Presidential Policy on Gender Recognition and Lived Name

UCR

Campus Checklist

- Campus-wide announcement gone out?

- Campus implementation committee established?

- Clear buy-in from senior leadership (i.e. presentation at senior level meeting)?

- High-level IT person involved?

- Chief Privacy officer or equivalent in the loop?

- Online, campus-wide training planned?

- In person, small group/department training planned?

- Communication to all students about ability to use lived names and gender/risk outside of UC/state/country?

- Integration of UC Path and local payroll and timekeeping systems for use of lived names?

- Connection with Office for Prevention of Harassment/Discrimination to take reports and respond?

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Policy Overview

- This new presidential policy ensures all individuals are identified by their accurate gender identity and lived or preferred name on university-issued documents and in UC's information systems by providing guidance on the collecting and reporting of gender identity lived name, and sexual orientation.

- Effective November 6, 2020, the systemwide policy must be fully implemented by December 31, 2023.

- The policy applies to all University students, employees, alumni, and affiliates.

- Full Policy & Appendix: https://policy.ucop.edu/doc/2700693/GRLN

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Policy Overview

- Gender Recognition

  - Minimum three equally recognized gender options — woman, man and nonbinary

  - Ability to easily change and update for students, employees, alumni and affiliates

  - The University is no longer asking for "sex assigned at birth" or "sex as listed on birth certificate"

  - The policy addresses how to report gender data to health insurers and the federal government and other places where only a female/male binary is used

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Policy Overview

- Lived name

  - Lived names can be first name, middle name and/or last name or surname

  - Lived names used whenever possible in the course of university business and education

  - Legal name must be kept confidential and must not be published on documents or displayed in IT Resource systems, unless it is the same as lived name

  - Only use legal name where legally required (generally this is when also using social security number)

  - Ability to easily change and update for students, employees, alumni and affiliates

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Policy Overview

- The policy permits the use of lived student names on eligible academic documents which include transcripts, diplomas and dissertation title pages

- Sexual orientation
  - Expands sexual orientation options to include asexual, requires fill in the blank options

- Pronouns
  - The policy guidance states locations may choose to add pronouns fields in information systems
  - Encourages their use in conjunction with all other updates

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Implementation Considerations

- Identifying all primary students, employees, alumni and affiliate IT systems and processes that require legal names

- Provide training to employees in the careful use/disclosure of legal names

- Modifying all students, employees, alumni and affiliate IT systems, including downstream systems, to accept lived name and the gender identity data fields, include expanded sexual orientation options, and encourage pronouns

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Implementation Considerations

- Reporting on gender identity to federal and other governmental agencies (e.g. IPEDS, Affirmative Action, Grants)

- Communicating processes for changing one's name and gender for university business and university-issued documents and communicating the potential challenges faced outside the university and the State of California if changing name and gender in the university system

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Implementation Considerations

- Safeguarding, protecting and managing hardcopies and digital forms which collect gender, sexual orientation, legal and lived name data

- Training staff who have access to gender, sexual orientation and legal name data about their role as data stewards and UC privacy policies

- Creating a culture inclusive of all diverse gender identities and sexual orientations, and the value of gender recognition, lived names and pronouns

- Reporting issues to the Chief Compliance Office to respond to noncompliance and harassment

Questions?