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Referenced policies and documents

Bullying, Harassment and Sexual Misconduct Policy

Lancaster University Strategic Plan 2020

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# 1. Introduction: experiences of gender identity and expressions at Lancaster University

This Guidance has been developed to provide practical information and support for trans and non-binary members of staff and students. Furthermore, it aims to offer advice and guidance to managers, members of staff and other people who are involved in providing support to trans people at the individual level.

It should be read in conjunction with the University Policy on Gender Identity and Expression, which outlines the University commitment to trans equality and inclusion.

The understanding of gender identity and expression is continually evolving. Students and staff at Lancaster University (LU) are actively contributing to this developing awareness, leading on events and good practices aimed at making our University a fairer and inclusive environment. Working with LU trans community has had a positive impact on the University organisational priorities and values.

Coming out as trans or non-binary, studying, conducting research and working as a trans person, or taking the decision to undergo, undergoing or dealing with the steps following a transitioning process, all represent very personal experiences, which should be treated with confidentiality, openness (where appropriate), inclusivity and respect by all members of the Lancaster community.

This Guidance, in association with the University Policy on Gender Identity and Expression, aims to:

* Provide assistance in addressing questions, doubts or concerns from staff, students and other members of the LU community about gender identity and expression.
* Identify clearly and easily Key Contacts that any trans persons can refer to for practical and pastoral assistance.
* Illustrate procedures developed at LU for supporting students and staff during the transitioning process and for accessing inclusive services. LU is committed to ensure that the gender identity and expressions of students and staff are acknowledged.

# 2. Definitions

’Trans’ is an umbrella term to describe people whose gender is not the same as, or does not sit comfortably with, the sex they were assigned at birth. In this guidance, the term trans is used to refer to:

* Persons who intend to take steps, are undertaking steps or have taken steps to align their gender with their gender identity, by changing physiological or other sex attributes.[[1]](#footnote-2)
* People who do not identify with the traditional gender binary categories of male and female, but place themselves within a spectrum of gender identities and expressions, including those who identify as transgender, non-binary, gender queer, agender, gender diverse, gender fluid or gender non-conforming.

For further details on the terminology linked with gender identity and expression, please see Appendix I – Terminology of this Guidance. This terminology is constantly evolving and highly personal. The list is therefore not exhaustive and is subject to periodic review.

# 3. Supporting Students and Staff going through transitioning

Transitioning is a term used to describe the different steps that a person can take in order to live in the gender they identify with.

This process is unique for each individual and can determine many changes in a person’s life. Some people decide to undergo medical treatments, hormone therapy or surgery, but not all trans individuals wish, or have the resources to, opt for this path.

It is not necessary to undergo medical intervention in order to transition or obtain a Gender Recognition Certificate (GRC).[[2]](#footnote-3)

Transitioning can also involve changing name and/or gender in official records, dressing in clothes aligned with the person’s affirmed gender, or communicating to other people about one’s gender identity.

For a trans person, starting to publicly present in their affirmed gender represents a crucial moment that requires support from the University. This should be managed and communicated appropriately to other colleagues and students. The trans person should always be involved in, and agree with, the way in which the University manages this process.

Some useful [guidelines](https://www.advance-he.ac.uk/knowledge-hub/trans-staff-and-students-he-and-colleges-improving-experiences#:~:text=Trans%20staff%20and%20students%20in%20HE%20and%20colleges%3A%20improving%20experiences,identity%20or%20decision%20to%20transition.) on how to support people who identify as trans or non-binary include, but are not limited to:

* Respect the person’s gender identity.
* Address and refer to a person using the pronoun(s) and title which make them feel comfortable. We cannot assume someone’s pronouns in the same way we cannot assume someone’s name.
* If in doubt, either listen to what pronoun others are using or politely ask what they prefer; however, if you make a mistake, do not over-worry: apologize and move on with the conversation.
* A good practice could be to introduce your own preferred pronoun(s) when you meet a person, which gives them the opportunity to share theirs if they wish to do so. This could be a way to put other people at ease and prevent them from worrying of having to specify their preferred pronoun(s).
* Respect people’s privacy. Do not tell other people about someone’s trans status without their consent. Do not ask questions about their ‘real’ or ‘birth’ name (dead name) or title. Do not ask if they have a GRC.

As with good practices generally, any advice must be combined with a specific context and use of good judgement in order to determine what is appropriate to a specific situation.

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| GOOD PRACTICE People at LU have the option to include their pronouns in their email signatures. This helps to normalise the practice and is an easy way to prevent misgendering. It also helps to demonstrate that pronouns should never be assumed. For more information on how to include preferred pronouns in an email signature, please consult the University website [here](https://answers.lancaster.ac.uk/display/ISS/Use%2Ba%2Buniversity%2Bemail%2Bsignature).The Students’ Union has held initiatives aimed at promoting trans inclusivity. The [‘All In’](https://lancastersu.co.uk/all-in) project encourages inclusivity within Sports teams, while a Pronoun campaign to raise awareness on the use of pronouns has been embedded within the entire organisation, resulting in the adoption of a specific [policy](https://nusdigital.s3-eu-west-1.amazonaws.com/document/documents/37205/dbcf39ac5ff493228f17a5fd349f4302/2017_10_11_Use_of_Pronouns_Policy.pdf?AWSAccessKeyId=ASIA4ZNQXZBZCKMC3ECG&Expires=1592310636&Signature=SoPd0g1wUu4nyB1KEvV%2BsyXwbQ0%3D&x-amz-security-token=IQoJb3JpZ2luX2VjED4aCWV1LXdlc3QtMSJGMEQCICyXVkw7JrPGPBK43%2FhuEmSn4gF51wC%2BZYuKj2SEibBjAiBGeQ7dwdEgrzLOIc0yE2CXqEVKE8de6NZbMkPV2qg1Hiq9Awi3%2F%2F%2F%2F%2F%2F%2F%2F%2F%2F8BEAAaDDg3OTIyODM0MDMzOCIMBkvC%2BZWVeDgRano%2BKpEDbLlB22XZveIHR5I%2FUEYzod%2FGcod0FyYocjzP3kT78X12lEG%2Fmf0a1vYuQAKP3slXoo5UKIC%2B0k2BphtGRbUofFYemWZ5rnCArgrMmoQ8JB%2F1yARsCAa0Wq2Hy3ieWpDBaX%2B0Q%2BlYJPW4GozXQrbkhtjzjl0gCOJ8GHecqiG01qjcXXAn241wj%2FrUrsFKyufoPaw4rIRPjPGCmEUD2KNavY87lNEbRuXH5yE0scSUslUa95y689%2F1QWhmUySeIif4ttx1l5Q4tiIQIO9iNrua7MRv5Q5eTNpp0wiCx4daRlPqJif5CN0z9LtM8NPbwfZEdKjB1nkoCjyPYBkmEDx1qEPPvmPfq%2BJToTxDix7idfI19qENDJP5FsGJ2IxWprQOSDURGMEzXOIZPaAXhtPy%2FCKq6fgTIPILdSNtrPuI2PJE3LvW90UmeSd37j%2BpdNn36c8536V0%2BelE2tPSjCy0RyA2jHjZ2kOdOtsDa5arIM%2Fp%2FOiXWFsDbQPOxKd51LwJgZ4shG3Y6hUVguSRw1yhKucw8bSh9wU67AGvq0ltO1DjynSbCvKPONBzmmVRyk5M7d%2FEdFtreseLrUJis3zmGF7kpha0Uf9neo1NlGmVOnS9DOjAFMcWDSuVkpvjHLcQOH9cHmB8ietcba5vkOnv2wGKop%2F9uUYnnfNPI3yiS9L4D6vc8F5AX2hStO6jYNiZiOro6OwpyQaeeL8MS7LdCD2ixRK%2F%2BSO1nnjmd7%2Fw0bFJ%2BoBNSenbQPun7ySJ%2ByTV9lNUz0VAG2dVqCQpZ9SVQ1IS2b5TRuUVUPGZD90vo9kZ6wQWYz4PbtZfbqPKtETtyW4kjgfE02E22ku3U38%2Bm1BYeIzXEA%3D%3D). |

## 3.1 Transition Support Plan

Every experience of transitioning is different. It is extremely important that the member of staff or student who intends to transition or who are transitioning has the opportunity to refer to a Key Contact with whom they can agree a support plan in order to manage their transition.

If a student or member of staff has decided to undergo transitioning (or is undergoing transitioning), they should contact one or more of the following people (i.e. whomever they consider appropriate) to discuss how they intend to deal with their transition:

Undergraduate students

Academic/Personal tutor; College Advisory Team (CAT) or College Managers.

Postgraduate taught students

Academic/Personal tutor; PGT Director; CAT or College Managers.

Postgraduate research students

Supervisor; PGR Director; CAT or College Managers.

Staff

Line manager, with HR Advisor available to support the line manager if required by the staff member.

A meeting will be arranged to discuss the situation in confidence and to agree the process for supporting the student or staff member with their transition.

It is recommended that:

* A support plan is outlined in the first meeting. Any decisions should be led by the trans student or staff member.
* A timeline for transitioning is discussed, with the understanding that timescales may change considerably in some cases if medical intervention is required.
* When training or briefing colleagues, involvement of fellow students or service users will be necessary. If so, agree when the training or briefing will be held and by whom. HR staff, managers and colleagues may require additional training when working with a colleague who is transitioning.
* When the trans person has informed the University and consented to make the required changes, actions will be planned to communicate the changes to other students and members of staff. These arrangements shall be detailed in writing, kept confidential, and any records updated with the affirmed gender, new names/s and titles at a point decided upon by the person who is transitioning. The University will store any documents with previous name/s and titles in compliance with its legal obligations and will ensure that they are kept confidential.

The University will take steps to ensure that Key Contacts will be trained to offer appropriate support.

For further details on what should be considered in the Transition Support Plan, see an example under Appendix IV and V. Please consider that every transitioning experience is unique, and each trans person may have different needs and/or concerns.

## 3.2 Change of name, gender and/or title

Some trans and non-binary people may express the intention to update their name and/or gender in LU records. Any requests will be addressed as sensitively and in a timely manner as possible. Once the changes have been made, there should be no records that disclose the person’s trans status to a third party, as far as possible.[[3]](#footnote-4)

Refusing to change a trans student or staff member’s title, name and/or gender on their records can constitute discrimination on the grounds of gender reassignment under the Equality Act 2010.

A GRC provides a trans person with the legal documentation required to change their birth certificate and legal gender. However, it is unlawful to require a GRC for changing someone’s name or title or gender marker.

Trans people can change their legal name by making a Statutory Declaration of name change with a solicitor. They can also do it by a change of name deed. This differs from a Statutory Declaration in that can be offered for free by various online companies. However, unlike the change of name deed, the Statutory Declaration is a written statement of fact and a legal document. For a change of name deed to have legal standing, the deed shall be enrolled, which requires paying a fee. In addition, the deed ends up being listed in public records and does not remain private.

It is recommended that any requests to change names are made in writing, accompanied by the original or certified copy of the Statutory Declaration or Change of Name Deed.

A list of documents that may require changes of name and/or gender can be found at Appendix VI and VII (Updating Records).

### 3.2.1 Students

Trans students are advised to refer to the Key Contact to agree appropriate actions in order to update their personal records on University databases. The Key Contact can provide support to liaise with specific offices and ensure that a student’s gender is identified correctly in different databases whenever possible.

It is however possible that the trans student prefers to request changes in relation to their name and/or title autonomously. Changes to name and title can be requested through the Base by completing a ‘[Change of name](https://www.lancaster.ac.uk/media/lancaster-university/content-assets/documents/student-based-services/base/change_of_name_and_gender_Form.pdf) and gender identity form.’[[4]](#footnote-5) Trans students can update their University card free of charge.[[5]](#footnote-6)

Information on registering a change of name and/or gender can be found on [The Base Services](https://www.lancaster.ac.uk/student-and-education-services/the-base/services/register-a-change-of-name-and-gender/) website. For queries regarding change of names requests, students can refer to the Student Records team in the Student Registry, which processes the change of name requests, by sending an email at recordsenquiries@lancaster.ac.uk.

Please note that the trans student can still refer to the Key Contact for any questions or doubts at every steps of the process.

In order to update a student’s name, gender and/or title in LU official records, the University requires evidence of a legal name change.

Supporting evidence can be provided by presenting one of the following documents:

* Statutory Declaration
* Change of name deed
* Driving license
* Passport
* National identity card

Please note that the University uses different databases to record data, which may present limitations in the available options to change personal information regarding gender and/or gender identity. It is recommended to discuss this issue with the Key Contact.

The University will take actions to review recording systems to ensure consistency in the available options to describe someone’s gender and/or gender identity.

### 3.2.2 Staff

Trans staff members are advised to refer to the Key Contact to agree appropriate actions in order to update their personal records on University databases.

The line manager (with the support of the HR Advisor, if required) will liaise with relevant teams in HR and Payroll.

In order to update a member of staff’s name, gender and/or title in LU official records, the University requires evidence of a legal name change.

Supporting evidence can be provided by presenting one of the following documents:

* Statutory Declaration
* Change of name deed
* Driving license
* Passport
* National identity card

The Key Contact will:

* Consider together with the member of staff which documents, or databases need updates (see Appendix VII – Updating Records – staff).
* With the member of staff’s consent, liaise confidentially with key staff in HR to update the member of staff’s personal records in University databases.

Please note that the trans staff member always needs to provide supporting evidence for HRMC related records.

### 3.2.3 Using preferred names and titles

Trans students or members of staff may not want, or may not be able to, change their legal name. However, they can ask the University to address them by using their preferred name.

Students and members of staff affiliated to a college or department should be given the opportunity to ask members of these institutions to use a certain pronoun, title or name informally before requesting an official change in University records.

Some records can be changed upon request (e.g. e-mail, staff directory). Preferred names not supported by legal documentation are treated in the same way as nicknames on LU internal systems, and as such, adding a preferred name does not require supporting documentation. Preferred names can also be used on internal documents.

If a trans student or member of staff wishes to use their preferred name, it is advisable to discuss with the Key Contact when and how to inform the Students and Education Services/HR, or to personally inform the Students and Education Services/HR in advance, so that this name is used in all appropriate occasions.

Staff can request to their line manager (with the support of the HR Advisor, if required) to include their preferred name in the ‘known as’ entry available on the Staff profile page in HR Core.

Exceptions to this rule are accepted when official or legal processes are involved, where the birth name, or if changed, legally changed named must be used, including (but not limited to):

* Degree certificates
* Qualification certificates
* Pension records
* Payroll records
* HM Revenue and Customs (HMRC) documentation

### 3.2.4 University photos

Profile pictures can be updated on Office 365 to align with staff and students’ affirmed gender. For more information on how to do this, please consult the ISS Help Centre [here](https://answers.lancaster.ac.uk/display/ISS/Change%2Bphoto%2Bin%2BOffice%2B365).

Students can upload their University photo through the University Photo Upload Applet in iLancaster. In case of any problems with the applet, please consult the ISS Help Centre [here](https://answers.lancaster.ac.uk/display/ISS/Problems%2Busing%2BUniversity%2BPhoto%2BUpload%2Bapplet%2Bin%2BiLancaster). However, if a student wishes to change their profile picture to align it with their affirmed gender, the University requires that they follow the procedure for a change of name described at 3.2.1.

Every researcher has two profile pages: one on their department and one on the Research Directory. The Pure system does not send all its information onto the departmental webpages. If a researcher updates their picture to Pure, it will update the *Research Directory* only. To update pictures on departmental webpages, researchers need to email it to webmaster@lancaster.ac.uk to request a change. For additional information, please consult the [Pure FAQ](https://www.lancaster.ac.uk/research/research-services/research-information--systems/faq/) webpage.

Staff can discuss with their Key Contact when and how to request a change of profile picture.

### 3.2.5 International staff or students

There may be international staff and students who wish to be referred to with their affirmed gender and/or their preferred name, but legislation in their country of origin does not allow a change in their legal records.

Changes to the student or staff member’s name, title and/or gender can be made in some records (e.g. e-mail; University card).

Regarding changes that require evidence of a person’s identity, such as a passport or a driving license, the [Home Office](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/810742/Use-and-change-of-names-v1.0ext.pdf) provides that if the trans person comes from a country where national authorities do not recognise changes to their names and/or gender in national identity documents, they can apply for a Biometric Residence Permit (BRP), providing that the applicant can demonstrate that they are using their affirmed gender and/or preferred name for all purposes.[[6]](#footnote-7)

Therefore, the University should require only the BRP as supporting evidence to update the international staff or student’s name and/or gender on official records.

### 3.2.6 Degree certificates and Alumni records

Alumni who wish to have their name and/or gender changed on the Alumni database after graduating can contact the Alumni office at alumni@lancaster.ac.uk, providing details of their current and former name and/or gender, date of birth, program and leave year. Please note that the Alumni database also contains the details of all current students. Therefore, current students may also contact the Alumni office and inform them of a change of name and/or gender, and these details will then be used on any communication the student receives after graduation.

Alumni who wish to change their name in their degree certificate should contact the Student Registry at alumnidocument@lancaster.ac.uk. A degree certificate is a legal document and a change of name and/or gender as part of a transitioning process requires providing supporting documents as evidence, such as a change of name deed, a Statutory Declaration, a passport, birth certificate, driving license or GRC. If an individual wish to change the name on their degree certificate after graduating, they will have to contact the Student Registry at alumnidocument@lancaster.ac.uk. Replacement certificates can be ordered online from the Student Registry; however due to the nature of the changes required, we recommend that you email alumnidocument@lancaster.ac.uk in the first instance.

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| GOOD PRACTICEThe Alumni Office allows former students to choose from the following gender options: Female, Male, Non-Binary, Other, Prefer not to say, Unknown. |

### 3.2.7 Qualification certificates

Qualification certificates must state the legal name of a student, not their chosen name. Students will need to formally change their name and show proof of legal name change (e.g. a statutory declaration of name change or a deed poll) for a certificate to be issued under a name different from the one under which they registered. Qualifications bodies should have specific procedures in place for trans people.

If a trans student requests a meeting to create a transition support plan, the Key Contact should inform the student that they should consider whether and when to request a change of records to the qualification bodies concerned.

### 3.2.8 Confidentiality and data protection in relation to change of name and/or gender

Confidentiality of information in relation to a person’s trans status is crucial. It must not be disclosed without the person's consent, which should preferably be obtained in writing.

A breach of confidentiality in storing and/or using information concerning an individual’s gender identity or expression, or transitioning status can amount to a criminal offence under the GRA 2004. This constitutes also a disciplinary offence and will be taken through the HR disciplinary process. The University considers this a disciplinary offence also when the breach of confidentiality concerns non-binary people.

If a person requests that reference to their previous gender and name is removed from all documents (except those that cannot be changed due to the University’s legal obligations), the University will commit to do this. Trans people who hold a GRC can request that any reference to their previous gender – and if applicable to their previous name – is changed. Nothing should remain on file that discloses the person’s previous details. Old data must be stored confidentially in HR Drive (for staff) or in a documents area of LUSI (for students) with restricted access.

It may be necessary to disclose information about a person’s trans status for insurance, pension and occupational requirements, where a trans person do not hold a GRC. However, this should only be done in consultation with the person concerned. Disclosure without a person’s consent constitutes a breach of their right to privacy.

Notification of intent to transition (e.g. by creating a transition support plan with the Key Contact) is sufficient for a person’s gender to be changed on University records, unless supporting evidence is needed. Further information on when supporting evidence is required can be found at Section 3.2 of this Guidance.

#### Students

A person’s file or record should always reflect their current name and gender. Information on the student’s previous identity, such as paper or medical records, or a GRC, must be kept confidential, while access to this information must be restricted.

Staff should be allowed to access this personal information exclusively to perform specific duties.[[7]](#footnote-8) Trans students should be made aware of the level of confidentiality provided by the University record system. They shall also be made aware of which staff members can access their record and be asked to give explicit (signed) permission for them to do so.

#### Staff

Information on the staff member’s previous identity, such as paper or medical records, or a GRC, must be kept confidential. Trans staff can contact their line manager (with the HR Advisor’s support if required) for assistance in updating their records.

Access to this information must be restricted. Staff should be allowed to access this personal information exclusively to perform specific duties.[[8]](#footnote-9) Trans staff should be made aware of the level of confidentiality provided by the University record system. They shall also be made aware of which members of staff can access their record and be asked to give explicit (signed) permission for them to do so.

### 3.2.9 References

References for current and former staff and students at any stage of their transition must make no indication of the person’s previous name and/or gender identity and shall refer to the person with the appropriate pronouns.

Failure to keep information confidential, unless the trans person has given explicit written consent to disclose it, would constitute a violation of the Data Protection Act and, where a person has a GRC, of the Gender Recognition Act.

If requested, the University will declare that it does not have any records to references related to someone who has transitioned that refer to a previous name or gender, unless a statutory obligation to release exists.

Should a member of staff be approached by third parties in relation to requests for information on trans students or staff that are unclear or controversial in any way, the request should be forwarded to the Information Governance team in the Division of Strategic Planning and Governance by e-mailing: information-governance@lancaster.ac.uk

## 3.3 Time off for transition

*Staff*

A staff member who intends to undergo, is undergoing or has undergone a transition may need time off work for health treatment or recovery. They may also require paid or unpaid annual leave.

The Equality Act states that it is unlawful for an employer to treat a trans person who is absent from work to undergo gender reassignment worse than someone who is absent from work for another reason - for example, because they are ill, injured, recuperating, or having counselling or medical appointments. Whilst the Equality Act 2010 does not explicitly cover non-binary identities, the University will support any non-binary staff in the same way as a binary trans staff who chooses to undergo any transition or gender affirming surgery/medical treatment.

Treatment related to transition cannot be regarded as cosmetic or elective. An employee should not be subject to a disadvantage for taking time off to transition or undergo gender affirming medical treatment (including surgery).

Transition-related absence should be considered as special leave and should not count towards an individual's sickness absence record, nor should it be subject to normal absence processes such as disciplinary or capability.

The line manager and employee should discuss in advance how much time off the staff member is likely to need to undergo any treatments, although the University should allow some flexibility. This will allow the University to plan for the absence and arrange cover for the employee if necessary.

A staff member who is transitioning may wish to be redeployed upon their return to work. However, the line manager should not put pressure on an individual to change jobs or make assumptions about their capability or wishes.

In addition to Annual Leave, the University provides the opportunity to ask for additional leave.

Conditions to apply for additional leave can be found [here](https://portal.lancaster.ac.uk/intranet/services/people/flexible-benefits/wellbeing/).

Students

A student who intends to undergo, is undergoing or has undergone a transition may need time off for treatment of recovery. This may also require adjustments to their programme of studies.

The University will support any non-binary students in the same way as binary trans students who chooses to undergo any transition or gender affirming surgery/medical treatment.

A student can discuss time off for transition with their Key Contact, and whether special arrangements to continue their programme of studies are necessary. If a student is experiencing fatigue or needs recovery time during hormone treatments, or if non-medical transitioning procedures require accommodating the student’s programme of studies, temporary adjustments can be discussed.

Adjustments to the student’s learning to minimise the impact of transitioning can also be considered.

## 3.4 Healthcare

An individual who identifies as trans does not necessarily seek medical intervention or surgery as part of their transition, but they may opt for this route. Usually, the initial Point of Contact is the person’s GP, who can refer their patient to one of the [Gender Identity Clinics (GICs) open in the UK](https://www.nhs.uk/live-well/healthy-body/how-to-find-an-nhs-gender-identity-clinic/).

GICs have long waiting lists: in 2020, the average waiting time for an initial appointment is approximately two years. They may also be some distance away; for instance, a trans student with a home address in Scotland or Wales may be referred to a clinic in Manchester.

Charity and non-profit organisations provide assistance with people who are experiencing the transitioning process. See Appendix X for a list of contacts.

However, it should be highlighted that transitioning can also include moments of joy, self-actualization and fulfillment for many trans people. It should not be assumed that medical support, including mental health support, is required. The University aims to offer all necessary support upon agreement and constant dialogue with the person concerned, but it should not be assumed that either medical or mental health support are required.

Staff undertaking medical appointments at a GIC or other gender professional must be allowed time away from their duties in line with University policy on other aspects of urgent medical treatment.

### 3.4.1 Students’ health and wellbeing

The University Student Counselling and Mental Health Service can provide mental health advice and support to help students continue with their studies if they are experiencing difficulties with their mental health. However, please note that this service is usually offered short-term and does not provide specific emotional support related to transitioning.

### 3.4.2 Staff health and wellbeing

Transitioning may represent a complex, potentially stressful and delicate experience for trans staff members. Staff should be encouraged to consult a mental health counsellor if they feel the need to, and appropriate arrangements to manage their workload should be considered during the agreement of a transition support plan.

The Counselling Directory website is a nationwide database of qualified counsellors and psychotherapists, where staff members interested in sourcing and paying for their own counselling can find useful information and view profiles of local counsellors. Other useful resources are listed at Appendix X of this Guidance.

LU offers an Employee Assistance Programme (EAP). The EAP portal provides information and useful links relating to sexuality, sexual orientation or gender identity issues. However, please note that the portal only allows self-identifying someone’s gender as either male or female. The University is taking steps to amend this in due course.

A [telephone helpline is available for family members](https://www.lancaster.ac.uk/staff-wellbeing/be-aware/eap/#d.en.440847) (partners or spouses, dependents aged 16-21).

3.5 Toilets and facilities

LU offers people the option to choose the toilets and changing facilities that align with their gender identity.

Providing private spaces for trans and non-binary people represents a sign of inclusion and support.

A trans student or staff member may wish to use the toilet corresponding to their affirmed gender. In these circumstances, other colleagues and students should not question this choice. If necessary, this decision can be communicated to other colleagues and students upon consultation with, and with the consent of, the trans person concerned.

The University provides gender-neutral facilities which trans and non-binary people can access to enjoy their privacy whether they do not feel comfortable with using gendered (typically male or female) toilets or changing rooms. These spaces are not necessarily restricted to trans people and should be open to anyone who wish to use them.

All major refurbishments and new buildings are designed with gender-neutral facilities on the ground floor. A campus-wide survey has also identified or reallocated provision to ensure that there is gender- neutral toilets and showers across campus. The University will take steps to include the location of gender-neutral toilets in campus maps.

Where gender-neutral facilities are not available, reasonable adjustments will be made to ensure that trans people who do not feel comfortable with using either male or female facilities can access dedicated spaces (e.g. by labelling a toilet in the building as gender-neutral) This should not be restricted to accessible toilets, as this does not support LU commitment to trans-inclusion and support for trans people to live in their affirmed gender.

Non-binary people will be able to access the facilities they are most comfortable using in this situation (e.g. accessible toilets: however, there is no expectation that they will always use them).

Use of gender-neutral toilet signage to identify these facilities can promote trans-inclusion.

## 3.6 Dress Code

Dress codes should be arranged in a way that gender stereotypes, or binary gender choices, are not reinforced. Trans people should face no obstacle in dressing in a way consistent with their gender identity.

The university encourages a range of gender expressions. Staff and students are free to apply the dress code in a way that reflects their gender identity.

## 3.7 Financial hardship for transitioning students

The transition process, whether it involves undertaking medical procedures or aligning a person’s appearance with their gender identity (e.g. changing clothes) may entail financial hardship. International and PGR students may face particular challenges. Students’ families may be hostile to the transitioning process and withdraw their financial support.

Funding in the form of grants or awards is available for students through colleges or the University. Although there are not any specific funding opportunities to cover specialist medical expenses related to transitioning, a few programmes aim at assisting students, including mature students and PGRs in some cases, in financial hardship.

For further information, students can contact their college, or make an appointment with a Student Funding Service adviser. Appointments and inquiries can be made at The Base or via e-mail at studentfunding@lancaster.ac.uk. Please also consult the [Financial Support and Awards](https://www.lancaster.ac.uk/student-and-education-services/money/funding/) webpage.

Please note that students can also contact the Students’ Union, which elects an LGBTQ+ Officer and has an [LGBTQ+ Forum](https://www.facebook.com/LancasterLGBTQ/).

## 3.8 Payroll and pensions

An individual’s change of legal gender may require updates to the staff member’s payroll and pension personal information, terms and conditions. Possible changes should be discussed with the HR Advisor as part of the creation of the transition support plan. In principle, a staff member should be regarded as their legal gender for pension purposes. In the past, state pension arrangements were different for men and women, but the legislation has gradually harmonized the eligibility conditions. This has created an inclusive space for non-binary people to be covered by this legislation.

The University will be required to inform the HMRC of any change of name and/or gender.

For further information, please consult the UK [government website](https://www.gov.uk/employee-changes-gender).

# 4 Discrimination, bullying, victimisation, harassment and sexual misconduct

LGBTQ people often suffer from discrimination, bullying, victimisation, harassment and sexual misconduct in the workplace. In a [recent survey from Stonewall](https://www.stonewall.org.uk/resources/top-100-employers-2018) on workplaces across the UK, 35 per cent of trans respondents had experienced negative comments or conduct from colleagues because of their gender identity.

Under the Equality Act 2010, all employers have a legal obligation to prevent and respond to these forms of discrimination and harassment in the workplace. Although the Equality Act refers to ‘gender reassignment’ as ground of non-discrimination, the University is committed to protecting all students, members of staff, visitors and contractors that do not conform with gender norms, including those whose appearance does not conform to gender binary expectations, regardless of the fact that they have not undertaken, are not undertaking or do not wish to undertake a transitioning process.

The University has a zero-tolerance approach on any forms of transphobic, homophobic and biphobic harassment, bullying or sexual misconduct, as well as discrimination, harm or threat of harm, or any inappropriate behaviour or language addressed to any members of the Lancaster University community.

Situations may arise where the rights of one individual cut across the rights of another: for example, a member of staff may object to gender identity on grounds of their religion or belief. The University recognises anyone’s right to hold these views, but not their manifestation in such a way that intimidates, humiliates, or is hostile or degrading to others or in any other way infringes the rights of others.

Every individual has the right to freely decide whether to be open regarding their gender identity or expressions.

Examples of transphobic bullying or harassment include (but are not limited to):

* Refusing to address a trans or non-binary person with their preferred name and correct gender and/or pronoun.
* Outing a person as trans without their consent or spreading negative comments or gossip about their gender identity or expressions.
* Homophobic, biphobic or transphobic comments, ‘jokes’ or name calling.
* Ignoring or excluding students, members of staff, visitors or contractors from activities because of their sexual orientation or gender identity or expression.
* Denying a trans or non-binary person access to single-sex facilities or gender-neutral toilets.

Any actions amounting to discrimination, bullying, harassment, victimisation or sexual misconduct will be investigated and where necessary disciplinary sanctions imposed so that LU staff and students, and visitors can enjoy an environment where everyone is treated with dignity and respect.

Zero-tolerance aims to eliminate undesirable behaviour among staff and students and means that if bullying, harassment or sexual misconduct has occurred, action will be taken.

Any person witnessing bullying, harassment or sexual misconduct has an obligation to let the University know at the earliest opportunity.

If a member of staff feels they have experienced trans-related bullying, harassment, victimisation, sexual misconduct or other forms of discrimination, they should contact their line manager. If they don't feel that they can speak to their line manager, then it is recommended to speak to their manager, the HR Advisor or the Equality, Diversity and Inclusion team. Staff may also seek advice through their trade union. Staff-related information on bullying, harassment and sexual misconduct can be found [here](https://portal.lancaster.ac.uk/intranet/services/people/hr-policiesprocedures/policiesprocedures/).

Students who feel they have experienced trans-related bullying, harassment, victimisation, sexual misconduct or other forms of discrimination, should contact the Student Conduct Officer (studentconduct@lancaster.ac.uk). Incidents can be reported anonymously by using the Unisafe App through iLancaster.

Emotional support and advice can be provided through the College Advisory Teams (CATs). They will liaise with the Student Counselling and Mental Health Service to ensure that students have access to the right level of support.

For further details on the meaning of discrimination, bullying, harassment, victimisation or sexual misconduct, see the LU [Bullying, Harassment and Sexual Misconduct policy](https://portal.lancaster.ac.uk/intranet/services/people/hr-policiesprocedures/policiesprocedures/) (Staff Procedure), the [Dignity in Student Life Policy](https://www.lancaster.ac.uk/media/lancaster-university/content-assets/documents/strategic-planning--governance/publication-scheme/5-our-policies-and-procedures/Dignity-in-Student-Life-Policy.pdf), the [Student Sexual Misconduct Policy](https://www.lancaster.ac.uk/media/lancaster-university/content-assets/documents/strategic-planning--governance/publication-scheme/5-our-policies-and-procedures/Student-Sexual-Misconduct-Policy.pdf), and Appendix II – ‘Legislation’ in this Guidance.

For further details on the meaning of transphobia, see Appendix I – ‘Terminology’ in this Guidance.

# 5. Additional information

## 5.1 Students’ Admission and Progression

*This section is under consultation with the Admissions Office to discuss whether specific support is available for trans applicants through the admission process.*

Trans people may not want to disclose their trans status during the application for a programme of study.

If a person applies for a postgraduate study programme after transitioning, any reference to their previous name and/or gender should not be disclosed. Legal changes to name and gender may take some time, and the candidate should take this into account before submitting their application.

Please note that the University will be required to conduct identity checks as part of the registration process. These will be conducted by respecting the student’s confidentiality and with sensitivity. The University is taking steps to provide prospective trans students with specific support.

Trans students should also be informed that the University cannot update personal details on third parties recording systems (e.g. UCAS) and they will have to make sure that they have notified these changes to the relevant bodies.

During their programme of study, a transitioning student may require time to attend medical appointments, undergo surgery, and recover after surgery. These circumstances may affect a student’s academic performance, and additional arrangements should be considered. Trans students should not be discriminated against other students on the basis of their gender identity.

Students should consider with the University appropriate changes to their study programme, or to their learning commitments, if time off for reasons linked with their transitioning is necessary. These issues should be discussed with the Key Contact as part of the Transition Support Plan.

## 5.2 Recruitment and selection of staff

Recruitment and selection processes can be a source of distress and anxiety for applicants. Vacancy advertisements should highlight the University commitment to equality, diversity and inclusion, including on the basis of gender identity and expression. They should also use gender-neutral language and avoid assumptions on the applicant’s gender, unless it is specifically required for the advertised position. A clear statement supporting diversity and inclusion should be included on job advertisements and on the University website, as it represents a positive way to communicate LU inclusive culture.

At the application stage, the applicant is required to fill in an Equality, Diversity and Inclusion form. The information provided in this form will be stored separately from the rest of the application, ensuring that the applicant’s trans status and/or gender identity will be kept anonymous.

During the interview process, it is good practice to remember that the applicant’s CV may present unexplained gaps or periods of unemployment that may relate to having experienced transphobia or to their transitioning. It is also important to remember that trans candidates can feel anxious of being judged for their appearance. As a way to support any potential trans applicants, it is helpful for the interviewers to introduce themselves including their pronouns: this opens the space up for an applicant to feel comfortable sharing their own should they wish to.

A person’s trans status is protected by the right to privacy under human rights legislation. The applicant should not be expected to disclose their gender identity during the application process or at the interview stage.

If official documents are required before commencing employment, the University should respect a person’s confidentiality when asking for an identity document, such a passport or a driving license, in case the person’s name and/or gender have not yet been updated.

Birth certificates should not be required as proof of identity, as they can ‘out’ a trans candidate who has yet to change their birth certificate. Asking for a birth certificate before commencing employment can constitute indirect discrimination.

If an identity document has been issued by a country with different legislative provisions than the UK in this area, some flexibility should be considered.

In these cases, the person should be able to ask the HR or EDI department for advice and guidance.

### 5.2.1 Disclosure and Barring Service

A Disclosure and Barring Service check may be required for certain jobs, but this could inadvertently disclose a person’s previous gender identity, or a change of name due to transitioning.

The Disclosure and Barring Service (DBS) offers a confidential checking service for transgender applicants in accordance with the Gender Recognition Act 2004.

If a trans applicant is asked to complete a DBS check and does not wish to disclose their previous identity to the University and/or in their DBS certificate, they shall contact a dedicated sensitive applications team before submitting their application. Please find more information in this regard, and more generally on the sensitive applications route for trans applicants [here](https://www.gov.uk/guidance/transgender-applications).

## 5.3 Accommodation

This section is currently under consultation with college managers and Senior Welfare Advisors for areas that need clarification

When students are allocated their accommodation before they arrive in light of their preference of accommodation type, they should be given the possibility to declare their gender preference.

Students should be provided with the contact details of a College staff member or College Manager when they apply for accommodation. This is helpful to trans students who do not want or cannot (e.g. due to parental/guardian involvement) disclose their gender identity in their application, so that they can discuss their gender identity in relation to accommodation in confidence.

Assumptions should not be made about the type of accommodation preferred by a trans student. It is important to consult the student about where they would feel more comfortable staying.

If the student notifies the University of the date when they will start or started to present themselves in line with their affirmed gender, the accommodation team and the college accommodation manager will take every possible action to assign the student to the correct location.

If a student intends to transition or is transitioning while living in students’ accommodation, procedures should be in place to guarantee flexible rental agreements to allow students leaving single-sex accommodations when they start living in their affirmed gender.

However, please note that a move to a different accommodation after it has already been allocated cannot always be arranged, depending on rooms availability within a specific college.

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| GOOD PRACTICEIn 2020, some College staff members attended a trans awareness session organised by Gendered Intelligence, which provided a basic introduction on issues related to trans experiences. The event received very positive feedback from attendees. |

## 5.4 Forms and questionnaires

When designing forms and questionnaires, consider if it is necessary to ask respondents about their sex or gender. Be clear of the reasons why the University needs this data.

In line with the data protection principle of ‘data minimisation’, when designing forms and questionnaires staff should ensure that they are collecting the minimum amount of personal data needed to satisfy the purpose for collecting the data. Additional personal data should not be collected if it is not going to be used. This is especially important when considering whether ‘special category data’ requires collecting to achieve the stated purpose.

If it is required to collect data on sex, gender or gender identity , additional options other than ‘male’ and ‘female’ should be included to describe someone’s gender. Some examples are provided below:

Option 1

* What best describes your gender?
* Male
* Female
* Non-binary
* Prefer not to say
* Prefer to self-describe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

This option allows the University to capture data on staff who do not identify as trans, but also do not identify as male or female.

Option 2

* Is your gender identity the same as the sex you were assigned at birth?
* Yes
* No
* Prefer not say

This option allows the University to know how many people have undergone transitioning and is more helpful to understand if better support at the transitioning stage is needed internally.

Option 3

* Do you identify as trans?
* Yes
* No
* Prefer not to say
* Prefer to identify as: \_\_\_\_\_\_\_\_\_\_\_\_\_

This option is preferred if the University intends to offer targeted services for trans staff, e.g. career support. Someone who selects ‘yes’ to identifying as trans should be given the option to also fill out how they prefer to be identified (e.g. non-binary/gender fluid/etc.).

## 5.5 Overseas travel (field trips, study abroad and placements)

Certain countries – or parts of countries – present a hostile environment for LGBTQ people, and trans persons in particular. Such hostility may manifest in the existence of legislation that includes homophobic or transphobic provisions, or in a social climate that is not welcoming towards the LGBTQ population.

The University should therefore consider these factors when a student or a staff member intend to participate in a field trip or other short trip abroad, or when a period of study or a placement abroad are planned as part of their study programme or work description.

Before travelling, as trip organizer, tutor, supervisor or Line manager, ensure that:

* The risk assessment procedure includes information on the legislation and level of acceptance towards LGBTQ people in the country of destination. This procedure is held internally by LU services. This information should be made available to potential participants as part of the advertisement process.
* Trip participants should be encouraged to discuss their specific needs with the trip organizer. Where a participant identifies themselves as trans this conversation should include, but not be limited to, the following:
	+ The trans person is signposted to appropriate Health and Wellbeing resources.
	+ The trans person is advised to discuss their travel plans with their GP if they have recently undertaken any medical procedures or need to access any specific medication related to their transition.
	+ The trans person is signposted to information, where appropriate, on bringing prescription medications into the destination country.
	+ The trans person is provided, where available, with information on accessing medical facilities for reasons linked with their trans status.
	+ The trans person is encouraged to ensure that they have adequate travel insurance cover in place for their trip.

Issues concerning identification should be carefully assessed. The [UK Government website](https://www.gov.uk/guidance/lesbian-gay-bisexual-and-transgender-foreign-travel-advice#advice-for-transgender-travellers-going-overseas-for-medical-treatment) states that

 ‘transgender travelers sometimes face difficulties or delays at border controls overseas if they present as a different gender to what is stated in their passport. This may occur even when your gender presentation is consistent with the gender marker in your passport and you have the correct documentation.’

Therefore, a trans student or staff member should evaluate these risks together with their trip organiser, tutor, supervisor or line manager in order to assess if their health and safety is at undue risk due to the individual’s gender expression or identity to help them make an informed choice. Where possible, they can agree on an alternative destination if they believe that there is a high risk for the person’s health and safety. However, this arrangement shall not amount to unfair treatment against the trans person or their fellow students or colleagues.

Accommodation abroad, including at LU partner institutions, may provide non-inclusive policies towards trans and non-binary students and staff members. Students and staff should be encouraged to find out accommodation arrangements and/or be informed of the arrangements available in the country of destination as part of the risk assessment and pre-departure preparations.

When agreeing a Transition Support Plan, the trans student or staff member who have planned overseas travel as part of their programme of study or role can discuss with their Key Contact whether different travel arrangements should be considered.

In preparation for the field trip, useful contacts and resources should be shared with students and staff, including, but not limited to:

* The [Foreign Office and Commonwealth information](https://www.gov.uk/guidance/lesbian-gay-bisexual-and-transgender-foreign-travel-advice) on travelling abroad as an LGBT person, including specific information on the country of destination.
* The [HM Passport Office](https://www.gov.uk/government/publications/applying-for-a-passport-information-for-transgender-and-transsexual-customers) information and advice for transgender and transsexual people applying for a passport in an acquired gender.
* Relevant human rights and/or LGBTQ groups active in the country of destination.
* The [Lancaster University LGBT Staff Network](https://www.lancaster.ac.uk/edi/networks/).
* The [Lancaster University Students Union LGBTQ Officer](https://lancastersu.co.uk/part-time-officers).
* The International Lesbian, Gay, Bisexual, Trans and Intersex Association State Sponsored [Homophobia](https://ilga.org/state-sponsored-homophobia-report) and [Trans Legal Mapping](https://ilga.org/trans-legal-mapping-report) Reports.
* Stonewall guidance [Safe Travels: Global Mobility for LGBT Staff](https://www.stonewall.org.uk/system/files/safe_travels_guide_2017.pdf).

## 5.6 Teaching

Students’ learning experience shall be characterized by respect and inclusion of all characteristics, including gender identity and/or expressions. No transphobic behavior is tolerated within the learning environment, and when it occurs it is dealt with promptly and effectively. Further information on the University bullying, harassment and sexual misconduct policy can be found at Section 4 of this Guidance.

Awareness on the University policy on Gender Identity and Expression and the associated guidance should be raised among the teaching staff and students. The University is taking steps to offer specific trans awareness training.

The teaching staff should ensure as far as possible that students are addressed with the correct name, pronouns and/or gender during lectures and seminars.

Examples of transphobic behavior can be found at Section 4 of this Guidance.

## 5.7 Students Sports

This section will be reviewed after a wider consultation with LU Sports Clubs.

LU offers many opportunities to improve one’s health and wellbeing through Sports societies and clubs that are open to students and staff members.

Wherever possible, trans people should have equal access to sports opportunities as other students and staff members, including participation in non-competitive sporting activities and events.

The British and Colleges Sports (BUCS) has a [Transgender Policy](https://www.bucs.org.uk/legal/bucs-transgender-policy.html) that prohibits discrimination on the basis of gender identity and expression. BUCS recommend that when any issues arise regarding transgender students’ eligibility to compete, the policy of the respective National Governing Body (NGB) should be adopted. If NGBs have not adopted a policy, the International federation regulations should apply.

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| GOOD PRACTICE In 2019, the Students’ Union launched the pilot project [All In](https://lancastersu.co.uk/all-in), which aimed to improve inclusivity in university sport teams alongside each team’s diversity in membership. Clubs had to meet specific criteria in their submissions to be awarded a mark of accreditation as an inclusive team. For further information, please see <https://lancastersu.co.uk/all-in>. |

## 5.8 Payroll giving

Staff can support trans inclusion in various ways. By accessing LU’s payroll giving scheme, it is possible to support a charity or charities of choice by making monthly donations in a tax efficient way.

# Appendix I

# Terminology

Please note this terminology is constantly evolving, highly personal and the subject of ongoing discussions. This list is therefore not exhaustive and is subject to periodic review.

Acquired gender/Affirmed gender

The gender a person self-identifies with after having socially transitioned and/or having their gender confirmed and/or legally recognised. An individual can transition and obtain legal recognition of their gender identity without medical intervention, but medical assistance is required in the UK to obtain the formal diagnoses and paperwork to allow a person’s acquired gender to be legally recognised in all circumstances through the issue of a Gender Recognition Certificate (GRC).

AFAB

Assigned Female at Birth. This refers to the gender that is assigned to an individual at birth based on their primary sex characteristics.

AMAB

Assigned Male at Birth. This refers to the gender that is assigned to an individual at birth based on their primary sex characteristics.

**AGAB**
Assigned Gender at Birth. This refers to the gender that is assigned to an individual at birth based on their primary sex characteristics.

Agender

A person who does not self-identify with any gender.

Androgyne

Androgyne, androgyn or androgynous gender, is an identity under the non-binary and trans umbrellas. Androgynes have a gender identity that can be a blend of both or neither of the binary genders. They may describe this as being between female and male, between man and woman, between masculine and feminine or simply 'in between.' They can also identify as neither feminine or masculine, or neither female or male.

Cisgender

Someone whose gender identity is the same as the sex they were assigned at birth. Non-trans is also used by some people.

Drag

Drag is a type of entertainment where people dress up and perform, often in highly stylized ways.

Today, many prominent drag artists are still people who identify as men and present themselves in exaggeratedly feminine ways as part of their performance and are known as drag queens. While some drag queens live their lives as men outside of their drag personae, people of any gender can be drag queens.

Drag kings, who wear men’s clothing and perform stylized forms of masculinity, are less common in the public eye, but do exist. Many drag kings are women, but people of any gender can be drag kings as well.

Many drag queens and kings have a separate drag persona in addition to the self they live as every day, but this does not mean they are trans.

Gender

Often expressed in terms of masculinity and femininity, gender is largely culturally determined and is assumed from the sex assigned at birth. It refers to a number of arrangements that informs how a person expresses their identity in society and interacts with others.

Gender affirming medical treatment / Gender confirmation medical treatment

A medical treatment that a person may undergo, under medical supervision, to make their body align with their gender identity, involving for example hormone therapy or surgery.

Some trans persons prefer to use the terms gender affirming medical treatment or gender confirmation medical treatment rather than gender reassignment treatment, as they feel that these terms better portray medical treatment or surgery as an alignment between a person’s mind and body rather than a transformation.

Gender binary

The classification of gender into two distinct categories of male/female, masculine/feminine, man/woman. Gender binary assumes that people should strictly ascribe to either one or the other.

Gender dysphoria

Used to describe when a person experiences discomfort or distress because there is a mismatch between their sex assigned at birth and their gender identity.

This is also the clinical diagnosis for someone who doesn’t feel comfortable with the sex they were assigned at birth.

Gender expression

Each person’s presentation of their gender through physical appearance – including dress, hairstyles, accessories, cosmetics – and mannerisms, speech, behavioural patterns, names and personal references. A person who does not conform to societal expectations of gender may not, however, identify as trans.

Gender identity

Each person’s deeply felt internal and individual experience of gender, which may or may not correspond with the sex assigned at birth, including the personal sense of the body (which may involve, if freely chosen, modification of bodily appearance or function by medical, surgical or other means) and other expressions of gender, including dress, speech and mannerisms. Gender identity can vary throughout a person’s life as is reflected but not solely encompassed in the term ‘genderfluid.’

Gender non-conformity

An umbrella term referring to people whose gender expression does not conform to perceived traditional gender norms. Sometimes this term is also used to identify cisgender people who dress or behave in ways that subvert gender stereotypes.

Gender reassignment

To undergo gender reassignment usually means to undergo some sort of medical intervention, but it can also mean changing names, pronouns, dressing differently and living in their self-identified gender.
Gender reassignment is a characteristic that is protected by the Equality Act 2010, and it is further interpreted in the Equality Act 2010 approved code of practice.

Gender Recognition Act (2004)

An Act of Parliament that regulates the process trans people are required to comply with in order to legally change their gender and apply for a Gender Recognition Certificate.

Gender Recognition Certificate (GRC)

A certificate which specifies the new legal sex and name of a trans individual. A Gender Recognition Panel issues a GRC once the criteria established by the GRA 2004 are met.

Intersex

A term used to describe a person who may have the biological attributes of both sexes or whose biological attributes do not fit with societal assumptions about what constitutes male or female. Intersex people may identify as male, female or non-binary.

Non-binary / Gender queer

An umbrella term comprising a spectrum of gender identities that are outside the gender binary categories of masculine and feminine.

Non-binary identities are varied and can include people who identify with some aspects of binary identities, while others reject them entirely.

Some, but not all non-binary people identify as trans.

Pronouns

Words we use to refer to people’s gender in conversation - for example, ‘he’ or ‘she’. Some people may prefer others to refer to them in gender neutral language and use pronouns such as they/ their and ze/zir.

Sex

A person’s physical and biological characteristics that are associated with being male, female or intersex. Trans or Transgender

An umbrella term to describe people whose gender is not the same as, or does not sit comfortably with, the sex they were assigned at birth.

Trans people may describe themselves using one or more of a wide variety of terms, including (but not limited to) transgender, transsexual,[[9]](#footnote-10) genderqueer (GQ), gender-fluid, non-binary, gender diverse, crossdresser, genderless, agender, nongender, third gender, bi-gender, trans man, trans woman, trans masculine, trans feminine.

However, people who describe themselves with one or more of the terms listed above do not necessarily describe themselves also as trans.

Transitioning

The steps a trans person may take to live in the gender with which they identify. Each person’s ‘transition’ will involve different things. For some this involves medical intervention, such as hormone therapy and surgeries, but not all trans people want or are able to have this.

Transitioning also might involve things such as telling friends and family, dressing differently and changing official documents.

The exact steps involved in ‘transitioning’ vary from person to person. Non-binary people, or people who describe themselves by using different terms beyond or other than trans or transgender, may also want to ‘transition’ socially and/or medically. Transitioning is not exclusive to trans people who describe themselves as trans men or trans women.

Trans man

A term used to describe someone who is assigned female at birth but identifies and lives as a man. This may be shortened to FTM, an abbreviation for female-to-male. Some trans men may not intend to transition or may not be in the process of transitioning when they use the term trans to describe themselves. Not all trans men will identify as trans once they are living in their affirmed gender.

Transphobia/transphobic

The disagreement with or dislike of someone based on the fact they are trans, including denying their gender identity or refusing to accept it. Transphobia may be targeted at people who are, or who are perceived to be, trans.

Transsexual

Transsexual is a term used to identify a person whose gender identity is not consistent with the gender they were assigned at birth, who generally seeks to change - or has permanently changed - their bodies through medical interventions, including but not limited to hormones and/or surgeries. Many trans people and activists prefer the term trans or transgender to transsexual, which is loaded with medical and biological connotations; however, some trans people are more comfortable using the word transsexual.

Trans woman

A term used to describe someone who is assigned male at birth but identifies and lives as a woman. This may be shortened to MTF, an abbreviation for male-to-female.

Some trans women may not intend to transition or may not be in the process of transitioning when they use the term trans to describe themselves. Not all trans women will identify as trans once they are living in their affirmed gender.

# Appendix II

# Legislation

Equality Act 2010

The Equality Act was adopted in 2010 and provides a coherent framework for previous equalities legislation. Gender reassignment is one of nine protected characteristics within the Act, and protects:

* A person who has proposed to undergo, is undergoing or has undergone gender affirming medical treatment.
* People who experience discrimination because they are perceived to be transgender (including e.g. if a person occasionally cross-dresses).
* People who are discriminated against because of their association with a transgender person (e.g. the parents of a transgender person).

The terminology adopted in the Act is insufficient to capture and fully address the challenges of trans people or the range of trans identities, particularly for those who do not wish to undergo gender affirming medical treatment. A wide range of people are included in the terms ‘trans’ or ‘transgender’ but they are not protected under the characteristic of ‘gender reassignment’ unless they propose to change their gender or have done so.

Because of these legal limitations, this policy and the associated guidance refer to ‘gender identity and gender expression’ to ensure that the full range of trans identities are covered and protected.

However, it is not necessary for a person to be under medical supervision or to undertake gender affirming surgery to be legally protected by the Act, as such protection starts from the moment they first notify the intention of transitioning (and even in case they later change their mind).

The Act states a public sector Equality duty which requires the University to have due regard to the need to:

* Eliminate discrimination, harassment, victimisation.
* Advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it.
* Foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

Some trans people could also be protected under the protected characteristics of disability when they have been diagnosed as having ‘gender dysphoria’ or ‘gender incongruence’ if the condition has a substantial and long-term adverse impact on their ability to carry out normal day-to-day activities.

Gender Recognition Act 2004

Trans people are able to receive legal recognition of their acquired gender through a procedure described in the Gender Recognition Act (GRA) 2004. If a trans individual meets the requirements set up in the GRA 2004, they receive an interim or full Gender Recognition Certificate (GRC). This means that they are legally recognised for all purposes in their preferred gender, and they will be able to obtain a new birth certificate which does not disclose that they have changed gender, if the person’s birth was registered in the UK. They will also be entitled to state benefits and occupational pension schemes in line of their acquired gender.

The individual seeking to obtain a GRC must meet the evidence requirements to apply for assessment by a Gender Recognition Panel who can then grant full legal recognition. The person must be at least 18 years of age, have or have had a medical diagnosis of gender dysphoria, have fully lived in their confirmed gender for at least two years, and intend to live permanently in their gender of preference.

It is unlawful and never admissible to ask to see or refer to a person’s GRC, and this may be regarded as harassment. If the University needs proof of a person’s legal sex or name, staff can request to see a driving license or passport.

The General Data Protection Regulation (GDPR) and the Data Protection Act 2018

The Data Protection Act 2018 governs how the General Data Protection Regulation (GDPR) is implemented in UK law. Together, they set out the rules for how personal data can be used and how it must be protected.

Trans identity and an individual’s gender history should be viewed as ‘special category data’ which is afforded higher levels of protection in the law, similarly to information contained within a person’s health record. This means that information concerning a person’s trans identity or gender history should be held securely and only shared with appropriate people, with the knowledge and/or consent of the individual themselves.

It is a criminal offence for a person to disclose information acquired in an official capacity about a person’s application for a Gender Recognition Certificate (GRC) or about the gender history of a successful applicant. It can be a criminal offence to disclose someone’s trans status without their consent and will be treated as a disciplinary issue by the University.

The Human Rights Act 1998

Protection of trans people is principally ensured under the right to a private life. The concept of private life has been interpreted more and more broadly by courts. It includes, among other rights, the right to obtain legal recognition of their gender identity and to gain access to social benefits and pensions according to their legal gender. In addition, the right to privacy entails that personal information should be kept securely and not shared with third parties without a lawful basis for doing so.

# Appendix III

# An example of steps typically characterising the transition of a Lancaster University student or staff member



# Appendix IV

# Transition support checklist – Staff

The Support Plan agreed between the trans member of staff and the line manager (with the HR Advisor’s support if required) shall be kept confidential. Copies of this Plan should be stored in HR Drive with restricted access. Only the line manager (and the HR Advisor if involved in the process or if the trans staff member agrees), the trans staff member and staff who need to perform specific duties (upon the trans staff member’s consent) shall have access to them.

The Support Plan is aimed at providing guidance on main areas of concern when an individual communicates that they intend to transition. Detailed agreements can be arranged with the line manager (and with the HR Advisor if involved in the process).

This plan represents an example of actions that can be taken but should be interpreted flexibly. The University recognises that every trans person’s experience of transitioning is unique and is keen on accommodating each person’s specific needs.

For further information, please contact the Equality, Diversity and Inclusion team at edi@lancaster.ac.uk.

|  |
| --- |
| Action plan to support staff transitioning gender  |
| Key Contact |
| Identify a person within the HR Department to support the trans individual during transition and agree an Action Plan with. Normally, this person would be the line manager (with possible support of the HR Advisor if required). This person will liaise with all HR departments and support the individual to access any further independent support. |
| Timetable |
| Consult with the trans member of staff dates when the actions will take place, for instance:* Change of name and/or gender in University records.
* Gender affirming surgery or other medical treatment(s).
* Use of facilities (toilets, changing rooms).
* When to inform other relevant areas of the University (e.g. colleagues, payroll, etc.).

Please remember that however important it is to set a timetable, transitioning can be a gradual process and certain steps may be easier to experience than others for the trans person.Please also note that timescales for medical procedures are reliant upon waiting lists. If using the NHS, the trans member of staff will only be given imprecise guidelines as to when they can expect certain things to occur. Waiting times may be given in years rather than months.  |
|  Arrangements in relation to transition  |
| Will the person require any time off, or flexibility for medical treatment or recovery? Should deadlines on work commitments be reviewed with the line manager, or flexibility be considered?Will non-medical transitioning procedures require a flexible working patterns and/or homeworking? Should a period of planned absence be identified to make it possible to access treatment? Is additional paid/unpaid leave needed?If the individual plans to undergo surgery or surgeries, should additional pay/unpaid leave or a leave of absence for recovery time be contemplated?Are there arrangements in place for when the individual returns to work? Should temporary or permanent changes to your workload be contemplated during and/or after transitioning (e.g. avoiding heavy lifting)? Are there any professional or attendance requirements that may be affected by the person’s absences during transitioning? |
| Change of name and/or gender in University records |
| What will the person’s new name, title and pronoun be? The person should consider together with the Key Contact what records need updating, starting with HR Core. The Key Contact should liaise with the relevant HR professionals to update payroll and Pension records. Changes to references in the library system, University website and intranet, meeting minutes, certificates and awards, University cards and email addresses should also be considered (please see Appendix VII for a list of records that may need updating).Staff should be allowed to access this personal information exclusively to perform specific duties. Trans staff should be made aware of the level of confidentiality provided by the University record system. They shall also be made aware of which members of staff can access their record and be asked to give explicit (signed) permission for them to do so. |
| Dress code  |
| Are there any workplace dress codes that need to be considered?Does the member of staff have any concerns regarding changing of dress at work? How can these be accommodated? |
| Toilets and single-sex facilities |
| Does the person know whether and when they intend to start using toilets aligned with their affirmed gender? This step may be taken at a different time than the change of name and/or gender in records, and/or than the change in dress code. Please remember that even if staff can choose toilets that align with their gender expression, the University also provides gender-neutral toilets across campus. |
| Communication |
| When and how would the person like colleagues, students in the department and service providers be informed (e.g. meeting, via e-mail)? When and how should the HR Advisor be informed, if they are not involved in the process? Does the person wish to inform the HR Advisors, colleagues/students themselves, or would they prefer this to be done by others?Is it necessary to organise more specific training for colleagues in addition to the mandatory Equality, Diversity and Inclusion Training? Who should deliver the training? Are there any educational materials that could be used? Will the individual be involved in sharing their experience?May there be a media interest on the person? Consider if it is necessary to involve the Communications department, but only with the full consent of the transitioning person. Any actions in this regard must prioritize the staff member’s safety and wellbeing.  |
| Support |
| Does the staff member have a support network?Are they receiving counselling? Do they wish to apply for external counselling?Are they aware of the existence of a Lancaster University LGBT Staff Network? Do they wish to be put in contact with them?Are they aware of the possibility that support is available through trade unions?  |
| Overseas travel  |
| Does the trans member of staff’s role require travel? Should different travel arrangements be considered after their transition? (e.g. travelling to countries with transphobic or homophobic legislation). |
| Agreement |
| Actions should be agreed between the trans member of staff and their Key Contact at the end of their initial meeting. The agreed actions should be documented in writing, and a follow up communication with a summary of the actions agreed should be sent to the person transitioning. A date for a follow-up meeting (or more) should be agreed. The person transitioning should be given appropriate time to consider the actions agreed and evaluate whether any changes are necessary. |

# Appendix V

# Transition support checklist – Students

The Support Plan agreed between the trans student and the Key Contact shall be kept confidential. Copies of this Plan should be stored in a documents area of LUSI with restricted access. Only the Key Contact, the trans student and staff members who needs to perform specific duties (upon the trans student’s explicit consent) shall have access to them.

The Support Plan is aimed at providing guidance on main areas of concern when an individual communicates that they intend to transition. Detailed agreements can be arranged with the Key Contact.

This plan represents an example of actions that can be taken but should be interpreted flexibly. The University recognises that each transitioning experience is unique and is keen on accommodating each person’s specific needs.

For further information, please contact the Equality, Diversity and Inclusion team at edi@lancaster.ac.uk.

|  |
| --- |
| Action plan to support students transitioning gender  |
| Key Contact |
| Identify a person to support the trans individual during transition and agree an Action Plan with them. Normally, this person would be: * Undergraduate students: Academic/Personal tutor; College Advisory Team (CAT) or College Managers.
* Postgraduate taught students: Academic/Personal tutor; PGT Director; CAT or College Managers.
* Postgraduate research students: Supervisor; PGR Director; CAT or College Managers.

This person will liaise with the Base, Students and Education Services, departments and colleges, and with the Student Counselling and Mental Health Service in case the student asks for support. Please note that this service does not provide long-term counselling or trans-specific support.  |
| Timetable |
| Agree with the trans student dates when actions will take place, for instance: * Change of name and/or gender in University records.
* Gender affirming surgery, or other medical treatment(s).
* Use of facilities (toilets, changing rooms).
* When to inform other relevant areas of the University (e.g. accommodation, academic department, etc.).

Please remember that, however important it is to set a timetable, the transitioning process can be gradual and certain steps may be easier to experience than others for the trans person. Please also consider that the timescale for medical procedures will not be known in advance. If a student decides to follow a medical transitioning route with the NHS, this process will normally take longer than the duration of a standard undergraduate degree.  |
| Arrangements in relation to transition  |
| Will the student require any extended time off, or flexibility for medical treatment or recovery? Should arrangements between the student and the University be considered in relation to continuing their current programme of study or requesting for intercalation? Should special arrangements be considered?Consider if non-medical transitioning procedures require accommodating the student’s programme of studies. Should temporary adjustments be considered for students who may experience fatigue, or need recovery time during hormone treatments or following surgery?Should adjustments to the student’s learning be considered to minimise the impact of transitioning (e.g. submission deadlines extension; exam resits)? |
| Work Placement and social activities |
| Will the student require any adjustments to work placements? Will the student require any adjustments concerning social activities or sports competitions, for instance in relation to single sex changing facilities? Consider liaising with Sports societies and groups. |
| Change of name and/or gender in University records |
| What will the student new name, title and pronoun be? Students should consider together with the Key Contact what records need updating, starting with LUSI. The Key Contact should liaise with the relevant departments and services to update University cards, the library system, website, meeting minutes, certificates and awards, payroll, and publications (please see Appendix VI for a list of records that may need updating). Trans students should be made aware of the level of confidentiality provided by the University record system. They shall also be made aware of which members of staff can access their record and be asked to give explicit (signed) permission for them to do so. |
| Dress code  |
| Does the student have any concerns regarding changing of dress at the University? How can these be accommodated? |
| Toilets and single-sex facilities |
| Does the student know when they intend to start using toilets aligned with their affirmed gender? This step may be taken at a different time than the change of name and/or gender in records, and/or than the change in dress code. Please remember that even if students can choose toilets that align with their gender expression, the University provides gender-neutral toilets.Does the student know if they intend to move to a student residence that aligns with their affirmed gender? Please consider contacting the Accommodation manager to discuss possible arrangements. |
| Communication |
| When and how would the person like staff and students in the department and college be informed (e.g. meeting, e-mail)? Please consider a statement that can be agreed upon. If the trans student lives in a student accommodation in college, is it necessary to inform Security personnel that the student is transitioning? (e.g. when collecting post and parcel from porter lodges, students need to present their University ID card, whose picture may not match with the student’s appearance).When and how would the student like external contacts (e.g. placement providers) to be informed? Is the trans student happy to keep their tutor or supervision team? Consider if the student would be more comfortable by making some changes to their team.Is it necessary to organise any training for staff and students in the department? Who should deliver the training? Are there any educational materials that could be used? Will the individual be involved in sharing their experience?May there be a media interest on the student? Consider if it is necessary to involve the Communications department, but only with the full consent of the transitioning person. Any actions in this regard must prioritize the student’s safety and wellbeing.  |
| Support |
| Does the student have a support network, e.g. family and/or friends?Is the student receiving counselling? Do they wish to be put in contact with the Health and Wellbeing Service for counselling? The University Student Counselling and Mental Health Service may offer various types of free support, but please note that this service is usually offered short-term and does not provide specific emotional support related to transitioning.Is the student aware of the LGBTQ+ Association at the Students Union? Do they wish to be put in contact with them?Is the student aware of the LGBTQ+ forum? Do they wish to be put in contact with them? Is the student aware of the possibility that support is available through trade unions?  |
| Overseas travel  |
| Is overseas travel planned as part of the student’s programme of study and/or placement? Should different travel arrangements be considered after their transition? (e.g. if overseas travel is in countries with homophobic or transphobic legislation)  |
| Agreement |
| Actions should be agreed between the trans student and the Key Contact at the end of the meeting. The agreed actions should be documented in writing, and a follow up communication with a summary of the actions agreed should be sent to the person transitioning. A date for one or more follow-up meeting should be agreed. The person transitioning should be given appropriate time to consider the actions agreed and evaluate whether any changes are necessary.  |

# Appendix VI

# Updating records - students

The trans student should take into account that some references and previous documents may remain unchanged, as not all data are digitally recorded. Not all University databases record personal information in the same way, so updating all personal records harmoniously in all University systems can require some time.

Records should only be changed following discussion and agreement of the student concerned. The date on which record changes will be active from will also need to be agreed.

|  |  |
| --- | --- |
|  | Updating records - students |
|  | Which identification/records will need to be changed? |
|  | University Student ID card (new photograph and name) |
|  | Student records and databases (e.g. LUSI, study programme, CRM, KX) |
|  | University website pages (e.g. student’s biography) |
|  | Personal tutor/supervisor records |
|  | Library records |
|  | Exams Office |
|  | Careers |
|  | E-mail  |
|  | Services used (e.g. Counselling records, Sports Centre, Pre-School Centre, Disability Service) |
|  | College |
|  | Club and society membership records |
|  | Certificates/grants/awards/transcript of records |
|  | PhD thesis  |
|  | Publications (please note that changes to publications records may require contacting third parties and may not be under the University responsibility) |
|  | References |
|  | Volunteering and mentoring records (whenever possible) |
|  | Committee meetings minutes and records (whenever possible) |

# Appendix VII

# Updating records - staff

The staff member can contact the line manager (and the HR Advisor if they wish to involve them) to express their intention to change their name and/or gender.

However, the trans member of staff should take into account that some references and previous documents may remain unchanged, as not all data are digitally recorded. These may need to be updated manually, and the process of finding and updating these records can require some time.

Not all University databases record personal information in the same way, so updating all personal records harmoniously in all University systems can require some time.

Records should only be changed following discussion and agreement of the staff member concerned. The date on which record changes will be active from will also need to be agreed.

|  |  |
| --- | --- |
|  | Updating records – staff |
|  | Which identification/records will need to be changed? |
|  | University staff card |
|  | Staff records and databases (e.g. HR Core) |
|  | Employee benefits (e.g. Pension and Death in Service Benefits) |
|  | University website pages (e.g. staff biography) |
|  | E-mail |
|  | Services used (e.g. Sports Centre) |
|  | Certificates/grants/awards |
|  | Publications (please note that changes to publications records may require contacting third parties and may not be under the University responsibility) |
|  | References |
|  | Committee meetings minutes and records (whenever possible) |

# Appendix VIII

# Change of name and/or gender in University records

## Students



For queries regarding change of names requests, students can refer to the Student Records team in the Student Registry, which processes the change of name requests, by sending an email at recordsenquiries@lancaster.ac.uk.

Trans students can also refer to their Key Contact for support at any steps of the process.

## Staff

 

# Appendix IX

# Internal sources of information and support

Students

Students’ Union

[LGBTQ+ forum](https://www.facebook.com/LancasterLGBTQ/)

Trans forum

Student and Education Services at [The Base](https://www.lancaster.ac.uk/student-and-education-services/the-base/)

The Student and Education Services has a section dedicated to [support for students](https://www.lancaster.ac.uk/welcome/support-for-students/)

Trade unions: UCU has an Equality Representative and an [Equality section on their website](https://www.lancaster.ac.uk/users/ucu/equality.htm)

[Lancaster University Health Services](https://www.lancaster.ac.uk/about-us/our-campus/health-services/)

Equality, Diversity and Inclusion [website](https://www.lancaster.ac.uk/edi/)

Staff

LGBT Staff Network: lgbtstaffnetwork@lancaster.ac.uk

[Employee Assistance Programme](https://portal.lancaster.ac.uk/intranet/services/people/health-and-safety/employee-assistance-programme/)

Equality, Diversity and Inclusion [website](https://www.lancaster.ac.uk/edi/)

Trade Unions: UCU, Unite and UNISON

# Appendix X

# Resource list

Please find below a selection of national trans organisations that offer support and guidance on trans-related groups and services. The list is not exhaustive. Inclusion in this list does not imply an endorsement of content or services.

Depend

Advice, information, support for family members, partners and friends of trans people.

<https://www.depend.org.uk/>

Gendered Intelligence

Support, training and resources for those who work with and support trans people across the UK; youth

services for the under 30s.

<http://genderedintelligence.co.uk/>

Galop

National LGBT domestic violence helpline.

<http://www.galop.org.uk/>

Gender trust

Supporting trans people nationally (18+).

<http://www.gendertrust.org.uk/>

GIRES

GIRES (Gender Identity Research and Education Society) promotes research, campaigns, provides publications, especially in the medical / healthcare field.

<https://www.gires.org.uk/>

Lancashire LGBT

A registered charity working across Lancashire (including Blackburn with Darwen and Blackpool) for Lesbian Gay Bisexual and Trans (LGBT) people.

<https://lancslgbt.org.uk/>

LGBT Foundation

National LGBT Helpline.

<https://lgbt.foundation/>

LGB&T Partnership

England-wide group of LGB&T voluntary & community organisations committed to reducing the health inequalities of lesbian, gay, bisexual &trans people.

[nationallgbtpartnership.org](http://t.co/N7TlHFy6Qn?amp=1)

Mermaids

Forum space, summer residentials and information for young trans people (<19) & parents.

<https://mermaidsuk.org.uk/>

Mindline Trans+

Nationwide, it is a confidential emotional, mental health support helpline for people who identify as transgender, agender, gender fluid and non-binary.

<https://bristolmind.org.uk/help-and-counselling/mindline-transplus/>

Mindout

MindOut Lesbian, Gay, Bisexual, Trans & Queer Mental Health Service.

<https://www.mindout.org.uk/>

Pink Therapy

The UK largest independent therapy organisation working with gender and sexual diversity clients.

<https://www.pinktherapy.com/>

Stonewall

Stonewall campaigns for the equality of lesbian, gay, bi and trans people across Britain.

<https://www.stonewall.org.uk/>

TranzWiki

A comprehensive directory of groups campaigning for, supporting or assisting trans and gender non-conforming individuals, including those who are non-binary and non-gender, as well as their families across the UK.

https://www.tranzwiki.net/

The Trevor Project

The Trevor Project is the leading national organization providing crisis intervention and suicide prevention services to lesbian, gay, bisexual, transgender, queer & questioning (LGBTQ) young people under 25.

<https://www.thetrevorproject.org/about/>

If you are interested in knowing more about the use of personal pronouns and why they matter, please consult: <https://www.mypronouns.org/>

# Appendix XI

# Frequently Asked Questions

## An individual student wishing to transition while studying at Lancaster University

* I identify as trans and I wish to transition, who do I need to contact first for support?

As a student, you can refer to a Key Contact who will support you and discuss with you which steps you think it appropriate to take in relation to your transition. Every decision will be agreed only with your explicit written consent.

The Key Contact can be whoever you consider more appropriate between:

* Academic/Personal Tutor; PGT Director; College Advisory Team or College Managers (Undergraduate and Postgraduate taught students)
* Supervisor; PGR Director; College Advisory Team or College Managers (Postgraduate research students)

The Key Contact will have received appropriate training to support you during transitioning. Your conversations with your Key Contact will remain confidential.

For an example of Transition Support Plan, including possible issues that you may want to discuss with your Key Contact, see Appendix V of this Guidance.

* Where can I get confidential advice around transitioning?

You can discuss and ask for advice around transitioning with your Key Contact, which can be whoever you consider more appropriate between:

* Academic/Personal Tutor; PGT Director; College Advisory Team or College Managers (Undergraduate and Postgraduate taught students)
* Supervisor; PGR Director; College Advisory Team or College Managers (Postgraduate research students)

The Key Contact will have received appropriate training to support you during transitioning.

Your conversations with your Key Contact will remain confidential. If you agree a Transition Support Plan, this will be documented in writing, and a follow up communication with a summary of the actions agreed will be sent to you.

Other internal sources of information and support are listed at Appendix IX of this Guidance.

Beyond Lancaster University, there are many organisations that can provide personal support. Some are listed at Appendix X of this Guidance.

For an example of Transition Support Plan, including possible issues that you may want to discuss with your Key Contact, see Appendix V of this Guidance.

* Will other students, and staff members be informed of my transition?

Other students and staff members will only be informed according to your wishes. If you wish them to be informed of your transition, you can agree when and how with your Key Contact, e.g. your Academic Tutor or your College manager. You may prefer to inform people yourself or ask the Key Contact or another person of your choice to do it on your behalf. It is also up to you whether you prefer your transition to be communicated in writing, e.g. via e-mail, or during a meeting.

You can also discuss with your Key Contact when staff would need training or briefing, and when other students or service users will need to be involved. Please note that you are not responsible for educating staff members or other students. Discussing when the training or briefing will be organised for staff and students does not entail that you will be the person responsible for delivering it.

For further information, please consult this Guidance, including an example of transition support plan at Appendix V.

* Can I use the facilities, for example changing rooms and toilets, which align with my gender identity?

Yes, you can. The University offers people the option to choose the toilets and changing facilities that align with their gender identity.

The University also offers gender-neutral facilities on campus. All major refurbishments and new buildings are designed with gender-neutral facilities on the ground floor.

Where gender-neutral facilities are not available, reasonable adjustments will be made to ensure that trans people who do not feel comfortable with using gendered (typically male or female) facilities can access dedicated spaces. Non-binary students will be able to access the facilities they are most comfortable using in this situation (e.g. accessible toilets: however, there is no expectation that they will always use them).

* Who do I go to if I am being bullied or harassed about my transition or gender identity?

As a student, if you feel you have experienced bullying, harassment, victimisation, sexual misconduct or other forms of discrimination on the basis of gender identity or expression, you should contact the Student Conduct Officer (studentconduct@lancaster.ac.uk). Incidents can be reported anonymously by using the Unisafe App through iLancaster.

Emotional support and advice can be provided through the College Advisory Teams (CATs). They will liaise with the Student Counselling and Mental Health Service to ensure that students have access to the right level of support.

Further information on the University bullying, harassment and sexual misconduct policy can be found at Section 4 of this Guidance. You can also check the [Dignity in Student Life Policy](https://www.lancaster.ac.uk/media/lancaster-university/content-assets/documents/strategic-planning--governance/publication-scheme/5-our-policies-and-procedures/Dignity-in-Student-Life-Policy.pdf) and the [Student Sexual Misconduct Policy](https://www.lancaster.ac.uk/media/lancaster-university/content-assets/documents/strategic-planning--governance/publication-scheme/5-our-policies-and-procedures/Student-Sexual-Misconduct-Policy.pdf).

* What support will the organisation offer me if I am transitioning?

As a student, the University intends to support you during your transition. You can approach your Key Contact to discuss your situation in confidence and to agree the process for supporting your transition. You will lead every step of the process to create a support plan. A timeline for transitioning will be arranged, with the understanding that timescales may change considerably in some cases if medical intervention is required.

You can discuss time off for transition with your Key Contact, and whether special arrangements to continue your programme of studies are necessary. Temporary adjustments if you are experiencing fatigue or if you need recovery time during hormone treatments can also be discussed.

It will be agreed when training or briefing of staff, fellow students or service users will be necessary, and which actions will be planned to communicate the changes to students and staff. These arrangements will be detailed in writing and kept confidential.

Support will be provided to update any records with new gender, name and titles at a point decided upon by you.

* Which of my records need to be changed?

When you notify your intent to transition, your student records should be changed to align with your affirmed gender.

It is recommended that you discuss when and how to update your personal records with your Key Contact (Academic/Personal Tutor, PGT Director, College Advisory Team or College Managers for undergraduate and Postgraduate taught students; Supervisor, PGR Director, College Advisory Team or College Managers for Postgraduate research students), which can liaise with the University services on your behalf.

You can also apply for a change of name and gender on your own by filling in the ‘Change of Name and Gender Identity’ form and submit it to the Base. However, the University encourages you to discuss these changes with your Key Contact to avoid inconsistencies.

For further information on changing name and/or gender in University records, please consult Section 3.2 of this Guidance.

## An individual staff member wishing to transition while working at Lancaster University

* I identify as trans and I wish to transition, who do I need to contact first for support?

As a staff member, you can refer to a Key Contact who will support you and discuss with you which steps you think it appropriate to take in relation to your transition. Every decision will be agreed only with your explicit written consent.

The Key Contact can be whoever you consider more appropriate between your line manager and your HR Advisor. You can also require that the HR Advisor is present when you meet with your line manager.

The line manager and the HR Advisor will have received appropriate training to support you during transitioning.

For an example of Transition Support Plan, including possible issues that you may want to discuss with your Key Contact, please check Appendix IV of this Guidance.

* Where can I get confidential advice around transitioning?

You can discuss and ask for advice around transitioning with your Key Contact, which can be whoever you consider more appropriate between your line manager and your HR Advisor. The line manager and the HR Advisor will have received appropriate training to support you during transitioning.

Your conversations with your Key Contact will remain confidential. If you agree a transition support plan, this will be documented in writing, and a follow up communication with a summary of the actions agreed will be sent to you.

Other internal sources of information and support are listed at Appendix IX of this Guidance.

Beyond Lancaster University, there are many organisations that can provide personal support. Some are listed at Appendix X of this Guidance.

For an example of Transition Support Plan, including possible issues that you may want to discuss with your Key Contact, please check Appendix IV of this Guidance.

* Will all my colleagues be informed of my transition?

Colleagues will only be informed according to your wishes. If you wish your colleagues to be informed of your transition, you can agree when and how to inform them with your Key Contact (your line manager or HR Advisor). You may prefer to inform your colleagues yourself or ask the Key Contact or another person of your choice to do it on your behalf. It is also up to you whether you prefer your transition to be communicated in writing, e.g. via e-mail, or during a meeting.

You can discuss with your Key Contact when colleagues would need training or briefing, and when other students or service users will need to be involved. Please note that you are not responsible for educating your colleagues. Discussing when the training or briefing will be organised for colleagues and students does not entail that you will be the person responsible for delivering it.

For further information, please consult this Guidance, including an example of transition support plan at Appendix IV.

* Can I assume a different role within the organisation while I am transitioning?

You can discuss changes in your tasks within the organisation with your Key Contact (your line manager or HR Advisor). Adjustments to your role may be considered whenever possible.

Temporary or permanent changes to your workload can be arranged (e.g. avoid heavy lifting).

* Can I use the facilities, for example changing rooms and toilets, which align with my gender identity?

Yes, you can. The University offers people the option to choose the toilets and changing facilities that align with their gender identity.

The University also offers gender-neutral facilities on campus. All major refurbishments and new buildings are designed with gender-neutral facilities on the ground floor.

Where gender-neutral facilities are not available, reasonable adjustments will be made to ensure that trans people who do not feel comfortable with using either male or female facilities can access dedicated spaces. Non-binary members of staff will be able to access the facilities they are most comfortable using in this situation (e.g. accessible toilets: however, there is no expectation that they will always use them).

* Who do I go to if I’m being bullied or harassed about my transition or gender identity?

As a staff member, if you feel you have experienced bullying, harassment, victimisation, sexual misconduct or other forms of discrimination on the basis of gender identity or expression, you should contact your line manager. If you do not feel that you can speak to your line manager, then it is recommended to speak to their manager, your HR Advisor or the Equality, Diversity and Inclusion team. You may also seek for advice through your trade union.

Further information on the University bullying, harassment and sexual misconduct policy can be found at Section 4 of this Guidance. You can also check the [Bullying, Harassment and Sexual Misconduct policy](https://portal.lancaster.ac.uk/intranet/services/people/hr-policiesprocedures/policiesprocedures/) (Staff Procedure).

* What support will the organisation offer me if I am transitioning?

As a member of staff, the University intends to support you during your transitioning. You can contact your line manager and/or your HR Advisor to discuss your situation in confidence and to agree the process for supporting your transition. You will lead every step of the process to create a support plan. A timeline for transitioning will be arranged, with the understanding that timescales may change considerably in some cases if medical intervention is required.

You can discuss time off for transition with your line manager or HR Advisor. Transition-related absence will be considered as special leave and will not count towards an individual's sickness absence record, nor will it be subject to normal absence processes such as disciplinary or capability.

It will be agreed when training or briefing of colleagues, fellow students or service users will be necessary, and which actions will be planned to communicate the changes to students and colleagues. These arrangements will be detailed in writing and kept confidential.

Support will be provided to update any records with new gender, names/s and titles at a point decided upon by you.

You can discuss what kind of additional support you would need in terms of time off to transition, health and wellbeing, payroll and pension, and changes in your workload.

* Which of my records need to be changed?

When you notify your intent to transition, your staff records should be changed to align with your affirmed gender.

It is recommended that you discuss when and how to update your personal records with your line manager or HR Advisor, which can liaise with HR on your behalf.

For further information on changing name and/or gender in University records, please consult Section 3.2. of this Guidance.

## A colleague of a staff member who is transitioning while working at Lancaster University

* What does it mean if someone is transitioning and what does it involve?

Transitioning refers to the steps a trans person may take to live in the gender with which they identify. Each person’s ‘transition’ will involve different things. For some this involves medical intervention, such as hormone therapy and surgeries, but not all trans people want or are able to have this.

Transitioning also might involve things such as telling friends and family, dressing differently and changing official documents.

The exact steps involved in ‘transitioning’ vary from person to person.

For further information on what transitioning involves, please consult this Guidance, including Appendix I– Terminology.

* What happens after a person has transitioned?

After a person has transitioned, they will live in the gender they identify with rather than the sex assigned at birth. They will decide together with their Key Contact (line manager or HR Advisor) when and how to communicate the news to their colleagues.

As a colleague of a staff member who has transitioned, you should respect their gender identity. Address and refer to your colleague using the appropriate pronouns and title. Respect their privacy. Do not ask about their dead name (i.e. their birth name after they have changed it) or if they have a Gender Recognition Certificate.

* Someone has told me they want to transition, what do I do?

If someone’s told you they want to transition, they trusted you with very personal information. Be thankful that they have decided to share it with you.

You can discuss with your trans colleague what name and pronouns they prefer to be referred to. You are not expected to become an expert on the use of correct pronouns from the start, so if you make an occasional mistake, just apologize and move on. However, repeatedly using the wrong name and pronouns can be seen as an intentional form of discrimination rather than an honest mistake.

Do not ask too intrusive questions (e.g. relating to any surgeries, other treatment, or of private nature), and avoid overloading your colleague with questions concerning their transition. Although it is commendable that you want to know more about your colleague’s experience, they are probably answering these questions with many other people, and this can be exhausting after a while. Think of learning new information yourself. For example, the University Guidance on Gender Identity and Expression provides a list of resources that can be helpful.

If your colleague asks you for advice on where to find support in relation to transition, you can point them to a Key Contact (e.g. their Line Manager or HR Advisor) who can help them to create a Transition Support Plan. You can also suggest consulting this Guidance, where they can find detailed information on University support for transitioning staff and students.

* Is there training about transitioning and trans equality/issues?

All staff is asked to complete a Diversity online training within three months from their appointment, and to refresh the training every three years. The training includes trans equality – related examples. You can also refresh your training earlier than three years from your appointment, if you want to.

In the past, Colleges have organised trans awareness sessions open to staff. As part of the implementation of the University Policy on Gender Identity and Expression, the University will provide periodic trans awareness sessions open to all staff.

Appendix X of this Guidance includes some examples of organisations that provide freely available resources with information on gender identity and expression.

* What is a pronoun and how do I know which one to use?

Pronouns are words we use to refer to people’s gender in conversation, for example ‘he’ or ‘she’. Some people may prefer others to refer to them in gender neutral language and use pronouns such as ‘they/them’.

In general, we cannot assume someone’s pronouns in the same way we cannot assume someone’s name. If you have a doubt on which pronoun to use to address someone, either listen to what pronouns others are using or politely ask what they prefer. If you make a mistake, do not worry too much, apologize and move on with the conversation.

* How do I respond if a student or staff member is using inappropriate language in relation to a colleague who is transitioning?

You should inform your manager immediately of the issue. You may also want to speak to your HR Advisor or to the Equality, Diversity and Inclusion team. In some circumstances, it may be appropriate to ask the student or staff member to stop using inappropriate language as it goes against the university’s policy on bullying, harassment and sexual misconduct.

You can also seek for advice through your trade union.

For further information on the University bullying, harassment and sexual misconduct policy, you can consult Section 4 of this Guidance.

* When do people who are transitioning start to use the facilities, like changing rooms and toilets, which match their affirmed gender?

A person who is transitioning may want to start using the facilities that align with their preferred gender. This step may be taken at a different time than the change of name and/or gender in records, and/or than the change in dress code. Even if staff can choose toilets that align with their gender identity, the University also provides gender-neutral facilities across campus.

Please send any questions or comments on the policy on Gender Identity and Expression and/or the related guidance document to: edi@lancaster.ac.uk

If you require any documents in an alternative format, please contact: edi@lancaster.ac.uk

This policy is available on the LU Website, at WEBPAGE.com

1. This could include steps such as changing one’s name, pronouns or surgical procedures. [↑](#footnote-ref-2)
2. For further details, see Appendix II – Legislation of this Guidance, and the entry ‘Affirmed gender at Appendix I – Terminology of this Guidance. [↑](#footnote-ref-3)
3. Some University databases may present limitations in the available options to change personal information regarding gender, while changes made in one database may not be automatically applied to other databases used by the institution. In this regard, the University is taking actions to ensure consistency in data collection across all databases. [↑](#footnote-ref-4)
4. Please note that the University is taking steps to review the ‘Change of name and gender identity form’ for the 2020-2021 academic year. [↑](#footnote-ref-5)
5. The ‘Change of name and gender identity’ form will be reviewed in due course to make this point clear. [↑](#footnote-ref-6)
6. For instance, if a person changes their name via deed poll or statutory declaration, the Home Office will be able to issue a BRP with the person’s preferred name. [↑](#footnote-ref-7)
7. Information on the student’s previous identity shall be kept confidential and only be accessed for legitimate and specific reasons, including providing evidence in the context of a legal dispute. Where the University shall assess appropriate support and adjustments for a trans student with disabilities, details on previous support provided to the student can be relevant to make an informed decision. These details may be reported in old files that identify the student with their previous gender or name/s. In these circumstances, the University will create a new record where the student’s previous gender and name/s will be pseudonymised. A copy of the old file will be retained and kept separate, restricted and confidential. The old file will be accessed only for legitimate reasons, such as for the University to provide evidence in the context of a legal dispute. [↑](#footnote-ref-8)
8. Information on the staff’s previous identity shall be kept confidential and only be accessed for legitimate and specific reasons, including providing evidence in the context of a legal dispute. [↑](#footnote-ref-9)
9. The word ‘transsexual’ is an outdated term that many people in the LGBTQ community deem offensive, although there may still be those who feel this best fits their identity. [↑](#footnote-ref-10)