A workshop hosted by National Grid, InterEngineering and Stonewall was held on the 29th November 2017 to identify what is good practice for supporting transition in the workplace, and if improvements could be made to current transitioning guides. The workshop was kicked off with a series of speakers from InterEngineering, National Grid, EDF Energy, Aston University, IBM and Stonewall. The event was attended by representatives across the engineering sector including EDF Energy, Jaguar Land Rover, Arup, Rolls-Royce and Wood. Five questions formed the basis of the workshop:

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Transitioning in the Workplace

A Good Practice Guide

InterEngineering
Connecting, Informing and Empowering LGBT+ Engineers and Supporters

nationalgrid

Terminology

Trans

An umbrella term to describe people whose gender is not the same as, or does not sit comfortably with, the sex they were assigned at birth. Trans people may describe themselves using one or more of a wide variety of terms, including (but not limited to) Transgender, Transsexual, Gender-queer (GQ), Gender-fluid, Non-binary, Gender Variant, Cross-dresser, Genderless, Agender, Non-gender, Third gender, Two-spirit, Bi-gender, Trans man, Trans woman, Trans masculine, Trans feminine.

Gender Dysphoria

Used to describe the condition of when a person experiences discomfort or distress because there is a mismatch between their sex assigned at birth and their gender identity. This is also the clinical diagnosis for someone who does not feel comfortable with the gender they were assigned at birth. Although many Trans individuals do experience gender dysphoria, not everyone who is Trans does experience it.

Non-binary

An umbrella term for a person who does not identify as either male or female. They may identify as both along a spectrum, and it may vary from day-to-day.

Transitioning

The steps a trans person may take to live in the gender with which they identify. Each person's transition will be different; for some this involves medical intervention, such as hormone therapy and surgeries, but not all Trans people want or are able to change their physical characteristics. Transitioning also might involve things such as telling friends and family, dressing differently and changing official documents (Social Transition).

Cisgender or Cis

Someone whose gender identity is the same as the sex they were assigned at birth. Non-trans is also used by some people.

Pronouns

Words we use to refer to people's gender in conversation, for example, 'he' or 'she'. Some people may prefer others to refer to them in gender neutral language and use pronouns such as they/their/them or ze/zir.

Acknowledgements

Thank you to all the delegates who attended and to your companies for allowing you to support this event. This report would not have been possible without the wealth of knowledge, experience and perspective you brought along. We hope that you learnt as much as we did from the event and made some valuable contacts to help you further along your diversity and inclusion journey.

National Grid and InterEngineering

Compiled and edited by

Melanie Jackson (IT Business Analyst and Co-Chair National Grid LGBT+ Network), John Bradbury (Continous Improvement Manager Amcor, Vice-Chair InterEngineering), Dr Mark McBride-Wright (Managing Director, EqualEngineers; Co-founder and Chair, InterEngineering), and Dr Harry Roberts (Mechanical Engineer EDF Energy and LGBT+ Transgender Support Lead).

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Foreward

"It is now two years since I first volunteered to step up to the Executive Sponsor for PRIDE, which is National Grid's LGBT and supporters network.

The PRIDE team has continued to work hard to be a visible reference point, both internally and externally. We support our employees and their families, participating in the London Pride Parade and were delighted to host the press accreditation for the event, a small way to demonstrate our support and commitment to the event. Most recently we hosted Stonewall in a panel event to draw out their views on the business value of diversity and how PRIDE and our LGBT employees can contribute to Bring Energy to Life. We want to have an organisation where people can be successful and also be able to bring their whole selves to work.

I am therefore delighted to also support this guide to helping both managers and employees support colleagues who are transitioning in the workplace. The benefits for supporting and managing gender transition will extend well beyond the impact on an individual and into the workplace. An employee is going to be able to contribute far more effectively if they are transitioning if any barrier on being effectively supported is removed."

Rachael Davidson
UK Genernal Counsel and Senior Sponsor LGBT+ Network NationalGrid

The process of transitioning can be one of the most stressful and unnerving times for an individual. In the workplace without a robust process in place, the individual, manager or colleagues can feel unsupported. 51% of trans employees have hidden the fact that they were Trans employees have hidden the fact that they are LGBT at work because they were afraid of discrimination, indeed 12% have been physically attacked by colleagues or customers (Source YouGov LGBT in Britain Trans report 2017: https://www.stonewall.org.uk/comeoutforLGBT/lgbt-britain-trans-report). This may lead to increased stress and poor mental health outcomes. Whilst less than 7% of the general population suffer with depression, and 18% suffer with an anxiety disorder, nearly half of transgender individuals experience these issues, with an estimated 41% having attempted suicide (Source: Psychology Today, December 2016 https://www.psychologytoday.com/blog/the-truth-about-exercise-addiction/201612/why-transgender-people-experience-more-mental-health).

A positive experience of transitioning in the workplace, for which an individual generally derives another significant part of their identity, can significantly improve mental health and wellbeing, resulting in them being able to give their productive best in the workplace. As the individual experiences less distress from the positive effects of transitioning, their productivity will improve and experience a reduced likelihood of job loss and economic disadvantage. This can be seen in the numbers of homelessness from which around 40% come from the LGBT+ community (Source: http://williamsinstitute.law.ucla.edu/wp-content/uploads/Durso-Gates-LGBT-Homeless-Youth-Survey-July-2012.pdf)

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Each of the above questions were discussed in groups with the speakers and attendees, and have subsequently been developed into a proposed roadmap to guide employees, managers and the company through the process of transitioning in the workplace. The output of the workshop is summarised in this document.

Where would a company start?

The top points as selected by participants at the workshop:

- **Senior sponsorship:** Visible leadership is essential to enable the creation of an accepting, safe and supportive workplace to transition in. This would be used effectively when combined with running awareness sessions, ensuring all management and leadership levels are engaged.
- **Running Trans Awareness Sessions:** it was identified that there should be different awareness sessions tailored for specific audiences, i.e. the session aimed at line managers would focus on different aspects to that given to colleagues/a wider audience. For reaching a wider audience, one option would be to run the session as a webinar, which has been done at some organisations. The following types of sessions were recommended:
    - For **General Employees** – this could be done as an optional activity (see below) or considered as a mandatory part of the induction process for new recruits;
    - For **HR** – although there is greater awareness, individuals transitioning in the workplace is still not commonplace. It is likely that most HR departments would not have had cases of individuals who are transitioning;
    - For **Colleagues** – this will provide some guidance and information with regards to what gender transitioning is and its impact. This would be specifically tailored to suit the requirements of the individual transitioning, as well as restating the company's expectations for all employees with respect to behaviours (a refresher from the General Employees awareness training;
    - **Host seminars with transgender speakers:** the personal stories of those who are Trans and are at different stages of their transition, can be very powerful to educate and address the misconceptions of what it is to be Trans. Through greater visibility it removes any "mystique" surrounding it.

  One example provided of raising Trans Awareness in the workplace was that of EDF Energy, who ran a Trans Awareness webinar on the Transgender Day of Visibility (TDoV, 31st March annually). The session was chaired by EDF Energy's Chief People Officer thereby demonstrating senior leadership and commitment. In addition to the webinar EDF Energy also held Stonewall Allies training for some of its senior managers in the organisation, with the focus being on trans awareness. Prior to which the company believed it had no transgender employees and after which a number currently working in the company came forward.
- **Start an Employee Resource Group:** This gained backing from participants as it would raise the profile and need provide support for trans individuals to the management/company. It would also provide an initial point of contact for support to Trans individuals.
- **Have a Discrimination Bullying and Harassment policy:** The policy should be aligned to explicitly address those with "Protected Characteristics" under the Equality Act 2010, of which "gender reassignment" is one of the characteristics. Although the Act currently only specifically addresses "gender reassignment", good practice for any organisation to also address "gender identity" and "gender expression" in the same way. It should also be noted that the Gender Recognition Act 2004 specifically covers those individuals who have undergone "gender reassignment" and have a Gender Recognition Certificate (GRC). This law is more onerous than the Equality Act 2010 for those with a GRC. As good practice, companies should treat those who are transitioning as if they already have a GRC, thereby ensuring they comply with the Equality Act 2010.
- **Join Stonewall as a Diversity Champion:** Stonewall have published a guide for developing a Transitioning at Work policy, as well as a guide on Transgender matters. Stonewall are well placed to advise an organisation on the best steps to take with creating their own policy.
- **Have open conversations with employees about Trans matters and issues:** In addition to running awareness sessions, by simply having everyday conversations and less formal sessions talking about Trans issues, a strong signal is sent to those considering coming out that the organisation is Trans-friendly and inclusive.
- **Auditing and Benchmarking:** Carrying out audits/surveys of where your organisation is with respect to Trans awareness and inclusion, and where improvements can be made; sometimes the smallest changes can have the biggest impact. Visit other companies to find out what their policies and standards are like to benchmark against, and determine what good practice can be copied for your organisation.

A Road Map for Transitioning

This is a road map for transitioning in the workplace, and was developed from Questions 2 to 5 of the workshop. It provides a guide for both supporting an employee through their transition and for creating an inclusive and safe workplace to transition in.

Step	*Employee*	*Manager*	*HR/HR Policies/Company*	*External Organisations*
Employee Questioning their Gender Identity	Look for support such as your internal company support systems or perhaps external organisations. External Organisations: GIRES, Gendered Intelligence, Stonewall, NHS website, Trans*formation; Google/Facebook search for local Trans Groups.	React positively and provide an open and welcoming place to discuss. If this is your first instance of having someone approach you with this, do not panic, support is available. Training on where to find support if an employee transitions such as web guides (this can be from external organisations) Attend awareness sessions to increase knowledge and empathy on the topic. Stonewall Allies Programme – for both senior and middle managers. Visible indicators for being pro-LGBT+, i.e. InterEngineering partnership, Stonewall brochures, badges, rainbow lanyards, etc.	Provide a safe space environment for coming out and personal expression (including mandatory diversity and inclusion training, educational events, facilities and policies to be inclusive). Provide support system such as counselling (Confidential and easy to find): Employee Assistance Phone line/ Programme Ensure your employee resource group is visible and is capable of providing support. Include Executive/senior sponsor. Provide some guidance on who to speak to or how to start the conversation on coming out, i.e. Occupational Health contact, HR contact, LGBT+ network contact, etc.	Provide support system such as counselling (Confidential and easy to find) *Resources:* Stonewall guides: http://www.stonewall.org.uk/supporting-trans-staff-workplace • Communicating Commitment to Trans Inclusion • First steps to trans inclusion List of Organisations to help with producing policies or guides if these policies do not already exist: Stonewall, GIRES, Trade Unions, e.g. Prospect, Unite, etc. & Trans*formation
Employee wants to Transition in workplace	Set-up initial meeting with HR or Line Manager to develop a memorandum of understanding with HR and your manager (including flexibility arrangements, timelines), or at least discuss timescales and the process – not everyone wants a memorandum of understanding. *Note this is a living document and will evolve over time. Consider in advance how/when to come out to people, colleagues. Have examples of how others have done it in other organisations – i.e. letters, emails, one-to-one discussions. Decide if you'd like support (Buddy) – could be your union rep, a close colleague/friend or someone from the LGBT+ network to attend meetings with the company.	Liaise with HR on what is the process, the internal processes/guidelines and next steps for transitioning. Agree with person transitioning who the line manager can speak to about their transition in confidence – legally important to do as well as being respectful. Act as the liaison with HR for the individual (if they want that), or HR to also attend. Develop internal team plan for transitioning process with employee and facilitate a session on scenarios which may occur such as customer facing/clients. Maintain regular communication with the employee including having two-way feedback – agree regular catch-up sessions (possibly with someone independent to the manager). May begin with weekly/fortnightly coffee meeting, ramping down as time goes on for example. Develop communication plan for dealing with customers.	Determine a flexible plan including communication, approximate dates, system updates, use of facilities etc. with the employee. Provide medical and finance assistance if required. Provide regular updates on the progress of system/admin changes. Provide written confirmation and potentially a list of what has been changed and that the changes are all complete. Provide an environment and process which enables feedback or concerns from all employees. Provide a 'buddy' for the employee and manager (can be found through external organisations). Have a check list of what documents are required to be changed and what are to be changed and a consent form for sharing information and who to tell (e.g. with outsourcing) also serves as checklist e.g. corporate credit card and help facilitate a streamlined name change process. If security clearance has been obtained, find out how this is transferred to the employee's new identity. Share good practice across companies (external and internal stakeholders).	Can provide external facilitation of the process, i.e. support to the individual (trade union rep for example) Can provide current good practice support from Stonewall, Trans*formation, Consultants, GIRES etc. Facilitate a network to connect employees and manager who are going through the process. **Resources:** Stonewall guides: http://www.stonewall.org.uk/supporting-trans-staff-workplace • Creating a transitioning at work policy List of Organisations: Stonewall, GIRES &Trade Unions, e.g. Prospect, Unite, etc.
Employee 'comes out'	Employee decides date and proposed method of coming out. This may be in a number of ways depending on the audience. Maintain communication with managers and HR. highlight issues or inappropriate 'banter' at an early stage.	If agreed with the person, provide communication prior to the day of the "change" of gender to specific colleagues/groups. Pro-active support for employee when they come out as well as for a period following the initial coming out, including regular check–ins.	Ensure harassment policies are up to date (i.e. how to deal with banter). Ensure there is a reaction plan for if things go wrong. Executive/senior management and leadership to show visible support for the person – set expectations and tone.	Stonewall guides: http://www.stonewall.org.uk/supporting-trans-staff-workplace • Engage all staff in trans inclusion
Support through transition	Maintain communication with managers and HR highlight issues or inappropriate 'banter' at an early stage.	Implements communication and "What If" plans as and when required. Regular catch-up sessions (possibly with someone independent to the manager). May begin with weekly/fortnightly coffee meeting, ramping down as time goes on for example.	Regular contact with employee and management of micro-activities. Obtain feedback and areas for improvement based on the employee's and manager's experience. Implement changes to procedures as required.	List of Organisations: Stonewall, GIRES,mental health charities such as Mind and Trans*formation Stonewall guides: http://www.stonewall.org.uk/supporting-trans-staff-workplace
Ongoing Support	Become a role model if comfortable for other employees going through process. Provide feedback for improving company procedures in future.	Be open to share good practice with other managers. Continue with regular catch-ups if the individual wants to continue this.	Review the process and determine improvements which can be made. Continuous process of learning from personal experiences within the organisation and reviewing changes to the law – the law is the basic level of protections and rights. Companies should seek to go above this minimum level for their arrangements.	Communicate with others who have gone through the process. Where good practice has been observed, incorporate and disseminate this information to other organisations.