

Transgender Employee Workplace Transition Plan Tool



This Workplace Transition Plan template, which is based on a model from Transgender Law Center, a California-based non-profit advocacy group, provides for managing the workplace processes that occur when an employee changes to a gender from the sex they were assigned at birth to a gender corresponding to their gender identity, a process known as “transition.” Be sure to adapt the template to meet the structures, procedures and policies of your organization as well as the individual needs of the transitioning employee.

PHASE 1

Before the workplace transition begins:

1. The transitioning employee will meet with their selected first point of contact to make them aware of the employee’s upcoming transition.
2. Refer the transitioning employee to the ABC Company HR department, if the point of contact is not in HR to receive orientation on the Company’s transgender policies and availability of transition-related health care benefits.
3. If the transitioning employee’s supervisor is not the first point of contact, find out if the transitioning employee wants a meeting to be scheduled with the supervisor to ensure the supervisor knows of the employee’s planned transition.
4. Make management beyond the transitioning employee’s supervisor aware of the planned transition so that leaders can express their support when the employee’s transition is made known to the employee’s work team.
5. The transitioning employee and their initial point person will meet to discuss all of the individuals who must be included in the workplace transition plan, which should include the employee, the employee’s immediate supervisor, someone from HR and, if the Company has an LGBT employee resource group, a representative from that group.
6. All members of the transition team will familiarize themselves with the Company’s policies and any other relevant resources providing educational information about transgender issues. **Note:** Since it’s unlikely that all transition team members will need to be brought on board at once, there should be a timeframe indicating when each member needs to become involved in the employee’s transition process, and