

WORKPLACE GENDER TRANSITION GUIDELINES

AT ERNST & YOUNG

Just as there are gay, lesbian and bisexual employees at Ernst & Young, there are also employees who are transgender. Some are out — i.e., open about their gender identity or expression — and others may not be.

However, given that many transitioning employees must come out to their employers in order to live consistently with one's gender identity full-time, employers necessarily become involved in an employee's transition.

PURPOSE FOR GUIDELINES

This document is intended to delineate workplace guidelines for addressing the needs and issues that arise in the workplace when a transgender person transitions on the job at the firm. These guidelines support the Ernst & Young Non-Discrimination & Anti-Harassment policy, which was expanded in 2005 to include gender identity and expression. This document is intended to be used by those who may be or are transgender, their co-workers, managers, and friends. If you need any assistance understanding something in this document or would like to have a conversation about transgender-related issues, please log on to the firm's LGBTQA website at beyond.iweb.ey.com and search for "Transgender" or see the resources section found at the end of this document.

Change often creates anxiety around the unknown and as with all change, gender transitions affect many people – the individual transitioning, supervisors, peers, clients, and even those with incidental affiliation such as working in the same location or practice area. These guidelines provide a starting point for building awareness around a topic that is new to the workforce in the last 15 years. While the topic is new because of greater emphasis on retaining one's past to succeed in a career or continue success in a career, it is similar to many other human resource change management issues that arise. These guidelines should be used in conjunction with change management resources and experience to ensure success on behalf of all parties involved.

POLICY STATEMENT

Ernst & Young has been and continues to be an advocate for diversity and equal employment opportunities for qualified candidates. Every person makes a unique contribution toward establishing Ernst & Young as a place where people can grow and succeed. We enable these contributions by maintaining a workplace environment that embraces diversity and fosters creativity and innovation. Accordingly, fairness and equity must be defining characteristics of our workplace environment.

Per our Non-Discrimination & Anti-Harassment Policy which includes the Equal Employment Policy, "It is the policy of the firm to maintain a professional business environment and a workplace that is free from discrimination on the basis of race, religion, color, creed, national origin, age, sex, marital status, sexual orientation, gender identity/expression, disability, citizenship, veteran status, or any other characteristic protected by applicable law, and from any intimidation of a verbal or physical nature. . . . It is the policy of Ernst & Young to recruit, hire, and promote for all job classifications without regard to any of the protected categories set forth below. All staffing decisions are based solely on the qualifications of each individual. The firm does not discriminate in working conditions, physical facilities, or any other terms, conditions or privileges of employment including transfer, compensation, training, promotion, demotion, or separation."

By providing a work environment of respect, trust, collaboration and cooperation, Ernst & Young can provide superior service to our clients and create a workplace in which we can achieve the highest professional satisfaction. People who can bring their whole selves to work can thrive in their job and career.

DEFINITION OF TERMS

The following list of terms is “text book” definitions. Please recognize that understanding of these and other terms may be different for each person. You should consider level setting the vocabulary you will use in each conversation to ensure everyone involved is using the applicable terms in the same way.

- **Transgender** refers to a broad range of people who experience and/or express their gender differently from what most people expect – either in terms of expressing a gender that does not match the sex listed on their original birth certificate (i.e. designated sex at birth), or physically changing their sex. It is an umbrella term that includes people who are transsexual, cross-dressers, or otherwise gender non-conforming. Not all people who consider themselves (or who may be considered by others as) transgender will undergo a gender transition.
- **Sex** is the biologically based presumption of reproductive capability to determine a person’s label of female or male. This label, at birth, is usually based on a doctor’s visual assessment of a baby’s genitalia.
- **Gender** is the social meaning given to sex. A person’s gender role reflects the duties, qualities and expectations of society based on gender which includes how we have learned to walk, look, act, dress, what job we choose, what first name we have and so on.
- **Gender Expression** refers to all external characteristics and behaviors that are socially defined as either masculine or feminine, such as dress, mannerisms and speech patterns.
- **Gender Identity** refers to a person’s innate, deeply felt psychological identification as male or female, which may or may not correspond to the person’s body or designated sex at birth. These individuals may or may not change their physical or gender characteristics in order to alter or publicly redefine their gender from male to female or from female to male. Gender identity is distinct from sexual orientation.
- **Gender dysphoria (GID)** is a psychological diagnosis recognized by the American Psychiatric Association. This disorder is marked by severe distress and discomfort caused by the conflict between one’s gender identity and one’s designated sex at birth. Not all transgender people experience gender dysphoria or are diagnosed with GID.
- **Transsexual** refers to those transgender individuals who, frequently with the support of medical or psychological professionals, are changing or have changed their physical characteristics/anatomy to facilitate personal and public recognition of their sex as different from that which they were assigned at birth. This may or may not include sex reassignment surgery.
MTF: “Male to Female”– Individual who is born and perceived to be male who transitions to publicly and privately live as a female.
FTM: “Female to Male” – Individual who is born and perceived to be female who transitions to publicly and privately live as a male.
- **Sexual orientation** refers to an individual’s physical and emotional attraction to the same and/or opposite gender. “Heterosexual,” “bisexual,” and “homosexual” (aka gay or lesbian) are all sexual orientations. A person’s sexual orientation is distinct from a person’s gender identity and expression.

TRANSITIONING

INTRODUCTION

While the majority of people are comfortable with the physiology and identity they were assigned at birth, there is a portion of the population which isn’t. Some percentage of this population takes initiative to actively change their

physiology (sex reassignment surgery—i.e. male to female) or expression (e.g. dress, jewelry, mannerisms, voice, vocabulary). Not all people who consider themselves or who may be transgender will undergo a gender transition.

The process of a transgender individual publicly changing his or her gender presentation in society is known as “transitioning”. The transitioning individual usually changes their name, clothing and appearance and may also entail anatomical changes. If the individual remains at their same place of employment during this transition, it is known as “transitioning on the job” or “transitioning in the workplace”. This transition may include hormone therapy, sex-reassignment surgery and/or other components and is generally conducted under medical supervision based on a set of standards developed by medical professionals.

Many transgender individuals face difficult situations/interactions in their personal, professional, family, and financial lives simultaneously. Additionally, those who have begun the transition process may have begun hormone therapy, which can effect the individual’s disposition. We encourage the support team to be aware and sensitive to the stresses on the individual both internal and external to the firm.

The process for transitioning individuals is extensive. It is accomplished with the help of medical professionals, in accordance with recognized standards of care. In general, the process will involve psychological evaluation, monitoring, and counseling; hormone therapy; and a trial living period of at least one-year (the “real life experience”) to ascertain the level of comfort the individual has in the reassigned gender. It is usually as the individual approaches this trial living period that the employer is given notice of the individual’s transition plan.

Each individual transitioning will have her/his own set of unique factors which will require a customized plan. It is important that the individual work with their support team in an open and honest way to allow a smooth process within the workplace.

RIGHTS AND RESPONSIBILITIES

There are rights, expectations and responsibilities of each party associated with a transition in the workplace and it is essential that open and honest communication be established to build trust for each party. With each right, also comes responsibility or an expectation. A successful transition in the workplace can only occur with commitment and understanding of each involved party.

A. TRANSITIONING INDIVIDUAL

If you are the transitioning individual, you have the right to openly be who you are. This means while still maintaining professional expectations, you may express your gender identity, characteristics or expression without fear of consequences. With this right comes the expectation that you will work with others to ensure they understand your needs and you understand the expectations of you.

It is important for you to do your part to make the transition successful and the first thing is to inform key personnel who can assist you. Your first point of contact may be your immediate superior, a member of your local People Team, EY/Assist and /or bEYond (Ernst & Young’s People Resource Network for Lesbian, Gay, Bi-sexual, Transgender and Ally issues) in your local or national area. EY/Assist or bEYond can assist you, when you are ready, in informing your immediate superior, and/or your local People Team. It is important that at some point your immediate supervisor, manager, or partner becomes part of your support team.

Remember you are covered under Ernst & Young’s Non-Discrimination and Anti-Harassment Policy, but Ernst & Young must be aware of your situation in order to provide support. Explain to the person that you’ve selected to speak with your intentions, needs, and concerns. Your manager, People Team members and others may not be educated about transgender issues and may not understand clearly what your needs may be. You should be prepared to spend some time educating people, but you don’t need to do it alone. Leverage your resources with EY/Assist or bEYond (national leadership or local groups) to help you think through your thoughts and prepare for those discussions. (See the “Creating a Plan” section.)

B. ERNST & YOUNG

Our culture supports diversity. If someone who reports to you informs you of their desire to transition or if an individual in your workplace is currently in the transition process, your support is critical. Below are tips to reflect your support:

- If you are unfamiliar or uncomfortable with the transition process, allow the transitioning individual to educate you or leverage coaching and resources available to you through EY/Assist, National bEYond leadership and your People Team support.
- Listen carefully to what the individual is telling you and how they'd like to be treated (do they want to keep their transition as quiet as possible or do they wish to celebrate publicly?).
- Be open-minded and discuss with the transitioning individual their needs and concerns.

If you oversee, manage, or lead an employee or partner who is transitioning, it is important that you demonstrate an understanding, and use a sensitive approach to their needs and concerns. It may be frightening to the transitioning individual to make himself or herself vulnerable to a person upon whom their job depends. Make it clear to them that your conversation will be held in confidence. Explain questions and concerns you might have and ask their opinion on matters covered in subsequent sections on “Making it Real” and putting together a plan for transitioning at work.

During the early stages of an individual's transition, few, if any accommodations will be required on your part. However, at some point, issues dealing with changes in the employee's physical appearance and name, as well as usage of restroom facilities and locker rooms must be addressed. There are also important considerations for employees who are involved in providing client service.

MAKING IT REAL

A. APPEARANCE STANDARDS

Individuals who are transitioning are required, prior to surgery, to assume the role of their reassigned gender. This is a requirement of the medical transition process, not an Ernst & Young requirement. This process is known as the “real life experience”. Although professionals may recommend living in the desired gender as a step to surgery, the decision as to when and how to begin the “real life experience” remains the transitioning individual's responsibility. Part of that experience is dressing full-time in the reassigned gender role.

A transsexual employee is permitted to dress consistently with his or her gender identity and is required to comply with the same standards of dress and appearance that apply to all other people in their workplace and similar position. Local management has the same right to review a transitioning individual's professional attire as they do any other individual.

Any concerns should be addressed with the employee or partner directly. Care should be given of *personal* opinions regarding a colleague's professional appearance. If the individual dresses or behaves inappropriately, this issue should be dealt with in the same manner it would be addressed with any other individual. You should contact your local People Team representative directly with questions or concerns.

B. RESTROOM & LOCKER ROOM ACCESS

Restroom access issues need to be handled with sensitivity, not only due to our obligation to provide transitioning individuals with the same level of restroom access available to non-transgendered individuals, but also due to the emotional responses of co-workers to the idea of sharing facilities with a transgender co-worker. Unisex restrooms avoid this potential issue; however, most facilities will have gender specific designations on their restrooms and locker rooms.

Once the “real life experience” begins, a transitioning individual will not be required to use the restroom of his or her designated sex at birth. A transitioning individual should use the facility based on their current gender presentation; specifically, their reassigned gender following commencement of the “real life experience” and from that point forward. Co-workers who have personal concerns about sharing a restroom or locker room with a transgendered individual should be invited to have an honest discussion with an appropriate People Team member or a representative from EY/Assist.

C. NAME, GENDER, PHOTOGRAPH CHANGES

Upon notification of legal name change of the transitioning individual, change their name and gender in all personnel and administrative records. (see “Name Changes” section) At the first opportunity, replace all photographs on display in the workplace with an updated photo portraying the individual in their new, re-assigned gender.

D. NAME CHANGES ON LICENSES

Many of our Ernst & Young people are required legally to have a current and valid professional license to function in their role. At some point in the transition process, the transitioning individual may legally change their name. At that point their legal name no longer matches the name found on their license. Those responsible for signing reports etc. should do so with their legal name. Upon a legal name change, individuals should work with the CPA Help Desk (or other appropriate licensing experts) to process the name change with the applicable licensing body.

E. CLIENT STANDARDS

Those transgender individuals who serve clients are held to the same appearance and behavior standards as everyone else. Serving clients is not a reason to deny a transitioning individual the right to dress in their reassigned gender role. Client, employee, or partner preference is not a reason to deny a transitioning individual the right to dress in her/his reassigned gender role. Communicating with clients can require difficult conversations. Please consider contacting national bEYond and/or the Americas People Team for coaching and developing an appropriate communication plan.

F. RIGHTS TO PRIVACY

Transsexual employees at Ernst & Young have the right to be who they are without unnecessary disclosure of medical information. In addition, current and prospective employees and partners who encounter problems concerning identification documentation, such as payroll and insurance forms, should feel comfortable raising those concerns with the People Team directly.

G. STATEMENT OF CONFIDENTIALITY

The transgender status of an individual is considered confidential and should only be disclosed on a need-to-know basis, and only with the consent of the individual. However, transitioning individuals are encouraged to participate in the necessary education of their coworkers at whatever level they are comfortable.

CREATING A PLAN

Ernst & Young's culture values process-oriented planning. The firm has committed significant resources to developing world-class project and change management programs. We recommend the creation of an engagement plan to help create a smooth transition process and to reduce uncertainties and provide everyone involved with a common road map from which to work.

GUIDELINES FOR TRANSITIONING INDIVIDUALS

You, as a transitioning individual should try to create a support team. Try to involve your manager, local people team and/or other supportive coworkers to work together to develop an engagement plan that is appropriate for you and the firm. The list below is a suggested list of things to consider and discuss with your support team.

DEVELOP A STAKEHOLDERS LIST

- Who are all the people in the firm you may need to engage at some point during the transition?
- When do they need to be engaged?
- Are there any specific issues that need to be addressed sooner rather than later?

CREATE A TIMELINE—SUGGESTED: 1 YEAR PRIOR TO TARGET TRANSITION DATES

WHAT ARE YOUR MILESTONES?

- Block out dates such as legal name change, transition milestones and other events.
- Review the stakeholder list and develop the program to allow time for education.

THINGS TO CONSIDER

- How would you like your team to find out about your transition? (e.g. A letter, a face-to-face meeting, individual discussions, your supervisor explaining)
- Will you need workspace changes to be made during the transition?
- How long do certain HR functions take? (e.g. legal name changes in PeopleSoft, company directories, etc.)
- How do you think your clients should be informed?
- When will you need to process any necessary changes to professional licenses?

EXPECT THE UNEXPECTED

BRAINSTORM POTENTIAL ROADBLOCKS AND ADJUST YOUR PLANS ACCORDINGLY. FOR EXAMPLE:

- List all the things that a new employee must do during the first week of employment—getting a security badge photo, W4 forms, insurance paperwork, etc. How long do these normally take?
- Do a search for your current name on the firm’s intranet for team rosters and other references. How many of these pages will need to be altered or removed?

GUIDELINES FOR SUPPORT TEAM

PROVIDE ASSURANCE

- Affirm your support of the individual – if you have concerns about the transition, state those separate from your support of the transitioning person
- Clarify that he or she is covered by the existing policies outlined in the “Policy Statement” section of this document.
- Make it clear that your conversation will be held in confidence and make note of those things for which you may wish to seek outside guidance.

SOLICIT INPUT

- Ask for suggestions on what you can do to help and discuss how you can assist him or her during their transition.
- Ask if he or she wishes to inform their manager, co-workers and clients themselves, or prefers that this be done for them.
- Ask if he or she is considering a name change. If yes, ask what name and pronoun the individual will use and when the individual will want you to begin referring to him or her using the new name and/or pronoun.
- Discuss and agree upon the procedure for adhering to the firm’s dress code
- The individual may feel more comfortable working in a different position during his or her transition. Discuss if there is a preference to remain in his or her current position or be redeployed.
- If the individual is married or partnered, ask how you should refer to them throughout and after the transition, e.g. partner, wife, husband, etc. and identify if there are any implications to employer provided benefits.

DEVELOP A PROJECT PLAN

Discuss the expected timeline

- When the individual will begin his or her transition at work. This will probably be the point at which the individual begins to present consistently with his or her gender identity, including change of name, pronouns, dress, grooming, appearance and restroom use.
- When to inform various stakeholders.
- Anticipated time off required for medical treatment, if known. Explain that normal sick pay and leave policies will apply.

Confirm who will be the firm’s main point of contact (manager or People Team representative) to manage the firm’s involvement during the transition.

ADDRESSING CONCERNS OF CO-WORKERS AND CLIENTS

A lack of knowledge about transgender issues has the potential for creating misunderstanding and tension in the workplace. While everyone is expected to conduct themselves in accordance with firm policies, we must also ensure that a forum is made available for individuals to express their concerns, ask questions and learn about transitioning in the workplace.

In addition to a potential workgroup meeting at which the individual’s manager may announce the transition (see Appendix A), trainings or briefing sessions for people on transgender issues are suggested. This will reduce fear of the unknown and help promote a positive work environment for all employees. Trainings or briefing sessions should be completed prior to the individual’s transition. This provides important information to co-workers, managers and clients on what to expect when the individual begins his or her transition. Establishing some level of comfort as to what the transition is and why it is happening is important for preventing future misunderstandings or issues.

People who raise concerns about a transgender co-worker should be provided Ernst & Young’s Non-Discrimination and Anti-Harassment Policy. They should be coached to differentiate personal beliefs from appropriate workplace behaviors

where necessary. They will need to work cooperatively with their co-workers regardless of their gender identity and that failure to do so could result in corrective action, including termination of their employment.

If people express concern regarding the appearance of a transsexual co-worker after reviewing Ernst & Young's policies or if they are curious about the change in appearance, the manager may meet with team members individually to inform them of the change and to answer questions.

If individuals have concerns with a transsexual co-worker's usage of a restroom or other sex segregated facility after reviewing Ernst & Young's policies, the individual with the concern may be permitted to use a different or single-occupancy facility, if such facilities exist at that work location.

PRONOUN AND NAME CHANGES

Individual's records and work-related documents should be retained under the individual's legal name (as reflected on identification documents verified at the start of employment) unless and until the individual makes a legal change. Where a person's legal name does not match his or her new name, the new name should be used on all documentation, such as e-mail, phone directory, company identification card or access badge, name plate, etc., except where records must match the legal name, such as on payroll and insurance documents.

In everyday written and oral speech, the new name and pronouns should be used when the individual is ready.

Upon legal change of name, submit a request through the PeopleSoft system (requires new social security card to be faxed). This change should update all internal systems and benefits related systems. To change email address and other IT related user names, select "name change" under "manage my accounts" on the Global Self Help web site. This request should be completed after the PeopleSoft name change is processed. Work with local contact to order new business cards, building IDs, name plates & hoteling/office related items.

Note on pronouns: If a co-worker is transitioning and you are not certain which pronouns to use, it is appropriate to respectfully ask his or her name and which pronouns you should use. In general, it is considered insensitive to refer to someone by the wrong pronouns once you have established which set of pronouns he or she prefers. Again, transitioning individuals should be prepared to help educate their co-workers.

LEAVE BENEFITS FOR TRANSSEXUAL EMPLOYEES

Managers should provide sufficient flexibility to meet the individual's needs for appointments. Time off for medical procedures is to be treated the same as other scheduled medically necessary procedures.

SURGERIES

The process of transitioning may include one or more surgeries. In addition to genital surgery, surgeries can include facial feminization or other feminizing procedures for those transitioning from male to female, or chest reconstruction or other surgeries for those transitioning from female to male. Recognize that a transitioning individual may or may not have these surgeries for any number of personal reasons and, furthermore, that surgery in and of itself is not the goal of a gender transition.

As with other aspects of a transition, plans should be discussed and communicated only with affected parties in order to manage expectations and to minimize disruption. Medical information, including surgery plans communicated by an individual, should be treated confidentially.

BENEFIT COVERAGE

As of the writing of this document, many of the medically-related procedures and therapies involved in transition are not covered by the firm's insurance coverage options. However, short-term leave for medical procedures is covered under the regular short-term disability guidelines. The firm continues to investigate options for improving coverage for everyone, so please ask questions when appropriate to determine the status at that point in time. Please contact Benefits Express (see "Resources" section) or bEYond for more information and/or assistance.

IN SUMMARY

Resources are available to help build awareness and understanding. Many are identified below. Additional support is available through EY/Assist and bEYond leadership. The tone that each of us sets will eventually determine the overall success of an employee transition at Ernst and Young. While every person has the right to personal beliefs, we have the obligation as employees of Ernst & Young to support individuals and their careers based on their abilities as part of our Ernst and Young team.

Each of us can have an immense impact from an individual transitioning – by focusing on making it a positive experience, we all have the ability to gain from the experience. The individual transitioning may find support that provides retention and productivity benefits. While all of us can learn from the process and individual transitioning – a transition exemplifies characteristics that we can all learn from – courage, determination, overcoming challenges, creativity, and think outside the proverbial box. It is a challenge to each of us to acknowledge the person rather than the packaging.

METHODOLOGY

This document was created by reviewing other companies' guidelines, conversations with multiple people involved with transgender issues, and discussions with Ernst & Young people at all levels. This topic is evolving in the businesses environment, including Ernst & Young. Should you have questions, concerns, or suggestions for improvement you are encouraged to start a dialogue. This document has been created to open dialogue and help people through a potentially difficult and stressful experience. Its impact and effectiveness depends completely on the open and honest feedback of those who use it. Please email bEYond to address any thoughts or comments you have.

INTERNAL RESOURCES

bEYond website

Americas People Team

EY/Assist

Benefits Express

beyond.iweb.ey.com

mypeoplelink.iweb.ey.com

www.eyassist.com (800) 333-4119

resources-hewitt.com/ey

EXTERNAL RESOURCES

Human Rights Campaign

Gender PAC

Gender Education & Advocacy

Out & Equal Workplace Advocates

Parents, Family & Friends of Lesbians and Gays

Donna Rose - Transgender Consultant

Transgender at Work

National Center for Transgender Equality

Harry Benjamin International

Gender Dysphoria Association

www.hrc.org/workplace/transgender

www.genderpac.org

www.gender.org

www.outlandequal.org

www.pflag.org

www.donnarose.com

www.tgender.net/taw

www.nctequality.org

www.hbigda.org

BOOKS

“As Nature Made Him” by John Colapinto

“Wrapped in Blue - A Journey of Discovery” by Donna Rose

“Becoming a Visible Man” by Jamison Green

APPENDIX A: JOB RELATED PLANNING FOR A GENDER TRANSITION

These are the recommended steps in an on-the-job transition for a transsexual individual at Ernst & Young. It may be appropriate to adapt this generic process to fit an individual person or a specific location. This planning document is to be used as a supplemental tool for the purpose of planning a transition.

ADVANCE PREPARATION

1. The transsexual individual meets with local People Team representative(s). The individual shares his or her transsexual status and intent to transition.
2. The same People Team representative(s) and the individual meet with the individual's immediate manager to share the employee's intent to transition (if the employee has not already done so). **Additional Recommendation:** People Team representative(s) and immediate manager should meet with the area leadership for informing, garnering support and involving them appropriately in the announcement of the transition.
3. The appropriate set of stakeholders should be identified to plan the transition. This will include the individual, his or her manager and People Team representative(s). If necessary, involve others as locally appropriate, such as a local transgender expert; bEYond or EY/Assist. The stakeholders should become familiar with educational resources, including firm policy and books on the subject.
 - Consider which people in the firm you may need to have engaged at some point during the transition and when they need to be engaged.
 - Consider any specific issues that need to be addressed sooner rather than later.
4. Plan the transition. Include solutions to the issues listed here:
 - a. The date of the transition, i.e., the first day of the change of gender presentation, pronoun usage and name. Recognize that the date of the transition will be driven primarily by the individual's situation and concerns.
 - b. How individual's workgroup, clients and/or vendors will be informed of the change. Before the general announcement, the individual may choose to talk to some of his or her co-workers to disclose his or her plans on a one-on-one basis.
 - c. Whether there will be an educational workshop (a "Transgender 101") given to staff.
 - d. What changes will be made to records and systems, and when.
 - e. How the current policies against discrimination, harassment and benefits will protect this individual.
 - f. How the dress code will be followed.
 - g. The expected plan for use of gender-specific facilities, such as restrooms.
 - h. Any time off required for medical treatment, if known.
 - i. What firm benefits are available to support the transition and effected by the transition.
5. Make advance arrangements for name changes to be effective on the day of transition, so that nameplates, badges, etc. will be available on the first day. See the list in "The First Day of Full-Time Workplace Gender Transition" below. Consider how long certain People Team functions take (e.g., legal name changes in human resource systems, company directory, etc.).

THE DAY OF THE ANNOUNCEMENT

1. Hold a workgroup meeting, or include this in an already-scheduled face-to-face meeting. Teleconference in any non-local stakeholders. Everyone in the workgroup whom the individual interacts with often should be included. *Do not do this by e-mail.* A handout is optional in conjunction with the face-to-face meeting. The individual should choose whether to be personally present at this meeting, depending on comfort level.
2. The manager of the workgroup (the department head, for example) 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 individual is valued and has management's full support in making the transition.
 - b. Explain firm policy and recommendations.

- c. Stress that on the transition day the individual will present him- or herself consistently with his or her gender identity and should be treated as such; for example, he or she should be called by the new name and new pronouns.
- d. Lead by example. Use the new name and pronouns in all official and unofficial communication.
- e. Make it clear that the transition is “no big deal” and that work will continue as before.
- f. Answer people’s questions.
- g. If a “Transgender 101” workshop is part of the transition plan, announce it. It should be offered before the day of transition.

THE FIRST DAY OF FULL-TIME WORKPLACE GENDER TRANSITION

On the first day of transition, the individual’s manager should ensure the following steps are taken, as they would for a new or transferred individual:

1. Issue a new identification badge with a new name and photo.
2. Place a new nameplate on door/desk/cubicle/workstation.
3. Update any organization charts, mailing lists and other references to the new name.
4. Follow-up on any incomplete name change related issues (email, etc.) as explained on prior page under “Name Changes” section.
5. The manager should plan to be on site with the worker the first day to make introductions, support the individual, ensure respectful and inclusive treatment and make sure that work returns to normal after a few hours.