

 		 <b>University Hospitals of Morecambe Bay</b> NHS Foundation Trust	
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## 1. SUMMARY

The University Hospitals of Morecambe Bay (the Trust) strives to be “a great place to be cared for; a great place to work” and an organisation which provides quality, compassionate care and supports its staff. For this ethos to be embedded, our organisational culture should recognise the value of an inclusive and diverse workforce and support staff in achieving it. Such an approach helps to ensure that staff are at their best when they are in work, allowing them to deliver the best possible care.

The Trust takes a zero-tolerance approach to discrimination on the grounds of age, disability, gender, gender identity or reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, and sexual orientation. This policy should be applied in a fair manner in line with the Equality Act 2010 and our Trust Values.

The evidence base for staff being able to be their true self to work shows that it can result in:

- Improved staff engagement, commitment and motivation
- A more efficient and productive workforce and organisation
- Better retention of valuable employees
- Reduced levels of absence, sickness and stress through improved health and wellbeing
- Better service provision
- Greater creativity and innovation
- An environment where staff can flourish and achieve their full potential

## 2. PURPOSE

This policy aims to support and protect trans and non-binary colleagues, including students and volunteers by ensuring the right support for all will enable us to be fully inclusive, where we meet the needs of all, including those from protected groups, promoting a diverse workforce with a greater diversity of thought.

There are also additional benefits in regards to the recruitment process, as we can attract a diverse range of candidates, help promote the benefits of working for the Trust and establish UHMB as an employer of choice.

This policy is also written to help staff achieve this and support managers in actively promoting inclusion and diversity within their teams. Managers should listen with fascination, show compassion & understanding and act with intelligence when considering supporting colleagues. Additionally, managers should also ensure all staff are aware of the Supporting Trans & Non-binary Colleagues policy and the support available to them.

## 3. SCOPE

All UHMBT Colleagues, Volunteers, Students who are on placement with us and contractors

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### 3.1 Roles and Responsibilities

Role	Responsibilities
Line Managers	Support colleague with their disclosure and transition in the workplace including organising new IT log in, ID card and uniform. Later in the policy explain in more detail the role of the manager. Read Trans and Non Binary Guide 2024
ID Card Team	Ensure to ask colleagues preferred name and if they would like their pronouns on the ID Card
Inclusion Team	Support and advice colleagues and managers
People Services Advisors/Business Partners	Support and advice colleagues and managers

## 4. POLICY

### 4.1 Supporting Colleagues – Introduction

Building an open, diverse, inclusive and fair workplace is an important part of creating a Trust that provides a Great Place to Work and a Great Place to be Cared For, for every individual.

Evidence shows that, in the workplace, trans colleagues and those thinking about undergoing transition may experience isolation, poorer mental health and anxiety. Within this evidence, it is also clear that the same pattern is visible for non-binary and gender nonconforming individuals. Some choose to leave the workplace, undergo transition and then find another job. It is estimated that around 50% of trans-identified people choosing to transition do this because of fears about transitioning at work and anxiety about having to 'come out' and/or deal with workplace bureaucracy. This may mean that highly skilled, qualified and compassionate individuals leave the workforce – or choose not to join it in the first place. This is why it is important to have clear signifiers that workplaces/teams/departments are trans-inclusive and these guidelines will help you with that.

For trans colleagues, these signifiers mean that they do not need to hide who they are when they come to work, which many trans people do on a daily basis out of fear of discrimination. Without these signifiers, trans colleagues (or potential colleagues) may anticipate experiencing discrimination and so apply a 'filter' to themselves and their work (for example not presenting or expressing their gender).

These signifiers also ensure that trans colleagues are not afraid to apply for jobs in other departments. Without these signifiers and support, trans colleagues may feel limited in which teams/departments they feel safe to apply to work in. This can have a longer term impact on their ability to progress in their career.

If you are unfamiliar about the needs of trans, non-binary and gender diverse people, and what workplaces and employers must do to visibly demonstrate trans-inclusion, then one

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source of support will be UHMBT's LGBT+ Network and People Services Inclusion Team who can provide advice, support and awareness-raising sessions.

Even if you do not have someone who is trans in your team, you still need to make sure that your department is trans-inclusive. This will reduce the pressure on individual trans, non-binary and gender diverse people to have to explain who they are, challenge transphobia and discrimination every single time it is encountered. Empower colleagues to become allies, supporting their trans colleagues and patients is important.

## 4.2 Legislative Framework

There are a number of important pieces of legislation which protect the rights of all colleagues from discrimination, and in particular trans individuals.

- a) The Equality Act 2010 (EqA) simplifies and harmonises protection offered to people from discrimination, harassment and victimisation. In addition, public sector organisations also have the duty to promote equality and good relations between all protected characteristics. Under EqA, trans people should expect employers, colleagues, patients, service users and contracted suppliers to refrain from any form of bullying, harassment, victimisation or discriminatory behaviour. The protection offered by the EqA begins when a person decides to undergo their transition process, and continues to protect them throughout their lives, no matter the point that their transition is at. The limitations of the Equality Act are acknowledged, the Trust is committed to protecting staff against all forms of discrimination based on gender identity or expression.
- b) The Gender Recognition Act 2004 (GRA) covers how trans people can have their identity legally recognised, which follows from being given a full Gender Recognition Certificate (GRC) following review by a Gender Recognition Panel. Once a GRC has been issued, there are increased privacy requirements for documentation/records that reveal a previous gender status which should never be disclosed without the person's prior consent. A GRC is not needed in order to change one's name, pronouns, or gender of presentation at work/or accessing a public service, and asking to see one is nearly always inappropriate. Appropriate identification can be provided from driving licences or other official documents.
- c) The Human Rights Act 1998 principles of are woven into the GRA, and the Act requires trans people to be treated with dignity and respect with regard to their need for privacy and all other principles within the Act.
- d) Under the General Data Protection Regulation of 2018, trans status and details relating to an employee's gender transition falls within a special category of 'personal data'. This means that such data can only be processed in certain limited circumstances, such as where a colleague gives explicit consent or where it is necessary for carrying out rights and obligations under employment law. Remember that you should always have your colleague's explicit consent to discuss matters relating to them with another person.

The basic legislative framework makes it unlawful to discriminate where either someone is perceived to be or is:

- a) intending to undergo gender affirmation
- b) undergoing gender affirmation

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c) or has undergone gender affirmation in the past.

Additionally, although not specifically covered by the act, it is considered good practice to apply the act to individuals who are not undergoing gender affirmation per se but who present their gender in a diverse way including fluidly.

This ensures that the initial stage is covered by the legislation, when an individual indicates an intention to commence transition. It is not necessary for all three circumstances to apply. In this context, discrimination means treating a trans person less favourably than you treat (or would treat) another person who is not undergoing gender affirmation (or contemplating it etc.). The Trust has a zero-tolerance approach to any bullying, harassment or discrimination on the basis of gender identity or expression. It is also unlawful for an employer to instruct someone else to do something discriminatory – for instance telling an employment agency not to hire a trans person. Pressure to discriminate is also unlawful – e.g. employees threatening not to work unless their employer dismisses a colleague who has decided to undergo transition.

If you require any additional help to understand how the law protects trans and non-binary colleagues (as well as those with other protected characteristics), please contact SAMI or Inclusion team.

### **4.3 Practical Advice for Managers to Support Colleagues**

In addition to ensuring that the Trust has visible signs and signifiers of the support on offer, there are some specific ways in which managers can support their colleagues' transition journeys. Some of these are set out below for a more comprehensive guidance please see the Trans and Non Binary Guide, for any further information support please contact our SAMI or the Inclusion team.

#### **4.3.1 Every person is different**

It is important to remember that every trans person is different and will want to approach their transition differently. Ensure that individuals are consulted with and asked about how they want to approach different concerns. While one colleague may choose to be 'out' about their trans status, others may not wish to be. This must be respected and you should take the lead from the needs of the trans colleague, especially around the different options for transitioning (including medical or social transition). Everything that follows in these guidelines is an overall 'rule of thumb' only. The key is to communicate openly and honestly with your colleague, and be guided by what they feel is best for them.

#### **4.3.2 Treatment timescales and time off work**

This is a general guide only and it is paramount to take individual needs into account on every occasion. The timescales for access to a gender identity clinic can be lengthy and you should recognise that a colleague may want to transition at work (in terms of their appearance and presentation) prior to completion of any medical intervention they may/may not want undergo.

At some point the colleague will want to start to live full time in their affirmed gender and their name and other records (such as their driving licence and passport) may be formally changed. Remember that treatment times and options vary and while some procedures

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may require less than two weeks absence from work, others may take much longer. Sometimes transition can take over 5 years. For others transitioning is a life-long process or do not 'medically transition'. For this reason, managers need to keep in touch and consult with the individual.

It is good practice to discuss at the earliest opportunity in advance the time away from work that an individual will need. When the individual is absent for treatment, normal sick pay arrangements should apply (refer to the Attendance Management at Work Policy).

Time off for treatments related to gender affirmation are specifically protected under the Equality Act 2010 and should be regarded as a short-term reasonable adjustment (not used in relation to any absence management process)

#### **4.3.3 When discussing a colleague's particular journey**

- a) Talk to them about projected timescale, if known, of any medical and surgical procedures and the time off requirement for medical treatment, including a discussion about how absences will be recorded and monitored.
- b) The expected point or phase of change of name, personal details and social gender. Name change may occur without any legal process but, before documentation is changed, it is usual for a Statutory Declaration (made before a solicitor or in a Magistrates' Court) or a Deed Poll document to be obtained. NB. The requirements imposed for confirming identity should be equivalent to the requirements generally required for employees changing their name i.e. trans employees should not be put through a more burdensome process than what is typically required

Full guidance on this is on the 'Trans and Non-binary Guide 2024'.

#### **4.3.4 Disclosure advice for Managers**

- a) As a manager, you need to talk to your trans colleague to establish whether they wish to inform colleagues about their trans status and transition. It is respectful and shows that you value a person to ensure that their needs are considered.
- b) Remember: colleagues are under no obligation to inform anyone about their trans status or the process they choose to undergo.
- c) While it is usually good practice for the manager to take responsibility for informing those who need to know, always check with the colleague and consult them before any disclosure is made, to whom and at what point in their journey. Level of disclosure may vary depending on the size of the department and the extent to which the employee who is transitioning has face-to-face contact with co-workers.
- d) Do remember that it is never appropriate to inform colleagues, clients and the public that a colleague has in the past transitioned or has a trans history and 'outing' someone could be classed as bullying or harassment, or even a hate crime depending on the context. The decision to disclose a transition journey should be a private matter since gender identity or gender status will have no bearing on that person's ability to do their job.
- e) In the instance where an employee is harassed, bullied or discriminated against by Trust employees, the Early Resolution Policy (Behaviours at Work) Policy provides details on how complaints of this nature should be handled. Disciplinary action will be taken against Trust employees who engage in these types of behaviours.

A guide to different levels can be found in the 'Trans and Non Binary Guide 2024'.

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#### 4.3.5 Relocation or Redeployment during Transition

The colleague may wish to be relocated or redeployed during the initial period if, for example, their working environment is stressful, perhaps because they have direct contact with the public or there is a history of transphobia within the team which has not been addressed or resolved. Where there are issues within a team, the Trust will provide all appropriate guidance, training and direction to that team. This will help them to better appreciate their colleague's journey and, hopefully, prevent that colleague from feeling the need to leave their position out of a fear of non-acceptance.

Relocation/redeployment may not always be necessary or appropriate; however, any decision should always be made in consultation. Some colleagues may prefer to stay within the environment in which they have made friends and where they feel supported. Trans employees must not feel restricted to areas which they consider 'safe'. An employer must ensure all spaces and teams are safe for trans colleagues and patients.

- a) You should also consider whether there are duties within the role that should not be undertaken at specific times within the process (for instance heavy physical work following surgery)
- b) Think about what risks may arise for the colleague in the workplace as a result of the transition, for instance in relationships with external parties or arising from media intrusion, and how they will be dealt with
- c) With the permission of your colleague, liaise with any clients or external agencies in respect of any outstanding matters in which the trans colleague is currently involved

#### 4.3.6 Employment policies and processes – considerations for Managers & People Services Teams

- a) What amendments will be required to records and systems and the safeguards of security
- b) What the implications are for pensions and insurance
- c) Whether a trans colleague is adequately covered by existing policy on issues such as confidentiality, harassment and corporate insurance, and if not have these documents amended as a priority
- d) If DBS checks are required, following a change of name, a special procedure may be accessed (please ask SAMI for assistance)

#### 4.3.7 Consider providing gender neutral facilities

While an increasing number of organisations have introduced gender neutral facilities in recognition of gender diversity and safety of all people, not all areas have these. Make sure to indicate that facilities such as toilets and changing rooms should be accessed according to the full-time presentation of the employee. Ensure that access to the relevant facilities is available to all colleagues as far as is practical. All staff have the right to use the facilities that correspond with their gender identity and the needs of non-binary people must also be recognised.

#### 4.3.8 Supporting your colleague by supporting yourself and your team

If you are in a management role, ensure that you are suitably informed about Gender and Sexual Diversity in the workplace, regardless of the status of your employees. You can always attend LGBT+ Awareness training or ask the LGBT+ network or Inclusion Team for advice and support.

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You may need to consider helping your team to become even more inclusive – assistance is available from the People & OD Inclusion team to do this.

You may also need to think about how to deal with individuals who (following education) do not understand the situation, are unsympathetic or behave in discriminatory ways. This could include asking overly intrusive questions about the employee's trans status and medical treatments.

#### 4.4 Memorandum of Understanding – A Practical Suggestion for Managers

To help create clarity between you and your colleague as they go through their journey, you may find it useful to draw up a 'Memorandum of Understanding' (MoU). This confidential document would be reviewed at regular intervals and represents a commitment from the manager and the Trust to support the colleague through every stage of their transition.

Although not the only part in the journey, an MoU will help to create a sensitive and supportive environment during a colleague's transition. It may also help to avoid damaging the relationship of trust and confidence that is implied in everyone's contract between them and the Trust. The MoU will also help you and your colleague to ensure that every aspect of their transition, and support on offer, from the Trust is carefully considered.

You may wish to structure the MoU using the bullet points under the 'Issues to be discussed' section on the previous page. The employee and the manager will need to agree the proposed actions to ensure there is mutual understanding about what needs to take place. Nothing must be done without the consent of the employee.

##### Who would be involved in drawing up the MoU?

While the initial meetings and the drafting of the document can be undertaken by the colleagues line manager or support manager, a member of the People & OD team should take an active role in the discussions and to meet with the colleague to review the details of the memorandum before it is signed. This must be done with the agreement of the colleague. The trans colleague may wish to have the assistance and support of a colleague, trades union or LGBT+ Network member during this process.

##### Who should sign the MoU?

The trans colleague and line manager (or other senior manager) should sign this document. The agreement does not represent a binding and unchangeable arrangement, but rather a commitment by the employer to engage with and support the employee at all stages.

There needs to be an agreement on where copies should be kept and who should have access. It is important that this confidential information is not shared in the workplace in an uncontrolled way.

#### 4.5 Ensuring that all Records are Accurate and Confidential

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All efforts will be made to ensure that all documents, public references (such as telephone directories, prospectuses, web biographies) and employment details reflect the acquired gender of the colleague. This will prevent any breach of confidentiality. Where documents have been seen and copies taken at the point of starting employment then every effort should be made to replace those with equivalent documents in the new name and gender. All documents will be held confidentially in line with HR/Data Protection policies and best practice.

People Services colleagues who have overseen or helped the manager with the transition process need to ensure that they inform other departments such as Occupational Health to update their records. This mitigates the need for colleagues themselves to have to check that all records reflect their acquired gender. It reduces needless anxiety and helps to ensure that processes protect privacy.

#### 4.6 Privacy, Personal Records and References

The utmost discretion is needed when dealing with telephone calls and any other instance where there is an opportunity for information to be overheard or otherwise received by someone else. Staff, particularly those working in environments where members of the public may make incoming calls, should be trained to understand the need for privacy and the importance of using correct pronouns as well as using non-gendered language to avoid misgendering people from the start. The inclusion team can advise regarding any training needs.

The Trust is mindful of, and compliant with, its responsibilities under GDPR which applies equally to all colleagues. In some cases, it may be necessary to retain records relating to a colleague's identity at birth for example pension or insurance purposes – the People Services team can advise in these instances. Access to any records showing the change of name and other details associated with the individual's trans status such as records of absence for medical treatment should be restricted to colleagues who require such information to perform their specific duties. Managers need to make sure they have specified why someone needs access to the information and for what purpose. If the former name ('dead name') of a person is still visible in the records, colleagues accessing the records need to be made aware not to use the 'dead name' and only use the acquired name of the person. These documents should be stored securely in a sealed envelope, separate from the files of other colleagues, rather than in a filing cabinet. Trans colleagues in employment may choose voluntarily to disclose at a secondary level, for example, answering an equal opportunities questionnaire, or asking for support from a line manager. However, this does not mean they are comfortable with onward disclosure to others; the need for strict confidentiality should be assumed unless the colleague gives permission for onward disclosure.

Breaches of confidentiality will be treated in the same serious manner as a disclosure of personal details of any other colleague. This applies even if the person does not hold a Gender Recognition Certificate under the terms of GDPR. Those who obtain such information as part of their job – therefore, in an 'official capacity' – could be committing a criminal offence if they shared this information with anyone else, unless this is authorised by the trans individual concerned.

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## 4.7 Specific Workplace Considerations for Managers and HR Teams

This section will be specifically useful if you recruit new staff, or have dealings with workplace insurance, pensions or retirement information.

### 4.7.1 Recruitment

There are very few instances where it is appropriate to specify an applicant's gender in a recruitment advertisement.

If you believe that the role on offer has a genuine requirement to be restricted to a particular gender, you should seek advice from the People & OD team before progressing with your recruitment.

### 4.7.2 Insurance matters

Employers registering colleagues for corporate insurance are advised to inform their underwriters if they know of a trans employee's status, since some insurers automatically invalidate a policy if a major fact such as gender reaffirming medical intervention is not disclosed. The employer should inform the colleague before disclosing this information. If an employer is unaware that a colleague is trans, the obligation to disclose falls upon the employee, who could also be held liable in the event of an accident for which no valid insurance cover exists.

### 4.7.3 Pensions and retirement

For state pension purposes, trans people can only be regarded as the sex recorded at birth until they have obtained a new birth certificate under the provisions of the Gender Recognition Act 2004. Otherwise, those born prior to April 1955 can only claim state pension at the age appropriate to the sex on the original birth certificate. A trans woman is entitled to receive a state pension from the age of 60 without a GRC, if she reached that age before 4 April 2005 when the Gender Recognition Act came into force. It is the responsibility of the employer to take suitable steps to keep confidential the reason for the colleague's apparent early or late retirement. Trans colleagues who are in possession of a GRC and members of the NHS Pension Scheme, should contact NHS Pensions (<http://www.nhsbsa.nhs.uk/pensions>) for further advice.

### 4.7.4 Dealing with the Media

There has been a recent increase in media scrutiny of the lives of trans people. The Trust's Communications Team should be consulted if there is any interest shown in the lives of any of the Trust's colleagues, and this is especially true for trans colleagues and any others who have protected characteristics. The Trust will do everything possible to protect its colleagues and ensure that they can continue to deliver the best care possible in a safe, supportive environment. If a colleague does experience unwanted attention from the media, it may be wise to consider taking appropriate actions as advised by the People & OD team.

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5. ATTACHMENTS		
Number	Title	<a href="#">Separate attachment</a>
1	Monitoring	N
2	Values and Behaviours Framework	N
3	Equality & Diversity Impact Assessment Tool	N

6. OTHER RELEVANT / ASSOCIATED DOCUMENTS	
The latest version of the documents listed below can all be found via the <a href="#">Trust Procedural Document Library</a> intranet homepage.	
Unique Identifier	Title and web links from the document library
Corp/Strat/012	UHMB Positive Difference Strategy
Corp/Pol/159	Uniform and Workwear
Corp/Pol/010	Attendance Management at Work
Corp/Pol/161	Early Resolution Policy (Behaviours at Work)
Corp/Pol/221	Transgender, Non-binary and Gender Fluid Patient Policy

7. SUPPORTING REFERENCES / EVIDENCE BASED DOCUMENTS	
Every effort been made to review/consider the latest evidence to support this document?	Not applicable
If 'Yes', full references are shown below:	
Number	References

8. DEFINITIONS / GLOSSARY OF TERMS	
Abbreviation or Term	Definition
<b>Cisgender Person</b>	Someone whose gender identity is the same as the sex they were assigned at birth. Non-trans is also used by some people.
<b>Cross-dressing</b>	A term that describes the practice of using clothing tailored toward the wearer's "opposite" gender. Not everyone who cross-dresses would characterise themselves as transgender. The law offers protection against discrimination to a person who cross-dresses as part of the process of transitioning but not where someone chooses to cross-dress for some other reason.
<b>Dead Name</b>	A person previous name they were known by
<b>Gender Dysphoria</b>	Anxiety or persistently uncomfortable feelings felt by an individual about their assigned gender which is in conflict with their internal gender identity. This is also the clinical diagnosis for someone who doesn't feel comfortable with the sex they were assigned at birth.
<b>Gender Recognition Certificate</b>	This enables trans people to be legally recognised in their self-identified gender and to be issued with a new birth certificate. Not all trans people will or want to apply for a GRC and you have to be over 18. An employer or service provider does not need to see a GRC in order to recognise an employee's or person's gender.

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<b>Gender</b>	The sociological set of boundaries and signifiers that may define people as being feminine, masculine, or androgynous. When you look at someone and decide that she's a girl, based on her appearance, behaviour, and presentation of self, you're judging her gender (not her sex).
<b>Gender Identity</b>	A person's innate sense of their own gender, whether male, female or something else (for example, non-binary) which may or may not correspond to the sex assigned at birth.
<b>Gender expression or gender presentation</b>	How a person chooses to outwardly express their gender, with the context of societal expectations of gender. A person who does not conform to societal expectations of gender may not, however, identify as trans.
<b>Gender Questioning</b>	This refers to people questioning their sexuality or gender, along with the diverse areas related to it. It is a stage where exploration, learning and experimenting often occurs. While some people have little to no issue in self-identifying, some encounter a great deal of confusion and uncertainty. They may have issues in understanding their sexuality, sexual orientation, gender identity, or whether or not they fit into any preconceived social normative labels.
<b>Intersex Person</b>	An individual who is born with male and female physiological characteristics and may or may not have various degrees of gender dysphoria.
<b>LGBTQ+</b>	Lesbian, gay, bisexual and transgender, Queer/Questioning += Other identities
<b>Medical Transition</b>	Medical transition is a part of transition in which a transgender person undergoes medical treatments so that their sex characteristics better match their gender identity.
<b>Non-binary</b>	An umbrella term for people who gender identity doesn't sit comfortably with 'man' or 'woman'. Non-binary identities are varied and can include people who identify with some aspects of binary identities, while others reject them entirely.
<b>Real Life Experience (RLE)</b>	A process where trans people live full-time in their preferred gender identity for a period of time to demonstrate they can function as a member of that gender. This relates to the process of obtaining a Gender Recognition Certificate.
<b>Re-assignment/Gender Affirming</b>	Refers to the process people undertake to move towards living in their preferred gender and is another way of describing a person's transition. To undergo gender affirmation 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. It is bad practice to ask trans people what surgery they have had without a medical need for this information. It should be noted that this is a contested term within the trans community. Tend to use the term gender affirmation or affirming
<b>Sex</b>	The various qualities displayed by the human body that, medically speaking, define people as being male, female, or intersex. A person's sex is made up of physical traits, genitals, hormone levels, chromosomes, internal sex organs, and secondary sex characteristics. Sex is distinct from gender.

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<b>Sexual Orientation</b>	This is a person's emotional, romantic and/or sexual attraction to another person.
<b>Social Transition</b>	Social transitioning includes changing your name and/or pronouns, appearance or expression (such as clothing or hairstyles), the washroom you use, and so on
<b>Trans, transgender</b>	A person whose sex at birth does not match their gender identity. An umbrella term to describe people who gender is not the same as, or sit comfortably with, the sex they were assigned at birth. This includes non-binary people, although not all non-binary people identify as trans.
<b>Trans man and trans woman</b>	A relatively safe term to use for trans people when the fact that they are trans is pertinent. A trans man is someone who was assigned female at birth and is now male and a trans woman is someone who was assigned male at birth and is now female.
<b>Transition</b>	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.
<b>Transphobia</b>	The fear and hatred of people who are trans or transgender.
<b>Transsexual Person</b>	This was used in the past as a more medical term (similarly to homosexual) to refer to someone whose gender is not the same as, or does not sit comfortably with, the sex they were assigned at birth. This term is still used although many people prefer the term trans or transgender.

## 9. CONSULTATION WITH STAFF AND PATIENTS

Enter the names and job titles of staff and stakeholders that have contributed to the document

<b>Name/Meeting</b>	<b>Job Title</b>	<b>Date Consulted</b>
Employment Policies Procedural Document Group		08/01/2025

## 10. DISTRIBUTION & COMMUNICATION PLAN

Dissemination lead:	Lee Jenkinson
Previous document already being used?	Yes
If yes, in what format and where?	Trust Procedural Document Library
Proposed action to retrieve out-of-date copies of the document:	PDT to archive previous version
<b>To be disseminated to:</b>	
Document Library	
Proposed actions to communicate the document contents to staff:	Include in the UHMB Weekly News. New documents uploaded to the Document Library.

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<b>11. TRAINING</b>		
Is training required to be given due to the introduction of this procedural document? <b>Yes</b>		
If 'Yes', training is shown below:		
<b>Action by</b>	<b>Action required</b>	<b>To be completed (date)</b>

12. AMENDMENT HISTORY				
Version No.	Date of Issue	Section/Page Changed	Description of Change	Review Date
1	09/06/2021		New	01/04/2024
1.1	16/09/2024	Page 1	Review Date extended – extension ID #1208	01/11/2024
1.2	07/02/2025	Page 1	Review Date extended – extension ID #1276	01/05/2025
2	13/08/2025	Throughout	Minor changes. Some sections removed and added to handbook.	01/02/2028

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## Appendix 1: Monitoring

What is to be monitored?	Methodology (incl. data source)	Frequency	Reviewed by	Group / Committee to be escalated to (if applicable)
Gender identity discrimination	Ulysses	Quarterly	Inclusion Team	Inclusion & Diversity Steering Group Speak Up Triangulisation Group
Gender diverse colleagues' experiences of Trust inclusion	Staff Survey	Annual	Inclusion Team and the Organisational Development Team	Inclusion & Diversity Steering Group

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## Appendix 2: Values and Behaviours Framework

To help create a great place to work and a great place to be cared for, it is essential that our Trust policies, procedures and processes support our values and behaviours. This document, when used effectively, can help promote a positive workplace culture. By following our own policies and with our **ambitious** drive we can cultivate an **open, honest and transparent culture** that is truly **respectful and inclusive** and where we are **compassionate** towards each other.

For further information, you can also refer to Our People Strategy online. This aligns with the NHS People Promise and helps outline our commitments to working together to make UHMBT a great place to work.



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## Appendix 3: Equality & Diversity Impact Assessment Tool



University Hospitals of  
Morecambe Bay  
NHS Foundation Trust

### Equality Impact Assessment Form

Department/Function	Inclusion Team	
Lead Assessor	Lee Jenkinson	
What is being assessed?	Supporting Trans and Non-Binary Colleagues	
Date of assessment	13/08/2025	
What groups have you consulted with? Include details of involvement in the Equality Impact Assessment process.	Patient Experience and Involvement Group?	NO
	Staff Side Colleague?	YES
	Service Users?	NO
	Staff Inclusion Network(s)?	YES
	Personal Fair Diverse Champions?	N/A
	Other (including external organisations):	

#### 1) What is the impact on the following equality groups?

	<b>Positive:</b> ➤ Advance Equality of opportunity ➤ Foster good relations between different groups ➤ Address explicit needs of Equality target groups	<b>Negative:</b> ➤ Unlawful discrimination / harassment / victimisation ➤ Failure to address explicit needs of Equality target groups	<b>Neutral:</b> ➤ It is quite acceptable for the assessment to come out as Neutral Impact. ➤ Be sure you can justify this decision with clear reasons and evidence if you are challenged
Equality Groups	Impact (Positive / Negative / Neutral)	Comments ➤ Provide brief description of the positive / negative impact identified benefits to the equality group. ➤ Is any impact identified intended or legal?	
<b>Race</b> (All ethnic groups)	Neutral		
<b>Disability</b> (Including physical and mental impairments)	Neutral		
<b>Sex</b>	Positive	Focus groups ongoing regarding Supreme Court ruling	
<b>Gender reassignment</b>	Positive	Focus groups ongoing regarding Supreme Court ruling	
<b>Religion or Belief</b>	Neutral		
<b>Sexual orientation</b>	Neutral		
<b>Age</b>	Neutral		
<b>Marriage and Civil Partnership</b>	Neutral		
<b>Pregnancy and maternity</b>	Neutral		
<b>Other</b> (e.g. carers, veterans, people from a low	Positive	Inclusion from those form gender diverse backgrounds	

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socioeconomic background, people with diverse gender identities, human rights)		
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2) In what ways does any impact identified contribute to or hinder promoting equality and diversity across the organisation?	
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3) If your assessment identifies a negative impact on Equality Groups you must develop an action plan <b>to avoid discrimination and ensure opportunities for promoting equality diversity and inclusion are maximised.</b>
➤ This should include where it has been identified that further work will be undertaken to further explore the impact on equality groups
➤ This should be reviewed annually.

Action Plan Summary
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Action	Lead	Timescale

This form will be automatically submitted for review once approved/noted by Trust Procedural Document Group.  
For all other assessments, please return an electronic copy to [EIA.forms@mbht.nhs.uk](mailto:EIA.forms@mbht.nhs.uk) once completed.

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