

APPENDIX 1 – Confidential Action Plan Template

<i>Planning the Transition</i>	Who?	When?
Initial discussion about planned transition (including employee's intentions and <i>may</i> include any medical advice) If the employee prefers to talk with People and Organisational Development initially, guidance will be provided, and People and Organisational Development can then make links with line manager and attend any meetings to provide support	Employee Line manager People and Organisational Development	
Ensure employee is aware of 'Transgender Equality and Transitioning in the workplace guidance' and supporting documents	Line manager People and Organisational Development	
Ensure employee knows they will be supported at work through the transition process	Line manager People and Organisational Development	
Think about and share a timeframe in relation to a planned transition – it <i>may</i> be possible to plan out each step and how long they will take, but not in all cases	Employee	
Create a transition plan that should consider and cover: <ul style="list-style-type: none"> Plan time off that may be required for appointments or treatment (<i>may</i> be guided by any medical advice) The date the transition occurs (this is the date the employee changes their gender expression) Decide how and when colleagues will be informed. Make a list of who needs to know. This will be individual to the employee who may or may not wish to do this themselves Consider whether any training or awareness sessions should be provided for colleagues Decide what needs to be updated eg ID badge, personal records, IT systems, Disclosure Scotland etc and when this should happen (in most cases this would be done in advance so that everything is ready on the day the employee transitions) 	Employee Line manager Employee Employee Line manager Line Manager People and Org Development Line Manager Employee	

<ul style="list-style-type: none"> • Prepare for the transition day – readiness for the first day 	Employee Line manager	
<i>Following Transition</i>	Who?	When?
Discuss and agree how any continued support following transition is to take place, depending on individual employee's wishes.	Employee Line manager	