

# Gender Identity & Trans Inclusion Policy

People Services



PUBLIC

Policy Review Due:	August 2027	Policy Version:	1.2
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## 1. Purpose

Riverside is committed to supporting and promoting equality, diversity and inclusion (ED&I). We are committed to treating all colleagues fairly and with dignity and respect.

This policy sets out how we will support trans and non-binary colleagues to be their authentic self in the workplace. It also includes support for colleagues who may be considering or are currently transitioning their gender identity. Finally, we demonstrate our commitment to applicants during and after the recruitment process.

TRG has a zero tolerance policy towards discriminatory language or actions that could cause a hostile environment. We do not accept behaviour that would constitute harassment or the exclusion of any individual. We will actively challenge and report any transphobia within our business and will take disciplinary action (up to and including dismissal) against those who breach our Equality, Diversity and Inclusion Policy and our Dignity at Work Policy.

Riverside acknowledge that in the Equality Act 2010 there is no hierarchy among protected characteristics; one protected characteristic is not more important than another. One person's protected characteristic must not be used to discriminate against another person because of that person's protected characteristic.

We want to provide an inclusive, welcoming and supportive workplace, where a trans or non-binary colleague feels safe and supported. This commitment is led from the Board and senior management team level through to line managers and all other colleagues.

Riverside is committed to promoting trans equality and will demonstrate this through:

- Ensuring that all training courses that are delivered are fully inclusive of trans people – this includes both face-to-face training and e-learning
- Ensuring that all forms and surveys are inclusive of trans people, including non-binary people for both colleagues and clients
- Including trans equality as a core part of the organisation's equality agenda and objectives
- Investigating fully all complaints of harassment, victimisation or discrimination on the grounds of gender identity, gender history, transitioning or gender expression
- Encourage colleagues to share their preferred pronouns and include these in their email signatures
- Establish and facilitate a staff groups and peer support networks through Pride
- Monitoring the implementation of this policy.

This policy has been developed and consulted on with the support of Unite, Stonewall and Pride. Pride is our LGBTQ+ colleague group which offers confidential support and guidance for colleagues and managers. You find more information about Pride on their RIC page..



PUBLIC

Policy Review Due:	August 2027	Policy Version:	1.2
--------------------	-------------	-----------------	-----

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We also understand that some of our trans colleagues may have an intersectional identity so may feel more comfortable engaging with our EMpower (BAME Colleagues) or EnAble (disabled colleagues) groups for further information and support.

## 2. Scope

This Policy applies to all Riverside colleagues including relief and agency colleagues.

## 3. Definitions & Legislation

Trans is an umbrella term to describe people whose gender is not the same as, or does not align 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, crossdresser, genderless, agender, nongender, third gender, bi-gender, trans man, trans woman, trans masculine, trans feminine and neutrois.

'Trans' or 'transgender' describes people whose gender identity differs from their sex assigned at birth. They are umbrella terms covering people who:

- are intending to undergo, are undergoing, or have undergone gender reassignment at any stage;
- identify as having a gender different from that which they were assigned at birth and are planning or have had medical interventions such as hormone replacement therapy or surgery;
- identify as having a gender different from that which they were assigned at birth, but who are not planning any medical intervention;

### **Non-Binary, Non-gender, Gender-Fluid and Intersex (Differences of Sex Development) Individuals**

Non-binary is an umbrella term for people whose gender identity doesn't align with 'man' or 'woman'. Non-binary identities are varied and can include people who identify with some aspects of binary identities, while others reject them entirely.

They may or not have medical interventions to align their body with their non-binary gender identity. Intersex is not a gender identity. It is a physical condition that affects up to 2% of the population, with many people being unaware that they are intersex.

### **Transitioning**

'Transitioning' is the process undertaken by a trans person in order to bring their gender presentation into alignment with their gender identity. This often involves dressing in line with their gender, changing their name and pronouns (e.g. she/her, he/him or they/them) and



PUBLIC

Policy Review Due:	August 2027	Policy Version:	1.2
--------------------	-------------	-----------------	-----

A charitable Registered Society under the Co-operative and Community Benefit Societies Act 2014

updating official documentation. It may involve various types of medical or surgical treatment, although this is not the case for all trans people.

Riverside recognises that the journey through transition is different for everyone and we are committed to supporting each individual in their decisions.

Please see the glossary ([Appendix A](#)) for further information.

This policy ensures our we are protecting our trans colleagues in line with the relevant legislation including

- The Equality Act 2010
- The Gender Recognition Act 2004
- The Human Rights Act 1998

Please see [Appendix B](#) for further information on legislation protecting trans colleagues.

#### 4. Support & Transitioning at Work

Riverside want all colleagues to feel they can be their authentic self every day at work. It is the responsibility of all managers and colleagues to create a caring, open and trusting environment which is key to ensuring all colleagues feel safe, supported and welcome in the workplace.

Our support is available to all trans / non- binary colleagues. When they feel comfortable to do so, trans / non- binary colleagues are encouraged to have a conversation with their manager about how we can support them in the workplace or throughout their journey.

When a colleague is transitioning they may find it helpful to agree a Programme of Support plan in conversation with their manager - [See Appendix C.](#)

Where an individual's gender identity is fluid, this will not affect their access to facilities and support, which can be decided by the individual based on their own sense of gender identity at that time.

We recognise that transition is a very personal process and is individual to each person. We will work with transitioning colleagues to ensure that support is tailored to meet their individual needs.

If a colleague does not feel comfortable discussing their transition with their manager they can approach People Services and a People Advisor can provide advice, support and options,

Our staff Group Pride are also available to support colleagues and managers throughout this time.

#### Updating Personal Records and ID cards



PUBLIC

Policy Review Due:	August 2027	Policy Version:	1.2
--------------------	-------------	-----------------	-----

A charitable Registered Society under the Co-operative and Community Benefit Societies Act 2014

Riverside want to ensure that being yourself in our workplace is an easy process and will not require evidence to make to their Riverside ID such as personal records, ID badge, email etc. Information on how to change these is outlined below.

Colleagues or their manager can change names and personal records by:

- Submitting a service request to People Hub
- Contacting our Facilities Team with a name and photo to request a new ID badge. Non-Binary colleagues are able to hold more than one name badge.
- Submit a change request form on the IT service page for the email and RIC directory to be updated. Colleagues can submit a colleague photo for their RIC directory photo.

Where a colleague wishes to change their payroll record they will need to ensure their HMRC record is updated; this must be done via their Government Gateway account on GOV.UK. This will then be reflected in payroll records.

We will always ensure as far as possible, that our systems allow colleagues to use the gender neutral title, Mx, to accommodate colleagues who identify as non-binary or do not wish to be identified by their gender.

### **Dress Codes and Uniforms**

TRG supports colleagues in wearing clothing that affirms their gender identity and gender expression. Where a uniform is part of their role, managers will ensure that trans colleagues have access to the uniform in which they feel most comfortable and where applicable, order new uniforms as part of their Programme of Support.

### **Changing facilities, toilets and other facilities**

Trans colleagues are entitled to use facilities – such as changing rooms and toilets – according to the gender with which they identify. Depending on a trans colleague’s journey, this may be from the point they start to live in their affirmed gender, however this it is about when they feel comfortable. Trans colleagues do not need to use accessible (disabled) toilets unless they wish to do so. Non-binary colleagues may wish to use a combination of different facilities.

### **Sharing Your Authentic You**

We understand that colleagues may only feel comfortable sharing their journey with their manager or select colleagues in the early stages. If this is their preference, we will do all we can to ensure confidentiality. . However, when developing the programme of support, trans colleagues may want to consider what they would like to share with team members, other colleagues and other relevant contacts, customers, external stakeholders and when.

This can be done at the colleagues’ own pace and and we will never put pressure on colleagues to do this. . Colleagues can also agree whether they would prefer to do this themselves, provide a pre prepared form of words or ask their manager or a work colleague to do this, or a mixture of these options.

Managers will also get express written agreement from the colleague about when and how



PUBLIC

Policy Review Due:	August 2027	Policy Version:	1.2
--------------------	-------------	-----------------	-----

**A charitable Registered Society under the Co-operative and Community Benefit Societies Act 2014**

this will happen, including the details of the message and who it will be shared with. Levels of disclosure may vary in detail for different types of contacts and will be agreed in advance.

### **Redeployment**

We hope that with the right support and ensuring smooth transitioning, trans colleagues will feel they are confident in continuing in their existing role. However, we understand that every journey is different and colleagues may feel that they would benefit from a move to another role during their transition. A move can be considered on either a temporary or permanent basis but this cannot be guaranteed and will depend the availability of a suitable role. Where a colleague feels that they would like to explore redeployment they should discuss this initially with their line manager who in turn will discuss the options available with the People Advice Lead. Any request for redeployment should be initiated by the colleague, a manager must not insist on redeployment if this is not the colleague's wish.

A small number of roles within Riverside have Genuine Occupational Requirement (GOR) meaning they can only be carried out by a colleague of a specified gender. If a transitioning colleague works in a role that has a GOR and they were appointed to this role prior to their transition, they will be unable to continue in this role once they have begun to live in their affirmed gender. This is because they will no longer comply with the GOR for their role. If this situation arises, the option of redeployment will be explored and efforts made to place the colleague in a suitable alternative role. Advice from People Services should always be sought in these circumstances.

### **Time off for appointments and during Transition**

Riverside understands that every colleague's gender identity journey will be different and the treatment and support required can last anything from a few months to years. Similarly the timescale for someone undergoing gender reassignment will be different in each situation and could vary quite significantly. It is important that regardless of the length of time, managers and colleagues understand that support is available throughout. We will endeavour to take all reasonable steps to accommodate trans colleagues when they require time away from work as part of their journey.

Where a trans colleagues has medical appointments relating to their transition these will usually be paid if they occur in working time. We ask, if possible for colleagues to arrange appointments at the beginning or end of the day or make use of hybrid working arrangements if this is available to them. However we understand that colleagues may have to travel a long distance for appointments, and these may be given at short notice. Managers will be as flexible as possible to accommodate colleagues need to reduced hours or duties, or other changes to usual working arrangements, for a temporary period following some treatments. Please see the Sickness Absence Policy for more information.

Riverside recognises that periods of absence may arise due to medical treatment/procedures or as a result of potential impact on a colleague's mental health. The Sickness Absence Policy.



PUBLIC

Policy Review Due:	August 2027	Policy Version:	1.2
--------------------	-------------	-----------------	-----

**A charitable Registered Society under the Co-operative and Community Benefit Societies Act 2014**

This policy will not be applied in a way that would subject trans colleagues to less favourable treatment than a non-trans colleague. In addition, normal sickness absence rules and entitlements will apply during this period.

Where an absence is due to a medical or surgical procedure related to their transition, the colleague should give as much notice of their intended absence as possible to their manager. This allows the manager to plan for the absence and take steps to minimise any impact on the organisation and provide the most appropriate support to the colleague.

A colleague should report their absence in accordance with the Sickness Absence Policy . Where a Fit note is required to certify the colleague's absence, there is no requirement to provide details of the procedures that have taken place. A return to work interview will take place upon the colleague's return and if practical, adjustments will be made to support the colleague and to help them complete their duties. With the colleague's consent the manager may wish to obtain an occupational health assessment to help facilitate their return to work.

## 5. Recruitment & Employment Records

Colleagues or applicants who have already transitioned have no obligation to disclose their gender history. Job applicants and interviewees will not be asked their gender identity during the recruitment process as this is not a relevant criterion in selection, neither is there any obligation for a trans person to disclose this as a condition of employment, save for exceptional circumstance where there is genuine occupational requirement.

If a colleague chooses to disclose their gender identity, this will not be used as a reason to not make an offer of employment. Similarly non-disclosure or subsequent disclosure will never be used as grounds for dismissal. Recruiting Managers who become aware that an applicant is trans will maintain full confidentiality in relation to this.

Where questions are asked relating to a candidate's diversity data during the recruitment process this will be recorded and held separately to the application. The information provided will be obtained anonymously and only be used to inform Riverside's EDI data.

### References

Where a reference request is received for an existing colleague who has transitioned, Riverside will respect the colleague's privacy and only respond using the colleague's correct name and gender in the reference. This information is strictly confidential and managers must be very careful of any record keeping in this. When Riverside requests a reference, we will make the request using the prospective colleague's correct name and gender since transitioning. We will not mention previous names or gender identity, unless specifically asked to do so (in writing) by the trans person.

### Criminal record checks/disclosure and barring

If a trans applicant has to complete a DBS check, the DBS offers a confidential checking service which complies with the Gender Recognition Act 2004. This gives the applicant the choice as to whether they give consent for their previous gender to be disclosed on their DBS



PUBLIC

Policy Review Due:	August 2027	Policy Version:	1.2
--------------------	-------------	-----------------	-----

A charitable Registered Society under the Co-operative and Community Benefit Societies Act 2014

disclosure. The applicant can also choose to communicate with the DBS via a third party if they would feel more comfortable.

### **Qualification certificates**

Riverside recognises that it can be difficult and expensive for a trans applicant to change their qualification certificates. If these are in a former name then where possible, a record will be made that the certification has been seen, but a copy will not be taken. If it is absolutely necessary for Riverside to store a copy, they will be stored securely and only accessed by named persons.

### **Professional registration**

If the applicant's job involves professional registration, we will check whether the registration body has a specific, confidential process for gender transition.

### **Pensions & Insurance**

Where pensions, national insurance contributions or other benefits are dependent on legal sex, trans colleagues will be advised of the different implications of whether they do or do not have a Gender Recognition Certificate.

#### **Insurance**

An employer is advised to inform their underwriters, in strict confidence, if they know of a trans colleague's history, when registering them for insurance and benefits, because some insurers automatically invalidate a policy if a major fact such as gender reassignment is not disclosed.

The transitioning colleague must be told that this is going to happen. If the employer is unaware that a colleague has undergone transition, the colleague must disclose their trans history because they could be liable, if they were involved in an accident at work, and their insurance was not valid.

Therefore, the insurer's policy in this matter must always be made clear to all colleagues, because it may not be known that a person has a trans history. Once this information is known, the process for entering it into the insurance policy must not be visible to others, and the people who now have that information must keep it completely confidential.

In each case this will be dealt with in the strictest confidence. Please contact People Services Reward Team for more information.

#### **Pensions**

When considering state pensions, trans colleagues are recognised as the sex recorded at birth until they have obtained a new birth certificate under the provisions of the Gender Recognition Act 2004. A colleague should be advised to take professional advice concerning pension implications, their rights and the status of their pension. The [Pensions Advisory Service](#) provides free and impartial advice in relation to pensions.



PUBLIC

Policy Review Due:	August 2027	Policy Version:	1.2
--------------------	-------------	-----------------	-----

**A charitable Registered Society under the Co-operative and Community Benefit Societies Act 2014**



## 6. Confidentiality

We understand that gender identity and transitioning can be a very personal and sensitive subject for trans colleagues to share. We want to assure all trans colleagues that the protection of your data is paramount to us.

We will ensure that records showing the colleague's previous names, titles and pronouns, which appear in old documents, cannot be seen, except for the small number of named persons in the People Services Team who are required to see them.

Paper records will be updated where possible. Those which cannot be updated – for instance, paper copies of references relating to the colleague's recruitment – will be stored in a secure place, and clearly marked as only to be looked at by named persons.

In some cases, it may be necessary to keep records relating to the sex that was registered on the colleague's birth certificate, for example, for insurance purposes.

Riverside will ensure that any information arising from these checks will be restricted to the colleagues whose specific duties are involved. They need to understand the importance of confidentiality and that any breach of the colleague's privacy is a serious disciplinary offence up to and including dismissal.

Under Section 22 of the Gender Recognition Act 2004, it is illegal for colleagues to share information about another colleague's trans status, unless there is a specific agreement to do so by the colleague. If it is deemed to be necessary to know a person's trans status, the colleague should provide his or her permission in writing.

## 7. Support for Colleagues with a Trans Family Member

If a colleague is supporting a family member who is transitioning, they may need to take time off to attend appointments and treatment or give assistance following surgical procedures. Some of these may be at short notice, and may involve travelling a long distance. Where possible managers will be flexible in accommodating requests for leave and flexible working during this period.

## 8. Further Information & Support

Colleagues are reminded that they can gain advice and support, including counselling, at any time through the Colleague Assistance Programme provided by AXA. Colleagues can call AXA 24/7/365 on **0800 072 7 072** or visit <https://axabesupported.co.uk/>

Other related policies and supporting Guidance

- [Equality, Diversity & Inclusion Policy](#)
- [Dignity at Work Policy](#)
- [Dignity at Work – Guidance for Managers](#)
- [Dignity at Work- Guidance for Colleagues](#)
- Dress Code



PUBLIC

Policy Review Due:	August 2027	Policy Version:	1.2
--------------------	-------------	-----------------	-----

A charitable Registered Society under the Co-operative and Community Benefit Societies Act 2014



Pride is our LGBTQ+ colleague group which offers confidential support and guidance for colleagues and managers. You can search for them on Workplace and the RIC.

### Clear it Out, Call it Out

If you have experienced or witnessed any transphobic discrimination you can email our Call it out, clear it out inbox – [callitout@riverside.org.uk](mailto:callitout@riverside.org.uk) to report the incident. Your email, which can be anonymous if you wish, will only be seen by a handful of specially trained People Services colleagues who will investigate your claims and aim to resolve any issues swiftly.

### External Agencies

- **Stonewall** [Directory of LGBTQ+ services and support groups](#)
- **Switchboard-** [LGBTQ+ Helpline](#) 0300 300 0630
- **Trans Unite-** Access over 100 verified [UK Trans support groups](#) and locate one close to you. Detailed profiles offer specific information on the scope of support provided, meeting schedules and contact information.
- National Bullying Helpline – 0845 22 55 787
- Victim Support Helpline- 0808 16 89 111

## 9. Roles and Responsibilities



PUBLIC

Policy Review Due:	August 2027	Policy Version:	1.2
--------------------	-------------	-----------------	-----

A charitable Registered Society under the Co-operative and Community Benefit Societies Act 2014

## Colleagues

- informing their line manager when they would like support with their gender identity

## Managers

- Creating a supportive and welcoming environment where colleagues feel safe at work.
- Supporting colleagues who come to them for support in their gender identity and completing agreed actions within timescales.

## People Services

- Supporting colleagues and managers throughout the trans Journey
- Providing policy and guidance to support trans colleagues
- Providing mandatory equality training for all colleagues
- Encouraging a culture of safe, welcoming working environments.

### 10. Risk Thresholds

Reported grievances and disciplinary cases and outcomes relating to bullying, harassment, victimisation, discrimination and hate crime are recorded and reported through the People Management Information Dashboards. The report is categorised by each area of the business and monitors protected characteristics. The report does not include any data which could identify individual colleagues. This is shared quarterly with Executive Directors. This protects TRG by ensuring any trends are identified early and that formal procedures are instigated with in a timely manner.

### 11. Equality, Diversity and Inclusion

Riverside is committed to Equality, Diversity & Inclusion. We strive to be fair in our dealings with all people, communities and organisations, taking into account the diverse nature of their culture and background and actively promoting inclusion. This policy aligns with Riverside's [Equality, Diversity and Inclusion Policy](#) and has been subject to an Equality Impact Assessment.



PUBLIC

Policy Review Due:	August 2027	Policy Version:	1.2
--------------------	-------------	-----------------	-----

A charitable Registered Society under the Co-operative and Community Benefit Societies Act 2014

## Appendix A– Glossary

Our Glossary is an abstract from Stonewall. We understand that language can evolve quickly, especially around trans issues and will endeavour to update this appendix accordingly.

### **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,

### **COMING OUT**

When a person first tells someone/others about their orientation and/or gender identity.

### **DEADNAMING**

Calling someone by their birth name after they have changed their name. This term is often associated with trans people who have changed their name as part of their transition. Deadnaming is a form of bullying / harassment.

### **DIFFERENCES IN SEX DEVELOPMENT (DSD)**

Differences in sex development is a group of rare conditions involving genes. Hormones and reproductive organs, including genitals. It means a person's sex development is different to other peoples. Some adults and young people with DSD may also use the term intersex.

### **GENDER**

Often expressed in terms of masculinity and femininity, gender is largely culturally determined and is assumed from the sex assigned at birth.

### **GENDER DYSPHORIA**

Used to describe 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 doesn't feel comfortable with the sex they were assigned at birth.

### **GENDER EXPRESSION**

How a person chooses to outwardly express their gender, within the context of societal expectations of gender. A person who does not conform to societal expectations of gender may not, however, identify as trans.

### **GENDER IDENTITY**

A person's innate sense of their own gender, whether male, female or something else (see non-binary below), which may or may not correspond to the sex assigned at birth.

### **GENDER REASSIGNMENT**

Another way of describing a person's transition. To undergo gender reassignment usually means to undergo some sort of medical intervention, but it can also mean changing names, pronouns, dressing differently and living in their self-identified gender. Gender reassignment is a characteristic that is protected by the Equality Act 2010, and it is further interpreted in the Equality Act 2010 approved code of practice. It is a term of much contention and is one that Stonewall's Trans Advisory Group feels should be reviewed.

### **GENDER RECOGNITION CERTIFICATE (GRC)**



PUBLIC

Policy Review Due:	August 2027	Policy Version:	1.2
--------------------	-------------	-----------------	-----

A charitable Registered Society under the Co-operative and Community Benefit Societies Act 2014

This enables trans people to be legally recognised in their affirmed gender and to be issued with a new birth certificate. Not all trans people will apply for a GRC and you currently have to be over 18 to apply. You do not need a GRC to change your gender markers at work or to legally change your gender on other documents such as your passport.

### **INTERSEX**

A term used to describe a person who may have primary sex characteristics of both or neither male or female and do not fit with societal assumptions about what constitutes male or female. Intersex people may identify as male, female or non-binary. See Above DSD also.

### **LGBTQ+**

The acronym for lesbian, gay, bi, trans, queer, questioning and ace.

### **NON-BINARY**

An umbrella term for people whose gender identity doesn't sit comfortably with 'man' or 'woman'. Non-binary identities are varied and can include people who identify with some aspects of binary identities, while others reject them entirely.

### **OUTED**

When a lesbian, gay, bi or trans person's sexual orientation or gender identity is disclosed to someone else without their consent.

### **PERSON WITH A TRANS HISTORY**

Someone who identifies as male or female or a man or woman, but was assigned a different sex at birth. This is increasingly used by people to acknowledge a trans past.

### **PASSING**

If someone is regarded, at a glance, to be a cisgender man or cisgender woman. See cis gender above.

### **PRONOUN**

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

### **QUEER**

Queer is a term used by those wanting to reject specific labels of romantic orientation, sexual orientation and/or gender identity. It can also be a way of rejecting the perceived norms of the LGBT community (racism, sizeism, ableism etc). Although some LGBT people view the word as a slur, it was reclaimed in the late 80s by the queer community who have embraced it. It is not acceptable for use by non-queer people at present.

### **QUESTIONING**

The process of exploring your own sexual orientation and/or gender identity.

### **SEX**

Assigned to a person on the basis of primary sex characteristics (genitalia) and reproductive functions. Sometimes the terms 'sex' and 'gender' are used interchangeably to mean 'male' or 'female' or 'man'



PUBLIC

Policy Review Due:	August 2027	Policy Version:	1.2
--------------------	-------------	-----------------	-----

**A charitable Registered Society under the Co-operative and Community Benefit Societies Act 2014**

or 'woman'.

### **Spectrum**

A term used to cover a variety of identities that have a root commonality or shared experience

### **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, crossdresser, genderless, agender, nongender, third gender, bi-gender, trans man, trans woman, trans masculine, trans feminine and neutrois.

### **TRANSGENDER MAN**

A term used to describe someone who is assigned female at birth but identifies and lives as a man. This may be shortened to trans man, or FTM, an abbreviation for female-to-male.

### **TRANSGENDER WOMAN**

A term used to describe someone who is assigned male at birth but identifies and lives as a woman. This may be shortened to trans woman, or MTF, an abbreviation for male-to-female.

### **TRANSITIONING**

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

### **TRANSPHOBIA**

The fear or dislike of someone based on the fact they are trans, including denying their gender identity or refusing to accept it. Transphobia may be targeted at people who are, or who are perceived to be, trans.

### **TRANSSEXUAL**

This was used in the past as a more medical term (similarly to homosexual) to refer to someone whose gender is not the same as, or does not sit comfortably with, the sex they were assigned at birth. This term is still used by some although many people prefer the term trans or transgender.



PUBLIC

Policy Review Due:	August 2027	Policy Version:	1.2
--------------------	-------------	-----------------	-----

**A charitable Registered Society under the Co-operative and Community Benefit Societies Act 2014**

## Appendix B- Legislation

The Equality Act 2010 (England, Scotland and Wales) protects against discrimination because of gender reassignment in employment and service delivery. It bans direct and indirect discrimination and victimisation. The Act makes clear that it is not necessary for people to have any medical diagnosis or treatment to gain this protection; it is a personal process of moving away from the gender assigned at birth to the correct gender. People discriminated against because they are wrongly perceived to be trans, or who are discriminated against because of their association with trans people or issues, are also protected.

The Gender Recognition Act 2004 allows individuals who have undergone gender reassignment to obtain a Gender Recognition Certificate they are legally of that gender for every purpose and have all the rights and responsibilities associated with that gender

The Human Rights Act 1998 gives protection to everyone, including transgender people. Article 3 creates an absolute ban on degrading treatment and Article 8 requires trans and non-binary people to be treated with respect, dignity and fairness and to protect their privacy in family life. Under this legislation, if a colleague discovers, in the course of doing their job that a colleague has a trans history this information should be treated in the strictest confidence. A colleague that shares such information with another person, without obtaining the trans person's consent could be committing a criminal act. Additionally this could be grounds for disciplinary action under the Group's Disciplinary Policy.



PUBLIC

Policy Review Due:	August 2027	Policy Version:	1.2
--------------------	-------------	-----------------	-----

**A charitable Registered Society under the Co-operative and Community Benefit Societies Act 2014**

## Appendix C- Programme of Support for Colleague Document

**Managers** - Before beginning this discussion managers should ensure they have booked a private space (or are meeting online where they cannot be overheard) and have cleared enough time to have a meaningful conversation. Take time to listen to your colleague and don't make any assumptions about their journey or support they require. Please read our Trans Policy and manager's guidance before having this conversation. The People Services advice team can provide you and your team member with support throughout.

**Colleagues** - This is your plan and your journey, and we use this document to support you and we understand that you may not have the answers to all these questions, nor may you not want to answer some of them and you may have questions beyond this. When speaking with your manager please be open and know that you will be listened to and supported. Remember to take breaks if you need to during the discussion and come back to it in stages if you feel that would be more suitable.

Colleague Name:	Colleague Pronouns:
Identity (optional):	Stage of Transition (optional):
Does the colleague wish to remain in their current role during the transitioning process- If no, Seek advice from People Services and consider possible redeployment within the organisation (discuss redeployment) <b>Discussion / Actions Agreed:</b>	
Does manager need to make any temporary or permanent changes to the current role? For example, lone working arrangements, physical considerations, such as heavy lifting, if colleague is undergoing medical procedures <b>Discussion / Actions Agreed:</b>	
Is any time off required for medical treatment and recovery? Is there an expected timescale for the treatment? How will this be managed? Discuss sickness monitoring procedures, so colleague is fully aware of what will happen	



PUBLIC

Policy Review Due:	August 2027	Policy Version:	1.2
--------------------	-------------	-----------------	-----

A charitable Registered Society under the Co-operative and Community Benefit Societies Act 2014



**Discussion / Actions Agreed:**

Is the colleague comfortable with their transition being shared with colleagues/team mates? (noting the colleague may prefer to do this in stages rather than all at once or may not be ready to do this at all just yet)  
I yes does the colleague wish to inform their colleagues and teammates themselves or would they prefer this to be done by their manager? When would they like this to happen? How will this be managed? At a team meeting, in small groups, on a 1:1 basis?  
Would the colleague like to provide some wording to be shared?

**Discussion / Actions Agreed:**

Is there any guidance material which the colleague wishes to share with managers and colleagues?

**Discussion / Actions Agreed:**

Is the colleague comfortable with talking about their journey with others? (ie. open to a conversation, or questions, which may help to increase open conversations and reduce anxiety on both the person and others).

**Discussion / Actions Agreed:**

When does the colleague wish to start any agreed changes to support their transition?

**Discussion / Actions Agreed:**

When does the colleague wish to start working in their affirmed gender identity? Are there any implications for single sex working requirements?

**Discussion / Actions Agreed:**

Does the manager need to inform customers or partner organisations? How would the colleague like this to be done? Would they prefer to do it or would they like their manager to do this on their behalf?

**Discussion / Actions Agreed:**



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Policy Review Due:	August 2027	Policy Version:	1.2
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What amendments are required to organisation records and systems, such as ID badge, RIC, payroll and pension arrangements? Manager needs to ensure Data Protection requirements are met and that access to the colleague's records is restricted.  
**Discussion / Actions Agreed:**

Should the colleague encounter unacceptable behaviour towards them (colleagues or service users) who should this be reported to? How would they prefer this is dealt with? Share with the colleague the Dignity at Work Policy.  
**Discussion / Actions Agreed:**

Are there any other wellbeing or health and safety concerns the colleague would like to share?  
**Discussion / Actions Agreed:**

Is there anything else the colleague or manager would like to discuss/add to this action plan?  
**Discussion / Actions Agreed:**

Is there an agreed date for when this action plan will be disposed of?  
**Discussion / Actions Agreed:**

Point of Contacts:  
 Manager-  
 People Services-  
 Champion / Spectrum member



Informing Checklist			
	Who will tell them?	When?	Date completed
People Services			
Team members			
Other colleagues			



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Policy Review Due:	August 2027	Policy Version:	1.2
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Others (specify)			
<b>Changes to Records Checklist</b>			
	Who will do this?	When?	Date completed
People Services Records			
Name badge			
IT systems including email			
Website			
Internet/intranet address entry			
Union membership			
Pension scheme			
Other:			
Review Date:			
Colleague Signature:		Date:	
Manager Signature:		Date:	



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Policy Review Due:	August 2027	Policy Version:	1.2
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