

University of Rochester
Office of Human Resources-Organizational Development and Staff Diversity

Gender Transition Guidelines for Supervisors and Managers

Overview

These Gender Transition Guidelines are provided to help foster dialogue and understanding of transgender issues in the workplace at the University of Rochester. Since some transitioning employees may decide to inform an employer of a planned gender transition in order to live with a particular gender identity full-time (while other transitioning employees may choose not to), supervisors and other managerial employees may need to become involved in assisting with work-related aspects of the employee's transition.

The University's Guidelines include recommendations for employees and also for managers and Human Resources Business Partners on how to provide a safe, welcoming, and supportive environment at the University of Rochester for employees undergoing gender transition, consistent with the University's philosophy that all employees should be treated fairly and respectfully, and in accordance with University policy which prohibits harassment or discrimination against individuals or groups on the basis of gender identity and/or expression. See the University's Equal Opportunity Statement¹ and its Policy against Harassment and Discrimination (Policy 106).

Notification of Transition

Employees are not required to disclose their gender identity or intent to transition. If an employee feels comfortable engaging in conversations about a transition, the employee may contact a Human Resources Business Partner (HR), the University's Equal Opportunity Compliance Director (275 7814), or one of the other internal resources identified on page 4 for assistance.

As transitioning may be a lengthy process, employees who wish to disclose their plans, will benefit from beginning these discussions well ahead of the planned transition date. During these conversations, the employee can speak

¹ "The University of Rochester values diversity and is committed to equal opportunity for persons regardless of age, color, disability, ethnicity, gender identity or expression, genetic information, marital status, military/veteran status, national origin, race, religion/creed, sex, sexual orientation, or any other status protected by law. Further, the University complies with all applicable non-discrimination laws in the administration of its policies, admissions, employment, and access to and treatment in University programs and activities." (Personnel Policy 100.)

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about intentions, needs, timing, and any other concerns relating to the transition and work. If the immediate supervisor is not already aware of the transition, the employee should discuss a timeframe for bringing the supervisor (or other managers, if desired) into the conversation about transitioning.

With the employee's consent, HR or the University's Equal Opportunity Compliance Director can help identify a supportive group of professionals to assist in the transition process at work. A list of individuals who have indicated a willingness to support employees in transition is available from Human Resources (275 0425), the Susan B. Anthony Center (275 8799).

Restroom and Locker Room Access

Access issues related to restrooms and other sex-segregated facilities (e.g., locker rooms) will be handled with sensitivity toward all employees. The University of Rochester provides transitioning employees with the same level of facility access as available to all employees. Transgender employees will be permitted to use the facilities that correspond to the employee's gender identity. As needed, the Office of Human Resources and the supportive group assisting with the transition can provide education and assistance to coworkers or others on topics related to transitioning and the workplace.

Health Benefits for Transitioning Employees

Effective January 1, 2015, the University of Rochester's employee health care plans will include transition-related health care benefits for transgender and gender non-conforming individuals. The Health Plan Committee, which evaluates new proposals for inclusion in the University's health program offerings, recently approved this recommended expansion of benefits to enrolled employees and covered family members. Per Aetna's/Excellus' policy guidelines, the benefit will cover medically-necessary transition-related coverage including hormone therapy, medical and psychological counseling, and gender affirmation surgery. Employees should check with their Health Care Plan Administrator (i.e., Aetna or Excellus) to inquire about coverage for specific treatments and services.

Right to Privacy

Transgender employees at the University of Rochester have the right to privacy. Current and prospective employees who have concerns about

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identification on documents, such as payroll or insurance forms, should feel comfortable discussing these issues directly with the Human Resources Business Partner assigned to their department.

Tips for Managers and Supervisors

It may be difficult for an employee to discuss gender identity and transition. The support of supervisors, managers, and other advisors who can demonstrate sensitivity to the individuals' needs and concerns is essential. This support includes indicating a willingness to participate in developing a transition plan that meets the joint needs of the individual and the University. You should serve as role models for others in the workplace regarding how to behave appropriately and supportively during this time.

The following section is designed to provide general guidance regarding how to respond when an employee in your unit is transitioning. For more specific advice and guidance regarding how to best support your transitioning employee, please contact your unit's Human Resources Business Partner.

Supporting Your Transitioning Employee

Whenever possible, supervisors/managers are encouraged to connect with their Human Resources Business Partner or the University's Equal Opportunity Compliance Director before beginning conversations about an employee's gender transition. You should reassure the employee that the University of Rochester will be as supportive as possible by:

- Assuring any transitioning employee of coverage under the University's equal opportunity and anti-harassment and anti-discrimination policies.
- Making it clear to the employee that all discussions concerning gender identity and transition will be held in confidence and will be disclosed only on a need-to-know basis and with the employee's consent.
- Asking the employee on their suggestions for what you can do to be helpful during the transition process.
- Mentioning to the employee that a support team can be established to assist in the transition and that the main point of contact for the team may be within Human Resources.
- Asking the employee if a name change is anticipated, and, if so, what name and pronoun (him, her, they, ze, etc.) will be used and when the

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employee will want to begin using the new name and pronoun in the workplace.

- Note on pronouns: It is considered extremely insensitive to refer to someone by the wrong pronoun once that person has identified which pronoun is preferred.
- Discussing the expected timeline for transition and anticipated time off required for medical treatment, if known, and explain applicable sick pay and leave policies.
- Addressing concerns raised by coworkers and providing training concerning gender identity as requested or as necessary.
- Providing the employee with the available resources outlined in the Resources section of this document.
- Assuring the employee that you are open to further discussions regarding the transition process.
- Informing the employee of the protections afforded to them by University Policy 106 and immediately responding to any complaints of discrimination or harassment pursuant to the steps outlined in that policy.

University of Rochester Resources

- Job-Related Planning for a Gender Transition (see Appendix A)
- Human Resources Business Partners
- Human Resources Office of Organizational Development and Staff Diversity
- Employee Assistance Program
- Equal Opportunity Compliance Director
- Pride Alliance @ UR
- University Health Services
- Susan B. Anthony Institute for Gender and Women's Studies
- Susan B. Anthony Center

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External Resources for Employees and Managers

- Gay Alliance of Genesee Valley
- Human Rights Campaign Foundation,
www.hrc.org/workplace/transgender
- Transgender at Work, www.tgender.net/taw
- National Center for Transgender Equality, www.nctequality.org
- Out & Equal Workplace Advocates, www.outandequal.org
- World Professional Association for Transgender Health,
<http://www.wpath.org/>
- Trillium Health, www.trilliumhealthny.org/
- Gay and Lesbian Medical Association, www.glma.org
- LAMBDA Legal

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Appendix A: Job-Related Planning for a Gender Transition

This planning document is to be used as a supplemental tool for the purpose of planning a transition.

Advance Preparation

1. The employee meets with their Human Resources Business Partner and/or the University's Equal Opportunity Compliance Director (or other internal resource as requested) to share the intent to transition.

2. The same Human Resources Business Partner or other internal resource asks if the employee wants to meet with the immediate supervisor or manager to share information concerning the intent to transition. Once notified, the supervisor can begin to update any organizational charts, mailing lists and other references with the employee's new name, if they chose to use one.

3. The internal resource can also help the employee in the process of completing paperwork for the Human Resources employee records system effective the first day of transition to change the following:
 - New name
 - Gender identification
 - Update the employee's University official e-mail address as needed

4. If desired, a support team can be identified to assist with the employee's needs in the transition process. A support team generally will include a representative from HR, the employee's supervisor or other managerial employee (as desired), and other internal personnel as desired/requested.

5. The supportive team may want to consider the following issues:
 - a. The date the transition will occur, i.e., the first day of the change of gender presentation, pronoun usage and name.
 - The specific steps of the transition and timing vary by individual and each person will differ in the level of disclosure provided as it relates to transition status. The date of the transition will be driven primarily by the employee's situation and concerns.

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- Make advance arrangements for name changes so that name plates, badges, etc., will be available on the first day. Consider how long certain Human Resources functions take (e.g., legal name changes in Human Resources employee records and to the University directory, etc.). It is important that managers and supervisors lead by example by using the name and pronoun the employee has requested.
- b. Whether and how the employee's workgroup, customers and/or vendors will be informed of the change.
- c. Whether and how staff working with the employee would benefit from training on gender identity.
- d. What changes can be made to records and systems and when.
- e. How current policies against discrimination and harassment protect this employee.
- f. The University's health care benefits.
- g. The expected plan for use of gender-specific facilities, such as restrooms and locker rooms.
- h. Any time off required and protections the employee may have for that time off, such as under the University's Sick Leave Plan for Short Term Disability and/or the FMLA.

Sharing Information with Coworkers

1. When the employee indicates a comfort level with sharing information about the transition with coworkers, hold a workgroup meeting or include the information in an already-scheduled face-to-face meeting with workgroup employees. Do not, under any circumstances, share this information by email! Everyone in the workgroup with whom the employee interacts frequently should be included in the meeting. If the employee is in agreement, provide teleconference links for anyone who is unable to attend the meeting. With the transitioning employee's permission, a handout including general (not personal) information about the transition process may be offered in conjunction with the face-to-face meeting. The employee may choose whether to be personally present at this meeting or not.

2. The manager of the workgroup (the department chair or director, for example) should share the information, in conjunction with the highest level

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manager in the group, to show support from the top down. The manager should:

- a. Make it clear that the transitioning employee is a valued employee and has management's full support in making the transition.
- b. Explain University policy and available resources.
- c. Stress that on the transition day the employee will present themselves consistently with their gender identity and should be treated as such. The employee should be called by the new name and new pronoun henceforth.
- d. Lead by example. Use the new name and pronoun in all official and unofficial communications.
- e. Make it clear that the transition will have no effect on day-to-day business and that work will continue as before.
- f. Answer people's questions.
- g. If a "Transgender 101" workshop is part of the transition plan, make the announcement at this time. It should be offered on the day of information sharing or as soon after as possible.

The First Day of Full-Time Workplace Gender Transition

On the first day of transition, the employee's manager should take these steps, much as they would for a new or transferred employee:

1. Place a new nameplate on the employee's door, desk, cubicle, or workstation, as needed.
2. The manager should plan to be on site with the employee the first day to make introductions, support the employee, ensure respectful and inclusive treatment, and to facilitate employees returning to work within a reasonable timeframe.

A Guide to Definitions

Gender identity

The term “gender identity,” distinct from the term “sexual orientation,” refers to a person’s innate, deeply felt psychological identification as being male, female, or some other gender. This identification may or may not correspond to the person’s gender designated by the sex indicated on the individual’s birth certificate.

Sexual orientation

“Sexual orientation” refers to an individual’s physical and/or emotional attraction. Heterosexual, bisexual, gay, lesbian, queer and pansexual are just a few of the terms used to describe individuals’ sexual orientations. A person’s sexual orientation is distinct from a person’s gender identity or expression.

Gender expression

“Gender expression” or “gender presentation” refers to all of the external characteristics and behaviors that are socially defined such as dress, grooming, mannerisms, speech patterns and social interactions that are socially identified as a particular gender. Social or cultural norms can vary widely and some characteristics that may be accepted as masculine, feminine or neutral in one culture may be viewed differently in another.

Transgender

Transgender refers to a broad range of people who experience and/or express gender differently from conventional or cultural expectations by either expressing a gender that does not match the gender designated on their original birth certificate (i.e., labeled sex at birth) or who physically change sex. This term includes individuals who identify as, but is not limited to, genderqueer, transsexual, or otherwise gender non-conforming. Not all people who consider themselves transgender will undergo a medical or surgical gender transition.

Genderqueer

A term used by some individuals who identify as neither entirely male nor entirely female.

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Transsexual

An older term for people whose gender identity is different from their assigned sex at birth who seeks to transition from male to female or female to male. Many do not prefer this term because it is thought to sound overly clinical.

Gender non-conforming

A term for individuals whose gender expression is different from societal expectations related to gender.

Transition

“Transition” refers to the time when a person begins to live as the gender with which the person identifies with rather than the gender assigned at birth, which often includes changing one’s first name and dressing and grooming differently. Transitioning may or may not also include medical and legal aspects, including taking hormones, having surgery, or changing identity documents (e.g. driver’s license, Social Security record) to reflect one’s gender identity.

FTM

A person who transitions from “female-to-male,” meaning a person who was assigned female at birth, but identifies and lives as a male. Also known as a “transgender man.”

MTF

A person who transitions from “male-to-female,” meaning a person who was assigned male at birth, but identifies and lives as a female. Also known as a “transgender woman.”