

Guidance Note – Transition Planning

Note: *It is essential that confidentiality is maintained at all times throughout this process.*

Pre-Planning Stage

Relevant background information is necessary for BT and the individual to effectively plan through the transition period. It is sensible that this is gathered in a face-to-face meeting between the individual and BT – preferably the current line manager or HR Business Partner. This must be managed in positive and confidential conditions. It is helpful to BT and the individual if the employee feels that he/she can speak freely and in confidence.

Questions to be considered

NB Not all questions will be relevant in all cases.

- Is the individual transitioning to male or female gender identity?
- Skill Family
- Personal circumstances
- Current performance and capability assessment. Is this stable or changing?
- Has the individual discussed their condition with LM or other work colleagues?
- Have the services of the OHS or Welfare Service been engaged? If yes is there a report history?
- What are the customer or supplier requirements of the current role? Is the individual directly customer facing?
- Is the individual in good physical and mental health?
- Has the individual discussed the situation with anybody in HR or AHRS? Has a HR Case been raised?
- Does the individual have a partner or family? what is the status? Are they aware and supportive? Will they be involved in the transition?
- What is the individual's social structure, do they have outside interests?: (clubs, associations)
- What network of friends and contacts does the individual have and is this to be supported during transition?

Transition Planning

Approach based on above.

To allow BT to support the individual through the transition and maximise prospects of success, the pre-planning stage is key. By making the effort to identify the needs of the individual and the requirements of the organisation in which they will transition, the long term success of the transition is more likely.

The longer term expectations and aspirations of the individual and BT's capability for support need to be identified from the outset. Pre-planning will need to be managed in line with BT diversity policy and national/local legislation. This last point will vary on a Global/location basis.

Therefore the Action Plan needs to address three main themes

1. The expectations of BT and the individual to undertake a transition successfully.
2. Suitability of the individual to transition successfully.
3. Ability of the organisation in which the individual currently resides to support such a transition.

Transition Management

The management of the process needs to be clearly expressed from the outset by the individual themselves, including timescales. Although the plan will change some clearly defined goals need to be clarified. What do they hope to achieve? and by when? This will vary from individual to individual.

This should be discussed as early as possible and documented/agreed by all parties.

A decision needs to be made if the transition period can be supported by BT. Are the expectations of the individual realistic? or can a alternative solution be found.

Wherever possible, a stable environment should be maintained throughout the first 6 months of the individual coming to work in their new social gender.

This is a key factor in the plan as a flexible and realistic approach needs to be taken by all parties, normally it is preferred that the individual conduct the transition within their current role however this may not always be the best approach and thought can be given to alternatives. In particular there may be situations where the individual needs to move to a non-customer facing role or a back office assignment. In such cases this should be discussed and agreed with the individual. Moves to a non-customer facing role (whether the individual remains with their current team or moves to a new team or line of business) should be funded by the existing unit. Following the initial transition period the individual will normally be expected to return to their owning business unit.

When these are thoroughly discussed and documented the tactical planning stage can commence. This is in four areas.

Communication

Initial communication needs to be carefully planned.

To be considered

1. How wide has the communication been so far? "Who knows already, or has guessed" the individual and the Line Manager should have a view for the current workplace position. Has the individual already received positive or negative feedback?
2. Based on "1" careful consideration should be given on how communication should be handled.
 - Is there a formal structure such as team briefing in place?
 - How big is the direct or indirect team?
 - What is the situation with customers/suppliers? does the individual physically meet them or is the contact via web or phone?
 - Are there individuals in the team that need special consideration? Religious or moral? (This may not be apparent initially but problems

will arise when communications have started.) BT's principles of respect for all individuals must be applied.

- Should the communication be formal or informal, also by whom? How competent or confident is the individual to handle direct feedback or questions or does the LM need specialist support?
 - If specialist support is required what form should it take?
- 3 Who will handle feedback or questions. Consideration – especially by the Line Manager – needs to be given to how questions or feedback will be handled. If negative, then it needs to be handled quickly and effectively.
 - 4 Ongoing Communications. – Care needs to be given within the plan to how this is handled. New team members joining need to be considered in terms of their reaction. Also factor in feedback from customers etc.

Operational Factors

In the initial planning stage consideration needs to be given to the capability of the individual. What is the current development plan for the individual? Are there performance issues that need to be managed? Is the person suitably skilled for the requirements of the role they will undertake during and post transition?

BT will give sensitive consideration to adjustments to the reasonable needs of the individual in the workplace. The term reasonable must be realistic. If all parties agree that the transition can take place in the current working environment then these requirements should be minimal. If the agreement is for the person to change location or role then reasonable consideration should be given to retraining.

(This may impact on the timing of the commencement of the transition and the individual should have their expectations managed in this area from the onset.)

If the person needs to find a new role in the organisation then the HR Business Partner needs to engage recruitment and resourcing managers in the agreed areas. This is a critical phase and the focus should be on “selling” the skills of the individual positively.

Location

If the transition of the individual will be from a new workplace location then consideration needs to be given to the Communications Plan and the Operational Plan. Is the individual sufficiently skilled to undertake the role immediately or will informal /formal training necessary? If so then will this be part of the transition?

Engagement

When the previous stages have been considered and agreed, the plan moves into engagement.

Factors such as behaviour must be considered. The Line Manager needs to be aware that the initial phases of transition are the most emotionally stressful for the individual. It may be the first time they have truly “lived in the role” they may need professional help and support on how they need to react or present themselves. This may be critical to the eventual success of the transition.

As the individual moves through the transition, careful monitoring needs to be carried out on how things are progressing.

Other factors need to be considered such as the individuals wellbeing outside BT. The plan may be successful in work, but will fail if things are going badly at home. Stress will ensue and will impact on the individual at the workplace. If this becomes apparent then early discussions between the individual and the Line Manager will need to address the problems - specialist support may be necessary.

It should also be noted that the transition period may require some periods of absence for the individual to undergo surgery and reasonable time will need to be given to allow these periods to be managed with minimal adjustment to work schedules etc.

Closure

The transition activity is extremely challenging and the success will depend on how the plan was constructed and managed through the life-cycle. Although a structured approach is useful it is not an exact science. At various stages the plan needs to be reviewed.

If the individual is not coping well with the adjustment then BT may need to engage professional support from medical or social services to help the individual through the difficulties. In some cases the individual may revert to their original gender. These cases must be handled with great delicacy in terms of how the individual and work colleagues respond.

If the plan has been successful then the individual will be able to continue their career within BT in their new gender identity the same as any other employee. BT needs to ensure that the systems and processes support the long-term development post transition.

Contact Point TBA

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Further Information Sources

Kaleidoscope

www.acas.org.uk

Equality Direct – www.acas.org.uk

BT's Equal Opportunities Policy:

<http://humanresources.intra.bt.com/fairness/eadiversity/10381>