

Transitioning Action Plan

This template can be used by a colleague going through the process of transitioning to develop an action plan with their manager of things that need to happen to prepare for their change of identity.

Colleague details

New name (in full, if known)	
Role	
Name of line manager	
Date of meeting	

Who needs to know?

	Who will tell them?	When?	How?	What information will be provided?	Date completed
HR					
Senior Manager					
Team members					
Other colleagues					
External partners/suppliers					

Changing everything into your new identity

	Who will do this?	When?	Date completed
Name badge			
Business cards			
IT systems – email, HR record			
Voicemail			
Intranet address entry			
Intranet information – org charts, team contact details etc.			
Work based social media			
Union membership			
Pension scheme			
Uniform/name badge			
Professional subscriptions/qualification certificates etc			
Any other information that will need to be changed?			

Medical appointments and absences

Reason	Dates

Getting ready for your first day

Date of work transition to new gender identity agree?	
Any amendments needed to your role or working conditions?	
Are you feeling ready?	
Is your wardrobe/uniform ready?	
Are colleagues ready?	
Any additional support needed for you or your loved ones?	
Any other concerns?	

Date of next meeting

It's good to agree a date with your manager to meet again to discuss progress towards this action plan.

Agreed date of next meeting: _____