A TRANSITIONING PROFESSIONAL'S GUIDE TO:

GENDER TRANSITION AND TRANSGENDER INCLUSION IN THE MUSEUM FIELD





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March 11th, 2019

Dear Trans and Allied Colleagues:

When we landed in Phoenix for AAM's 2018 Annual Meeting, we weren't sure how the LGBTQ Alliance would react to our requests for a trans-focused committee. The lack of resources up to that point was, after all, the result of an oversight of the trans community's needs even within specifically LGBTQ spaces. We had both experienced this lack first hand and were determined to make sure others wouldn't have to experience it in the future. Towards the end of the committee meeting, our Chair called for "additional business" and the rest, as they say, is history.

Gender Transition and Transgender Inclusion in the Museum Workplace: A Toolkit for Trans Individuals, Institutions, and Coworkers is the result of three teams of trans and allied museum professionals working across the country to create resources that are approachable even to those without any prior knowledge about the trans community. The Toolkit comes at a time when the transgender community is constantly under attack. The education and knowledge it provides can create a path for those interested in becoming allies and can foster a more inclusive atmosphere within the museum field. We hope that the Toolkit will prove useful to those who are transitioning or those who wish to improve the diversity and inclusion policies around them.

As Chairs, we are so proud of what the members of the Taskforce have created. Watching so many transgender museum professionals and their allies come together to work on the *Toolkit* has been truly inspiring and reminds us what we can do together as a community. We owe an enormous debt of gratitude to: Lauren Griffin, who was consistently amazing and went above and beyond leading our third team; Jennifer Olive, who served as editor for this project; our outside readers, who took time out of their busy schedules to give us feedback; and AAM and the LGBTQ Alliance, who have been so open and eager to helping us correct the oversight that has existed this long. We still have a long ways to go towards equality; but, hopefully, the *Toolkit* can be a significant step in the right direction for the museum field.

If you ever have any questions about the *Toolkit* or about trans inclusion, please reach out to us via the LGBTQ Alliance.

Sincerely,

Alison Kennedy (they/them)

Co-chair, Taskforce for

Transgender Inclusion

Anna Woten (she/her) Co-chair, Taskforce for

Ahla

Transgender Inclusion

March 11th, 2019

Gender Transition and Transgender Inclusion in the Museum Workplace: A Toolkit for Trans Individuals, Institutions, and Coworkers

Dear Colleagues and Friends:

At the May 2018 AAM Annual Meeting, the LGBTQ Alliance formed the Task Force for Transgender Inclusion in response to requests from members to provide support for institutions working to become more welcoming of transgender employees and visitors. Led by Alliance members Anna Woten and Alison Kennedy, a group of 22 museum professionals has worked in the intervening months to create *Gender Transition and Transgender Inclusion in the Museum Workplace: A Toolkit for Trans Individuals, Institutions, and Coworkers.* The *Toolkit* was collaboratively written and edited by the Task Force teams, as well as edited by outside consultants.

The *Toolkit* includes a set of three guides that provide targeted guidance for transitioning professionals, institutions, and coworkers. The Task Force expects that the Toolkit will most commonly be approached in one of two ways:

- 1) By the Transitioning Professional
 - We imagine this will be the most common
 - The transitioning professional will access the toolkit and provide their institution with *An Institution's Guide* and *A Coworker's Guide*
 - The transitioning professional will then use *A Transitioning Professional's Guide* while working with their institution
- 2) By the Institution who will use the *Toolkit* and maintain it on file
 - HR will make A Transitioning Professional's Guide and A Coworker's Guide available to staff
 - HR will then reference the institutional policies and guidelines recommended in *An Institution's Guide* While working with transitioning professionals

The mission of the LGTBQ Alliance is to provide a forum for communication and dialogue to advance diversity, equity, inclusion and inquiry with particular respect to sexual orientation and gender identity within museums. In these times of cultural challenges to acceptance of all people, I can think of no more important, timely, or needed guidance than the resources the Task Force has created.

On behalf of the LGBTQ Alliance, I thank them for everything they are doing to address the needs of all our colleagues. Their work is a model and inspiration.

Sincerely,

Mike Lesperance (he/him)

Chairperson, LGBTQ Alliance

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March 11th, 2019

Dear Colleagues:

Diversity, equity, accessibility, and inclusion (DEAI) are essential values of museums and of the American Alliance of Museums. These principles are not only bedrocks of ethical and morally courageous museum work, but they are also guideposts for how museums can remain relevant and welcoming to an ever-diversifying population. Simply put, inclusion is central to the effectiveness and sustainability of museums – and we must work to welcome all.

This was one of the points in our recent report, *Facing Change: Insights from the American Alliance of Museums' Diversity, Equity, Accessibility, and Inclusion Working Group.* Another insight was that inclusive practice requires a careful and continuous examination of our biases and ongoing, conscious efforts to eradicate inequality throughout our institutions.

I am delighted to release *Gender Transition and Transgender Inclusion in the Museum Workplace:* A *Toolkit for Trans Individuals, Institutions and Coworkers*. I hope this resource will guide museums in welcoming transgender staff — and by extension, transgender audiences, volunteers, and leaders.

The Toolkit is the result of a lot of hard work by the Task Force for Transgender Inclusion. I am grateful to each of its twenty-two members, as well as for the leadership of the LGBTQ Alliance who recognized and addressed this need. I am confident the Toolkit will quickly spark awareness, dialogue, and much-needed action.

As always, I welcome your feedback on how we can do our work better together.

Sincerely,

Laura Lott (she/her)

President & CEO

Law Hoth

American Alliance of Museums

INTRODUCTION

According to a 2015 study by GLAAD, 84% of Americans learn about transgender people through the media. Despite this high percentage, only 16% of people surveyed in 2015 reported knowing or working with a transgender person. This percentage goes down to 9% for people age 45+. Because the majority of people in the United States learn about transgender people without actually knowing any transgender people, it is "crucial that the media increase and improve the coverage of transgender issues, and that transgender people have the opportunity to tell their own stories about our lives and the issues we face." 1 Museums have an excellent opportunity to share the stories of transgender people in all walks of life. In order to best welcome transgender visitors and tell the stories of transgender people, museums must work to support and welcome transgender staff.

For the majority of people, their gender identity matches the one assigned to them at birth. Transgender (trans) people, however, have gender identities that do not match those assigned to them at birth. "Many will undergo the process of aligning their life and physical identity to match their gender identity, a process called transitioning." Medical processes, such as hormone replacement therapy and surgical procedures, are not required to transition. Some people choose not to, or cannot, undergo any medical processes, but this doesn't invalidate their gender.

Each transgender person views themself and their experiences differently. Individuals will always have personal preferences in terms of the language that their employers use. In this document, we use the umbrella term "transgender", which includes non-binary identities.³ Because of this broad definition, we we encourage you to use the language and identity terms indicated by your transitioning employee or coworker.

Over 2018-19, a group of transgender and ally museum professionals formed the American Alliance of Museums' LGBTO Alliance's Taskforce for Transgender Inclusion and worked to research and create Gender Transition and Transgender Inclusion in the Museum Workplace: A Toolkit for Trans Individuals, Institutions, and Coworkers. We collaboratively wrote and edited the toolkit, as well as received editorial advice from outside consultants, in an effort to provide support for institutions working to become more welcoming of transgender employees and visitors. We envisioned the Toolkit as a starting point and encourage you to adapt its contents for individual situations.

A TRANSITIONING PROFESSIONAL'S GUIDE

The purpose of *A Transitioning Professional's Guide* is intended to guide transgender museum professionals through their workplace transitions. There is no one-size-fits-all plan for transitioning, but the guides, sample scripts, and resources included here should help you in planning a workplace transition that fits your unique situation. As you work through this planning process, you should review the accompanying *An Institution's Guide to Gender Transition and Transgender Inclusion in the Museum Field* and *A Coworker's Guide to Gender Transition and Transgender Inclusion in the Museum Field* and ensure that your institution has access to them. Each of these documents helps create an inclusive work environment and remove the burden of education from the transitioning professional.

PLEASE NOTE

Transitioning is a very personal choice, and only an individual can make the determination if coming out is a safe course of action depending on their location and employer. The content contained within *Gender Transition and Transgender Inclusion in the Museum Workplace: A Toolkit for Trans Individuals, Institutions, and Coworkers* is for informational and educational purposes only. It is **not** intended to be used as legal advice. Always research local, state, and national laws and consult with a lawyer before making any legal decisions regarding workplace transitions.



BEFORE COMING OUT AT WORK

COMING OUT AS TRANSGENDER AT WORK CAN MEAN SOMETHING DIFFERENT FOR EVERYONE.

Sharing personal information about yourself may feel overwhelming or uncomfortable, and you may fear discrimination or harassment. However, coming out at work also enables you to live openly in your job. Additionally, if you are going to change your gender presentation or undergo hormone therapy, you may want to inform your coworkers so that they can better understand the changes to your appearance. If you determine that coming out at work is the right thing for you to do, remember that you do not have to share more than your coworkers need to know in order to do your jobs well together.

There are some common things that may be essential for you to share at your job to ensure that your transition proceeds as smoothly as possible. Coworkers will definitely need to know if you are changing your name and pronouns so they can address you correctly. You may also need to update your name and/or gender markers in your personnel records. Ideally, your workplace will understand that these changes are necessary, but be prepared to push for them if needed. If you are going to make any quick changes, such as a wardrobe change or using a different restroom, you may want to inform people in order to avoid having to explain to everyone individually over and over again. However, coworkers do **not** need to know the details of your medical transition (if applicable), your exact gender identity (unless you feel comfortable sharing it), or your life or relationships outside of work and how transitioning affects those experiences. Consider how sharing particular aspects of your transition helps you in order to determine the best steps forward in your situation.

One of the best ways to support yourself when beginning the process of coming out at work is to make a plan. The details of the plan will vary depending on your preferences and your professional situation, but these three overall questions can guide you:

- 1) What information are you going to share?
- 2) Who needs to know?
- 3) How do you want to tell people?

Once you have determined the answers to these questions, you can build a timeline and reach out to the necessary people. A thoughtful process with clear expectations will help you communicate the respect you have for your coworkers and also show them that you expect respect from them as well.

WHAT INFORMATION ARE YOU SHARING?

Before speaking to anyone, decide first on what information they need to know. The information you provide should aim to clarify the situation and your expectations so that there are as few opportunities for miscommunication as possible. If it helps, you can write down what you want to say so that you can be consistent across the various conversations you might have.

Name your identity

Begin by deciding how you will describe your identity when you come out. Explain any terms that may be unfamiliar in your own words. For example, "I am a transgender woman, which means that although you currently know me as a man, I am actually a woman" or "I am non-binary, which means I am neither a man nor a woman." You don't have to use these exact wordsdescribe it in whatever way makes you most comfortable.

Identify changes that need to happen at work

What does your identity mean for practical changes that need to happen at work? For example, are you using a new name? Will people use new pronouns for you? If so, describe these things. If you will be using pronouns other than "he/him" or "she/her" pronouns, consider including an example of how to use your pronouns in a sentence.

Once you know what you're going to say, it's time for you to decide whom to tell and when.

"A transgender person (like me) is someone whose true gender is different from the one they were assigned at birth. For most of us, it's something we just know and feel deeply."

WHO NEEDS TO KNOW?

You should come out to anyone who works with you on a regular basis. If you would rather a particular person hear the news from you instead of anyone else, include them in your coming out plan. Consider the following types of people in your plan (though some may not be applicable to your situation):

- 1) Manager or direct supervisor
- 2) Human Resources (Payroll, Benefits, Accounting, etc.)
- 3) Department or division head
- 4) Department or division coworkers
- 5) People in other departments or divisions with whom you regularly work
- 6) Departments or divisions who work in the same physical area (same floor/wing)
- Regular partners or collaborators outside your institution (national projects, regional committees, etc.)
- 8) Any other contacts with whom you have an established professional relationship (regular vendors, contractors, etc.)

The order and method of informing these different groups is up to you. Talking to HR or your direct supervisor early is generally a good idea as they may be able to assist you in the coming out process by sending emails or coordinating meetings. Be sure to consult your employee handbook or other available resources to check if there a standard procedure for more common needs like name or personal changes. It may also help to find one or two coworkers who you suspect will be supportive to be close allies.

WHAT MIGHT THEY ASK YOU?

Your supervisor or HR may have questions for you beyond the details of your transition plan, and it is wise to prepare yourself for these questions. Keep in mind that you do not have to answer questions that reveal personal information beyond what is relevant for your transition at work. For example, you do not need to discuss the details of your medical transition. If you are asked a question that feels irrelevant or too personal, do not be afraid to set a boundary and say, "I'd rather not get into personal details like that. Let's focus on what this process means for everyone here at work." The chart below includes some possible questions that people may ask you and some sample answers that you can use. Feel free to adapt these answers to your own unique situations.

"Knowing that you support me is so important. One thing you can do is to model using my name and pronouns correctly, even when I'm not around. Help others remember, too, by correcting or reminding them if they forget."

Question	Sample Answer
"What does transgender mean?"	"A transgender person (like me) is someone whose true gender is different from the one they were assigned at birth. For most of us, it's something we just know and feel deeply."
"Are you having the surgery?"	"I don't feel comfortable discussing my medical history at work, thanks. Let's focus on [x] task."
"What happens if I mess up and use the wrong name or pronouns?"	"I understand that mistakes will happen while you get used to the change. The best thing to do if you mess up is to quickly correct yourself and move on. If you notice someone else slipping up and not noticing, it would really help me if you could remind them of my name and pronouns. As long as you're trying your best, everything will be okay."
"How should I explain this to other people?"	"You may not need to explain anything to anyone. It usually isn't relevant at all. There could be some situations where you need to explain it. If that happens, you could say that I'm transgender and that I now use this name and these pronouns. You don't need to answer any questions that you don't feel comfortable answering."
"What bathroom will you use?"	"I'll be using the [women's]/[men's] restroom, just like the rest of the [women]/[men] in our office."

"I don't feel comfortable in either the men's or the women's restroom, so I'll be using the single-stall restrooms down the hall." "I'll be using [x] restroom for now, but I might need to change in the future, or I might become more comfortable in a different restroom. I'd appreciate it if people could understand that need and not draw attention to it if I need to change restrooms." "Being gay is different from being transgender. Being gay is about the gender of people to whom you're attracted, but being transgender is about my gender and how I need to live."

"Why can't you just be a feminine man/masculine woman?"

"Gender expression is different from gender identity.

Being a feminine man just doesn't feel right to me,
and it's not who I am. After all, feminine men are
still men, and I am a woman regardless of my
gender expression."

"Gender expression is different from gender identity.

Being a masculine woman just doesn't feel right to
me, and it's not who I am. After all, masculine
women are still women, and I am a man regardless
of my gender expression."

Question "What should we do with all the files and documents around here that have your old name on them?"

Sample Answer

"I would appreciate your help in changing the names on the files and reports that are the most public-facing. We don't have to do it all at once, but I'd love your help doing that bit-by-bit wherever it's possible."

"Please don't talk about this with new hires. They may not even know that I'm transgender when they meet me, and I would rather not have others discussing this aspect of my history at work. If someone uses the wrong pronoun, though, please correct them."

"Should we inform new hires about your pronouns/transition?"

"Please don't disclose that information without checking with me, even if someone asks."

"There is no need to bring it up to anyone, but I'm comfortable with new hires knowing that I am transgender, especially if they are looking for resources or advice on the subject."

"How can I help?"

"Knowing that you support me is so important. One thing you can do is to model using my name and pronouns correctly, even when I'm not around. Help others remember, too, by correcting or reminding them if they forget. And, of course, if you ever hear anyone making rude comments about me, please stand up for me. People are a lot less likely to make these comments if they know that their sentiments are not shared by others here."

HOW DO YOU WANT TO TELL PEOPLE?

There are several appropriate ways to inform your colleagues of your identity, name, and/or pronouns, including one-on-one meetings, small group meetings, and/or emails. You can use whatever methods make you most comfortable. You do not necessarily have to be present for all meetings or responsible for sending all emails. In fact, having your supervisor or HR send an email or lead a meeting can signal to colleagues that your institution supports you and that they should take the information seriously.

As a general suggestion, you may want to have face-to-face meetings with HR, your supervisor, or individual colleagues to begin. You most likely will interface with these groups of people the most regarding your transition, and they can make great allies when informing the rest of your coworkers. If you have a lot of people to inform, setting up group meetings or sending an email will save the time and energy of having to inform everyone one by one. You can help craft an email if someone else will be sending it to ensure that everyone is on the same page.

If it is feasible, setting up a trans 101 training may be beneficial for coworkers. You do not need to be present for these trainings. In fact, coworkers may feel safer asking uncomfortable but necessary questions about trans issues without you there.

There are a number of ways to facilitate this type of training. Local health or trans advocacy groups would be the best place to start looking for suggestions and resources. Even if they do not offer the training themselves, they should know local people who do.

Below are some sample timelines and strategies for how the process of coming out worked for a few different members of the Task Force who wrote this document.

Large Museum, 400+ Employees

- The trans employee begins by meeting with a representative from Human Resources, followed byhis direct supervisor. Together, they devise a plan to inform the employee's department (12 people), frequent collaborators in the museum (about 200 people), and some frequent collaborators and project partners outside the museum (about 15 people).
- 2) The employee's supervisor (also department manager) and the employee craft an email message together for the employee's department using his preferred language and terms.

- 3) At a regular weekly department meeting at which the employee is not present, the supervisor/manager reads the email language from the employee stating that he is transgender and his new name and pronouns. Then, a trans health professional from a local community clinic runs a short "Trans 101 in the Workplace" training and allowed time for Q&A from the 12 department members.
- 4) Before the meeting, the supervisor/manager sent an email to other managers in the museum letting them know that the employee's department would be learning the news that morning, and their direct reports would receive an email after that meeting. After the employee's department finished their meeting and training, the supervisor/manager sends emails to frequent collaborators inside and outside the museum. The email uses similar language to the one co-written with the employee for his department.
- 5) The employee arrives at work that afternoon and continued with work as usual with everyone being informed of and using the correct name and pronouns.

Medium Museum, 100 Employees

 Two months prior to transition date, the trans employee begins by meeting with her Human Resources Director. Together, the two create the basic plan for informing coworkers and list out the necessary changes, such as her listed name and

- gender with health insurance and payroll.
- 2) The HR Director meets with the transitioning employee's immediate supervisor and the upper-level supervisor for her division about the transition plan. The upper-level supervisor takes point for the process as a show of institutional support.
- 3) One month prior to the transition date, the HR Director attends a department meeting (12 coworkers) for the transitioning employee's department. The transitioning employee does not attend this meeting in order to allow her coworkers to ask questions that may have been uncomfortable otherwise. The HR Director and the transitioning employee's supervisors inform her department of her transition (including name and pronouns) and explain institutional policies and expectations. The coworkers are also instructed to not discuss this information with other departments.
- 4) Two weeks prior to the transition date, the HR Director begins meeting with each department (including volunteers) in person to explain the transition and the expectations of coworkers going forward. The HR Director also arranges for the creation of new nametags, business cards, and name plates.

5) On the day designated as the transition date, the trans employee arrives at work and coordinates with the HR Director to finalize the changeover of email and computer credentials, as well as nameplates. The trans employee continues work as usual with coworkers using the correct name and pronouns.

Small Museum, 15 Employees

- The trans employee begins by meeting with their direct supervisor. Together they make a plan for how to inform their other coworkers and discuss what logistical changes would need to be made to their name and gender for payroll, health insurance, etc.
- 2) The supervisor then meets with the head of the museum to inform them of the trans employee's transition, name, and pronouns, and to go over the plan made with the employee and discuss applicable institutional policies. They also arrange for the creation of new nametags, business cards, and name plates.
- 3) The supervisor hosts a meeting with all other employees, which the trans employee does not attend, to inform their coworkers of the trans employee's transition, name, and pronouns, and to allow them to ask questions. They explain institutional policies and expectations.

- 4) The supervisor also reaches out to volunteers to explain via email and in person the transition and expectations of coworkers going forward.
- 5) The trans employee comes to work the day after the meeting and coordinates with their supervisor to changeover their email address, computer credentials, name tags and nameplates, etc. The trans worker then continues work as usual with all coworkers being informed and using their correct name and pronouns.

"With any type of coming out, remember that there are both benefits and risks; so, do things in your own way and in your own time."

WHAT ARE YOUR RIGHTS?

As the fight for trans rights continues, local, state, and national laws constantly change, making an exhaustive list of trans rights impossible to document. It is important, though, for you to know your rights before coming out. Lawyers who specialize in discrimination laws are the best resource for clarifying the specifics of a law or statute, though they are often inaccessible due to geographic availability or financial limitations. Local and state trans advocacy groups are a great first stop for figuring out what the legal landscape looks like in your area. You can also check with national advocacy groups, such as the National Center for Transgender Equality (https://transequality.org) or the Human Rights Campaign (https://hrc.org), to determine your current federal rights. It's important to remain current on how laws are changing so that you can prepare and make the best choices in approaching situations during and after your transition at work.

Some examples of behaviors that could constitute discrimination are being fired, being denied a promotion, witnessing offensive jokes about transgender people, being subjected to repeated intentional use of the wrong name or pronouns, and being the target of invasive questions about your body or other personal topics. You may also face microaggressions-comments or behaviors from coworkers that are not overtly malicious and may even be well-intentioned but are, nonetheless, hurtful.

If your rights are being violated by your coworkers or supervisors, it is extremely important that you document each occurence with as much detail as possible. If you feel safe and comfortable doing so, you can begin by addressing the problem directly with the coworker(s) in question. In some cases, they may not have known they were doing or saying something hurtful and will appreciate having more information.

For example, imagine that one of your coworkers repeatedly uses the term "transgendered" or refers to people as "transgenders." They may not know that these are not the preferred terms. You-or an ally or supervisor--could approach that coworker privately and gently say:

"Hey, I heard you use the term 'transgendered' in that meeting this morning. You may not know this, but trans people don't really like that term. You can just say 'transgender'--it's an adjective, not a verb. Does that make sense? I know it's sometimes hard to keep up with the terminology, but I wanted to make sure that I let you know."

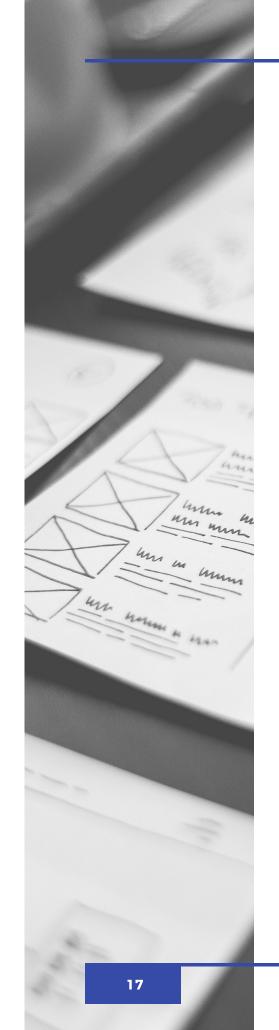
If the coworker is not receptive or the conversation does not change their behavior, you can involve your and/or their supervisors. If you suspect it may help, you can present the issue in terms of how it affects workflow or productivity for you or your team. For example, imagine that a coworker repeatedly uses the wrong name and pronouns for you and has not responded to repeated corrections. This coworker even uses the wrong name and pronouns with external vendors and contractors. When telling your supervisor about the situation, you could say:

"[Coworker] keeps using the wrong name and pronouns for me in our correspondence with a contractor on our project. This behavior resulted in several confusing situations, including me being mistakenly left off of several emails and missing important documents and invoices. Can we resolve this issue so it stops affecting our work?"

Another option for addressing issues of discrimination and microagressions is with your Human Resources department, if your institution has one. Otherwise, a supportive supervisor can be a helpful mediator. Bring your documentation of what has happened along with copies of the laws or statutes being violated, if applicable, in case your HR representatives or supervisors are not familiar with them.

If you are unable to resolve the issues internally, there may be other avenues open to you, such as filing a complaint with a city or state labor office (depending on whether it is a city or state law). Keep in mind that the specific names of these offices vary greatly by area.

If the situation persists without remedies from your institution, you can even consider filing a lawsuit with the help of an attorney or a complaint with a state or local civil rights agency. Whether you submit the issue internally or externally, you need to be aware of possible complications. Some institutions may retaliate, especially if they have been unsupportive in the past. For example, if you file a complaint and your institution learns about it, they may retaliate by cutting your hours or firing you. Though this kind of retaliation is illegal, it is often difficult to prove. Lawsuits and complaints can be time-consuming and emotionally exhausting, but if you have been discriminated against, you have the right to pursue these avenues.



COMING OUT AT WORK

NOW THAT YOU HAVE MADE YOUR PLAN, HOW SHOULD YOU GO ABOUT COMING OUT AT WORK?

With any type of coming out, remember that there are both benefits and risks; so do things in your own way and in your own time. The road for coming out is just as unique as every person coming out, but there are some common steps or things to consider when you are transitioning at work.

BUILD A SUPPORT SYSTEM

When coming out at work, the first step many people choose is telling any colleagues that they consider friends. Telling friends can help build a support system, like a work family, that can assist in the larger workplace transition. It allows your friends separate time to process and learn what transition may mean and look like for you. You will gain practice in answering questions that your colleagues or HR may have, and your support system can help teach others and even guard you from questions your colleagues may have.

As with everything, there are risks to coming out to your work family first. You may purposefully or accidently be outed to other colleagues or HR before you are ready. Some colleagues who you thought were friends may distance themselves from you as they hold different beliefs or need time to process. You should also be mindful of overrelying on individual colleagues, even if they are supportive. The details of your transition can be personal or emotional, and fellow colleagues should not bear the brunt of this emotional weight as it can put them in an uncomfortable position.

WORK WITH HR

When you are ready to come out at work you'll need to work with your Human Resources representative or the person at your institution who handles those responsibilities. When you meet with them, bring a copy of An Institution's Guide to Gender Transition and Transgender Inclusion in the Museum Field and A Coworker's Guide to Gender Transition and Transgender *Inclusion in the Museum Field*, if your institution does not already have copies on file, and review these with your HR representative. These documents can help you and your institution with planning your transition timeline as well as changing your name, photo, and gender marker where allowed. See Appendix B for a sample transition plan.

Keep in mind that you may need to meet multiple times or have staggering timelines for certain documented changes. Some changes can be made prior to a legal name change, but others, such as payroll, can only be changed after you have completed a legal name change.

Even with these different timelines, you do not need to answer questions about the medical aspects of your transition as they should have no bearing on your work transition. Below, you'll find a list of documents that may need to be changed during this process.

- Name (both internal and public-facing documents)
- Badge
- Email
- Telephone system
- Business cards
- Access and ID cards
- Insurance profiles
- General HR systems
- Retirement accounts

OTHER RELATED DOCUMENTS

If you transitioned after completing your degree, licensing, or any other certification programs that list your name, picture, or other personal details, you will need to update these records as well. The procedure and timeframes for updating these outside documents will vary by source, requiring you to contact each organization individually. To help, consider making a list of all items you may need when applying to future jobs along with their relevant requirements to ensure you don't accidentally forget something.

SAMPLE SCRIPTS

Coming out will be different for each person.

Some people may feel more comfortable telling people verbally in one-on-one meetings or group settings. Others may prefer written email communication. You might also consider a combination of telling people in person and via email. What's important is that you choose the way that is best for you and your situation.

Below are samples of verbal and written communication that you can reference when talking about your transition. The samples here are just suggestions and can be changed to reflect your own situation. For example, you may not want your supervisor to use the wrong pronouns at all when notifying your coworkers. It is important that you choose a method with which you are comfortable.

In order to ensure accurate information and maintain close working relationships, it might be good to have a one-on-one meeting with:

- Your supervisor
- Human Resources
- Your supervisor's supervisor
- Coworkers with whom you spend a lot of time

After having one-on-one meetings, you may choose to share this information in group settings or via email. HR may have suggestions on the timeline or methods of communication depending on your institution.

"How you choose to handle or confront these challenges is completely up to you and your comfort level. This work takes emotional labor, and your health, comfort, and safety are the most important factors within the equation of how to manage microaggressions."

Work with your manager and HR personnel on the timeline so they can be prepared to field questions once word has spread. Email works well to disseminate the information to all of your coworkers quickly before word spreads. It can also be a great platform to share and answer a lot of questions that may come up after you come out. Remember to keep your emails objective and keep facts simple. In either group settings or email, let people know your name, pronouns, whether you are open to questions, and anything else you want to share.

What you can say verbally to come out to someone (e.g., Supervisor, HR)

"Hi [insert name], I have some personal news I'd like to share with you. This information may come as a surprise for you and you may not understand it; but, I am open to questions, and I hope you'll hear me with an open mind. I am [transgender, genderqueer, etc.], and I am in the process of [ex: transitioning from female to male]. What that means at work is that I would like to now be known as [New Name] instead of my current legal name, and I would like to use [x] pronouns. I would like to share this with my coworkers via mass email next week, but we can work together on a timeline if you'd like. I plan to [what do you want to change/do? Ex: start presenting full time, start using a different restroom, start going by a new name] once I send the email. I plan to have a meeting and tell [HR, supervisor, etc.] later today and request that you refrain from telling them beforehand. Afterwards, I'd be happy to meet with you both to discuss next steps or answer any questions you have.

Sample Coming Out Email for Coworkers

Dear fellow colleagues,

I have some news to share that I've been wanting to tell you all for a while. I hope that you all read this with an open heart and mind knowing you all can come and ask me respectful questions at any time. I am [transgender, genderqueer, etc.]. Starting today, I would like to be called [New Name] and go by [x] pronouns. You may have noticed or will start to notice changes in my appearance, but I am still the same colleague you all know and love; I am just allowing you all to see the real me.

I really enjoy working with all of you and hope that you will show me respect by making these name and pronoun changes. If you have questions or would like to learn more, I'm happy to sit down and discuss and answer questions. I will also list some resources that you can check out on your own. If you have questions or concerns, please see [HR person's name] or [supervisor's name].

[Link to Coworker's Guide]
[Links to webpages or other resources you'd like to share to help teach colleagues]

Best, [name]

Sample Coming Out Email for Department

Dear department,

I need you all to know something important about me, which is that I am transgender. For me, this means that even though I was assigned [gender] at birth, I will now be living as [gender]. Here are some resources to help

you understand: [include links to Coworker's Guide]. I use [kinds of pronouns] pronouns ([include examples]), and I am changing my name to [new name].

I am relieved to finally be telling you, and I'm confident that all of you will support me. I know it can be challenging to adapt to a new name and pronouns, but I'm sure that we can overcome any difficulties that may arise with mutual respect and good faith. If you do accidentally slip up and use my old name, all you need to do is correct yourself and move on.

I'd be lying if I said I wasn't nervous about sharing this information, but I feel lucky to have all of you as my coworkers during this process.

Best,

[New Name]

Sample Email from a Supervisor

Dear colleagues,

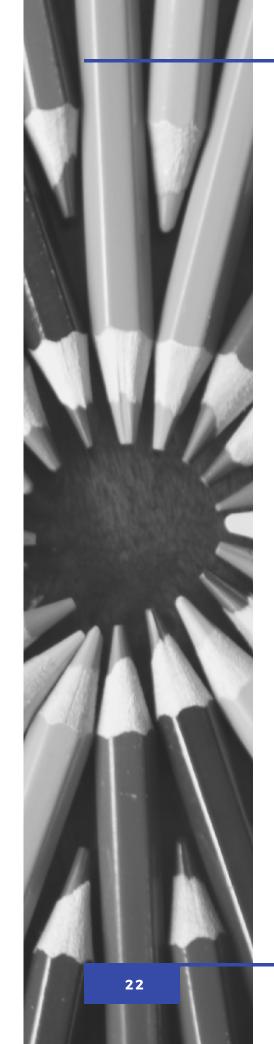
I'm writing to share some information about one of our [department name] employees, [Old Name]. [Old Name] is transgender, which means that although [Old Name] was assigned [female/male] at birth, [Old Name] is more comfortable living, identifying, and being acknowledged as [a man/woman/non-binary/etc]. Moving forward, [new pronoun] will be using [feminine/masculine] pronouns [list pronouns to use] and going by the name [New Name].

I know all of us appreciate what a supportive, collegial experience it has been at the Museum, and I'm sure this process will be no different. The change in pronouns and name may be hard at first, but, with some time and practice, it will start to come easily for all of us.

Please feel free to ask me or HR if you have any questions.

Thank you in advance for your support of one of our valued [department name] team members!

Thanks, [Name]



AFTER COMING OUT

COMING OUT AT WORK IS OFTEN A PROCESS THAT EXTENDS BEYOND "OFFICIALLY COMING OUT."

After you have come out at your workplace, you may continue to face certain challenges, such as misgendering and microaggressions. However, there are steps you can take to build confidence and practice advocating for yourself in these situations. How you choose to handle or confront these challenges is completely up to you and your comfort level. This work takes emotional labor, and your health, comfort, and safety are the most important factors within the equation of how to manage microaggressions. So pick your battles accordingly, and remember that it is not your job alone to correct every offense!

HANDLING MISGENDERING AND MICROAGGRESSIONS

The following are some suggestions for addressing misgendering and microaggressions, but this section is by no means exhaustive.

If a coworker misgenders you or offends you in a one-on-one interaction and you are comfortable talking to them about it, you can practice gently addressing it in the moment by pointing out that what they said is incorrect and/or harmful. If relevant, you could offer a brief explanation yourself, but it is also perfectly okay to simply refer them to A Coworker's Guide to Gender Transition and Transgender Inclusion in the Museum Field for more information.

It may feel intimidating to correct a coworker in the moment or to correct a coworker while in a group meeting. An alternative in "Another simple way you can begin to advocate for change is by adding your pronouns to professional email signatures, name tags, badges, etc."

those cases is to either pull the individual aside at a later time to talk with them or send them a brief email pointing it out. An example script for correcting misgendering via email might be:

Dear [coworker's name],

In our team meeting earlier, you referred to me as 'he/him.' I wanted to send along a friendly reminder that my correct pronouns are 'she/her.'

Best regards, [Your name]

If you are facing a more serious or continuing aggression or discrimination by a coworker, you may need to talk to a supervisor or HR representative (if your institution has one). See the Know your Rights section earlier in this document for strategies on how to approach these situations.

A simple way to practice regularly advocating for yourself in the workplace, if you have the opportunity, is to practice introducing yourself with your pronouns at the beginning of any meetings where everyone goes around introducing their names/titles/departments. Encourage other coworkers to do the same so that you are not the only person sharing pronouns. For example, you can introduce yourself with the following:

"My name is Marian, and my pronouns are they/them."

Additionally, if you have a coworker with whom you are close and trust, you may want to have a conversation with them and ask them for back-up at work in whatever ways you need, including correcting coworkers when you are not present. Having a friend to help you in those situations will help you feel more confident--plus, two voices are often louder than one!

And regardless of your approach, it can also be helpful to simply remind your coworkers that sex or gender have effectively no bearing on a person's work or professional status.

COMING OUT TO NEW HIRES

Even after you formally come out in your workplace, new hires may start that are not aware of your gender, pronouns, or transition. It is worth planning out if and how you want to address this with incoming members on your team. Some questions you can brainstorm beforehand include:

- Will you have to share old documents or other records with this person that include your old name, and do you feel it is necessary to clarify what that means with them?
- Do you want your supervisor to discuss this with them via email or in person before they start?
- Do you want to talk with them directly about it via email or in person when they start?
- Do you want to introduce yourself with your pronouns when you first meet them?
- Do you want to share resources with them, such as A Coworker's Guide to Gender Transition and Transgender Inclusion in the Museum Field?

As with everything in this process, there is no right way to come out, and it entirely depends on your personal preference, comfort, and desire to be (or not to be) out.

ADVOCATING FOR POLICY AND PRACTICE CHANGES

Once you have begun to feel more confident advocating for yourself, you may wish to try and advocate for additional policy changes in your institution as well. Again, this work is not your sole responsibility; so if/when/how you choose to address these matters is up to you and your comfort level. Some of the following can be used as practices rather than policies, which can have fewer barriers in less supportive institutions.

One form this work could take is making changes to employee handbooks. Start by talking to your managers, HR, or a coworker you trust who may be able to give you more information about the process of editing employee handbooks. You can explain that your experience gives you unique and valuable insight, offering to help update the handbook in relevant ways. These updates could mean changing some language used throughout the handbook (phrases like "ladies and gentlemen," "he/she," or other terms you notice). It could also mean adding policies for addressing coworkers, clients, visitors, etc. It may be helpful in this case to refer to An Institution's Guide to Gender Transition and Transgender Inclusion in the Museum Field.

Another simple way you can begin to advocate for change is by adding your pronouns to professional email signatures, name tags, badges, etc. You might suggest that your cisgender coworkers begin to do the same with their pronouns to show solidarity and to normalize the practice.

Additionally, if your position requires you to regularly interact with the public (as a presenter, educator, etc.), there are many ways to practice

making your public interactions gender inclusive. For example, again, you may wish to introduce your pronouns with your name in presentations if you feel safe doing so. This introduction not only helps you practice advocating for yourself to coworkers and strangers, but it also can be very meaningful to transgender or questioning adults or youth in the audience. Encourage your cisgender coworkers to do the same--they will likely be surprised by the positive feedback they get from their audience! Other practices you and your coworkers can employ include things such as:

Additionally, if you need outside support from other transgender professionals who have faced similar challenges or situations, you can consider connecting with the Task Force for Transgender inclusion via the AAM LGBTQ Alliance.

- Using singular "they" pronouns as the default for clients/visitors/volunteers until you know differently.
- Addressing an audience en masse with gender neutral titles such as "folks" or "friends" as oppose to "ladies and gentlemen."
- Employing family inclusive language (such as "grown-up" in place of "parent" when unsure of a relation between a child and an adult) in order to honor non-traditional family structures.
- Reinforcing non-dominant narratives and images in your presentations and PowerPoints.

It may help to start small by getting a group of coworkers to support you and help advocate for these changes before diving in to make bigger institutional changes. When working towards policy change and advocacy, the most important aspect is to take things at your own pace when you feel safe and comfortable doing so.

END NOTES

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- ² "Transitioning in the Workplace," IBEC for Irish Business, accessed January 8, 2019, http://www.ibec.ie/IBEC/ES.nsf/vPages/HR_best_practice~Diversity_and_the_ integrated_workplace~transitioning-in-the-workplace-20-03-2017/\$file/Workplace_Gender_Identity_Expression_and_Transition_Guidelines __Ver_2.pdf
- ³ ibid.

APPENDIX A: SAMPLE INSTITUTION GUIDELINES

The following are transition guidelines created by the Tacoma Art Museum. The guidelines are included here with permission.

Introduction

Tacoma Art Museum is an advocate for diversity and equal employment opportunities for all qualified candidates. We do not discriminate on the basis of gender identity or expression. We believe that providing a work environment based on respect, trust, and collaboration creates an exceptional employee experience where employees can bring their whole selves to work and thrive in their careers.

These guidelines are intended for TAM's transgender and gender non-conforming employees, their coworkers, managers, human resource professionals, LGBT employee group leaders and others who may be involved in a workplace gender transition. It covers best practices for employees and managers as well as how to address visitors, volunteers, and external stakeholders.

Expectations for Transitioning Employees

If you are the transitioning individual, you have the right to openly be who you are. This means that while still maintaining professional expectations, you may express your gender identity, characteristics or expression without fear of consequences. With this right, however, also comes the expectation that you will work with others to ensure they understand your needs and you understand the expectations of you. As part of a team, it is important for you to do your part to make the transition successful and one of the first steps is to inform key personnel who can assist you.

Your first point of contact may be: your immediate manager, the Human Resources coordinator, a member of TAMs Employee Assistance Program, or a member of the Gay TeAM affinity group. It is important that at some point your immediate manager or HR coordinator becomes part of your support team. You will work with your first point of contact to develop a transition plan detailing how information about your transition will be communicated to other TAM employees and stakeholders as necessary.

Remember, as with all employees, you are covered under TAM's non-discrimination policy; however, TAM must be aware of your situation in order to provide support.

Expectations for Managers

TAM is committed to and supports diversity. If someone who reports to you informs you of their desire to transition or if an individual in your team is currently in the transition process, your support is critical.

If you are unfamiliar or uncomfortable with the transition process, Allow the transitioning individual to educate you (if they are willing). Additional education and support is available from the Employee Assistance Program, the Gay TeAM affinity group, and the HR coordinator.

Listen carefully to what the individual is telling you about how they'd like to be treated. For example, do they want to keep their transition as quiet as possible or do they wish to celebrate publicly? Be open-minded and discuss the transitioning individual's needs and concerns. If you oversee, manage, or lead an employee who is transitioning, it is important that you demonstrate an understanding, and use a sensitive approach to their needs and concerns.

Based on past experiences of bias, it may be quite stressful and frightening for the employee to make themselves vulnerable to a person upon whom their job depends. It is important that you make it clear that your conversation will be held in confidence. Also ask their permission to talk to the HR coordinator for further assistance.

Transitioning employees will develop a Transition Plan in collaboration with their point of contact (who may be you, the HR coordinator, or another person).

Not only do the specific steps of transition and their timing vary, individuals also differ in how public they want to be as they transition. Some individuals prefer that very few people know they are about to transition and hope that after the transition they can quietly blend in as members of their gender. Others are committed to educating the public about transitioning and are eager to answer questions, and continue to talk openly about being transgender long after transition.

Work situations vary, too. The type of workforce; the nature of work being done; the amount of interaction the individual employee has with peers and visitors all have a bearing on how the transition should be handled. For all these reasons, there is no single formula for managing transitions in the workplace.

It is important to work closely with the employee to ensure we respect their privacy and their preference on the amount of information that should be shared with the rest of the employees. It is essential that open and honest communication be established to build trust for each party. With each right, also comes a responsibility or an expectation. A successful transition in the workplace can only occur with commitment and understanding of each involved party.

Control over the flow of information is very important in managing the transition process. The manner in which co-workers and clients are informed about the employee's change and the timing of this disclosure are critical in making the transition progress smoothly. Therefore, confidentiality should be a primary concern in the early stages of transition planning.

Expectations for Human Resources Coordinator

In addition to ensuring these best practices for managers are followed, the HR coordinator needs to ensure that the employee's manager is supported throughout the entire transitioning process.

Regular check-ins with the manager and the transitioning employee are important. The HR coordinator needs to work closely with the manager and the transitioning employee to ensure individual and team meetings are scheduled appropriately and the proper external support is being leveraged. The HR coordinator also needs to keep a close 'pulse' on the museum to ensure there are no negative issues in the workplace that are not being addressed.

Lastly, the HR coordinator is advised to check-in over the long term and not just during the initial transition process. Some issues may not surface until some time has passed and the initial focus on transition is over.

Expectations for Staff

TAM is committed to and supports diversity. All staff are expected to treat co-workers with respect and dignity.

The Gay TeAM affinity group is available to provide additional support and resources for the transitioning employee, their manager, and any other staff who request it.

If a co-worker is transitioning and you are not certain which pronouns to use, it is appropriate to respectfully ask their name and which pronouns you should use. In general, it's considered insensitive to refer to someone by the wrong pronoun once you have established what the person prefers.

Transitioning individuals should also be prepared to understand honest mistakes and help educate their co-workers as necessary. Continued and prolonged use of the incorrect name and/or pronouns to refer to a colleague can be considered harassment and will be addressed under TAM's Harassment, Discrimination, and Workplace Violence policy.

Transition-related Changes

Name and gender change

Legal name and gender "marker" (i.e., "M" or "F" on legal identity documents) changes can sometimes take months or even years to get updated depending on the circumstances. Until then, every effort will be made to use the new name and gender marker on all documentation. (e.g. email, phone directory, company identification card or access badge, name plate, etc.) The only exception is where records must match the person's legal name, such as on payroll and insurance documents.

Employees with a legal change of name and/or gender marker should notify HR via email. This change should update all internal and benefits-related systems. In everyday written and oral communication, the new name and pronouns will be used when the individual is ready, in accordance with their Transition Plan.

Email

TAM's email system is not linked to the employee's legal name. To change your name in the email system, contact the IT and Facilities Manager.

The transitioning employee should change the name and pronouns in their email signature in accordance with their Transition Plan.

Communication

The employee's Transition Plan will detail how and when co-workers and other stakeholders will be informed of the transition.

Frequently Asked Questions

How should a transgender employee dress?

A transgender employee is permitted to dress consistently with their gender identity and is required to comply with the same standards of dress and appearance that apply to all other people in their workplace and similar position. Managers have the same right to review a transitioning individual's professional attire as they do any other individual. If a transgender employee dresses inappropriately, this should be addressed in a manner consistent with any other employee. Any concerns should be addressed with the employee directly. Take care not to use personal opinions to judge a colleague's

professional appearance. If the individual dresses or behaves inappropriately according to the dress code, this issue should be dealt with in the same manner it would be addressed with any other individual.

Which restroom should a transgender employee use? TAM's staff restrooms are all-gender.

Our policy is that all employees are permitted to use the facilities that correspond with their gender identity. For example, a person who identifies as a man is permitted to use men's restrooms, and a person who identifies as a woman is permitted to use women's restrooms. All employees should determine the most appropriate and safest option for themselves.

What if an employee needs to take time off for transition-related healthcare?

Managers should provide sufficient flexibility to meet the individual's needs for appointments. Time off for medical appointments and procedures is to be granted on the same basis as for any other scheduled medical appointments and procedures.

Employees (and covered dependents) in the process of transitioning may wish to have appropriate medical care to support their transition including treatments such as hormone replacement therapy and/or gender reassignment surgery. TAM's health insurance provides coverage for transgender care as follows:

[summary of benefits]

As with other aspects of a transition, plans should be discussed and communicated only with affected parties in order to manage expectations and to minimize disruption. Medical information, including surgery plans communicated by an individual, should be treated confidentially.

What if a co-worker has a concern about an employee's gender transition?

A diverse workplace means that employees must be able to work with all kinds of people. It is not required that they "believe in" or accept an individual's right to be transgender. All employees are entitled to their beliefs, but everyone should be required to treat the transitioning employee and every other employee, with respect and without bias.

A lack of knowledge about transgender issues has the potential for creating misunderstanding and tension in the workplace. While everyone is expected to conduct themselves in accordance with Company's Harassment, Discrimination & Violence in the Workplace Policy, we must also ensure that a forum is made available for individuals to express their concerns, ask questions and learn about transitioning in the workplace. The Gay TeAM affinity group is available to help answer questions or secure outside resources for education as needed.

APPENDIX B: SAMPLE TRANSITION PLAN

Transition Plan: Avery

Primary Point of Contact: Zhou (direct supervisor)

Stakeholders and Plan:

Bonnie (HR Director): Avery to meet one-on-one with Bonnie before 3/18.

Luka (Education Director): Avery and Zhou to meet privately with Luka by 3/20.

Ben (IT Manager): Zhou to meet with Ben as soon as possible after 3/18 to discuss necessary steps for changing name in email and other institutional technology.

Education Team: Avery to inform education team at team meeting on 3/25.

Entire Museum: Bonnie to send out all-staff email on 3/27. Bonnie to draft email by 3/25 for Avery's review and revision.

Volunteers: Cy (volunteer coordinator) to send out email to all volunteers who work with Avery on 3/27. Bonnie to share text of all-staff email with Cy after Avery's revisions; Karen will use the same language for the volunteer email.

Name Change:

Avery will begin going by Avery and using they/them pronouns on 3/27. All of the following instances of Avery's former name will be changed on 3/27 or as soon as possible thereafter:

- Email address and signature (IT department to manage)
- Security badge (Avery to get new badge on 3/27)
- Name tag (Avery to complete paperwork for new nametag by 3/30 for next order)
- Business cards (Avery to complete paperwork for new business cards by 3/30 for next order)

Avery will get their legal name changed within the next six months. Legal documentation will be changed as soon as the court order goes through and, for items such as payroll, as soon as changes are made with the Social Security Administration.

Guidelines Review:

Zhou will conduct a Guidelines Review session with the education team during the regularly scheduled team meeting on 4/1. This meeting will be mandatory for all members of the team except Avery.

Bonnie will conduct a Guidelines Review session with all management staff on 4/3. All staff will receive a copy of A Coworker's Guide to Gender Transition and Transgender Inclusion in the Museum Field.

Practical Considerations:

Restrooms: In the absence of all-gender restroom facilities, Avery has chosen to continue using the women's restroom and locker room.

Complaint Procedures:

Any concerns or complaints about Avery's transition are to be referred to Zhou. If complaints or concerns are voiced to Avery, they will refer the person to Zhou and notify her.

Members of the education team are expected to help hold each other accountable for using Avery's correct name and pronouns. A period of adjustment is expected, but efforts to use the correct name and pronouns should begin immediately on 3/27. If colleagues continue to use the incorrect name or pronouns, Zhou and Bonnie will work together to take corrective action.

Transition Milestones:

Avery will require time off for gender affirmation surgery in or around November. Avery and Zhou will coordinate exact dates as more details from healthcare providers are known.

Additional Resources:

Fatima (chair of Education's Diversity Taskforce) [contact info] Karl (EAP contact) [contact info]

Other Considerations:

Avery to contact the National Association for Interpretation regarding name change on CIG certification. If additional steps are needed, Avery will communicate needs to Zhou.

APPENDIX C: FURTHER RESOURCES

Museum Specific Resources:

Coleman, Laura-Edythe. *Understanding and Implementing Inclusion in Museums*. Rowman & Littlefield Publishers, 2018.

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- Sawyer, Katina B.; Thai, Jayden L.; Martinez, Larry R.; Smith, Nicolas A.; Discont, Steve. "Trans Issues in the Workplace 101." TIP: *The Industrial-Organizational Psychologist*. 2016: No. 54(1).
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We would also like to acknowledge our 11 members who are stealth, or who chose not to be listed by name for personal or safety reasons. While some in the museum field are making progress towards better inclusion of transgender staff, volunteers, and patrons, many institutions do not have policies in place to protect the transgender community. As such, it is not always safe for trans individuals to reveal their identity or trans status, even if they have already transitioned. We greatly appreciate the risk they took to help the *Toolkit* become a reality and we hope that this will make the museum field a safer place for everyone.