

GUIDELINES AND MODEL FOR TRANSITION, DETRANSITION, AND RETRANSITION PLAN

This guidance document serves as supporting procedures and referenced material described in HRAR 2.04 and may be updated as glossaries or other [resources](#) within the Office of Equity and Human Rights are updated or as administrative processes evolve. This is model guidance and may not be desired by everyone. When reviewing these options, please keep in mind that these are a model only and the approach taken should be centered on the transitioning, de-transitioning, or re-transitioning employee's requests or requirements.

For the purposes of this document and HRAR 2.04, the following glossary is provided:

Gender identity (sometimes simply referred to as “gender”) refers to a person’s internal, deeply-felt sense of being female, male, or another gender identity, regardless of their anatomy or the sex they were assigned at birth.

Gender expression refers to an individual’s characteristics and behaviors (such as appearance, dress, mannerisms, speech patterns, and social interactions) that may be perceived as feminine, masculine, or another gender expression.

Transgender is a term that describes people whose gender identity does not match the sex they were assigned at birth.

Cisgender is a term that describes people whose gender identity matches the sex they were assigned at birth.

Non-binary is a term that describes a gender identity that is not strictly male or female.

Gender Expansive is an umbrella term that describes a gender identity and/or expression that expands upon current cultural or societal expectations of gender.

Transition is the legal, medical, or social processes some transgender or nonbinary people undergo to match their gender identity. Examples can include a formal or informal change to names or pronouns, makeup and hairstyles, hormone therapy, or gender-affirmation surgery.

Deadnaming is the act of referring to a person (typically one who is transgender, non-binary, gender expansive, or similar) by a name they have previously used, such as their given birth name, that they have since stated is no longer the correct way to address them.

Misgendering is the act of referring to someone (especially – but not limited to – a transgender or non-binary person) by using a word, pronoun, or form of address (Mr., Ms., Mx., Sir, Ma’am, etc.) that does not correctly reflect the gender with which they identify.

Outing is the public disclosure of the non-public sexual orientation, previous name(s), or gender identity of a person. Outing a person is a violation of privacy and City policy, and is also dangerous for the outed individual.

Before the Workplace Transition Begins

Identity is a deeply personal, complex facet of our lives, and no one can completely understand anyone else's journey. Whatever an employee's past, present, or future gender identity is, and regardless of their reasons for transitioning, detransitioning, or retransitioning, or their mode(s) of transition (social, legal, medical and/or surgical) or lack thereof, the City expects management, BHR staff, and other employees to remember and respect the fact that the transitioning person is the authority on their identity.

There is no "best" way to transition, detransition, or retransition. Gender transitions are often non-linear and personal; therefore, it is important that the transition plan be developed to be as adaptive and flexible as possible for the situation and circumstances at hand.

- Some employees (hereafter, "transitioning employee" or "employee") who make changes to their name, pronouns, expression, etc., may also not identify with the word "transition." If the employee identifies or requests the utilization of an alternative term to "transition" in discussing that employee's workplace modifications, use the requested alternative term.
- For the employee, a transition, detransition, or retransition may include various medical and surgical procedures, and/or change in their appearance, name, or gender markers. No specific procedure, appearance, medical care, or legal intervention (e.g., name change) is required for an employee's gender identity to be valid.
- It is inappropriate to ask if someone is going to "fully" transition, "get the surgery," whether they are "pre-op" or "post-op," or to otherwise inquire as to what changes (e.g., medical, legal, etc.) a person may or may not be considering or has already had. A person's medical history is personal and private. Like other personal, private matters at work, do not ask unless a person offers that information themselves.

Employee Request Notification

1. Transitioning employees should first reach out to the assigned Human Resource Business Partner ("HRBP") for their Bureau or Office. If an employee does not know who the assigned HRBP is, the transitioning employee or someone they trust can ask their supervisor, manager, or timekeeper.
2. At the request of the employee, within two weeks of the transitioning employee reaching out to the HRBP, the HRBP will set up a meeting (virtual or in-person) to answer any questions or concerns the employee has related to their transition.
 - a. The assigned HRBP will provide the employee with all City policies relevant to the prospective transition process, including HRAR 1.06 (Employee Medical Files), 2.02 (Prohibition Against Workplace Harassment, Discrimination, and Retaliation), 2.04 (Gender Identity Non-Discrimination and Workplace Gender Transition), and the paid and unpaid leave options under Chapter 6 (e.g., FMLA, OFLA, ADA, Paid Leave Oregon, etc.). The HRBP will give the employee an overview of these policies and advise, generally, how each policy protects or assists the employee. The transitioning process may require multiple visits to medical professionals which may include various medical procedures that could require an employee to take time off from work on an intermittent or continuous basis. In this initial meeting, the HRBP will also share benefits information with the transitioning employee about benefits coverage for gender-affirming care, carrier contact information to facilitate the employee's benefits coverage questions, and information to connect the employee with the City's Queer Alliance employee resource group.
 - b. The transitioning employee will notify HRBP when they are ready to schedule a joint meeting with their supervisor and the HRBP. The HRBP will schedule a meeting (virtual or in person) with the transitioning employee and their supervisor within two weeks of the notification; others may be included if desired by the transitioning employee. This meeting

should be scheduled to ensure the supervisor knows of the employee's planned transition and provide support and guidance to the supervisor and employee. At the sole election of the employee, management beyond the transitioning employee's supervisor can be made aware of the employee's planned transition so that leaders can express their support when the employee's transition is made known to the employee's work team.

3. After these initial meetings, and additional meetings as needed for clarification or questions by the transitioning employee, the assigned HRBP and management will collaboratively create a Workplace Transition Plan (Plan), unless the employee objects or indicates in writing that they do not desire a plan. An employee may also create their own proposed Workplace Transition Plan if they desire and submit it to BHR for review and consideration. The transitioning employee will know best when this should occur as they will be able to determine all relevant factors to be considered when choosing this date.
 - a. The Plan should address:
 - the date the transition will officially and formally occur, e.g., when the employee will begin to use their name and pronouns in the office;
 - support for the employee using facilities they feel most comfortable using;
 - how and in what format the transitioning employee's coworkers should be made aware of the employee's transition (it is up to the transitioning employee to decide if they would like to make some coworkers aware of their transition on a one-on-one basis before it is officially announced);
 - what, if any training, will be given to coworkers and management;
 - what updates should and can be made to the transitioning employee's records, and when they will be made; and
 - the general process for using any leave that may be needed for pre-scheduled or anticipated medical appointments or procedures, as well as a discussion of what accrued leave, Paid Leave Oregon or long-term disability benefits may provide income continuation during the recovery phase.
- Ensure that all name changes (Zoom, Teams/Outlook; name plaques on cubicles/offices, etc.), email addresses, and photographs are updated in advance so that all changes coincide on the transition day.

Day of Notifying Workgroup of Transition

- At the employee's discretion and choice, the employee may with assistance they request from the HRBP, set up a work team transition meeting that includes the transitioning employee, the employee's manager or supervisor, the employee's coworkers, and any other leadership if they are able to attend. At the meeting, the employee may:
 - provide a handout about transgender issues;
 - seek a volunteer from the City's Queer Alliance employee resource group or elsewhere in the City to attend for support;
 - determine whether they, as the transitioning employee, feel comfortable attending or would prefer not to be there; and
 - ask the head of their work team or another manager they prefer to announce the transition.

Management Expectations for Employee Workgroup Meeting (*at election of requesting employee*)

- Management who are present must send a strong message of respect for the individual, for diversity and inclusion, and for setting the tone regarding expectations from staff.
- The speaking supervisor and the employee should meet ahead of time to agree what topics

should be addressed by the supervisor at the announcement meeting.

- Depending on the interest and desire of the transitioning employee, it is strongly recommended that a member of senior management over the workgroup act as an inclusion sponsor. The role of the sponsor will be to send top-down, respectful, inclusive messages that will make strong impressions and set standards and expectations for appropriate attitudes and behaviors for all employees within the work group. As needed, managers should reiterate these messages verbally and/or in writing. Generally speaking, at the meeting, the manager supervisor should:
 - emphasize the transitioning employee's importance at the City and the City's complete support of the employee's transition;
 - review the City's relevant policies described above;
 - encourage respect for the transitioning employee's gender expression;
 - advise coworkers about the transitioning employee's new name and pronoun(s);
 - model behavior by using the transitioning employee's new name and pronoun in all communication – written and oral, formal and informal;
 - correct and/or discipline coworkers for the repeated deadnaming or misgendering of the transitioning employee;
 - announce any training dates to occur; if any and if possible, the training should occur before the date of the employee's official workplace transition;
 - solicit any questions to be asked privately between management and coworker and employee, or in the open meeting at the discretion of the employee (refer questions the manager cannot answer to BHR); and
 - in closing, establish that the transition will not change the workplace and that everything should go on as it did previously.

Official Workplace Transition Day 1

The transitioning employee's manager or supervisor should be clear that all elements are in place, in the same way they would for a new hire or transferred employee. These elements include:

- Making sure that the transitioning employee has a new ID badge and photo if necessary.
- Ensuring all work documents have the appropriate name and gender and checking that these have been changed in all places an employee's name may appear.

The transitioning employee's manager, supervisor, and/or sponsor will schedule regular check-ins with the employee for the first year to ensure that any issues are identified early and can be addressed without escalation to more official HR actions. These check-ins should be at least monthly. These check-ins must occur during regular working hours and will be considered normal paid time, not subject to special billing codes, and the employee is not required to relinquish this time in order to meet other bureau priorities. The employee is permitted to invite peers to this meeting if needed, who will be afforded the same worktime expectations as the employee.

For ongoing guidance, managers, supervisors, and sponsors should reach out to their bureau's HRBP, the Office of Equity LGBTQIA2S+ Program staff, the Queer Alliance leadership team, or other support staff as identified by the employee.