

## **Transgender Equality Policy**

### **Purpose**

This policy outlines our commitment to ensuring that transgender employees are treated with dignity and respect and are not disadvantaged in the workplace.

The policy sets out the steps we take to welcome and support transgender employees so that they feel that they belong.

### **Scope**

The policy covers all employees, contractors, temporary workers and job applicants and applies to all stages of the employment relationship.

The policy accompanies our equal opportunities policy and dignity at work policy.

Failure to take account of this policy may result in disciplinary action.

### **Our Commitment**

We believe that diversity and inclusion bring benefits to the business and that people work better when they can be themselves and feel that they belong.

We are committed to providing a working environment that is free from discrimination, harassment or victimisation and will ensure that our recruitment, promotion and retention procedures do not treat people less favourably because of their gender identity.

### **Terminology**

We recognise the terminology around gender identity is evolving as awareness increases and more people choose to self-define. Transgender is an umbrella term describing the diverse range of people whose gender identity differs from the sex that they were assigned at birth. An individual may identify as transgender but may not identify with the binary concept of woman or man.

We acknowledge that gender identity and sexual orientation are not interchangeable concepts. Gender identity is about a person's internal perception of their gender. Sexual orientation, or sexuality, is about to whom someone is physically and/or emotionally attracted. This may be to someone of the same sex ("lesbian" or "gay"), or different sex ("heterosexual" or "straight") or more than one sex ("bisexual"). We will not assume that a transgender colleague has a particular sexual orientation.

Managers and colleagues should respect how an individual chooses to describe themselves and, if in doubt, should ask rather than assume. Using inappropriate language and terminology can cause offence and distress and undermines our efforts to create an inclusive workplace.

The **appendix** to this policy provides a glossary of some of the most commonly used terms.

### **The Law**

#### **Equality Act 2010**

Gender reassignment is one of the nine protected characteristics covered by the Equality Act 2010. The Act protects a person from discrimination, harassment and victimisation if they are “proposing to undergo, or undergoing, or have undergone a process (or part of a process) of gender reassignment”. There is no requirements for the person to be under medical supervision to be protected. Under the Act, a person who takes time off work for gender reassignment must not be treated less favourably in respect of employment decisions, for example by being denied access to training or promotion opportunities.

The Act also protects anyone who is perceived to have the characteristics of gender reassignment or is associated with someone who has the protected characteristic of gender reassignment, such as an individual’s partner or a friend.

An employee who treats a colleague less favourably because of gender reassignment, for example by refusing to work with them, may be held personally liable for discrimination.

#### **Gender Recognition Act 2004**

The Gender Recognition Act 2004 Allows an individual to apply for a gender recognition certificate (GRC), which will give them legal recognition in their acquired gender and enables them to obtain a new birth certificate. The Act safeguards the privacy of an individual with a GRC by defining information relating to the gender recognition process as “protected information” and, except “in certain specific circumstances” (for example, for the purpose of preventing or investigating crime), it is a criminal offence to disclose such information without the individual’s consent.

An application for a GRC will be made to the Gender Recognition Panel. Individuals are required to provide a medical diagnosis of gender dysphoria and evidence that they have lived in their acquired gender for two or more years and intend to do so permanently.

An individual should never be asked if they have a GRC and to do so could be considered harassment. No one is required to apply for a GRC for employment purposes and an individual may choose not to for various reasons.

## How we support transgender equality

We recognise that job applications and employees are not required to tell us their gender status or gender history. The gender in which an individual chooses to present will always be acknowledged and respected. This extends to individuals who identify as non-binary, ie they do not regard their gender identity as exclusively male or female.

To promote a workplace that is inclusive of people, regardless of their gender identity, we adopt the following approach.

### Recruitment

We wish to attract applicants from as wide a talent pool as possible and the recruitment process is designed to be inclusive of applicants regardless of their gender identity. Except in exceptional defined circumstances, a job applicant's gender identity is irrelevant. In an exceptional circumstance where the nature of a specific role might lawfully prevent someone who is transitioning from applying, legal advice must always be sought in advance of advertising.

Job advertisements should make clear that opportunities are open to all suitably qualified applicants. If this statement makes explicit reference to not discriminating on particular grounds, this reference should extend to all of the protected characteristics, including gender reassignment. Where an application form is used, this should not include a question about previous names as this may deter an individual who has transitioned from applying.

Managers should not ask questions about an applicant's gender identity or history. If an individual chooses to mention this during the interview, they should be informed that we support transgender employees and assured that the disclosure will have no bearing on the outcome of the interview, will not be revealed outside the interview room or noted on the interview record.

The requirement to provide proof of identity to confirm the right to work in the UK can be particularly sensitive for a transgender applicant whose identification documentation may be in their previous names. We will always ensure that an applicant is made aware of the full range of permissible identification documents and the process of checking is handled sensitively and with respect for the privacy of the individual.

Where an individual's documentation reveals their previous name and thereby their gender history, this information will be kept confidential and stored securely with the permission of the individual and in accordance with our **data protection policy**. The same approach will apply where an applicant is required to present qualification certificates before a job offer is confirmed and the certificates are in the applicant's previous name.

### Monitoring

In line with our policy on equal opportunities in employment, we will gather and analyse information relating to the diversity of the workforce and applicants for employment and promotion. Equality monitoring enables us to identify under-representation and where there are barriers to inclusion. This helps inform priorities for action and provides a baseline for measuring progress. Gender identity is included among other personal characteristics.

The disclosure of personal information by employees/job applicants is voluntary and employees may withdraw their consent to its processing at any time. Any information disclosed will be treated in confidence, stored securely and used only to provide statistics for monitoring purposes in accordance with our **data protection policy**. When communicating monitoring data, we will ensure that it is anonymised to avoid identifying individuals.

### Employment

An employee who is transitioning may wish to be redeployed on a temporary or permanent basis. This may be because: the individual is in a public-facing role and wishes to avoid having to answer questions from the public about their gender identity; or the role involves particular tasks that will be difficult to undertake if undergoing a particular type of treatment (for example, hormone therapy that causes fatigue). Requests to be redeployed will be discussed with the employee and, where possible, we will seek to accommodate the employee's wishes. This will include agreement on whether the redeployment is temporary or permanent.

A Manager should not put pressure on an individual to change jobs or make assumptions about their capability or wishes.

An employee's gender identity will not have a bearing on any employment decisions or access to benefits, except where permitted by law. For example, an individual who has transitioned but does not have a GRC may be required to disclose their gender history for insurance and pension purposes. In such circumstances, we will handle such information in line with our **data protection policy**.

Where pension and insurance providers request disclosure of an individual's gender identity, we will ensure that this requirement has been checked with the underwriter and the requirement is made clear in any scheme information provided to employees. In such circumstances, the employee's written consent will be obtained before disclosing their gender history and status.

**Names and pronouns**

We will take all necessary steps to ensure that an individual's change of name is respected.

A GRC is not required to enable someone to change their name and we will never ask an individual if they have a GRC to verify a name change.

We will always respect an individual's chosen pronouns. Consistently addressing a transgender employee by their previous name and/or an inappropriate pronoun may be regarded as harassment and will be dealt with accordingly.

**Updating employee records**

An individual does not need a GRC to request that their details are updated on their employment records. The individual will be treated in the same way as other employees wishing to update their details. We will agree with the individual what paper and electronic records need to be updated. These will include those records that may contain names, titles and other personal identifiers such as photographs on the organisation's website or intranet.

Where an employee is absent while completing their transition, any records that hold personal details should be updated by the time the individual presents at work and their new identity.

**Confidentiality**

All records that include details of an employee's gender history will be destroyed in a secure manner, unless there is a specific reason for retaining them (in which case the employee will be made aware of this and told why). Where other people in the organisation need to be aware of the employee's transition to make a change to a particular record, we will obtain the employee's consent, and restrict the information to those who need to know.

Where there is a need to retain documentation that shows someone's gender history, this information will be stored confidentially in line with the requirements of data protection legislation. The information will be held electronically in a secure environment (for example, password protected) that can be accessed only with the consent of the individual concerned. Only names individuals will be allowed to access this information and those individuals will be made aware that breaches of confidentiality could be unlawful and result in disciplinary action.

Care will be taken to ensure that any search of the organisation's records by others will not inadvertently reveal an employee's gender history.

It is an individual's decision whether or not to reveal their gender status and we will respect their right to privacy. The right to privacy will apply regardless of whether or not the individual has a GRC.

Where an employee discloses information about their gender history or status (verbally or in writing), this will be treated as confidential. This includes any information provided to the line manager or HR. Such information will not be shared with others, unless there is a specific reason and then not without the written consent of the individual concerned. Disclosure of the gender history of someone with a GRC without their specific permission would normally be a criminal offence.

Information relating to an employee's gender status or history will not be disclosed to a third party without the individual's consent, for example when responding to a reference request.

### **Communication**

Where an employee chooses to transition while working for us, we will work together with the employee to agree who will be told and by whom, and when and how this will happen. The most important consideration is that the employee feels safe in the workplace.

The employee may wish to tell colleagues about their transition or may prefer for this to be done by someone else on their behalf. We will encourage the individual to do what is best for them and, if the employee is not ready to tell anyone at the early stages, we will respect the employee's wishes. The employee is entitled to privacy and we will seek to protect them from intrusive enquiries.

Where an employee has a public or client-facing role, we will discuss with the individual what third parties need to know and how this should be handled.

We will be mindful of possible media interest and establish a protocol for handling media interest to ensure that:

- a transgender employee is not left to deal with this; and
- their colleagues understand the importance of not compromising the individual's right to privacy.

### **Bullying and harassment**

We adopt a zero-tolerance approach to harassment, bullying or victimisation and such behaviour may result in action being taken under our disciplinary procedure.

Examples of harassment against transgender people include:

- verbal abuse such as name calling, threats, derogatory remarks or belittling comments about transgender people;
- asking an individual if they have a GRC;
- jokes and banter about someone's gender identity or transgender people generally;

- refusing to use the appropriate pronoun (for example, calling a trans woman “he”) or calling the person by the name they had before they transitioned;
- threatening behaviour or physical abuse;
- intrusive questioning about someone’s gender identity or transition;
- excluding a transgender colleague from conversations or from social events;
- refusing to work with someone because they have transitioned; and
- displaying or circulating transphobic images and literature.

All employees are made aware of our policy on investigating claims of bullying and harassment and the procedures in place for handling complaints. We will also publicise our position on bullying and harassment to any third parties with which we engage.

Any complaints of bullying or harassment are taken seriously and dealt with promptly.

### **Single-sex toilets and facilities**

We will support a transgender employee’s right to use the toilets and facilities appropriate to their gender from the point at which the individual declares that they are living their life fully in that gender. In some cases, the individual may wish to use a single-occupancy toilet during their transition, but they must not be pressurised to do so and this should not be seen as a long-term solution. A transgender person should not be expected to use an accessible toilet unless they prefer to do so.

We will agree with the employee when they wish to start using the facilities appropriate to their affirmed gender and how this should be communicated to colleagues. Any concerns raised by others will be dealt with promptly and sensitively and harassment of the individual will not be tolerated.

Where possible, we will move from providing gender-specific toilets to gender-neutral toilets.

### **Dress codes**

We will agree with the employee what flexibility in our dress code may be permitted to accommodate the process of transition or where a gender-specific mode of dress would be uncomfortable for the individual.

If a transgender employee is required to wear a uniform, we will ensure that arrangements have been made to provide them with a uniform appropriate to their gender. The uniform will be available from the point at which the individual presents in their affirmed gender.

### **Training on transgender equality and gender reassignment**

Information on transgender equality and gender identity is an integral part of our equality-awareness training for our staff. The aim is to help our workforce to understand what is and

is not acceptable behaviour and to differentiate myth from reality, thereby minimising the potential for conflict arising from misunderstandings.

Discrimination because of gender identity is included in other training as appropriate, for example, induction, recruitment and selection, performance management and customer-care training.

### **Supporting an employee who is transitioning**

We will be supportive of an employee who has made the decision to transition.

We acknowledge that the transition process and the time takes will be unique to each individual and that it is not always a single process. We will not make assumptions about the employee or what they need but will instead work with the individual to ensure that they have the support that is right for them.

Transitioning is a major decision and the individual may have taken years to come to this point. They may fear rejection or ridicule by their work colleagues. It is therefore vital that we support the individual so that they can continue to work without fear of discrimination and harassment.

Once we have been made aware by an employee that they will be starting, or have started, the process of transitioning, an appropriate point of contact will be agreed with the employee. That person will work with the employee to develop a confidential action plan to manage the individual's transition at work.

The plan will consider what steps that is bespoke to the individual employee's transition. No action will be taken without the employee's consent.

It is important to develop a plan that is bespoke to the individual employee. Some of the key issues to address are likely to include:

- when and how an individual will present at work in their affirmed gender;
- handling a request by the employee to change their job temporarily during the transition process or to move to a new role permanently;
- the point at which colleagues, especially any direct reports, will be informed and how this will be done;
- if and how third parties, such as clients, should be informed;
- how absence from work for reasons associated with transitioning (for example, for medical appointments and/or medical treatment) will be handled;
- arrangements for changing the individual's name on their personnel records, email, security badges etc;
- confidentiality; and
- dress code and/or uniforms.



Transitioning is a process that takes time, and, to help both parties, regular review meetings will be arranged to manage the process. This will ensure that the right support is in place, and enable the plan to be amended as things change. Effective support for someone who is transitioning requires dialogue, agreed action and respect.

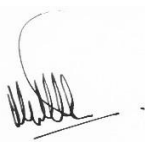
### Appendix: glossary

- **Acquired gender:** Used in the Gender Recognition Act 2004 to describe a person's gender after transitioning. As this is a legal term, many people now prefer to use the term "affirmed" gender.
- **Assigned gender:** The gender assigned to someone at birth, based on their physical characteristics.
- **Cisgender (or Cis):** Describes someone whose gender identity matches the sex that they were assigned at birth.
- **Cisnormative:** An assumption that gender is a binary concept and that being cisgender is the norm.
- **Cross dresser:** Someone who chooses to wear clothes not conventionally associated with their assigned gender. "Cross dresser" is now used in preference to the term "transvestite", which is considered to be outdated and can cause offence. Cross dressers are generally comfortable with their assigned gender and do not intent to transition.
- **Dead naming:** Describes not using an individual's chosen name.
- **Gender:** Describes how an individual presents themselves and this may be as a woman, as a man, as having no gender, or as having a non-binary gender. Gender is increasingly recognised as being on a spectrum and not a binary concept.
- **Gender dysphoria:** A recognised medical condition where the individual experiences severe discomfort and anxiety because their gender identity and does not align with their biological sex.
- **Gender expression:** How someone manifests their gender identity in society, for example through their appearance and behaviour.
- **Gender identity:** A person's internal perception of their gender, their sense of self. For transgender people, their gender identity does not match the gender they were assigned at birth.

- **Gender reassignment (or transitioning):** The process where an individual changes their expressed gender to live fully in the gender with which they identify. For example, a person who was assigned female at birth decides to take steps to live the rest of their life as a man. Gender reassignment does not require medical treatment and is a protected characteristic under the Equality Act 2010. For many transgender people, the terms “gender confirmation” or “gender affirmation” are now preferred to “gender reassignment”.
- **Intersex:** An intersex person is born with ambiguous genitalia and/or sex chromosomal variations that do not fit within the typical definitions of female or male. An intersex person may self-identify as a man or a woman or neither.
- **LGBT+:** Lesbian, gay, bisexual, transgender is a commonly used acronym. The “plus” denotes inclusion of other identities such as intersex or asexual. The acronym is often expanded to LGBTQI with “Q” standing for Queer (or questioning) and “I” for intersex.
- **Misgendering:** When a transgender person is referred to by the sex that they were assigned at birth.
- **Natal gender (or natal man/natal woman):** Used as an alternative by some people to Cisgender (or Cis).
- **Non-Binary:** A term used by people who feel that their gender identity is not binary male or female. Some non-binary people do not identify with any gender while others may feel that they embody elements of both genders, or a gender that is different to either male or female. Some transgender people will identify as non-binary but many do not.
- **Sex:** The biological and physiological differences that define men and women.
- **Trans man (female to male):** Used to describe a person who was assigned as female at birth but has a male gender identity and transitions to live permanently as a man.
- **Trans woman (male to female):** Used to describe a person who was assigned as male at birth but has a female gender identity and transitions to live permanently as a woman.
- **Transgender (or trans):** An umbrella term describing the diverse range of people whose gender identity or gender expression differs from the gender they were assigned at birth. The term can encompass individuals who are cross dressers or non-binary.

- **Transitioning:** The steps taken by individuals to live in the gender with which they identify. These steps can be social, psychological, legal and may sometimes involve medical procedures. Each person's experience of transitioning is unique to them. Transition is not about the individual "becoming" as it is about them "gender affirming".
- **Transsexual:** Under the Equality Act 2010, a transsexual person is someone who has the protected characteristic of gender reassignment (see above). A transsexual person does not have to be under medical supervision to be protected under the Act. Employers should recognise that many individuals regard being transsexual as part of their gender-identity history and that then they transition may simply want to be described as a woman or a man. The terms is now considered to be out of date and the more inclusive term "transgender" is preferred.
- **Transphobia:** A fear of or a dislike of transgender people. It is based on prejudice and misunderstanding and can involve verbal abuse, physical violence and other forms of harassment.

Signed:



Date: 1 May 2023

Malcolm Rose, Chief Executive Officer - On behalf of Shield Service Group Ltd