/way to educate others
    - For others:
      * Respectful, inclusive behaviors
      * What to do when co-workers, residents, clients, participants are behaving in a non-inclusive manner.
  + Concern/Complaint Procedures
    - Where they should go to discuss concerns
    - How they can effect change
  + Deviations or Amendments from plan
    - How would the employee like to handle a deviation from their original plan?
  + How to notify the people who need to be notified
    - Think about boundaries needing to be set, transparency of boundaries, consistency of boundaries, predictability of boundaries, and most importantly KINDNESS.
  + How would the employee like the education/correction of other employees to be handled?
  + What company resources are available?
    - Health benefits
    - EAP
    - Mentor/Support groups
    - Legal benefits
    - Resource connection
  + What types of training would the employee like the team to be provided?

Other things to consider:

* Change the employee’s badge
* Personnel File update
  + Name Change
  + Gender changes