Trans Policy (Staff) | Manager’s Quick Guide

Introduction

This Quick Guide is here to help you, as a manager within the University of Edinburgh, support Trans members of staff looking to use the [Trans Policy (Staff.)](https://human-resources.ed.ac.uk/policies-guidance/a-to-z-of-policies-and-guidance) The biggest thing we want you to know is that you have access to support and guidance, with this Quick Guide offering you some practical steps to providing informed support for colleagues.

## Top Tips

**Top Tip 1 – Listen**

For a member of staff to come to you to discuss their gender identity, and what that may mean for them in the workplace, is often not an easy step to take. You may well be the first person they’ve talked to about this, so it’s important that you first listen.

* **Establish when and where is the best place for a conversation**. Is this in-person? On teams? In a private room? Off-location? Have you given yourself enough time?
* **Let them do the talking.** While there might be things to do, it’s important you really listen to what your colleague has to say and not try to rush anything or start working through a check list
* **Ask open questions.** It’s key for you to ask questions in an open way that ensures you’re able to support your colleague in the best way for them, while establishing boundaries as to what they may want/not want to talk about right now. Examples of good open questions to ask are “what support would you like from me?”, “how would you like this to be communicated to the team (or not)?”
* **It’s *their* journey**. It’s important that this is their journey and that, wherever possible, they should be and feel in control of what happens next and that actions relating to their identity shouldn’t happen without their knowledge and agreement.

**Top Tip 2 – Learn**

This could be your first time supporting a Trans member of staff through the [Trans Policy (Staff)](https://human-resources.ed.ac.uk/policies-guidance/a-to-z-of-policies-and-guidance)... and that’s fine! There’s no expectation for you to be an expert on everything, but the steps below will help you be as prepared as you can be

* **Read the Policy**. Please make sure you read the policy in full as there is a lot of information and guidance within it. The more you know, the better the support you can offer and know your own role in the next steps
* **Learn the language.** There could be terms and concepts that you may be less familiar with such as the many identities that sit under the Trans umbrella, different routes of transition etc. [The Policy](https://human-resources.ed.ac.uk/policies-guidance/a-to-z-of-policies-and-guidance) and information on the [Trans Hub](https://equality-diversity.ed.ac.uk/trans) will help you and avoid placing the burden on a Trans person to do the educating for you.
* **What support is on offer?** You (and your colleagues) are not in this unsupported, and there is support from other managers, HR, Staff Networks etc. to help navigate the policy/ the experience in general.

**Top Tip 3 – Do**

As a manager, there are several things that you should do to ensure your colleague has a smooth experience

* **Make a plan.** It’s very important that, after the initial conversation, that next steps are established, even if that is simply to have another conversation within a certain time – you can use the Conversation Template below as a guide to help you. It also will be a good idea to decide how to answer question from colleagues, this may be through you as a manager, them as the person transitioning, or a mixture of the two.
* **Update information.** The colleague will likely be able to do much of this themselves, but there will be parts that you may have to do or approve – make sure you and your colleague are clear on who is doing what and when.
* **Remember it’s *their* journey.** It’s important to reiterate that they feel in control of what happens in relation to their identity and that you won’t do or say things without their knowledge/agreement (yes, we’ve said this twice!)

## Manager’s Checklist

Here’s a quick checklist for you:

* I have read the [Trans Policy (Staff)](https://human-resources.ed.ac.uk/policies-guidance/a-to-z-of-policies-and-guidance) and understand my role
* I have done any necessary reading to be as informed as possible e.g. exploring the [Trans Hub](https://equality-diversity.ed.ac.uk/trans)
* I have had a confidential conversation to establish support and next steps with the colleague
* I have clear consent and clarity to work on any next steps e.g. talking to the team
* I have established what support the colleague needs from me e.g. regular check-ins
* I have clarified how to communicate any changes with the team/students/other teams i.e. if I do it, or if they wish to do it
* I have clarified how best to answer any questions from the team/colleagues/students i.e. if I do it, or if they wish to do it
* I have reached out for support (if needed) for myself e.g. HR Helpline, HR EDI,
* I have directed my colleague to support (if needed) e.g. HR Helpline, HR EDI, Staff Pride Network

## Conversation Plan

*Note: You may need to do this more than once and this is just a suggested guide*

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| **Questions** | **Notes** |
| What support does the staff member require from you/ the team?  Have they informed anyone else? | *Make sure this is done in an open way – everyone will be different in what they may want/not want.*  *For adjustments you may want to use the* [*Individual Adjustments Plan*](https://human-resources.ed.ac.uk/a-to-z-of-forms) *to record them.* |
| Do they want to make any changes to their name/pronouns/email etc? | *This could be in either an informal/local way, or by using the* [*Trans Hub*](https://equality-diversity.ed.ac.uk/trans) *and/or* [*ISG form here*](https://ed.unidesk.ac.uk/tas/public/ssp/content/serviceflow?unid=cd227f90d9ab40bba6e65911ebd8c6d6) |
| How would they like to inform fellow colleagues and/or students (or not)? | *Some people may prefer to let people know themselves, others may want you to tell the team/students/others and handle any questions, or a mixture of both. Timeframes for this are also helpful to understand.*  *People may be “out” to specific groups or individuals. It is important to establish to who will be informed, and that people are not “outed.”* |
| Are there any upcoming appointments relating to their transition?  Will any time off be required? | *Trans people may have a series of processes to take to “transition”, these could include medical appointments, legal appointments, or time off to talk to family etc. Everyone will be different.*  *It’s important that in all these conversations that you remain respectful of people’s right to privacy, you won’t need to know all the ins and out, just enough for you to know how best to support them* |
| What are some of the agreed next steps we are going to take (if any)? | *It’s important that next steps and timeframes are agreed i.e who is doing what, and when. It is particularly important that these are led by the Trans colleague, and they must feel like that have control over what happens next* |
| *Notes:* | |