**Appendix 3 - Action plan template**

Managers directory’ checklist to use in conjunction with an employee who is transitioning.

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| Have you read the Transgender guidance? |  |
| Have you sought support from HR?  For reasons of confidentiality, agree with the employee what information should be shared with the HR Business Partner. |  |
| Have you outlined the support available to the employee through:   * Occupational Health, Safety and Wellbeing Services? * Time Off Work? * Reasonable adjustments? |  |
| Have you spoken to the employee to gain an understanding of any concerns they may have regarding the transition process and any perceived impact on the workplace and their colleagues? |  |
| Have you agreed a planned approach, - led by the employee covering:   * updating records * agreeing any workplace adjustments * planning and agreeing leave for transitioning * agreeing approach to inform colleagues. * agreeing what facilities will be used. * agreeing first day arrangements? |  |

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| **Update records** | |
| Have you agreed with the employee who will update various records? |  |
| Have you agreed the date that personal records (title, first name, family name and gender) should be updated? The timing of record changes should be synchronised as far as possible. |  |
| If you are updating records, have you agreed with the employee what personal information should be shared with colleagues? |  |
| Have you or the employee updated the following records?   * HR and payroll – pre-existing staff number should be retained. * Email address – a new account is recommended. * IT systems * Circulation lists * Staff directories * Security pass * Pension record * Rotas * Name badges * Telephone directory   Records should be updated so that all current and future references pick up the employee’s new details and records pre-dating the transition are deleted as far as possible. |  |
| Have you identified departmental contacts in HR, payroll and IT in case of glitches? Your HR Business Partner will be able to help identify these contacts. |  |

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| **Workplace adjustments** | |
| Have you agreed any temporary or longer- term workplace adjustments?  For example:   * time off * change in role or duties. * risk assessment following surgery. * flexible working following facial hair treatment |  |

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| **Leave for transitioning** | |
| Have you agreed the expected time off required, to attend appointments or undertake treatments relating to gender reassignment, in line with the Authority’s [Time Off](https://intranet/our-people/hr/leave-and-absence/) policy? |  |

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| **Use of facilities** | |
| Have you discussed the Equality and Human Rights Commission’s (EHRC) interim [update](https://www.equalityhumanrights.com/media-centre/interim-update-practical-implications-uk-supreme-court-judgment) on the practical implications of the Supreme Court Judgement published 25 April 2025. |  |

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| **Informing colleagues** | |
| Have you agreed with the employee how and when colleagues will be told about the transition? This could be done on a one-to-one basis, in groups or by email. |  |
| Have you or the employee informed colleagues?   * what is going to happen and when? * what their responsibilities are? * how can they help and support the employee? * of the facts but not graphic detail? |  |
| If the employee has decided to inform colleagues themselves, have they told you when this will happen so you can provide support as required? |  |

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| **First day arrangements** | |
| Some employees will prefer to take a short break to prepare to return to work in the gender. Have you arranged for:   * a friend to meet the employee from reception and accompany them back to the workplace? * an appointment for a new security pass? * a one-to-one meeting with the employee to discuss on-going support? * new uniform to be provided as appropriate? |  |

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| **Handover to new manager** | |
| Have you spoken to the employee to agree what information should be shared with the new manager?  Have you set up a meeting for you, the employee and the new manager to discuss what has happened to date and what is planned in the future? Previous special leave / sickness absence should be covered to ensure they are accounted for accurately. |  |