

Workplace Gender Transition Guidelines

O'Neill School of Public and Environmental Affairs *Indiana University Bloomington*

Executive Summary

The O'Neill School of Public and Environmental Affairs actively strives to cultivate diversity, equity, and inclusion. We aim to respect and elevate the voices of all community members, including those of all gender identities and gender expressions. We do not discriminate on the basis of gender identity or gender expression. We believe that providing a work environment based on respect, trust, and collaboration creates an exceptional employee experience where employees can bring their whole selves to work and thrive in their careers.

According to the Report of the National Transgender Discrimination Survey, “the vast majority (78%) of those who transitioned from one gender to another reported that they felt more comfortable at work and their job performance improved.”¹ At the same time, 15% of survey respondents reported harassment at work and 53% felt that they had to hide their gender identity in order to avoid anti-transgender discrimination at work.² However, having LGBTQ-supportive policies and workplace climates results in LGBTQ employees being more engaged in the workplace and more committed to their jobs.³ **Therefore, we establish these guidelines to ensure trans and/or gender nonconforming⁴ faculty and staff feel more fully included and safe in their job as they journey through their transition process.**

These guidelines are intended for **everyone at O'Neill**. They include:

- Best practices for the transitioning employee
- Best practices for supervisors and HR Director
- Best practices for addressing students
- Best practices for managing day-to-day situations in the workplace
- An explanation of terminology and a list of additional resources
- Guidance for coworkers

¹ Grant, Jaime M., Lisa A. Mottet, Justin Tanis, Jack Harrison, Jody L. Herman, and Mara Keisling. *Injustice at Every Turn: A Report of the National Transgender Discrimination Survey*. Washington: National Center for Transgender Equality and National Gay and Lesbian Task Force. (2011). Available at <https://www.hivlawandpolicy.org/resources/injustice-every-turn-a-report-national-transgender-discrimination-survey-jaime-m-grant>

² James, S. E., Herman, J. L., Rankin, S., Keisling, M., Mottet, L., & Anafi, M. *The Report of the 2015 U.S. Transgender Survey*. Washington, DC: National Center for Transgender Equality. Available at <http://www.ustranssurvey.org/reports>. (2016).

³ Badgett, M. V., Laura E. Durso, Christy Mallory, and Angeliki Kastanis. "The business impact of LGBT-supportive workplace policies." (2013).

⁴ We use the language adopted in The Trans and/or Gender Nonconforming Student Guide to Indiana University Bloomington, revised July 2018, published by the LGBTQ+ Cultural Center. “The goal of using language such as “trans and/or gender nonconforming” is to acknowledge people who identify anywhere on the vast spectrums of gender and sex, and all of their marvelous combinations and intersectionalities. This phrasing was also meant to include those who do not identify as having a gender, those who identify as having a fluid gender, those who identify as having multiple genders, and any combination therein. Using the phrase “and/or” in “trans and/or gender nonconforming” is meant to acknowledge and include people who identify under the diverse umbrella term of trans and identify as gender nonconforming as well those who identify as gender nonconforming, but not trans and vice versa.”

Introduction

These guidelines were developed over the course of the Fall 2018 semester in partnership between the O’Neill Human Resources Department, the O’Neill Office of Diversity, Equity, and Inclusion, and many generous individuals. The structure was initially adapted from the Human Rights Campaign “Template for Gender Transition Guidelines”⁵ as well as Yale University’s “A Guide to Gender Identity & Affirmation in the Workplace.”⁶ The language and format were then updated to reflect the O’Neill School’s workplace culture and values.

We recognize that as language continues to evolve, so will this document. These guidelines should be revisited every five years to ensure that the best practices and language provided best serve the entire O’Neill community.

We appreciate and recognize the following individuals for their contributions in reviewing and editing the guidelines:

Joshua Gilstein, Review Coordinator & Strategy Specialist Graduate Assistant, Office of the Dean

Jeanne Bailey Smith, Owner – Bikesmiths, Bloomington, IN

Elizabeth Bartelt, MPH, Research Coordinator, Center for Sexual Health Promotion

Doug Bauder, Director, LGBTQ+ Culture Center

Michael Block, Assistant Director, O’Neill Budget & Finance

Lauren Easterling, Director, Training Services, IU School of Medicine – Graduate Division

Anita Herbertz, Director of O’Neill Human Resources

Danielle Hernandez, Programming Assistant, LGBTQ+ Culture Center

Abby Jones, MSc, MSDA(c)

Michael McGuire, O’Neill Executive Associate Dean

Kand S McQueen, Ph.D., O’Neill Senior Lecturer

Brian Richardson, MS.Ed, O’Neill Director of Diversity, Equity, and Inclusion

Megan Starnes, O’Neill Director of Strategic Initiatives

Michael Wilkerson, O’Neill Senior Lecturer

⁵ Adapted from the Human Rights Campaign [Template for Gender Transition Guidelines](#), as part of the Transgender Inclusion in the Workplace Toolkit for Employers. The Human Rights Campaign (HRC) is the leading LGBT civil rights organization in the United States. More information is available at <https://www.hrc.org/campaigns/trans-toolkit>. HRC continues to grow in supporting the transgender community, and we therefore have consulted with experts and other sources to ensure the language used in this guide is affirming and inclusive.

⁶ “Guide to Gender Identity and Affirmation in the Workplace at Yale University.” Office of LGBTQ Resources. Yale University. Available at http://lgbtq.yale.edu/sites/default/files/guide_to_gender_identity_and_affirmation_in_the_workplace_at_yale_2016_0.pdf

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Indiana University Non-Discrimination/Equal Opportunity/Affirmative Action Policy

“Indiana University pledges itself to continue its commitment to the achievement of equal opportunity within the University and throughout American society as a whole. In this regard, Indiana University will recruit, hire, promote, educate, and provide services to persons based upon their individual qualifications. Indiana University prohibits discrimination on the basis of age, color, disability, ethnicity, sex, gender identity, gender expression, genetic information, marital status, national origin, race, religion, sexual orientation, or veteran status.

As required by Title IX of the Education Amendments of 1972, Indiana University does not discriminate on the basis of sex in its educational programs and activities, including employment and admission. Questions specific to Title IX may be referred to the Office for Civil Rights or the University Title IX Coordinator.

Indiana University shall take affirmative action, positive and extraordinary, to overcome the discriminatory effects of traditional policies and procedures with regard to the disabled, minorities, women, and veterans.”⁷

Indiana University and The O’Neill School follow this policy and also seek to go above and beyond what is required by law in protecting and supporting students, faculty, and staff.

About Gender Transition

While the majority of people are comfortable with and identify with the sex they are assigned at birth, there is a portion of the population who are not and do not. These people may or may not identify as transgender and/or gender non-conforming. They may, or may not, take steps to actively change their:

Physiology – which can include hormones or gender confirmation surgery – i.e. male-to-female or female-to-male

Expression – i.e. clothing, hairstyle, mannerisms, body language, voice – to better express and interact with the world as they truly are

The process a transgender and/or gender non-conforming person goes through to publicly change their gender presentation to affirm their gender identity is known as “transitioning.” Not everyone who considers themselves transgender and/or gender non-conforming will undergo a medical (or physiological) transition. Those that do may utilize all the steps available to them or only some of them. Gender transition is a personal process and it is important to note that there is no one way to transition. Often it comes with financial and structural barriers that may mean it takes longer for some people than for others.⁸

The person transitioning may make immediately visible changes during their transition such as altering their clothing and appearance to coincide with their gender identity and legally changing their name.⁹ There are other changes that individuals may make that will take much longer to be visible, including body alterations such as hormone replacement therapy, gender confirmation surgery, and/or other components.

It is important to realize that each person undergoing a transition will have their own set of circumstances which will require a customized plan. Remember that there is a vast spectrum of gender identity and expression and that gender transition encompasses more than transitions from male-to-female and female-to-male. It also includes individuals who are transitioning to gender non-binary, agender, and gender fluid, to name a few.

⁷ Indiana University Policy UA-01, last updated 27 June 2018. Available at <https://policies.iu.edu/policies/ua-01-equal-opportunity-affirmative-action/index.html>

⁸ Winter, S., Diamond, M., Green, J., Karasic, D., Reed, T., Whittle, S., & Wylie, K. Transgender people: health at the margins of society. *The Lancet* 38(10042), 390-400. Available at [https://doi.org/10.1016/S0140-6736\(16\)00683-8](https://doi.org/10.1016/S0140-6736(16)00683-8) (2016).

⁹ This document uses the singular they/them/their pronouns to refer to the transitioning individual.

Best Practices for the Transitioning Employee

If you are the transitioning individual, you have the right to openly be who you are. The O’Neill School is fully supportive of your right to express your gender identity, characteristics, or expression without fear of negative consequences.

In order to help facilitate making your workplace transition as successful as possible, one of the first steps is to inform key personnel who can assist you.

Your first point of contact may be:

- your immediate supervisor
- the Director of Human Resources
- the Director of O’Neill’s Office of Diversity, Equity, and Inclusion
- a member of Indiana University’s [Employee Assistance Program](#)
- the [LGBTQ+ Culture Center](#)¹⁰
- a trusted colleague or peer

Take the time to explain to that person your intentions, needs, and concerns. **It is important that at some point your immediate supervisor or HR Director becomes part of your support team.** The O’Neill School must be aware of your situation in order to provide support. By knowing the relevant details of your personal experience, O’Neill will be able to assist you more appropriately.

The O’Neill School is your partner in educating - you do not need to do it alone. The Human Resources Office and Office of Diversity, Equity, and Inclusion will help educate the O’Neill community about the gender transition process in general. The **Employee Assistance Program** may be able to assist you with specific questions you have. The **LGBTQ+ Culture Center** can also help you think through your ideas and prepare for those discussions.

You can access the **LGBTQ+ Culture Center** by emailing gltbtserv@indiana.edu or by calling 812-855-4252. You may feel free to reach out directly to the current Director, Doug Bauder, at dbauder@indiana.edu.

Remember, as with all employees, you are covered under **Indiana University’s** non-discrimination policy, and that O’Neill is here to support you throughout your transitioning process.

¹⁰ The LGBTQ+ Culture Center primarily supports IU students and welcomes appointments from all. They offer free counseling, support groups, and programming for LGBTQ+ individuals at IU.

Best Practices for Supervisors and HR Director

The O’Neill School is committed to and supports diversity, equity, and inclusion. Your support is critical if someone who reports to you informs you of their desire to transition or if a person in your workplace is currently in the transition process. Both the decision to transition, and the events leading up to that decision, can be quite profound. Your support can help ease any anxiety related to the workplace and transitioning at work.

Key Principles

- If you are unfamiliar or uncomfortable with the transition process, first do your own research using the resources at the end of this guide and online to educate yourself. Additional education and support are available from the **LGBTQ+ Culture Center**.
- **Listen carefully to what the individual is telling you about how they would like to be treated and what the workplace transition process should look like for them.** For example, do they want to keep their transition as quiet as possible or do they wish to celebrate publicly? How and when do they want to notify coworkers and students?
- **Respect** and discuss the transitioning person’s needs and concerns.
- If you oversee, manage, or lead an employee who is transitioning, it is important that you **show empathy and use a sensitive approach** to their needs and concerns.
- If useful, **share success stories** from other O’Neill experiences with transgender and/or gender non-conforming employees transitioning on the job.
- **Provide support:** Share this guide with them and the resources cited throughout the document.
- **Remember** that you are working with someone who has most likely had to navigate a difficult path concerning “sex” and “gender.”

Based on past experiences of bias, a transgender and/or gender non-conforming employee may be understandably reluctant to disclose and make themselves vulnerable to a person upon whom their job depends. It is important that you make it clear that your conversation will be held in confidence and assure them that both they and their employment are safe.¹¹ If you are the supervisor, **ask their permission** to talk to the HR Director for further assistance.

- **Explain any questions and concerns you might have** and ask their opinion on matters covered in subsequent sections.
- Once the employee has made contact with someone in the HR department, the HR Director will work with the employee to **gather key information to inform the planning steps** of workplace transition.

The HR Director needs to know when the transitioning employee expects to start presenting themselves in their affirmed gender. The employee may also have an idea about when they need to take time off for medical needs if they are pursuing a medical transition. The employee will work with HR to discuss a date or timeframe for this process. These dates can change, depending on a multitude of factors, such as provider availability, insurance issues, cost, and emotional readiness. It is important to be understanding and flexible and to work collaboratively with the individual.

¹¹ Both the City of Bloomington and Monroe County have non-discrimination ordinances prohibiting employment discrimination on the basis of gender identity and expression. More information can be found at <https://www.freedomforallamericans.org/category/states/in/>

Workplace Transition Support and Planning

The information on workplace transition support outlined below is intended **to give an example process but not to prescribe the process for any one individual**. Each employee's plan **will be individualized** and will vary in many aspects, as there is no one path to gender affirmation. Faculty and staff may be at different points of their transition during their employment at the O'Neill School and IU. Therefore, it is important to support individuals regardless of where they are in their transition process.

Key IU resources include the **O'Neill Office of Diversity, Equity, and Inclusion**, **O'Neill Human Resources**, and the **LGBTQ+ Culture Center** on campus. It is critical to consider every individual's right to privacy, confidentiality, and choice during each stage of a transition. The following steps outline key aspects of the workplace transition planning process, followed by further explanations of some of those steps:¹²

1. The employee should decide who will be key players in this workplace transition plan and what role each person will take. These key players will comprise a workplace transition team for the employee (more information below).
2. Transitions may be gradual, but it may be helpful to select a date on which a process will become formal. This may be the day on which all students, faculty, and staff are informed of the transition. It may also be when the employee's name and gender become public. The employee may choose to change this date based on their readiness. The HR Director should be flexible in these cases and follow what the employee decides.
 - a. If there is a transition day, the employee and their workplace transition team can think about who will be on site to facilitate the process, support the employee, ensure respectful and inclusive treatment, and make sure that work continues normally.
3. The employee should decide how information will be communicated to colleagues. For example, there may be an email sent to a specific work group, a team meeting, or an employee may wish to have face-to-face conversations. As with all stages of a transition, the employee's consent and input are critical.
4. Participation from someone in a leadership role (O'Neill Executive Associate Dean, O'Neill HR Director, etc.) is an important component of communicating the following:
 - a. **The employee is valued and has O'Neill's full support in making the transition.**
 - b. Indiana University's non-discrimination policy.
 - c. The employee should be called by their correct name and pronouns.
 - d. Work will continue as normal.
 - e. Appropriate channels for questions and concerns.
 - f. It is important that the leadership person lead by example by using the employee's correct name pronouns in all official and unofficial communication.
5. A person in a leadership role can assist with identifying resources that would be beneficial to the employee's team, including an in-person training or workshop which focuses on gender identity, such as the Ally Training from the **LGBTQ+ Culture Center**.
6. The workplace transition team is encouraged to check in with the employee shortly after the workplace transition date, 30–60 days after that date, and again 6-9 months after that date.

¹² These bullet points were adapted from "A Guide to Gender Identity & Affirmation In the Workplace" from Yale University.

Initial Conversations

When an employee contacts their supervisor or HR Director to explain they are planning to transition and wanting to start presenting in their affirmed identity, the employee will need to be assured that the **O’Neill School will work with them to help make their workplace transition as smooth as possible.**

The employee should be reassured that the information they share will be treated with confidentiality.¹³ The employee has probably taken great care to safeguard this information and wants to be sure it will be disclosed at an appropriate time and in a respectful manner.

The transitioning employee should be assured that they will have input into planning the steps of their workplace transition. **The employee should always have the main voice in the workplace transition process.**

Creating a Workplace Transition Team

The supervisor or HR Director will help in putting together a **workplace transition team** for the individual, which may include one or all of the individuals mentioned above (Page 5).

The employee should feel confident that the people who are a part of their workplace transition team will take steps to inform themselves about transgender and/or gender non-conforming experiences and the transition process.

A sample process may look like:

- The individual shares information about their upcoming transition with the HR Director.
- The individual shares this information with a few trusted colleagues.
- The individual informs the HR Director who they would like to be a part of their workplace transition team.
- The HR Director coordinates an initial meeting for those individuals.
- At the initial meeting, the HR Director explains the team’s role in supporting the individual, being an ally, and being an advocate for diversity and inclusion at O’Neill.
- The transitioning individual asks for support from the team as needed, such as helping them think through ideas for how to come out to the other colleagues in their department or being available for questions from colleagues in their department
- The team checks-in with the transitioning individual, either as a group or individually, shortly after the public workplace transition date, about 30-60 days after that date, and again about 6-9 months afterward

Respecting the Individual’s Privacy and Confidentiality

Not only do the specific steps of transition and their timing vary, people also differ in how public they want to be as they transition.

Respect the diversity. Some people prefer that as few people as possible know they are about to transition and hope that after the transition they can quietly blend in as members of their affirmed gender. Others are committed to educating the public about transitioning and are eager to answer questions and continue to talk openly about being transgender and/or gender non-conforming long after transition. In some cases, the individual’s situation outside work can be challenging and therefore confidentiality is critical.

Work situations vary, too. The nature of work being done, the amount of interaction the individual employee has with peers and students, and the surrounding culture all have a bearing on how the workplace transition should be handled. For all these reasons, **there is no single formula for managing transitions in the workplace.**

¹³ O’Neill is committed to the protection and confidentiality of personnel files. These files are held in a secure place, with access given only to qualifying (under IU Policy) human resources staff members. Information regarding personal data will only be discussed with the employee, unless release of information has been granted to a third-party.

It is important to work closely with the employee to ensure respect for their privacy and to understand their preference on the amount of information shared with their colleagues. It is essential that open and honest communication be established to build trust for each party. The transitioning employee should communicate with their workplace transition team about what information they feel comfortable sharing, with whom, and when. At the same time, the transition plan should fit the workplace culture. The transgender and/or gender non-conforming status of an individual is considered confidential and should only be disclosed on a need-to-know basis, and only with the consent of the individual.

Control over the flow of information is very important in managing the workplace transition process. The manner in which co-workers and students are informed about the employee's change and the timing of this disclosure are critical in making the workplace transition progress smoothly. Therefore, confidentiality should be a primary concern in the early stages of workplace transition planning.

Transgender and/or gender non-conforming employees at O'Neill have the right to be who they are without unnecessary disclosure of medical information or gender history. Current and prospective employees who encounter problems concerning identification documentation, such as payroll and insurance forms, should feel comfortable raising those concerns with their supervisor or HR Director.

Telling Co-Workers

This part of the process will be the most unique to each individual. Sometimes the employee who is transitioning wants to personally tell a few co-workers with whom they are close before everyone else is told. In such a case, these co-workers need to be asked to keep the information confidential.

If the transitioning employee has a supervisor who has not been part of the initial conversation but will be impacted by the transition, they should be told about the upcoming transition before the employee's public workplace transition date. The supervisor is responsible for being a strong advocate for the transitioning individual and to help them during their workplace transition.

At some point, the transitioning individual may wish to share the transition publicly with the O'Neill community. In deciding the mode of communication to share with O'Neill community members, it may be helpful to consider the frequency with which you interact with different individuals. For example, if you have weekly contact with someone, you may wish to come out in person. If you have monthly contact, an email message may suffice. If you have only occasional contact, you may choose to not reach out unless something merits it.

In sharing information about your transition with the broader O'Neill community, you have a few different options:

- The Executive Associate Dean can send an email of support to faculty, staff, or both with or without an attachment of a personal letter from you
- You can send a personal letter directly to faculty and/or staff via email
- You or a chosen representative can make a brief announcement at the next all faculty/staff meeting
- You or a chosen representative can make a brief announcement at your departmental faculty/staff meeting
- You may choose not to make a formal announcement

In deciding which communication method works best for you, you should think about whether you would want to send an announcement before the formal workplace transition date or on the date itself. Whichever communication channel is selected, it is extremely important that the Executive Associate Dean, the HR Director, and the Director of Diversity, Equity, and Inclusion reinforce O'Neill's commitment to diversity, equity, and inclusion and be supportive of the employee as they journey through their transition.

Clearly expressed support from the Dean and the Human Resources Director can be very helpful, and they are both happy to offer support. If you are making an announcement at a meeting, the meeting could include a training component conducted by an outside expert and should be planned in advance.

It is also important to recognize that people's feelings about sex and gender are issues that can raise strong emotions and discomfort. Employees should be encouraged to examine their feelings and speak to the appropriate resources if necessary. The HR Director and Director of Diversity, Equity, and Inclusion are both valuable resources in addressing concerns of faculty and staff members.

This outline provides several examples of how to communicate with others at O'Neill during the workplace transition process. The transitioning individual, in conjunction with the HR Director, will have the final say on how they wish to share their plans with others in the building.

Working with Students

Communicating with students may require difficult conversations so a meeting should be held with the Director of Diversity, Equity, and Inclusion and the transitioning employee beforehand to ask their preference on how certain situations should be handled. **The transitioning individual will have the final say on how they choose to communicate with students.** An appropriate announcement may include:

- The transitioning employee making an announcement on their own or with an ally present in the classroom (such as a member of the workplace transition team, HR Director, or Director of Diversity, Equity, and Inclusion)
- The transitioning employee making an announcement on their own electronically via Canvas or email to the students they work with directly
- The Director of Diversity, Equity, and Inclusion leading a training component in the classroom as part of an announcement
- Sharing with students individually when they interact with them in the course of their work
- No formal announcement
- Other options as discussed

Managing Day-to-Day Situations in the Workplace:

Addressing Concerns of O’Neill Community Members

The likelihood of negative reactions can be reduced by establishing a culture of appreciation of differences, providing adequate training, and treating all employees fairly. Everyone is expected to conduct themselves in accordance with *Indiana University’s Non-Discrimination/Equal Opportunity/Affirmative Action Policy*.

A diverse workplace means that employees must be able to work with all people. **All employees are entitled to their beliefs, but everyone is required to treat the transitioning employee – and every employee – with respect.**

Appearance Standards

The O’Neill School does not have a formal dress code. All employees are encouraged to dress professionally and may do so consistent with their gender identity and expression. Transgender and/or gender non-conforming employees who work with students are held to the same appearance and behavior standards as cisgender employees. Serving students is no reason to deny a transitioning individual the right to dress and present in a way that affirms their gender.

Restroom Access

O’Neill School policy is that faculty, staff, and students are permitted to use the facilities that correspond with their gender identity. For example, a person who identifies as a man is permitted to use the men’s restrooms, and a person who identifies as a woman is permitted to use the women’s restrooms. All faculty, staff, and students should determine the most appropriate and comfortable options for themselves. It is O’Neill’s obligation to provide all faculty, staff, and students with adequate facility access.

Where possible, O’Neill has provided additional **single-occupancy, all-gender facilities** including:

1. The first floor of the Paul H. O’Neill Graduate Center
2. The first floor of O’Neill across from the café, near the stairs

Note: Any employee may choose to use these options, but no one, including a transgender and/or gender non-conforming person, is required to. Additional all-gender facilities are available across campus and [can be found here](#).

Co-workers who have personal concerns about sharing a restroom with a transgender and/or gender non-conforming colleague should be invited to have an honest discussion with an appropriate supervisor or HR Director. Co-workers uncomfortable with sharing a restroom with a transgender and/or gender non-conforming colleague should consider using the single-occupancy restrooms referenced above. It is never permissible to ask the transgender and/or gender non-conforming person to go out of their way.

Using the Appropriate Pronoun

If a co-worker is transitioning and you are not certain which pronouns to use, it is appropriate to respectfully ask them. One way to do this is to simply say, “My name is Terry and I go by he/him/his pronouns. How about you?”

You can also continue to use someone’s name when you do not know their pronouns. For example, “Our colleague Jesse lives in Indianapolis. Jesse commutes to O’Neill every day.”

It is insensitive to intentionally refer to someone by the wrong pronouns once they have established what their pronouns are. If you accidentally mis-gender someone by using the wrong pronouns, apologize succinctly, correct yourself, and move on with the conversation.¹⁴

¹⁴ For more information on how to react after accidentally misgendering someone, there are many resources available online including this article from the Q Center in Portland, OR. <http://www.pdxqcenter.org/how-to-react-after-accidentally-misgendering-someone/>

Below are some examples of pronouns. This list is not exhaustive of all pronouns available and will continue to evolve over time. Continued and prolonged use of the incorrect name and/or pronouns to refer to a colleague can be considered harassment and will be addressed under *Indiana University's Non-Discrimination/Equal Opportunity/Affirmative Action Policy*.

Examples of Pronouns¹⁵

___ laughed.	Ask ___!	That's ___ pen.	That pen's ___.	Did ___ enjoy ___?
he	him	his	his	he; himself
she	her	her	hers	she; herself
they	them	their	theirs	they; themselves
ze	hir ("here")	hir	hirs	ze; hirself
ze	zir	zir	zirs	ze; zirself

Name and Gender Changes

Legal name and gender marker (i.e., “M” or “F” on legal identity documents) changes can sometimes take months or even years to get updated depending on the circumstances.¹⁶ Until then, every effort should be made to use the correct name and gender marker on all documentation. (e.g. email, phone directory, CrimsonCard, name plate, etc.) IU’s Preferred Name Policy states that faculty, staff, and students may use names other than their legal names to identify themselves.¹⁷ The only exception is where records must match the person’s legal name, such as on payroll and insurance documents. In the case where someone is both an employee and a student, the Registrar’s office may need to be consulted.

Using one’s correct name is both a sign of respect and has shown to reduce mental health risks.¹⁸ In everyday written and oral communication, the correct name and pronouns should be used when the individual is ready.

To change your primary (legal) or [preferred name](#), home address, IU office phone number, alternate email address, emergency contacts, military status, or ethnic group:¹⁹

1. Go to [Personal Information \(employees\)](#). This requires [Two-Step Login \(Duo\)](#).
2. Click the appropriate button to enter your changes.

Notes:

- If you are changing your Primary Name (first name and/or surname) because of a legal name change, you will be prompted to complete and submit an IU personal data change form.
- To change your preferred email address, see [Change your primary email address and set delivery for your email addresses](#).

¹⁵ Adapted from the LGBTQIA Resource Center, UC Davis, available at <https://lgbtqia.ucdavis.edu/educated/pronouns>

¹⁶ For more information on legal name changes, visit <https://indianalegalhelp.org/court-forms/forms-name-change/petition-for-adult-name-change/> and <http://indianatransgendernetwork.com/resources/legal/changing-name-gender-markers-legal-documents/>

¹⁷ University Policies: Preferred Name, USSS-15. Last updated 07-01-2015. Available at <https://policies.iu.edu/policies/uss-15-preferred-name/index.html>

¹⁸ Russell, S. T., Pollitt, A. M., Li, G., & Grossman, A. H. Chosen name use is linked to reduced depressive symptoms, suicidal ideation, and suicidal behavior among transgender youth. *Journal of Adolescent Health*. (2018).

¹⁹ Information from Indiana University Knowledge Base. Available at <https://kb.iu.edu/d/afol>

- For other changes that you are unable to make directly, such as gender:
 - If you are an academic appointee, contact your [campus Dean of Faculties or academic affairs office](#).
 - If you are a non-academic employee, contact your [campus departmental human resources representative or human resources office](#).

Information you update yourself should appear in the IU Directory and the Global Address List within 24 hours. Changes that require official action by a campus office may take up to a week to appear. If the change does not appear after that time, contact your information provider.

You can [change your IU username](#) once you have changed your preferred name in the system. Follow the instructions on [this Knowledge Base page](#) to make the change.

[A separate secure, online form](#) must be filled out for the IU Health Center if the employee wishes up to update their information in their Electronic Medical Record.

CrimsonCard

Your CrimsonCard can easily be replaced if your name has changed. If your name changes or you transfer to another department within IU, you can get an updated CrimsonCard at no cost. For name changes, be sure to update your [preferred name](#) 24 hours prior to requesting a new card. You can exchange your card at any [campus CrimsonCard office](#). Note: We'll take a new photo any time you replace or renew your CrimsonCard.²⁰

Leave Benefits for Employees

Supervisors should provide sufficient flexibility to meet the individual's needs for appointments. Time off for medical appointments and procedures is to be granted on the same basis as for any other scheduled medical appointments and procedures. *Please refer to the Indiana University Medical Leave policy found at <https://policies.iu.edu/policies/hr-05-20-fmla-family-medical-leave/index.html>.*

Medical Care & Insurance Coverage

Employees (and covered dependents) in the process of transitioning may wish to have appropriate medical care to support their transition including treatments such as hormone replacement therapy and/or gender confirmation surgery. *Indiana University's* health insurance follows industry standards and provides coverage for transgender care. Full plan details can be found at http://hr.iu.edu/benefits/health_care.html. A list of trans and/or gender nonconforming knowledgeable medical practitioners [can be downloaded here](#).

Employees who have questions or difficulty accessing coverage are encouraged to contact **IU Human Resources** via [AskHR](#) (812-856-1234) or reach out to **Anthem** or **IU Health** directly for assistance.

As with other aspects of a transition, plans should be discussed and communicated only with affected parties in order to manage expectations and to minimize disruption. Medical information communicated by an individual should be treated confidentially.

The Importance of Training & Education

In addition to a potential workgroup meeting where the transitioning employee's supervisor or HR Director may announce the transition, ongoing training or educational sessions on transgender and/or gender non-conforming experiences will be provided for all employees.

Education helps reduce fear of the unknown and helps promote a positive work environment for all employees. Training or educational sessions should be offered prior to the individual's transition and continue throughout the year as part of the Office of Diversity, Equity, and Inclusion initiatives. Education provides important information to faculty, staff, and students on what to expect when the person begins their transition. Establishing some level of

²⁰ More information is available at the CrimsonCard website, available at <https://crimsoncard.iu.edu/about/replacing.html>.

comfort as to what the transition is and why it is happening is important for preventing future misunderstandings or issues.

Ensuring Long-Term Success: Monitoring over Time

The difference between a moderate or an “okay” experience with workplace transition and one that is ultimately successful for everyone involved over the long-term depends on effective and meaningful follow-up over time. If issues between co-workers are going to surface, they might not surface right away when a lot of time and attention is focused on the transitioning employee, the educational sessions, and so on. Rather, issues might arise one, two, six or even twelve months down the road.

In some workplaces, co-workers express bias or resentment toward the transgender and/or gender non-conforming employee (often due to a lack of knowledge). They may express these feelings by refusing to use the correct name and correct pronouns, verbally harassing the employee, or refusing to work with the employee. Sometimes, more subtle behavior such as isolating the transgender and/or gender non-conforming employee from meals or staff activities takes place. Workplace gossip about the transgender and/or gender non-conforming person or unacceptable jokes may surface. The transgender and/or gender non-conforming employee may not report such behavior because they believe it may make the situation worse or result in retaliation.

Supervisors must be proactive in monitoring behavior toward the transgender and/or gender non-conforming employee. They must provide support for the employee to report issues and challenges confidentially to the HR Director. **Any harassment** that is taking place should be dealt with immediately to send a clear message to all employees that this behavior **is unacceptable and will have consequences** for the employees involved. Gossip, unacceptable comments or jokes, and other unproductive behaviors will be addressed.

People who raise concerns about a transgender and/or gender non-conforming co-worker should be coached to differentiate personal beliefs from appropriate workplace behaviors. They will need to work cooperatively with their co-workers regardless of their gender identity and failure to do so could result in disciplinary action. The employee should also be provided with ***Indiana University's Non-Discrimination/Equal Opportunity/Affirmative Action Policy***.

Responding to Concerns Regarding Restrooms: Talking Points for Supervisors

If a faculty member, staff member, or student approaches you with concerns over sharing restroom facilities with a transgender and/or gender non-conforming person, consider the following:

Listen: What exactly is the concern? Are they concerned for privacy or safety? If so, an honest and upfront conversation may help alleviate their concerns.

Refocus: Acknowledge apprehension while reminding the person that everyone needs to use the restroom and that this is about ensuring access for all. Refocus conversation on behavior: we all know what appropriate restroom behavior looks like. If everyone's behavior is appropriate, then there should not be an issue.

Reinforce: It may help to reinforce O'Neill's value of respect for all faculty, staff, and students noting that everyone is allowed, by O'Neill policy, to use the facilities that correspond to their gender identity.

Remind: If the faculty member, staff member, or student is still reluctant and concerned, maintain the policy and remind them of other options. For example, the concerned person may use one of the single-occupancy, all-gender restrooms or a restroom on a different floor or in a different area.

HR Director Role

In addition to ensuring these best practices for supervisors are followed, the HR Director needs to ensure that the supervisor is supported throughout the entire workplace transition process. Regular check-ins with both the supervisor and the transitioning employee are important.

The HR Director needs to work closely with the supervisor and the transitioning employee to ensure individual and team meetings are scheduled appropriately and the proper support is being leveraged.

The HR Director also needs to keep a close 'pulse' on the faculty and staff to ensure there are no negative issues in the workplace that are not being addressed.

Lastly, the HR Director is advised to check-in over the long term and not just during the initial workplace transition process. Some issues may not surface until some time has passed and the initial focus on transition is over.

O'Neill Director of Diversity, Equity, and Inclusion Role

In addition to supporting the communication process with students, faculty, and staff, the Director of Diversity, Equity, and Inclusion will play a key role in supporting the transitioning individual, the HR Director, and the entire O'Neill community throughout the workplace transition process.

The Director of Diversity, Equity, and Inclusion should provide ongoing opportunities for training and education related to the LGBTQ+ community and how to best support individuals in the O'Neill community.

The Director of Diversity, Equity, and Inclusion also needs to keep a close 'pulse' on the cultural climate of the building to ensure there are no negative issues that are not being addressed.

Lastly, the Director of Diversity, Equity, and Inclusion is advised to check-in over the long term and not just during the initial workplace transition process. Some issues may not surface until some time has passed and the initial focus on transition is over.

Terminology

The following terms are ‘text book’ definitions. The glossary is intended to provide information about terms used in these guidelines in reference to gender identity and expression. As language continues to evolve, so do these terms. Considerations should be taken around level-setting in each conversation to ensure everyone involved is using the applicable terms in the same way.²¹

Affirmed gender: The gender to which someone who is transgender has transitioned. This term is often used to replace terms like “new gender” or “chosen gender,” which imply that the current gender was not always a person’s gender or that their gender was chosen rather than simply in existence.

Agender: A person who does not identify with or conform to any gender.

Ally: A supporter or advocate for the Lesbian, Gay, Bisexual, Transgender or Queer community. Being an ally is about using inclusive language, showing respect and support for your colleagues and in this case, members of the LGBTQ community through your actions and your words. Typically, allies to lesbian, gay and bisexual people are straight and allies to transgender people are cisgender. Allies are not limited to the LBGTQ+ community – people can be allies to any marginalized population.

Cisgender: A term for people whose gender identity, expression, or behavior aligns with those typically associated with their assigned sex at birth. (From the Latin root “cis” meaning “on the side of.”)

Gender: While often used interchangeably with “sex,” refers specifically to the behavioral, cultural, psychological or social traits typically associated with one sex, rather than biological characteristics.

Gender confirmation surgery: Surgical procedures that help people adjust their bodies in a way that more closely matches or desired gender identity. It is only one small part of a transition. Not every transgender person will desire or have resources for surgery. This term should be used instead of sex-reassignment surgery.

Gender binary: The concept that there are only two genders, male and female, and that everyone must be one or the other.

Gender expression: All of a person’s external characteristics and behaviors — such as clothing, grooming, mannerisms, speech patterns and social interactions — that represent or express one’s gender identity to others. Social or cultural norms can vary widely and some characteristics that may be accepted as masculine, feminine, androgynous, or neutral in one culture may not be assessed similarly in another. A person’s gender expression may also be referred to as their “gender presentation.”

Gender Identity: A person’s internal, deeply held sense of their gender.²² Since gender identity is internal, one’s gender identity is not necessarily visible to others. One’s gender identity may or may not correspond to one’s sex assigned at birth.

Gender marker: A legal indicator of one’s gender. This can include one’s gender on a passport, birth certificate, driver’s license, insurance card, or other government-issued documents or legal documents.

Gender neutral: Not gendered. Can refer to language (including pronouns), spaces (like restrooms), or identities (being agender, for example).

²¹ These terms were adopted from both the Human Rights Campaign Template for Gender Transition Guidelines and “A Guide to Gender Identity & Affirmation In the Workplace” from Yale University, except where noted otherwise.

²² Adapted from GLAAD Media Reference Guide – Transgender. Available at <https://www.glaad.org/reference/transgender>. (2018).

Gender non-conforming: A term to describe people who have, or are perceived to have, gender characteristics and/or behaviors that do not conform to traditional or societal expectations. Keep in mind that these expectations can vary across cultures and have changed over time. Gender non-conforming, like transgender, is an umbrella term and includes people who may identify as “genderqueer,” “non-binary,” or as “gender fluid.”

Intersex: Describing a person whose biological sex is atypical and does not fit into a medical binary of male or female. There are many genetic, hormonal, or anatomical variations which make a person intersex (i.e., Klinefelter Syndrome, Adrenal Hyperplasia).

LGBTQ: An acronym that stands for Lesbian, Gay, Bisexual, Transgender and Queer.

Medical transition: The process of taking hormones or undergoing surgical procedures in order to change one’s body in a way that affirms one’s gender identity. Surgical procedures are sometimes discussed separately as surgical transition. Not all individuals undergo medical transition.

Non-binary/Gender Non-binary: A term used by someone who experiences their gender identity and/or gender expression as falling outside the binary categories of man and woman. They may define their gender as falling somewhere in between man and woman, or they may define it as wholly different from these terms.²³

Sex: The classification of people as male or female. At birth, infants are assigned a sex based on a combination of biological characteristics including chromosomes, hormones, and reproductive organs.

Sexual orientation: An individual’s enduring physical, romantic and/or emotional attraction to another person. Gender identity and sexual orientation are not the same. Transgender people may identify with any sexual orientation, such as straight, lesbian, gay, bisexual, pansexual, or polysexual. For example, a man who transitions from male to female and is attracted to other women may identify as a lesbian or a gay woman.

Transgender: A person whose gender identity, expression or behavior is different from those typically associated with their assigned sex at birth. Transgender is a broad, umbrella term. (Note: Transgender is correctly used as an adjective, not a noun or verb, thus “transgender people” is appropriate but “transgenders” and “transgendered” are viewed as disrespectful.) Not all people who consider themselves, or who may be considered by others, as transgender will undergo a gender transition.

Third gender/third sex: A term that incorporates genders other than male or female such as the Fa’afafine in Samoa, Kathoey or Ladyboys in Thailand, and Hijras in India and Pakistan. Some people in the United States, especially in communities of color, use the term third gender to self-identify.

Two spirit: A self-identity adopted by some indigenous North American people who take on a multitude of gender roles, identities, and expressions. Those who identify as Two Spirit often see themselves as embodying both masculine and feminine spirits and characteristics.

²³ Adapted from GLAAD Media Reference Guide – Transgender. (2018).

University Resources

The **LGBTQ+ Culture Center** actively fosters the academic and personal success of LGBTQ+ students through programming, services, and support, while enhancing the campus community's understanding and appreciation of LGBTQ+ people and issues. While primarily focused on students, they also provide support and resources for LGBTQ+ faculty and staff. The Center also has an excellent library of LGBTQ literature available to everyone. <https://lgbtq.indiana.edu/index.html>

Indiana University's Employee Assistance Program is a voluntary program that provides professional, confidential counseling to help individuals bring their life into better balance, when day-to-day activities are interrupted by stress. <http://hr.iu.edu/benefits/eap.html>.

Bloomington Resources

Bloomington Pride serve LGBTQ+ people of Bloomington and South Central Indiana through advocacy, safe and inclusive spaces, arts and culture events, and educational programming. They support a range of LGBTQ+ programs and events, including the Prism Youth Community, LGBT Aging & Caring Network, Trans and Allies Support Community, PRIDE Film Festival, Pridefest summer celebration, and PrideSlam poetry competition. <https://bloomingtonpride.org/>

Trans Allies and Support Community (TASC) is a Bloomington PRIDE program working to support and affirm transgender and nonbinary gender-diverse people in Central Indiana through support, advocacy, and social connection. The group meets weekly at the Monroe County Public Library. <https://bloomingtonpride.org/tasc/>

Indiana Resources

The **Indiana Transgender Network** aggregates resources available to transgender and gender diverse people living in Indiana. Their goal is to make it easier for people making a gender transition or trying to understand the subject of gender identity to find counselors, medical resources, legal information, support groups, advocacy organizations and other help on their journey. <http://indianatransgendernetwork.com/>

National Resources

The **National Center for Transgender Equality (NCTE)** is a national social justice organization devoted to ending discrimination and violence against transgender people through education and advocacy on national issues of importance to transgender people. By empowering transgender people and allies to educate and influence policymakers and others, NCTE facilitates a strong and clear voice for transgender equality in our nation's capital and around the country. www.transequality.org

Lambda Legal is a national organization committed to achieving full recognition of the civil rights of lesbians, gay men, bisexuals, transgender people and everyone living with HIV through impact litigation, education and public policy work. <https://www.lambdalegal.org/>

The **Transgender Law Center** is the largest national trans-led organization advocating self-determination for all people. Grounded in legal expertise and committed to racial justice, TLC employs a variety of community-driven strategies to keep transgender and gender nonconforming people alive, thriving, and fighting for liberation. <https://transgenderlawcenter.org/>

The **LGBT National Help Center** serves gay, lesbian, bisexual, transgender & questioning people by providing free & confidential peer-support and local resources. The LGBT National Hotline can be reached 24/7 at 1-888-843-4564. <https://www.glbthotline.org/>

GLAAD rewrites the script for LGBTQ acceptance. As a dynamic media force, GLAAD tackles tough issues to shape the narrative and provoke dialogue that leads to cultural change. <https://www.glaad.org/>

Guidance for the Transitioning Employee: Developing a Plan

We encourage creating an engagement plan to help smooth the workplace transition process. A plan also helps reduce uncertainties and provides a common road map for everyone. The outline below will vary depending on your individual needs and situation. For example, some of this language applies to binary oriented transitions – from male-to-female or female-to-male – and may be less relevant to non-binary or gender nonconforming employees.

1. **Get support from the people around you.** As a transitioning employee, you should try to create a support team. Try to involve your supervisor, HR Director and/or other supportive co-workers to work together to develop an appropriate plan that meets your needs. The following is a suggested list of things to consider and discuss with your support team.

2. **Develop a stakeholders list**
 - Who are all the people in the work group you may need to engage at some point to help support you during your workplace transition? Example: HR Director, Anita Herbertz
 - When do they need to be engaged?
 - Who do you want to be a part of your workplace transition team?

3. **Create a timeline – suggested: what are your milestones?**
 - Discuss the expected timeline.
 - Are there any specific issues that need to be addressed sooner rather than later?
 - Block out dates such as legal or professional name change, transition milestones and other events.
 - Review the stakeholder list and develop the program to allow time to meet with them to discuss your workplace transition.
 - Anticipated time off required for medical needs, if known.

4. **Things to Consider**
 - How would you like your team to find out about your transition? (e.g. letter, face-to-face meeting, individual discussions, your supervisor/HR Director)
 - What would you like to share with your colleagues? What words do you want to use to describe yourself? What is important for them to know (or not) about you?²⁴
 - Will you need workspace changes during your workplace transition?
 - How long do certain HR functions take? (e.g. legal name changes, O’Neill directories, etc.)
 - How do you think your students should be informed (if applicable)?
 - Will you need to process any changes to professional degrees, awards, or publications?
 - Do a search for your current name on the O’Neill’s intranet for team rosters and other references. How many of these pages will need to be altered or removed?

²⁴ “Guide to Gender Identity and Affirmation in the Workplace at Yale University.” Office of LGBTQ Resources. Yale University.

Guidance for Co-Workers

The moment a friend, loved one, colleague or acquaintance makes the decision to ‘come out’ as transgender and/or gender non-conforming, is always a unique event. Understand that when someone ‘comes out’ to you, it is an act of trust – and that person deems you trustworthy. There is no one ‘right’ way to demonstrate your support – and being supportive does not require you to march in parades. (Although you are welcome!)

Be as open and honest as you would like your co-worker to be with you.

- If this is new for you -- and if you feel awkward, say so. Everyone will make mistakes as they work to be an ally. Being honest of your intention to help – especially in those moments – will help alleviate tense situations. Ensure you continue to educate yourself in order to avoid making the same mistakes.
- Encourage honesty and constructive feedback amongst your co-workers.
- Understand if the person declines to answer your questions. Usually these questions are best asked of a neutral third party that is happy to help. A person transitioning will let you know if they feel comfortable answering questions about their history and the changes in their life.
 - You may consider seeking additional training and education using the resources provided in this guide or at the LGBTQ+ Culture Center.
- Take the time to talk and be prepared to listen.

Here are some “ally” behaviors that help create an inclusive workplace:

- Don’t make assumptions about a person’s sexuality or gender. Not everyone’s appearance or behavior plays to stereotypes.
- Know and understand O’Neill’s policies on gender identity: non-discrimination, harassment, medical leave, etc.
- Let your co-workers know that you will not tolerate even subtle forms of discrimination or harassment in the workplace.
- Add your pronouns to your bio, syllabi, and email signature
- Rely on resources and other allies, rather than the transitioning individual, as a source of education.
- Correct others when they misgender a colleague or use their “dead name” (name used before transition)

Why become an ally?

- Make a positive impact on a fellow employee’s life
- Become a better leader
- Personal and professional growth
- Personal satisfaction
- Help create a better and more productive workplace
- Career networking
- Champion and celebrate all aspects of diversity