**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?
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| 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?
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| 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. |  |