

IMPERIAL

Guidance for managers to support employees who are transitioning

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1 Introduction

In order to make the transition process as smooth as possible for a member of staff and to alleviate their worries about transitioning in the workplace, it is important that line managers are fully supportive of a member of staff's transitioning process. This will help the individual feel as comfortable as they can in the workplace during this time which can be an important life event.

An employee who feels supported by their manager would have a better sense of wellbeing in the workplace. This contributes to an inclusive and positive experience for the trans individual and enhances the workplace culture and environment.

2 Meeting with the employee

Have discussions with the person who is transitioning. For some individuals there may not be any need for any significant processes other than changing their name and gender markers on ICIS, whereas others may wish to agree an individual action plan. It may sometimes be necessary to have further meetings where HR or other relevant individuals are present, but the manager must agree with the employee regarding who needs to be present at these meetings.

Any notes and communications pertaining to the meeting(s) should be kept confidential. The individual should be made aware of how their manager (and HR, if relevant) will keep these notes confidential. It is important that these discussions are led by the individual transitioning and they are comfortable with what has been agreed.

Please see the [Managers' Toolkit](#) for a practical plan template.

3 Name and title change

The manager should be aware that HR will replace or alter the following records:

- ICIS (Imperial College Information System)
- Payroll details
- Personnel files in HR and Departments
- Supervisor records
- Welfare/disability/counselling records (if applicable)
- Pension details

The individual may also need a new Imperial ID card and computer log-in details, which will be arranged once HR has updated their records.

The Gender Recognition Act 2004 does not require Imperial to amend records such as the minutes of meetings that predate the individual's transition. However, it is good practice to consider any documentation that is available to the public, such as committee minutes, and discuss with the individual how to manage any name change that might alert the public to their transition. Where possible, documents may be redacted to avoid unintended disclosure.

4 Time off for transition

Not all people who transition choose to undergo any medical or surgical treatment. However, the individual may decide to undergo a number of medical procedures to support their transition. Managers must by law (see Section 4.3 and 4.4 of the Trans Staff Policy, "The Legal Right to Time Off" and "Good practise related to time off") provide sufficient flexibility to meet the employee's needs for appointments. These may be treated as sick leave if the appointments are for half a day or longer. Appointments of less than half a day do not need recording but must be agreed with the manager. Time off for the purpose of transitioning is protected. Where possible these appointments/interviews should be scheduled outside regular working hours, however Imperial recognises that this may not always be possible due to clinic, passport office, bank etc. appointment dates and opening times. Time off for surgical procedures is treated the same as other scheduled medically necessary procedures.

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[Occupational Health](#) can support with guidance and advice around medical procedures and support a phased return to work.

Medical procedures may include:

- Therapist visits (can have varying frequency, from quarterly to weekly)
- Doctor's office visits
- Electrolysis (can be weekly)

- Laser hair removal treatments (usually 4 treatments, 4-12 weeks apart): discuss what the staff member wants, and if requested, where possible, permit the employee to work from home for a few days after each treatment, while the face heals.
- Surgery: time off for surgery will vary depending on the type of surgical interventions required

Employees may also wish to take time off/arrange flexible working for these purposes:

- To provide proof or attend interviews, if needed, to acquire documents pertaining to their affirmed gender, e.g. Home Office visits, bank appointments, legal appointments etc.
- To attend peer or family support groups either internally or externally to the organisation

If a staff member wishes to discuss the time off, they need to arrange a time to discuss this advance with their manager. There should be an informal and confidential meeting between the staff member and manager to discuss the individual's needs. These discussions about time off should be led by the needs of the individual. During the meeting, any time off needed can be agreed and recorded and a plan can be put in place in advance, so that cover can be arranged if necessary.

Please see the [Managers' Toolkit](#) for a practical plan template.

4.1 Impact on the rest of the team

Should cover be needed, this should be arranged as appropriate by the line manager. This can be done in several ways, including the reallocation of tasks to other members of the team, a shadowing arrangement prior to the individual leaving, which may then be offered as a secondment to the shadowee, a secondment on its own, an internship, hiring a temp, etc.

The line manager should ensure that the allocation of cover does not impact negatively on the rest of the team and the manager should try to address any concerns team members may have on a one-to-one basis.

5 Informing colleagues/students

It is vital to discuss how and when other colleagues and/or, where appropriate, students will be informed. The person who is transitioning may want to do this for themselves or they may want this to be done for them. Whichever option is chosen, it is important that the person transitioning retains control over what and when people are told, and the language used to explain this.

Any communication, whether written or face to face, should be with the backing of the line manager. Either the line manager can communicate this in the format agreed with the staff member, or the staff member can inform the relevant teams or people

perhaps with the line manager being present or copied into the emails.

Agree how to notify the team, wider department, and any other stakeholders as necessary, for instance students.

It is important to follow confidentiality, data protection and disclosure protocols.

6 Training

It is essential that all relevant people are informed of their responsibility to facilitate a staff member's transition and to take pre-emptive steps to eliminate unlawful discrimination, harassment and victimisation.

Therefore, it may be necessary to provide information or training to colleagues following the announcement. If this training relates to the transition of a particular person, rather than general training, that person must be involved in the decision-making process about how this is to be undertaken. Specific trans awareness training is advised to create a supportive environment where trans employees feel comfortable to be themselves.

Contact the [Equality, Diversity and Inclusion Centre \(equality@imperial.ac.uk\)](mailto:equality@imperial.ac.uk) to advise on any training.

7 Dress codes

As long as there are no health and safety requirements for the individual to dress a certain way, flexibility in the individual's appearance is allowed.

Agree with the member of staff when they wish to start dressing and presenting themselves in their affirmed gender and whether this will be a phased process.

The manager or HR adviser should make the person aware of the full [University dress code](#). If the individual feels that the policy will hinder their presentation during or after transition in some way, their line manager will, with the aim of finding a satisfactory compromise, sympathetically consider the issue consistent with the objectives of this policy. Such consideration may include discussing with the individual and agreeing an alternative version of a uniform, including the option of wearing trousers or long skirts, or other options agreed upon with the individual, unless there is an over-riding health and safety need.

8 References

References for current or former staff who have transitioned will make no reference to the person's former names or gender status and will use the appropriate current titles and pronouns.

9 Further support

Contact the [Equality, Diversity and Inclusion Centre](mailto:equality@imperial.ac.uk) (equality@imperial.ac.uk) for further information and guidance.

Please see the [Managers' Toolkit](#) for a practical plan template.

10 Frequently asked questions

I know a member of another team transitioned and I wanted to talk to the manager of that team about how they managed the member of staff whilst they were transitioning, as I too manage someone in my team who intends to transition. Can I discuss this with the manager who has experience of a staff member transitioning?

You do not want to accidentally out the individual in your team that is transitioning to the other manager (even if you do not mention who the person is), so it would be advisable to approach the individual and let them know that you were thinking of speaking to another manager whose member of staff had transitioned. Only if the individual is happy with this should you go and talk to that manager.

Remember too that transition may involve different processes for different individuals, and so how one person transitions may be completely different to how another person transitions and may require a different management approach to address the different needs.

Some people may undergo medical procedures which vary in length and may or may not involve operations and/or hormone therapy, whereas for others it might involve electrolysis or other therapy etc.

The Equality, Diversity and Inclusion Centre is looking to collect anonymised case studies of managers supporting transition of their staff member and would welcome any such case studies to create a resource of good practice examples.

I do not know how long my member of staff is going to be off for as they themselves are not entirely sure. How do I plan for provision for time off for medical intervention specific to transition?

The individual may still be awaiting dates confirming appointments for medical procedures. They might only know whether or not they need more treatments/appointments depending on the outcome of how their bodies respond to various medical procedures and this may alter the duration of recovery.

Agree a timescale with the individual for when they think or know they would need time off, but also consider a back-up plan in case timescales change or a phased return to work is needed. Include flexible options in any provision to be made whilst the employee is away.

Will the employee still be able to carry out their duties whilst transitioning even though I know they are not taking a block of time off, but rather attending

appointments as and when needed?

It is normal for transitioning to be an ongoing process. This could for example be different appointments and different types of surgery, followed by recovery, in between times of work.

This should be discussed on an ongoing basis with the individual concerned, as there may be some physical, or lab-related duties involving chemical substances that would need to be reassigned as part of the individual's transitioning.

University Management Board

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