

**Planning Information Related to Staff**

The following outlines the general steps involved in an on-the-job transition for a transgender employee.

**Advance Preparation:**

1. The transgender employee meets with the designated Human Resources Manager. The employee shares their transgender status and intent to transition.
2. The Human Resources Manager will arrange a meeting with the employee and their immediate supervisor to share the individual's intent to transition.
3. The appropriate set of stakeholders should be identified to plan the workplace transition using AC-E-2.
4. Plan the transition including ways to address or resolve any identified issues including, but not limited to, the following:
  - a. The date of the transition, i.e. the first day of the change of gender expression, pronoun usage and name. Recognize that the date of the transition will be driven by the employee.
  - b. How employee's clients, customers, co-workers and/or students will be informed of the change. If there is to be a general announcement, the employee may choose to talk to some of their co-workers to disclose plans on a one-on-one basis, before a broader statement is made.
  - c. Ensure that the employee is aware of the right to dress in accordance with their gender expression.
  - d. Ensure that the employee is aware of the right to use a washroom that corresponds to their gender identity.
5. Make arrangements for name changes to be effective on the day of the transition, so that nameplates, email, I.D. Badges, business cards etc., will be available on the first day if possible.

**Communication Plan and Professional Development:**

1. Hold a workgroup meeting or include this in an already scheduled face-to-face meeting. Everyone in the workgroup whom the employee regularly interacts with should be included. The employee may or may not wish to be present depending on their level of comfort.
2. Depending on the preference of the employee, the supervisor of the workgroup should make the announcement, in conjunction with the highest level manager in the group to show support. 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.

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- b. Explain the Board's policy and recommendations.
- c. Stress that on and after the transition day the employee will present him or herself consistently with their gender identity and should be treated as such.
- d. Lead by example. Use the employee's identified name and pronoun in all communication.
- e. Own when mistakes are made in name or pronoun use, apologize, quickly correct them, and move on. Consider asking questions that will help avoid this in the future. Provide context and explanation when possible.
- f. Make it clear that the transition is not a big deal and that work will continue as before.
- g. Answer people's questions, respecting the privacy of the individual to the extent possible at all times.

**After Transition:**

1. Ensure that any organization charts, mailing lists and other references to the new name are correct.
2. Ensure that the Human Resources Data Base, and Student Information Data Base, if the employee is a teacher, are updated with:
  - a. New name
  - b. Correct Gender Marker ("M", "F", "O" for Other)
3. The supervisor should plan to be on site with the employee the first day, and thereafter as required to make introductions, support the employee, and to ensure respectful and inclusive treatment.

See other preparations related to Students in Appendix 1 that may be helpful in developing a detailed plan for the employee using AC-E-2.

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**Planning Guide for Transgender and Gender Diverse Staff/Transition Plan**

Directions: This planning tool should be reviewed with the employee and relevant parties as a way to ensure the work environment is both safe and supportive. Affirm that the disclosure will be kept confidential.

School:

Date:

Employee's Name Prior to Transition:

Employee's Name After Transition:

Employee's Pronouns After Transition:

Assigned Gender at Birth:

Gender After Transition:

Time Frame for Transition:

Building Support Team:

Meeting of the interested parties is scheduled for:

Who will be attending? Administrator, School Contact Person, Clinician, Community Provider, Designated Support Person, Other:

Plan for washroom?

Check-in plan?

Which team support person will be the employee's main support?

Other accommodations requested?

Will there be a legal change in gender?

Will there be a legal change in name?

Will there be information to be updated in the Employee Data Base?

What gender/name/pronouns/prefixes will be used in other areas?

Who else is aware?

Who else needs to know?

Is there anything we can do to help the person feel safer at work?

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How should any discrepancies in name/pronoun use be handled with other students, parents, staff or business contacts?

Is the employee connected to the transgender community?

Does the employee need other supports?

Does the employee wish to be included in the communication to and/or training of others?

Any anticipated time loss required?

Additional information?

How public or private will information about the employee's transgender status be?

Do they wish to inform their manager, co-workers, students themselves, or prefer that this be done for them?

Timing and method for the above communication?

Does the staff member wish to remain in their current position following transition, or if possible be re-deployed to an alternate work location?

Will a new photo identification badge be required? If so, when should this be arranged?

Additional information?

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