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Section 1: Our Commitment to Transgender Equality

Introduction

Who is this guidance for?

This guidance aims to increase understanding and awareness of gender identity and what support you can expect at the University of Nottingham. It will be particularly useful if:

- You are a line manager supporting a member of your team
- You are a member of staff planning, are in the process of, or have transitioned
- You are a work colleague of someone you know who is planning, is in the process of or has transitioned

It aims to promote understanding of a range of transgender identities [*hereafter referred to as 'trans', used in this guidance as an inclusive 'umbrella' term for anyone whose gender identity and/or gender expression differs from the legal sex they were assigned at birth*] and provide guidance on what may constitute discrimination against trans staff. This guidance intends to help managers and colleagues to support trans staff effectively, and mitigate the need for the trans employee to have to provide ad hoc training to their own work team. It also aims to promote practical support for members of staff whose gender identity and/or expression differs from the sex they were assigned at birth. This guidance should be read as part of the wider set of University policies relating to equality at work.

This guide has been developed in conjunction with the University of Nottingham's Trans Working Party, LGBTQ+ Staff Network and has drawn on guidance from AdvanceHE (previously the Equality Challenge Unit), Stonewall, and the Government Equalities Office. Acknowledgement and thanks are extended to the University of Leicester's Equalities Team, who allowed their "*Transitioning Guide for use by Staff and Students*" to shape our thinking.

Equality, diversity and inclusion

The University values the diversity of its people and is committed to advancing equality and eliminating discrimination. Employees and managers should apply and operate these guidelines fairly and in doing so ensure that there is no unlawful discrimination on the grounds of any protected characteristic in line with other Equality Diversity and Inclusion (EDI) related guidelines.

The University also recognises its legal responsibility to protect the rights of trans staff and to ensure that no individual is subject to discrimination or victimisation arising from gender identity.

The University has made specific commitment to Equality, Diversity and Inclusion through the appointment of a Pro-Vice-Chancellor for EDI. A strategic delivery plan for EDI at the University of Nottingham was published in September 2019 (see: <https://www.nottingham.ac.uk/edi/edi-strategic-delivery-plan.aspx>).

Section 2: Creating Understanding

Who are the trans community and what does it mean to be trans?

What does 'trans' mean?

Trans is used in this guidance as an inclusive 'umbrella' term for anyone whose gender identity and/or gender expression differs from the legal sex they were assigned at birth.

How are legal sex and gender different?

Legal sex is currently either 'male' or 'female', usually assigned at birth based on external physical characteristics.

In contrast, gender can be defined as a combination of factors:

- a) **Gender roles, norms and behaviours:** these are expectations constructed by society and are based on the legal sex assigned at birth (for example, expectations that men will prefer STEM subjects, or that women are better at listening to people's problems).
- b) **Gender identity:** this is a person's internal perception of their identity (for example, I am a woman).
- c) **Gender expression:** this is the way a person lives in society (for example, the clothes someone chooses to wear).

Transitioning

Trans people hold a variety of identities. Some trans people may change from one gender expression to another (eg man to woman or other identity), with or without medical intervention. Transitioning is the term used to describe this process. Every trans person is different and not all trans people will undergo medical or social changes.

Non-binary identities

Not every trans person will identify as a man or a woman, they may identify as 'non-binary' or another preferred term such as 'genderqueer' and may prefer to use gender-neutral pronouns such as 'they' and 'them' as opposed to 'he' or 'she'. For the purposes of this document, we will use the term 'non-binary' to refer to gender identities that are not distinctly or consistently related to being a woman or a man. This may include people who do not identify with either label, who identify with both, or who identify with different labels at different times.

Isn't 'they' a plural pronoun?

They has been used as a singular pronoun for hundreds of years. For example, in the sentence 'each student should carefully organise their backpack for the upcoming trip', each student is singular, and they is used to indicate that the gender of the student is not known. Similarly, if someone tells you that their preferred pronouns are 'they/them', simply use this in place of he/his or she/her. 'Is Sam coming on the trip? Yes, they're on their way'.

What if I use the wrong pronouns?

Accidental use of incorrect pronouns sometimes happens. If this occurs, simply correct yourself, apologise, and continue with the conversation. 'Is Sam coming on the trip? Yes he, no sorry, *they* are on their way'.

Consistent, deliberate use of incorrect pronouns is not acceptable and should be dealt with initially under the Dignity at Nottingham Policy.

Further information on different trans identities can be found in the Glossary of Terms (Appendix 1).

Understanding trans experiences in the workplace

It is recognised that the experience of transitioning in the workplace can present challenges. To help people better understand trans experiences in the workplace, Advance HE have published the stories of Emma and Rachel. These stories speak about the issues they encountered as trans people and how support in the workplace helped. You can access their stories here:

1. <http://www.ecu.ac.uk/casestudies/trans-staff-emmas-story/>
2. <http://www.ecu.ac.uk/casestudies/trans-staff-rachels-story/>

The University aims to be trans-inclusive in everything it does. Like many organisations though, we recognise we still have work to do and areas where we can continue to learn and improve and are actively working with our LGBTQ+ networks as part of this continuous improvement process.

Section 3: Equalities

Equalities Statement

The University values the diversity of its people and is committed to advancing equality and eliminating discrimination. Employees and managers should apply and operate these guidelines fairly and in doing so ensure that there is no discrimination on the grounds of any protected characteristic (age, race, disability, religion or belief, sex, sexual orientation, gender reassignment or marriage and civil partnership, pregnancy and maternity) or on the grounds of other factors of identity such as socioeconomic background or neurodiversity (learning difference).

Harassment based on gender identity or expression is a form of discrimination and will be regarded as such. Examples of unlawful discrimination based on a person's trans identity or perceived trans identity include:

- Refusing to promote a member of staff because they are trans.
- Deliberately excluding a trans person from any work or work-related activity on the grounds of their gender identity.
- Refusing to associate with or ignoring someone because they are trans.
- Refusing to address the person using their correct pronoun or name (the correct ones are always what the person advises).
- Revealing the trans status of a person to others, by disclosing information to individuals or groups – in other words, 'outing' someone.
- Not respecting a person's gender identity because people think the individual is not sufficiently 'convincing' in their gender role.
- Indefinitely refusing to allow a trans person to use single-sex facilities appropriate to their gender identity.

Transphobia and transphobic language in the workplace

The following are examples of transphobic language, but many of these examples are also common mistakes made by well-meaning people. It is important for colleagues and managers to recognise that without understanding and education, their good intentions can result in transphobia and repeated occurrences of this kind of language could constitute workplace bullying. It is essential for managers and colleagues to reflect on their own thoughts, comments and conduct in light of the examples below.

Trans people should note that the examples given below may be triggering because we have provided examples in the form of quotes.

- *Speculating about someone's gender:* "Is that a man or a woman?" - This is inappropriate in any context. It can lead to insulting gossip and bullying.
- *Purposefully ignoring someone's chosen pronoun:* "I've just always called him 'he', it's too hard to remember that it's changed", this undermines someone's gender identity and sense of self.
- *Disclosure of or referring to someone's trans history:* "He used to be a woman". For some people, their trans history is part of their past and not their current identity. It is a matter of personal choice whether they wish to disclose this or not. No one should be forced to disclose their trans history or have others disclose it without their consent. Similarly, even if someone is open about their trans history, you should not assume that they are happy for you to refer to their pre-transition life.
- *Inappropriate questioning about medical treatment:* "Have you had the op?" Gender identity is someone's internal, deeply held sense of their own gender. Questioning about whether someone has had surgery or other medical treatment is an invasion of privacy and is always inappropriate. It also puts the trans staff member in the position of having to educate you, for example that there is not one 'op' to have.
- *Commenting on someone's ability to "pass":* "you're doing so well, I'd never have guessed you weren't always a man!" "Passing" refers to someone's ability to be correctly perceived as belonging to the gender that matches their identity. In addition, 'passing' can also mean 'not being identified by others as trans'. People's gender identity should be respected regardless of their appearance. It is also not appropriate to assume that a trans person's goal is to present as being cisgender (not trans).
- *Questioning or restricting the use of facilities eg toilets or changing rooms:* "You know this is a women's bathroom?" Trans people should be able to choose to use the facilities that align with their gender identity without fear of harassment.¹

Use of intended transphobic language and bullying behaviour will not be tolerated by the University. Where concerns are raised by another employee, these will be investigated through the Dignity at Nottingham Policy

(<https://www.nottingham.ac.uk/hr/guidesandsupport/complaintsgrievanceanddignity/dignity/dignity-at-nottingham.aspx>) and in line with the University's Equal Opportunities Policy (<https://www.nottingham.ac.uk/hr/guidesandsupport/equalityanddiversitypolicies/index.aspx>).

¹ Examples are taken from "First Steps to Trans Inclusion", Stonewall, July 2016

Section 4: Terminology and Legislation

Appropriate terminology

A variety of terms may be used both socially and legally to describe trans experience. It is important to be guided by and willing to learn from the individuals you interact with, as terminology can change over time and different trans people may use different pronouns and labels to denote their identity. If you are unsure, do ask or refer to the [glossary of terms](#)² in Appendix 1 for some common terms and descriptors.

The following guidelines³ may be helpful for managers and colleagues to consider:

- Think of the person as being the gender with which they self-identify.
- Use the name and pronoun the person asks you to. If you are not sure what the right pronoun is, politely ask them which name and pronoun they use. If you make a mistake with pronouns, apologise, correct yourself and move on.
- Respect people's privacy. Do not ask what their 'real' or 'birth' name is.
- Do not tell others about a person's trans status. This is confidential and sensitive information. If documents must be kept which contain the person's old name and gender, keep them strictly confidential and always act in accordance with the Data Protection Act 2018/GDPR requirements.
- If you hear or see staff members or students using transphobic language or behaviour, challenge it and/or bring it quickly to the attention of someone in a position of authority.
- Respect people's privacy and boundaries. If you feel it is appropriate and relevant for you to ask a personal question, first ask if it is okay to do so. If the answer is no, accept this respectfully. Personal questions include anything to do with a person's sex life, anatomy (not just genitalia) and relationship status – past, present or future. Questions about medical transition, such as 'Are you on hormones?' can be considered highly personal.
- Listen to the person, and ask how they want to be treated and referred to.
- Continue to have regular and open dialogue together.
- Being trans is different to being intersex (being born with biological attributes of both sexes or neither sex).
- Some terms are considered offensive due to their history of pejorative use. Slang terms should not be used even if the intention is not to offend, insult or make fun. Even if one trans person has told you that they do not mind particular terms, remember that other people may not feel the same way and avoid using terms that could be interpreted negatively. The most appropriate term is to use 'trans' as an adjective or 'describing word'. For example, a trans colleague, a trans student, a trans service user, a trans member of the public, trans people, trans women, trans men etc.

Gender neutral pronouns

Pronouns are the words we use in place of a noun, such as she/her/hers to refer to a woman or her possessions or attributes. Many trans people will advise what pronouns they wish you to use. Some people may prefer others to refer to them in gender-neutral language and use pronouns such as they/their or ze/zir.

² Adapted from "Trans staff and students in HE and colleges: Improving Experiences", November 2016, p1-7.

³ "Trans staff and students in HE and colleges: improving experiences", Equality Challenge Unit Nov 2016

The Equality Act 2010

Under the Equality Act 2010, the protected characteristic of gender reassignment applies to a person who 'proposes to undergo, is undergoing or has undergone a process (or part of a process) for the purpose of reassigning the person's sex by changing physiological or other attributes of sex' (Equality Act, 2010).

Importantly, the Equality and Human Rights Commission (EHRC) technical guidance states that under the [Equality] Act gender reassignment is a personal process ... rather than a medical process. Protection applies from the moment the person indicates their intention to start the reassignment process, even if they subsequently change their mind. The act does not require someone to undergo medical treatment in order to be protected' (EHRC, 2012).

Further, in 2016 the Government clarified (Government Response to the Women and Equalities Committee Report on Transgender Equality 2016) that "Wider categories of transgender people, such as cross-dressers, non-binary and gender fluid people are protected if they experience less favourable treatment because of gender reassignment - for example, if they are incorrectly perceived as undergoing gender reassignment when in fact they are not, or incorrectly perceived to be male or female, perhaps because they do not comply with what society normally expects of men or of women."

The Gender Recognition Act 2004

The Gender Recognition Act 2004 allows individuals who have undergone gender reassignment to obtain a Gender Recognition Certificate (GRC). This means that they are legally recognised for all purposes in their confirmed gender. Anyone who acquires information that a person is trans or has a trans history in an official capacity (in the course of their job, for instance) is liable to criminal proceedings if they pass that information to a third party without the permission of the individual.

Confidentiality

Confidentiality is crucial. All personal data, including data related to gender identity, must be treated as strictly confidential in line with the Data Protection Act 2018/GDPR. In addition, the Gender Recognition Act gives trans people privacy rights. It is important that we all respect the privacy of those that we work with and treat data sensitively and in accordance with the Data Protection Act 2018/General Data Protection Regulation (GDPR) (see: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/711097/guide-to-the-general-data-protection-regulation-gdpr-1-0.pdf).

Section 5: Practical guidance

Establish a key contact

Whilst we recognise not all people who transition will require support from their manager, colleagues or the University, it might be helpful for some people to have a single point of contact in the workplace who they can trust and speak to if/when they share their intentions to transition. In most cases, the key contact will be the employee's line manager, but we recognise there might be instances where employees will choose to work with a colleague. For ease of reference, for the purpose of this guide, the 'key contact' will be referred to as the line manager, but it is recognised this might not always be the case. Where an employee does not feel their immediate line manager will be best placed to be their key contact, they should raise this with the senior manager in their

reporting line to agree and identify a suitable 'key contact'. The immediate line manager should be kept informed where required (ie signatory/authorisation on system changes).

The line manager will be an emotional and practical support to the employee through the entire transition process. With the employee's consent and where needed, the line manager might wish to make contact with the Human Resources Employment Relations team (HRER@nottingham.ac.uk) for support and advice. HR will be able to offer practical advice on how to inform work colleagues, how to support employees if time off work is needed and how to update University systems and records. Where needed, the Employment Relations Adviser will signpost the manager and employee to the 'personal support plan' – see Appendix 2.

Personal Support Plan

Once an employee has established their key University contact, they may want to work together to complete a personal support plan (Appendix 2). The support plan should be optional and led by the employee transitioning.

Ideally, the plan should include agreed information on what changes are required and when (ie changes to name, use of pronouns and when/how to update employee records) through to agreeing a process to notify the team and discussing any planned absence from work (if necessary). It is likely the support plan will need updating over time and it is imperative the document is saved in a secure and confidential space that only the employee and the line manager can access and in compliance with the Data Protection Act 2018/General Data Protection Regulation (GDPR), see: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/711097/guide-to-the-general-data-protection-regulation-gdpr-1-0.pdf.

Dress Code

Dress codes can particularly impact on trans people who are asked to wear clothing that does not align with their gender identity or expression. Dress codes should apply to all employees and use gender-neutral language, for example, 'staff may wear a skirt or suit trousers' rather than 'women may ...'. Where uniforms are required, then these should be gender neutral. If a person is transitioning, consideration should be given to whether new uniform will be needed and if so, this should be provided promptly.

Facilities and toilets

A trans person should have access to toilets and facilities in accordance with their gender identity. It is not acceptable to restrict a trans person from using identified facilities that match their gender identity (ie a woman would use the 'female' toilets). The point at which the employee changes which facility, such as changing rooms, shower rooms and toilets, they use, should be agreed with the individual. The University endeavours to have more gender-neutral toilets across our estates, but unfortunately they are not available in all buildings at this point.

Photographic identification

Depending on the employee, it might be necessary to update photographic identification ie University Cards during the transition process. In the early stages of transition, a trans person may not feel able to permanently present in their self-identified gender. It may be appropriate for cards to be updated frequently to ensure they always represent the employee's current appearance. This should be discussed as part of the personal support plan. Note that there is no charge for replacement cards that are required because an employee is transitioning.

Absence from work

Leave/time off work should be accommodated to enable employees undergoing any form of medical treatment. Employees are encouraged to discuss timescales with their line manager and/or HR Employment Relations contact as early as possible so that appropriate arrangements or adjustments can be made. An employee who has time off work that relates to their transition should be treated in the same way as someone who is absent for reasons of sickness. This should be in line with the University Sickness Absence Management Policy (<https://www.nottingham.ac.uk/hr/guidesandsupport/absenceandannualleave/sicknessabsence/index.aspx>). It might be that the employee will need temporary reasonable adjustments to be in place during the transition stages and/or when they return to work, should they be absent. This could include an adjustment in sickness triggers or a temporary adjustment to their work duties. If time off work is required, it is important for the employee and line manager to discuss what support is needed and capture this in the personal support plan.

Communicating changes to external agencies

It is the employee's responsibility to contact external agencies such as HMRC, the Border Agency, Banks, Grant Funders and/or any National Statistics Agencies should they wish to make any changes to their name, title, gender or legal sex.

Changing titles

The titles Mr, Miss, Ms and Mrs are social titles with no legal status and can be freely changed at any time. Employees may choose to adopt any title on MyView and this might include a gender-neutral title such as Mx or they might choose to opt for no title at all. Any option may be chosen, regardless of legal sex or gender and no documentary evidence is required to make this change on MyView.

Changing first name

The University will not require employees to produce formal documentation to confirm any change of first name (ie by deed poll or statutory declaration), but HR will require instruction from the employee to make the necessary changes to their HR records. This can be done by either;

- 1) Completing a written statement of intent to transition form (see template at Appendix 3) and returning the form to HR (their established HR contact or to the HR mailbox: HR@nottingham.ac.uk). On receipt of the form, HR will make all necessary changes to the HR systems, including MyView, or;
- 2) Updating MyView records directly. Please be advised, if employees change their first name direct on MyView, HR will contact the employee to make sure these are intentional changes before updating HR records.

It is important HR are informed if an employee is changing their first name for reasons of transition to enable them to a) make sure adequate support is in place for the employee, where necessary and b) ensure the University is complying with the Gender Recognition Act and GDPR when storing/destroying employment records in the employees former name (see employee records below).

Changing University Systems

Whilst an employee can update and change their personal details on MyView at any time, this will not mean that all key University systems will also be updated and, depending what the change is, might require formal documentation to be presented to HR (ie a birth certificate would be required to change payroll and pension data). It is recommended employees work with their line manager to identify a list of non-HR systems that will need to be updated. Appendix 4 provides a list of some of the key University IT systems, which might be relevant to update. This is by no means an exhaustive list and it is important to note that Schools/Departments often use different systems. In conjunction with the employee, the line manager should liaise with the relevant School/Department to ask that the necessary details are updated at a mutually agreed date.

Recognising gender

There is an option in MyView to self-declare gender identity should employees wish to do so. Information will also be sought from applicants about their gender identity when they complete the equality information as part of the recruitment process.

Changing legal sex

In the UK, a person's legal sex (male or female) cannot be changed by law unless the trans person obtains a Gender Recognition Certificate (GRC). An employee cannot change their legal sex on MyView without a GRC. Where an employee requests to change their legal sex on MyView, they will be asked by HR to present a copy of their birth certificate/passport to enable the system change (see GRC section below).

Gender Recognition Certificate (GRC)

The Gender Recognition Act 2004 enables trans people to apply to receive a GRC if they satisfy the criteria for legal recognition in the acquired gender. The criteria includes; individuals over the age of 18, who have been diagnosed with gender dysphoria, have lived in the acquired gender for at least two years and intend to live in the acquired gender for the rest of their life.

When a trans person receives a GRC, they have the legal right to change their sex and are recognised for all purposes in their confirmed legal sex. Obtaining a GRC means a person is entitled to be issued with a new birth certificate and passport and entitled to state benefits and occupational pension schemes.

The University cannot ask to see a GRC (it is illegal for employers to ask to see a GRC) to change an employee's legal sex on University systems, but they can ask to see a copy of a passport or birth certificate to make the necessary change.

It is important to note that many trans people do not or cannot obtain a GRC. This means that their legal sex on official records (including employment records) may remain different to their gender identity.

Employee records

Where an employee has obtained a GRC, the University has a legal responsibility (where they are made aware) to ensure all references to the individual's former name and gender be removed and destroyed to ensure their former identity is not revealed. HR should work with the employee to ensure records are destroyed at a mutually agreed time.

Where an employee shares their 'intension to transition', they can request that all references to their former name and gender be removed from old records to ensure their former identify is not

revealed. If this is requested by the employee, the University will ensure that all paper and digital files that reference the employee's previous gender identity are destroyed and/or reissued (eg offer letters and contracts of employment in the HR Department should be re-issued in their current form/template and relevant emails/letters within the Department/ School should be re-issued). It is advised that the line manager works with the employee to either delete or redact all emails/org charts/letters etc and the HR contact works with the employee in reference to their personal file to ensure all relevant documents have been destroyed/stored and/or re-issued appropriately.

Should an employee be subject to a formal HR process that remains unspent at the point of their transition (ie have a final written sanction on their personal file) the HR contact will re-issue all paperwork associated with the investigation under the employee's new identity.

By law, the University has to keep a record of an employee's legal sex to share with external organisations for purposes of tax, national insurance and pensions. Where an employee's legal sex cannot be changed (ie they do not hold a GRC), the University should keep documents that reference their former name and gender separately filed on their personal file so that it is inaccessible to anyone other than an agreed person (ie in a sealed envelope with clear instruction on who can have access to the records if and when necessary).

It is recommended that the HR contact works with the employee to ensure all necessary documents have been sealed appropriately. It is not necessary to retain paper or digital documents within the employee's department. The line manager should therefore work with the employee to ensure all documents referencing their previous identity are either expunged or amended accordingly and if in any doubt, liaise with their HR contact for advice.

Pension Schemes

Trans people without a GRC are treated according to their legal sex as assigned at birth for state and occupation pension purposes. Those with a GRC are treated as their acquired gender, and backdated state pension payments may be applicable if the GRC was obtained after retirement. It is important that a person who has had their marriage annulled or their civil partnership dissolved, in order to gain a GRC, reviews their pension arrangements otherwise a dependant's benefit may be adversely affected.

To make changes to the University occupational pension schemes, the employee should contact the pensions team initially, tel: 0115 9515 996 or email: pensions@nottingham.ac.uk. For example, the USS scheme requires a change of name through deed poll, a statutory declaration or the production of their new passport/birth certificate (if applicable) and other pension schemes might vary too.

Recruitment

It is not necessary for applicants to disclose their trans status as part of the application process. If a trans applicant has not yet been issued with new identification, their birth certificate will show they were born with a different name and gender to the one they might present at interview. It is important, therefore, for colleagues who engage in the recruitment process to demonstrate sensitivity and ensure confidentiality when asking candidates for proof of identity.

References

References for current or former staff who have transitioned must use the appropriate (ie updated) pronoun. Where the University is aware of the change, they must make no reference to the person's former name or gender.

International Staff

Some countries do not have a process in place to enable their citizens to change their gender on identification documents. In other countries, trans people can experience societal hostility and persecution. Consequently, some international staff may not have identification in their self-defined gender and may seek to transition while working and studying in the UK. Others may have had their self-defined gender legally recognised by another country and may be eligible to apply for a GRC. Trans foreign nationals whose national authorities do not recognise changes to names and/or gender in their passports or national identity cards can obtain a biometric residence permit in their chosen name and self-identified gender, see:

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/550968/Home_Office_Use_and_Change_of_Names_revision_060916.pdf. If a staff member is faced with returning to a country where they have a well-founded fear of persecution due to their gender identity, they can make an asylum claim.

It is also important to consider UK staff who are travelling internationally. Discuss the feasibility/logistics and carry out a risk assessment to determine if the employee might be at risk because of their trans status. The HR International Team, the University International Office or the Office of Global Engagement will be able to advise.

Section 6: Support for the transition process

Social/Medical/Legal Transition

Transition is the process of a person changing their **social** role in order to match their gender identity. Examples of transitioning include telling friends, family and colleagues; changing the name they want to be known as; asking people to use different pronouns; by dressing differently and perhaps obtaining voice training. It may involve **medical** assistance such as accessing endocrinology services to affect hormones or by having surgery to change primary or secondary sex characteristics (eg chest or genitals). Some people may also seek **legal** recognition of their new social role by applying for a Gender Recognition Certificate. Some trans people will express their self-identified gender part-time, while others will do so full-time.

Each individual's situation will vary depending on a range of factors, including whether or not a person opts for medical procedures. Many trans people will socially transition, but not undergo any medical treatment, or will alter their gender expression alone (ie they may only change their name and pronouns). The most important consideration is ensuring that all staff are supported to express their gender in the way they are most comfortable.

Supporting changes

To transition is a very personal decision and a very personal journey. No two experiences of transition will be the same. Each person's transition should be led by the individual themselves, and as a result it is not a prescriptive process. The steps a person who is transitioning wishes to take should never be assumed and any action or decision in supporting the transition should be made in discussion and agreement with the person transitioning.

In line with Section 5 of this guide, we advise that an employee going through a transition process should establish one key contact, who ideally for ease of access should be their line manager. A member of the Employment Relations team in HR can also be a key contact for both the employee and the line manager. Employees might instead or also wish to seek support from the University Occupational Health Service (<https://www.nottingham.ac.uk/hr/guidesandsupport/healthandwellbeing/occupational-health/occupational-health.aspx>), the University Counselling Service (<https://www.nottingham.ac.uk/counselling/index.aspx>) and/or the Employee Assistance Programme

<https://www.nottingham.ac.uk/hr/your-benefits/the-employee-hub/the-employee-hub.aspx>). It is a matter of personal choice for the employee as to who should be contacted. The sections below provide advice and guidance on practical support for transition. They should be read in conjunction with the more general advice earlier in this Guide.

It is important that, once there is an awareness a person wishes to transition, they should be acknowledged in their new name and identity. At this point, it would be beneficial for the line manager to ask the employee which pronouns they will be using to help avoid any confusion. University employees are expected to respect requests by individuals to use specific pronouns.

When speaking with a person who has a non-binary gender identity it is important to use gender neutral language such as *they, them, their*. Colleagues should avoid any gendered or binary language such as *sir/madam, ladies/gentlemen, his/her*. A person who has a non-binary gender identity may prefer to be acknowledged with the prefix Mx.

Before an employee starts to present in their chosen gender, it is advised that the employee plans what will happen and when with their line manager. Appendix 5 might be a useful tool for employees to refer to 'Planning your transition – things to think about'.

Whilst it is important to have respect for people's boundaries and their personal information, having open and shared conversations on the process and what needs to be considered should ensure everything is in place to avoid any contradictory information or embarrassment. These details can be captured in a Personal Support Plan.

Telling people

The employee transitioning should have discussions with their line manager about approximate timescales of when they wish to present to others their self-identified gender. They should also discuss and agree how this will be communicated to work colleagues and any other key groups identified. The employee may wish to tell people themselves or they may prefer another person does this either with them present or in a separate discussion. Sharing with colleagues/others might be the opportunity for the employee (or line manager) to share the name, gender and pronouns they wish others to use from that point onwards.

It is important not to put pressure on the employee if they are unsure when and how they would like to present to others in their self-identified gender. This process should be led by the individual employee.

Managing the reactions of colleagues/others

When people transition or come out as trans, the process itself may present challenges for others who have fixed notions of gender or lack of awareness of gender identity and they may not know how to respond. The process is likely to be a learning curve for all concerned and colleagues/others may initially have no idea how to respond or support appropriately. People may have questions for either the employee who is transitioning or their line manager and whilst it is important to be able to ask questions to learn about and understand the process, it is equally important to show respect and consideration for people's rights, experiences and feelings when asking questions. The line manager should provide a copy of this guide or a link to the guide to colleagues/others (at the point agreed with the employee) to help educate and raise awareness. Whilst the individual transitioning may be happy, where reasonable, to support individual understanding on trans issues, it might be beneficial for the section manager to link in with the Professional Development team to arrange any training and/or briefings to help raise awareness.

With agreement of the employee, it would be helpful if a senior member of staff within the staff member's School/Department demonstrates their support by:

- Making it clear that trans people have the full support of the institution, and that the institution supports all people to express their gender however they feel most comfortable.
- Explaining and reiterating the institution commitment to equality, diversity and inclusion, and its policy on dignity.
- Emphasising that the person should be addressed by their preferred name and the appropriate pronoun. They should also be referred to by their preferred name and the appropriate pronoun in their absence.
- Providing a link to this guidance and giving staff a key contact who can answer questions (this would not usually be the trans staff member).

Training

Training is an indispensable tool in supporting and empowering all managers and staff to feel confident in supporting their trans colleague(s). When developing training programmes, podcasts, seminars, workshops and best practice guides, it is good practice to involve trans staff in the planning and design phases.

HR have identified local trans staff who are happy to provide feedback on these phases. It may be valuable for training to be supported by a trans organisation and the University has existing relationships with a number of expert organisations.

For further information and sources of help please refer to Appendix 6.

Appendix 1

Appropriate Terminology

Please take a moment to review the glossary of terms⁴ below. This covers the terms used in this publication and elsewhere.

Acquired gender	A legal term used in the Gender Recognition Act 2004. It refers to the gender that a person who is applying for a gender recognition certificate (GRC) has lived for two years and intends to continue living in. Affirmed gender may be used when a person has transitioned, but has decided not to apply for a GRC.
Cisgender	A term used to describe people who are not trans. Cisgender is based on the Latin prefix cis, which means 'on this side of'. The Latin prefix trans means 'across from' or 'on the other side of'. The use of cisgender is debated within the trans community and some people prefer the term non-trans as it familiarises the use of the term trans (see below).
Dual role	<p>A dual role person occasionally wears clothing and or makeup and accessories that are not traditionally associated with the sex they were assigned at birth. Generally, dual role people do not wish to transition and do not necessarily experience gender dysphoria. Some people prefer the term alter ego.</p> <p>Historically the terms transvestite and cross dresser were used to describe dual role people, but they are now considered to be outdated. While some people may use these terms to describe themselves, other people may find the terms offensive.</p>
Gender	Gender refers to the cultural and social distinctions between men and women. It consists of three related aspects: a society's constructed gender roles , norms and behaviours, which are essentially based on the sex assigned at birth; gender identity , which is a person's internal perception of their identity; gender expression , which is the way a person lives in society and interacts with others. Gender does not necessarily represent a simple binary choice: some people have a gender identity that cannot be defined simply by the use of the terms woman or man. It should be noted that currently, for the purposes of UK law, gender is binary – people can only be male or female. However, there is growing pressure from campaign groups for this to change in line with other countries including Australia, Bangladesh, Denmark, Germany, India, Nepal and New Zealand.
Gender expression	While gender identity is subjective and internal to the individual, gender expression refers to all of the external characteristics and behaviours that are socially defined as either masculine or feminine, such as clothing, hairstyle, make-up, mannerisms, speech patterns and social interactions. Typically, trans people seek to make their gender expression match their gender identity, but this is not always possible. It is best practice to not assume someone's gender identity on the basis of their gender expression. If you are not sure, it is best to ask a person how they would like to be addressed.
Gender incongruence and gender dysphoria	Gender incongruence is a medical term used to describe a person whose gender identity does not align, to a greater or lesser extent, with the sex assigned at birth. Where this causes discomfort it is known as gender dysphoria.

⁴ "Trans staff and students in HE and colleges: Improving Experiences", November 2016, p1-7.

	<p>Gender dysphoria is a term describing the discomfort or distress caused by the discrepancy between a person’s gender identity (their psychological sense of themselves as men or women) and the sex they were assigned at birth (with the accompanying primary or secondary sexual characteristics and or expected social gender role).</p> <p>Gender dysphoria is not a mental health condition, but unmanaged dysphoria or the social stigma that may accompany it and any changes a person makes to their gender expression can result in ‘clinically significant levels of distress’. In order to qualify for NHS medical assistance to transition, a trans person in the UK must have a diagnosis of gender dysphoria. As not all trans people have gender dysphoria, this presents a significant barrier to accessing medical support and the criteria for obtaining a Gender Recognition Certificate under the Gender Recognition Act 2004.</p>
Gender reassignment	<p>The legal term used in the Equality Act to describe the protected characteristic of anyone who ‘proposes to undergo, is undergoing or has undergone a process (or part of a process) for the purpose of reassigning the person’s sex by changing physiological or other attributes of sex’ (Equality Act, 2010). This is the protected characteristic that protects trans people from discrimination, victimisation and harassment in employment, education and when using services. Importantly, the act requires no medical supervision or interventions for a trans person to be afforded protection, and people who are perceived to have the characteristic as well as people who are associated with that characteristic will also be protected.</p>
Gender Recognition Certificate	<p>Gender Recognition Certificates (GRC) are issued by the gender recognition panel under the provisions of the Gender Recognition Act 2004. The holder of a full GRC is legally recognised in their acquired gender for all purposes. It is never appropriate to ask a trans person for a GRC and such a request is likely to be unlawful because it breaches their right to privacy. Once a person has obtained a GRC their gender history can only be disclosed where there are explicit exceptions in law.</p>
Gender variance	<p>Gender variance, also referred to as gender non-conformity, is behaviour or gender expression that does not match socially constructed gender norms for men and/or women.</p>
Intersex	<p>An umbrella term used for people who are born with variations of sex characteristics that do not fit the typical definition for ‘male’ or ‘female’ bodies. This may mean that further investigations are needed before their sex is assigned, and that they are not assigned a sex at birth. Until recently, parents of intersex babies were encouraged to elect for surgery so that their child would conform to stereotypical male or female appearances. As a result, many intersex people can encounter difficulties as their gender as assigned at birth may differ from their gender identity. Today, parents are advised to delay surgery until their child reaches puberty so that the child can inform decision-making. Not all intersex people opt for surgery, and many will consider themselves to be intersex rather than male or female. Some intersex people may decide to transition to their self-identified gender and start to identify as trans. Some intersex people may prefer the term DSD (disorders of sexual development).</p>
Legal sex	<p>A person’s ‘legal’ sex is determined by their sex on their birth certificate and the assumption made at birth is that their gender identity (boy, girl) matches. For higher education institutions, a person’s legal sex is only relevant for insurance, pension purposes and in rare cases occupational requirements.</p>

	For the purposes of everyday life (including banking, personal identification and travel), a person's legal sex may not be the same as their self-identified gender.
Lesbian, gay, bisexual, trans + (LGBT+)	While being trans or having a trans history is different from sexual orientation, the forms of prejudice and discrimination directed against trans people can be similar to those directed against lesbian, gay, bisexual and other people with a minority sexual orientation (LGB+), and so historically these groups have coexisted and supported each other as one community. As a result, advocacy and support groups often cover LGBT+ issues. Trans people can also identify as LGB+.
Non-binary	Non-binary is used to refer to a person who has a gender identity which is in between or beyond the two categories 'man' and 'woman', fluctuates between 'man' and 'woman', or who has no gender, either permanently or some of the time. People who are non-binary may have gender identities that fluctuate (gender fluid), they may identify as having more than one gender depending on the context (eg bi-gender or pangender), feel that they have no gender (eg agender, non-gendered), or they may identify gender differently (eg third gender, genderqueer). Just as with trans men and trans women, non-binary people transition and live their lives in various ways – which may or may not include medically transitioning.
Pronoun	A pronoun is the term used to refer to somebody, for example she or her or hers or herself, or he or him or his or himself. Gender-neutral pronouns include: <ul style="list-style-type: none"> ○ they or them or their or themselves ○ che or chim or chis or himself ○ E or Em or Eir or Eirs or Emself ○ Per(person) or pers or perself ○ Xe or hir or hirs or hirself
Real-life experience or experience	'Real-life experience' or 'experience' are terms used by the medical profession to refer to the period in which an individual is required to live, work and study full-time in their affirmed gender before they can undergo medical transition. Some trans staff and students may be asked by a gender identity clinic to provide confirmation from their institution that they are undertaking real-life experience or experience.
Self-identified gender	The gender with which a person identifies.
Sex	Sex refers to the biological status of a person as male or female. Sex is (usually) judged entirely on the genital appearance at birth. Also see Legal Sex*, Intersex*.
Sexual orientation	Sexual orientation is different from gender identity. Trans people, like any other people, can have a wide range of sexual orientations for example heterosexual, lesbian, gay, bisexual, or asexual.
Trans	Trans is an inclusive umbrella term for people whose gender identity and or gender expression differs from the sex (male or female) they were assigned at birth. The term may include, but is not limited to, trans men and women, non-binary people and dual role people. Not all people that can be included in the term will associate with it. The terms trans should only be used as an adjective, for example, trans people, trans man or trans woman. However, a trans person may say 'I am trans'.
Trans history	A person with a trans history will have transitioned to their self-identified gender. Consequently, they may no longer identify as a trans person, and simply see once having been trans, or their transition journey, as part of their history.

Trans man	A person who was assigned female at birth, but identifies as a man or towards the masculine end of the gender spectrum.
Trans woman	A person who was assigned male at birth, but identifies as a woman or towards the feminine end of the gender spectrum.
Transition	Transition is the process of a person changing their social role in order to match their gender identity. Examples of transitioning include telling friends, family and colleagues, changing names, asking people to use different pronouns, and changing the way gender is expressed. For some people, this may involve medical transition such as hormone therapy or surgery.
Transphobia	Transphobia is a term used to describe the discomfort, fear, anger, intolerance or resentment that some people may have as a result of another person being trans. This can result in discrimination, harassment, victimisation and hate crime.
Transsexual	Transsexual is a term that was historically used to describe a person diagnosed with gender dysphoria. Increasingly, trans people no longer use this term, preferring instead trans or transgender. Many people may find the term offensive, though others may use it to describe themselves.

(Source: "Trans staff and students in HE and colleges: Improving Experiences", November 2016, p1-7)

Appendix 2

Personal Support Plan Template

This personal support plan should be kept confidential between the employee and the line manager (and the key contact if this is distinct from the line manager). It might be that both parties agree to share this with their HR contact, if required. The support plan is for trans employees more broadly in the social sense and not just for employees who are planning to medically or legally transition.

The plan can be changed and adjusted according to the meetings between the employee and line manager.

Support plan	Comments	Responsibility and dates
Establish a key contact within the University (ideally the line manager)		
Ensure the employee is aware of any help and support they may need to access including Counselling, the Employee Assistance Programme, HR, Occupational Health, the LGBTQ+ Network		
Consider if any immediate temporary or permanent changes to the current role need to be addressed and consider any reasonable adjustments		
Consider any immediate or long-term key work requirements (such as planned international travel). Discuss the feasibility/logistics and carry out a risk assessment to determine if the employee might be at risk because of their trans status - speak to the HR International Team, the University International Office and the Office of Global Engagement		
Are there any planned non-medical appointments that need to be considered (this could include appointments with a speech therapist, laser hair removal or exercise classes to maximise the effect of hormone treatment). Consider how these appointments are logged in line with the University Sickness procedure		
Are there any planned medical appointments that need to be considered (this could include counselling, appointments with a gender identity clinic and/or planned surgery). Consider how these appointment are logged in line with the University Sickness procedure		
Will any time off work be required during the employee's transition journey		
Consider if any adjustments will need to be made during the transition journey - liaise with Occupational Health and make necessary referrals where needed		

When will the employee begin to transition at work?		
What will the employee's new name, title and preferred pronouns be and agree how this can be best communicated to people. Would phasing be appropriate? Would the employee like to tell colleagues or for them to be informed on their behalf?		
When will the employee present themselves in their self-identified gender (consider if some time off work is needed once people have been informed and before the employee wishes to present themselves in their self-identified gender or consider phasing)		
Discuss how best to communicate the transition to colleagues/others. Who will do this and how. Also consider agreeing a targeted list of people who might need to be aware of the transition		
Submit a statement of intent to transition form or update MyView to ensure HR records are updated (and documents are stored/discarded correctly)		
Ensure all necessary changes are made on University systems		
Consider any dress code/uniform changes		
Consider what toilet and/or changing facilities will be used and from when (will it be appropriate to communicate these changes to colleagues)		
Consider if any training will be needed for the team and how this should be delivered		

Appendix 3

Statement of intent to transition

Completion of this form is optional for employees who intend to change their name, gender, title and pronouns and want to inform the University HR Department to enable HR records to be updated. Employees might prefer instead to update their MyView record. [NB if employees are making changes to their first name via MyView, HR will make contact with the employee to ensure these changes are intentional and to establish whether the changes are being made in connection with a transition].

Our commitment to equality

Creating an inclusive environment for our staff, which is not only free from discrimination, but celebrates and values diversity both reflects and is fundamental to achieving our goals. The University will treat all employees with respect, and seek to provide a positive working and learning environment free from discrimination, harassment or victimisation. We recognise our legal responsibility to protect the rights of trans staff and to ensure that no individual is subject to discrimination or victimisation because of their gender identity.

I wish to notify the University of Nottingham that (please tick as appropriate):

- I have already transitioned to my self-defined or legally recognised gender and wish to ensure that I can go about my day-to-day life in my self-identified or legally recognised gender with ease; or
- I intend to transition to my self-defined gender and wish to ensure that I can go about my day-to-day life in my self-identified or legally recognised gender with ease.

I ask that the HR Department make the changes below to my University HR records and will work with my line manager to update all other key University IT systems.

Current title:	Change of title:
Current name (first and surname):	Change of name (first and surname):
Gender identity:	
Preferred Pronouns:	
Change to legal sex: Y/N	
(NB: legal sex can only be changed with a GRC. The University will ask to see a birth certificate or passport before making this change on any University system)	
Date you wish for the change(s) to be effective from:	
I have established a key contact within the University: Y/N	

Signed: **Date:**

Please return this form to HR@nottingham.ac.uk or the established HR contact. This form will be stored or discarded in line with the Gender Recognition Act and GDPR requirements.

Appendix 4

List of University IT Systems

Support will be provided by managers to help employees change and update all University IT systems. The following list of IT systems has been provided as a guide, but is by no means an exhaustive list. It is important to note that Schools/Departments often use different systems.

- Staff username eg pazham@nottingham.ac.uk - can be changed by emailing the IT Service desk (itservicedesk@nottingham.ac.uk)
- Staff HR record (which will pull through to also change your email address) – email: HR@nottingham.ac.uk
- University ID card (there is no charge for this) – email: universitycard@nottingham.ac.uk
- University short courses system – change manually at: <https://training.nottingham.ac.uk/cbs-notts/RegisteredGuest/changepassword.aspx>
- Concur – change manually at: <https://www.concursolutions.com/default.asp>
- Business World – email Application Support at: applicationsupport@nottingham.ac.uk
- e-staff profile – change manually at: <https://estaffprofile.nottingham.ac.uk/Account/Login?ReturnUrl=%2f>
- Student records system login, email: is-saturn-support@nottingham.ac.uk) and references to academic staff on student records system
- IMAT
- Barclaycard (University credit card)
- Academic bibliographies
- Personal tutor system (School dependent)
- School advertising materials – brochures, web site (contact marketing representative)
- Committee minutes and records, including references on workspace (contact Chairs and Secretaries)
- University Twitter/Facebook etc (if you used your full email address to sign up)
- Course handbooks
- Office door names
- Email signatures of colleagues and automated team email messages

Other work-related places the employee may need to consider:

- Trade union membership
- Professional/learned body membership cards
- Counselling Service
- Cripps Health Centre/Cripps Dentist/University nursery
- Banking details (to tie with payroll change)
- Pension

Appendix 5

Planning your transition – things to think about

The following information might be helpful for employees to consider what they wish to discuss and share with their line manager/key contact before devising a personal support plan.

- Do you plan to change your name or personal details, such as title?
- If you have any planned medical or non-medical appointments, can you indicate when these are and if any support in the workplace will be needed post appointment?
- Do you intend to identify/present in a new gender? If so, from when?
- What pronouns would you like colleagues/others to use and from when?
- Are there any adjustments that you think may be required to enable you to continue in your current role?
- Are there supportive arrangements and reasonable adjustments you feel might be helpful at various stages of the transition?
- What amendments to records and systems (if any) will be required and when?
- When would you like to inform relevant people?
- Would you like to inform others in person or would you like this to be done by someone else such as your key contact?
- If you would like your key contact to inform others, should this be done via email or face-to-face?
- Do you feel training or briefing of colleagues or service users will be required/necessary? If so, when would you like this to happen and do you have a view on who should deliver this?
- If you require emotional support for your transition, please provide details of what you would like the University to do and when, if applicable (ie counselling, referral to Occupational Health, signpost to the LGBTQ+ Staff Network).

Appendix 6

Further information and sources of support*

The Beaumont Society is the largest support group in the UK. Through its work, it promotes better understanding of the conditions of trans, transvestism and gender dysphoria (www.beaumontsociety.org.uk).

Beyond the Binary is a magazine for UK non-binary people (www.beyondthebinary.co.uk).

Depend is an organisation that offers free, confidential and non-judgmental advice, information and support to all family members, partners, spouses and friends of trans people (www.depend.org.uk).

Equality and Human Rights Commission is the statutory body responsible for protecting, enforcing and promoting equality across nine protected characteristics – age, disability, gender, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion and belief, and sexual orientation (www.equalityhumanrights.com).

The Forum: for sexual orientation and gender identity equality in post-school education promotes equality and good practice in employment and the provision of post-school education, with a specific focus on sexual orientation and gender identity, or trans, equality issues (<https://sgforum.org.uk>).

Gender Identity Research and Education Society initiates, promotes and supports research, particularly to address the needs of people who have a strong and ongoing desire to live and be accepted in the gender in which they identify, although different from that assigned at birth (www.gires.org.uk).

Gendered Intelligence is an organisation which provides support, training and resources for all those who work with and support trans people as employees, colleagues, students, pupils or clients; youth groups, activities and support for young trans people up to the age of 25; and works extensively in schools, colleges and universities with both staff and students offering mentoring, workshops and training (www.genderedintelligence.co.uk).

The Gender Trust is recognised as an authoritative centre for professional people who encounter gender identity-related issues in the course of their work. In particular, this group includes employers, human resources officers, health workers and information services. National helpline: 0845 231 0505 (www.gendertrust.org.uk).

Mermaids UK provides support and information for children and teenagers who are trying to cope with gender identity issues, and for their families and carers (www.mermaidsuk.org.uk).

National LGBT Hate Crime Partnership brings together 35 LGBT organisations from across England, Wales and Scotland and is led by the LGBT consortium on behalf of the EHRC. It aims to increase the reporting of homophobic, biphobic and transphobic hate crimes and incidents and improve the support available to those targeted (www.lgbthatecrime.org.uk).

NHS Choices covers trans health issues (www.nhs.uk/livewell/transhealth).

Nonbinary inclusion project is a grassroots organisation fighting for the inclusion and recognition of non-binary people in law, media and everyday life within the UK (<http://nonbinary.co.uk>).

Notts Trans Hub is a web page bringing together trans-friendly Nottingham-based groups and events (<https://nottstranshub.wordpress.com/trans-friendly-groups-events/>). Contact via nottstranshub@yahoo.co.uk.

Press for Change is a political lobbying and educational organisation that campaigns to achieve equal civil rights and liberties for all trans people in the UK through legislation and social change (www.pfc.org.uk).

Scottish Transgender Alliance is a project funded by the Scottish government Equality Unit to assist trans people, service providers, employers and equality organisations to engage together to improve gender identity and gender reassignment equality, rights and inclusion in Scotland (www.scottishtrans.org).

Stonewall is a campaigning organisation, but also helps organisations including HEIs and colleges to recognise the benefits of the perspectives of lesbian, gay, bi and trans people for all employees, service users and members of the community. They have published a series of publications on trans employees (www.stonewall.org.uk).

Transformation provide advice for trans and non-binary staff at work (www.transformationuk.com).

Transbareall works to help people accept their bodies and live more fulfilling lives (www.transbareall.co.uk).

Transgender Zone is an online resource that covers all aspects of trans issues, including a section specifically for female-to-male trans people (www.transgenderzone.com).

TranzWiki is a directory of the groups campaigning for, supporting or assisting trans and gender non-conforming individuals, including those who are non-binary and non-gender, as well as their families across the UK (www.transwiki.net).

** Please note that the resources suggested in this section are not affiliated with the University of Nottingham and have not contributed to the development of this guidance – they are suggested solely as potential sources of further support and employees do not need to contact any external organisation in order to receive support at work.*