

2007 Trans-Health Conference, Philadelphia, PA

Presenter: Jessica McKinnon

April 6, 2007

# MAKING A SUCCESSFUL TRANSITION AT WORK

# Who am I?



- ◆ My name is Jessica McKinnon
- ◆ Originally from Cape Town, South Africa
- ◆ Software engineer at economic consulting firm based in Washington, DC
- ◆ Male to Female pre-operative transsexual
- ◆ Made decision to transition in June 2005
- ◆ Transitioned full time at work in July 2006
- ◆ <http://www.jessicamckinnon.com>

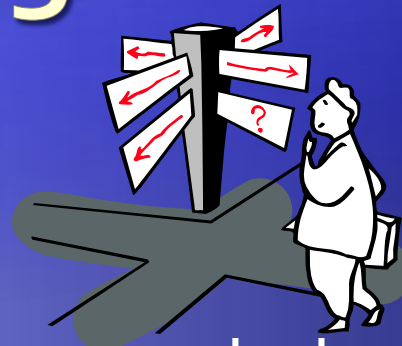
# Who are you?

- ◆ Already transitioned full time
  - ◆ =
- ◆ Thinking about or planning transition at work
  - ◆ =
- ◆ Still uncertain about transitioning at all
  - ◆ =
- ◆ Family and friends; other support
  - ◆ =

# Overview

- ◆ Planning
- ◆ Working with HR
- ◆ Insurance and other policies
- ◆ Communication
- ◆ Optional extras

# The road to living fulltime as the real you

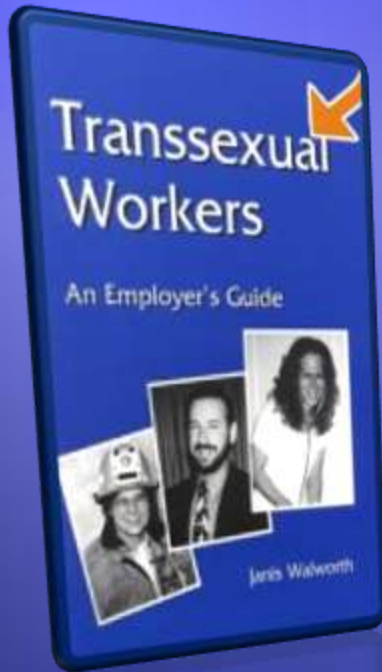


- ◆ It's your own journey
- ◆ There is no right or wrong way to transition
- ◆ Don't rush into anything
- ◆ Know yourself and your capabilities
- ◆ Know that you deserve respect
- ◆ Be confident
- ◆ Thorough planning is the key to a successful transition

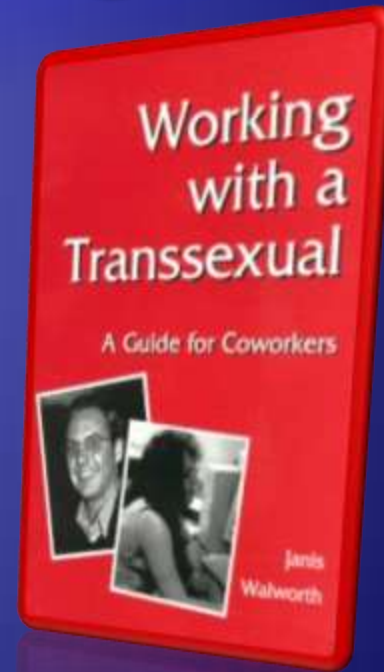
# Devising your plan

- ◆ Plan a *tentative* timeline before approaching HR
- ◆ Prepare talking points for disclosure discussions
- ◆ Be *flexible*: plans change so be open to revisions to your original plan
- ◆ Have a fast-track contingency plan: prepare for unintentional premature disclosure (just in case)
- ◆ Read books on transitioning at work

# Recommended reading



(Author: *Janis Walworth*)



<http://www.amazon.com/gp/product/0966548825/>

<http://www.amazon.com/gp/product/0966548817/>

Making a Successful Transition at Work  
© 2007 Jessica McKinnon  
All rights reserved

# My tentative timeline

## Tentative transition timeline:

Late Feb 2006 - private disclosure to new HR director (<Chief HR Officer>)

May 2006 - starting hormone treatment

Late May 2006 - private disclosure to direct manager (<Immediate Manager>)

Late June 2006 - private disclosure to senior management

End June 2006 - official verbal and written disclosure to all staff / seminar(s) / books available

July 1, 2006 - official start date living full-time as a woman

July 1, 2006 to July 16, 2006 - vacation

July 17, 2006 - first day at work presenting as a woman

July 1, 2007 - qualify for surgery recommendation

Feb 2008 - surgery

March 2008 - work from home part-time

April 2008 - back in office post-surgery

# Medical Insurance: First steps

- ◆ Common misconception: No insurance coverage
- ◆ Investigate prior to HR disclosure if possible
- ◆ Obtain a copy of your medical insurance policy (usually a very long detailed document; preferably digital to make searching easier)
- ◆ Keywords: sex, gender, trans, exception
- ◆ Transgender-specific exclusions *can* be removed!
- ◆ Use 'discrimination' only as a last resort

# Approaching HR

- ◆ Try not to get *too* emotional 😊
- ◆ There is no “best” way to break the news
- ◆ Collaborative process; you need to take the lead
- ◆ Provide reading material; therapist contact info
- ◆ Discuss timeline; edit to fit company schedule (avoid major events like all-hands meetings)
- ◆ Consider signing HIPAA disclosure forms to allow HR and therapist to collaborate freely

# My timeline changes

Original

Final (3 revisions over 4 months)

Late May 2006 - private disclosure to direct manager (<Immediate Manager>)  
Late June 2006 - private disclosure to senior management  
End June 2006 - official verbal and written disclosure to all staff / senior management  
July 1, 2006 - official start date living full-time as a woman  
July 1, 2006 to July 16, 2006 - vacation  
July 17, 2006 - first day at work presenting as a woman

5/5 Timeline review with <Managing Partner>  
5/12 Advise <Chief Technology Officer>  
5/23 Advise Equity Partners - Board Meeting???  
5/24 Advise <Immediate Manager>  
6/21 Advise General Partners  
6/27a Advise IT Department  
6/27p General Management Notification  
6/27p Employee Notification  
6/28a Info Session #1  
6/30 Jason's last day in the office  
7/14 Employee Info Session #2  
7/17 Jessica's first day back in the office

Making a Successful Transition at Work  
© 2007 Jessica McKinnon  
All rights reserved

# Medical Insurance: Next steps

- ◆ Remove all transgender exclusions (if present)
  - ◆ HR working with their Insurance representative
- ◆ Warning: Pre-existing condition? Waiting period?
- ◆ Obtain predetermination confirming coverage
  - ◆ Carrier requirements vary, but usually include at least:
    - ◆ List of related procedures, codes, providers, proposed dates of service, and costs
    - ◆ Letter from therapist (similar to the one for hormones)
  - ◆ Write a cover letter to personalize your application

# Other odds and ends

- ◆ Work with HR to amend company policies to add “gender identity and/or expression” to all anti-discrimination clauses
- ◆ Review company’s diversity and inclusion policy
- ◆ Discuss restroom usage options
- ◆ Perfect your look, voice – first impressions last, and you want to present your very best when you first come back to work as the real you

# Approaching your management chain

- ◆ Start as high up as possible (e.g. CEO, President)
  - ◆ That way you have senior level backing should anyone in the chain question your decision's effect on the company
- ◆ Keep your message clear and consistent
- ◆ Assure them that this is a positive move, and that your productivity will at least stay the same, if not improve
- ◆ Provide reading material at each meeting

# Preparing for mass-disclosure

- ◆ *Verbal or written?* Both?
- ◆ Either way, have the initial message conveyed by senior management to staff
  - ◆ e.g. CEO, Managing Partner, President, etc.
  - ◆ Conveys the message that the company is supporting your transition – encourages acceptance by staff
- ◆ Feel free to add your own sentiments *afterwards*

# The disclosure message

- ◆ Full support of transition by company
- ◆ Dates, e.g. information session(s), first day
- ◆ New name, pronoun usage
- ◆ Addresses common causes for concern
  - ◆ Basic facts about gender identity disorder
  - ◆ Restroom usage
  - ◆ Approval not required – just acceptance in workplace
- ◆ Reading material, and other sources of information

# Delivering the message

- ◆ This is also a transition for your coworkers
- ◆ Find a happy medium between giving too little and too much information, especially when answering questions
- ◆ Find the medium best suited for your own work environment

# Coming out: The aftermath

- ◆ Show confidence
- ◆ “Dress for success” (first impressions last)
- ◆ Give people time to come to terms with change
- ◆ Little to no reaction can be a good thing
- ◆ Goal: “biggest non-event in company history”
- ◆ Deal with any issues through HR should any arise

# Optional extras

- ◆ Name change
- ◆ Post-op “maintenance” at work

# Optional extras: Name change

- ◆ Court-ordered name change
  - ◆ Social security
  - ◆ Drivers' license (some states you'll do this before SS)
    - ◆ *Remember to ask them to take a new photo!*
  - ◆ Direct debit bank account
  - ◆ Company payroll
  - ◆ ... and then all the rest in any order ...

# Optional extras: Post-op “maintenance” at work

- ◆ Make HR aware of your post-operative needs well in advance
- ◆ Possible solutions / workarounds:
  - ◆ Privacy suite (normally for use by postnatal mothers)?
  - ◆ Individual-use restroom?
  - ◆ Lockable office with blinds to cover windows?

# Sample documents

- ◆ <http://www.jessicamckinnon.com>
  - ◆ Timelines and planning notes
  - ◆ Insurance letters and documentation
  - ◆ Disclosure meeting outline (department)
  - ◆ Disclosure memorandum (all staff)



# Questions?



Making a Successful Transition at Work  
© 2007 Jessica McKinnon  
All rights reserved

# Things to remember

- ◆ Planning
- ◆ Flexibility
- ◆ Confidence
- ◆ Be yourself
- ◆ Don't panic – have fun!



2007 Trans-Health Conference, Philadelphia, PA

Presenter: Jessica McKinnon

April 6, 2007

# MAKING A SUCCESSFUL TRANSITION AT WORK