# Gender affirmation plan template

## About this template

We’ve written this template as if you’re having a conversation with your employee as their manager. Unless otherwise stated, the questions are for you to ask your employee.

Use it to help plan and guide your conversation with them to create a gender affirmation plan.

These questions are a guide and what you use may vary from person to person and organisation to organisation.

Check with your people and culture or diversity teams if you want more advice.

## How to use this template

Before you meet with your employee about this plan, send a copy to them. Gender affirmation is a process led by them and won’t always have a clear start or end.

This means your employee may not be ready to answer every question in this plan. Or even know how to answer every question. Your employee can pick what questions they’re ready to answer at any time.

Under each question, write a list of actions including a timeframe and who is responsible to implement them.

Ensure your employee knows they only need to disclose the information:

* they feel comfortable with
* which may be necessary to support their affirmation.

Before anyone implements actions in this plan, check with your employee if the plan is consistent with what you have agreed to or if they want any changes.

If your employee agrees, set up a time to revisit the plan in case they want to make changes. Or let them know they can contact you at any time to make changes.

### Privacy, security and secure storage

The affirmation plan is a confidential and sensitive document. You must handle all information in it to comply with all relevant privacy laws and your organisation's policies.

Make sure you:

* save this document in a secure location, where only you and your employee can access it (or anyone else your employee consents to having access)
* retain this document’s ‘confidential’ watermark or use an equivalent to note this
* give your employee access to it or let them know where you’ve saved it.

Also ensure you’ve made your employee aware of the potential for [third-party access to their information](#_Third-party_access_and).

## Questions

### Support person

| Questions | Responses | Actions | Timeframe | Responsible by |
| --- | --- | --- | --- | --- |
| Do you want a support person involved in discussions about this gender affirmation plan?  Anyone can provide them with support. Examples include a co-worker, a family member or friend, a union representative, or whoever they choose. | Yes  No  If yes, who will this person be?  Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| Can we offer the support person any training that would be helpful? | Yes  No  Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| End of table |  |  |  |  |

### Support team

| Questions | Responses | Actions | Timeframe | Responsible by |
| --- | --- | --- | --- | --- |
| Who will support you in the workplace?  Examples may include your director, manager, a co-worker or the diversity and inclusion team. | Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| How often would you like to meet about your gender affirmation plan? | Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| End of table |  |  |  |  |

### Presentation, name and pronouns

| Questions | Responses | Actions | Timeframe | Responsible by |
| --- | --- | --- | --- | --- |
| If applicable, what is your affirmed name? | Insert answer. |  |  |  |
| What pronouns will you use? | Insert answer. |  |  |  |
| When will you start to use your affirmed name and pronouns? | Click or tap to enter a date. | * Insert action list. | Insert timeframe. | Insert name. |
| When do you want to present at work as your affirmed gender and what will this involve? You only need to disclose the information you feel comfortable with and which may be necessary to support your affirmation. | Click or tap to enter a date.  Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| End of table |  |  |  |  |

### Team and stakeholder communication

If you choose to inform others of your gender affirmation:

| Questions | Responses | Actions | Timeframe | Responsible by |
| --- | --- | --- | --- | --- |
| Would you like me to inform our team? If so, when and how will this happen? | Click or tap to enter a date.  Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| Would you like me to inform people outside of our team? If so, when and how would you like this happen? | Click or tap to enter a date.  Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| Would you like me to inform any external stakeholders? If so, when would you like this to happen? | Click or tap to enter a date.  Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| How would you like us to inform people if they call our place of work and ask after you by your former name? | Insert answer. |  |  |  |
| How would you like your gender affirmation acknowledged by the team? | Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| End of table |  |  |  |  |

#### Non-managers who use this guide

An employee can decide not to include their direct manager as part of their gender affirmation.

If an employee’s manager isn’t part of their gender affirmation, the manager needs to be informed before the employee tells their team.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Questions | Responses | Actions | Timeframe | Responsible by |
| Who will inform the manager and when will this happen? | Click or tap to enter a date.  Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| End of table |  |  |  |  |

### Corporate systems

Corporate and IT system changes are complex.

Read our [advice on the complexities of corporate and IT system changes](#_Corporate_systems_and) so everyone understands what to expect.

If you choose to update your details:

| Questions | Responses | Actions | Timeframe | Responsible by |
| --- | --- | --- | --- | --- |
| Do you plan to update your personal details with HR and any other relevant systems? If so, when do you plan on doing this? | Yes  No  Click or tap to enter a date. |  |  |  |
| Do you need me to help find out who we need to contact to make these updates? Do you want me to make contact with them? | Yes  No | * Insert action list. | Insert timeframe. | Insert name. |
| To try and ensure any irrelevant old information isn’t accidentally merged with your current profile in our IT systems – what other departments or agencies in the Victorian public sector have you worked at? Can you list out any old email addresses and names you have used in previous roles? | Insert answer. |  |  |  |
| End of table |  |  |  |  |

### Education and awareness

| Questions | Responses | Actions | Timeframe | Responsible by |
| --- | --- | --- | --- | --- |
| Are there any resources you would like us to make available to people who have questions about your gender affirmation? | Yes  No  Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| Are there any questions or topics about your gender affirmation that are acceptable or unacceptable to discuss with you? | Yes  No  Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| Are there any aspects you would prefer employees discuss with someone else? Would you like me to be that person? | Yes  No  Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| End of table |  |  |  |  |

### Facilities

| Questions | Responses | Actions | Timeframe | Responsible by |
| --- | --- | --- | --- | --- |
| Would you like support in communicating your use of facilities to other employees? If yes, what would this support look like? | Yes  No  Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| End of table |  |  |  |  |

#### For employees who work at multiple sites

| Questions | Responses | Actions | Timeframe | Responsible by |
| --- | --- | --- | --- | --- |
| Are there appropriate facilities for you to use at all sites you work at?  If there aren’t, work with your facilities team to look at options for your employee. | Yes  No  Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| End of table |  |  |  |  |

#### For non-binary people

| Questions | Responses | Actions | Timeframe | Responsible by |
| --- | --- | --- | --- | --- |
| Are there appropriate all-gender facilities for you to use?  If there aren’t appropriate facilities for your non-binary employee, chat with your facilities team to explore options. | Yes  No  Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| End of table |  |  |  |  |

### Leave and flexible work arrangements

| Questions | Responses | Actions | Timeframe | Responsible by |
| --- | --- | --- | --- | --- |
| Do you need any flexible work arrangements? | Yes  No  Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| Are you planning on taking any leave for your gender affirmation? If you’re from the Victorian Public Service and covered by the [VPS enterprise agreement](https://www.dtf.vic.gov.au/funds-programs-and-policies/victorian-public-service-enterprise-agreement-2020), we need to check what entitlements you may be able to access. | Yes  No  Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| End of table |  |  |  |  |

### Wellbeing support

| Questions | Responses | Actions | Timeframe | Responsible by |
| --- | --- | --- | --- | --- |
| Are there any adjustments that could support your mental, emotional or physical safety? | Yes  No  Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| Would you like to access therapy or counselling support? | Yes  No  Insert answer. | * Insert action list. | Insert timeframe. | Insert name. |
| End of table |  |  |  |  |

#### Advice for managers

If your employee would like to access wellbeing support, find out what is available in your organisation with your relevant teams.

Also see our list of [resources and advice on gender affirmation](#_Resources_and_advice).

### Reporting unacceptable behaviour

| Questions | Responses | Actions | Timeframe | Responsible by |
| --- | --- | --- | --- | --- |
| Who would be the best person for you to contact if there's unwarranted and unacceptable behaviour? | Insert name. | * Insert action list. | Insert timeframe. | Insert name. |
| End of table |  |  |  |  |

#### Advice for managers

You need to be aware of what actions your organisation can take in response to unwarranted and unacceptable behaviour.