Presidential Policy on Gender Recognition and Lived Name
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?
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
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
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  • Legal name must be kept confidential and must not be published on documents or displayed in IT Resource systems, unless it is the same as lived name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
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
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
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
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?