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# DIAGNOSTIC, ADVISORY AND CONSULTING SERVICES

SUPPORTING TRANS & GENDER  
DIVERSE INDIVIDUALS IN  
ORGANISATIONS

SEE  Change Happen

SMILE | ENGAGE | EDUCATE

DIVERSITY – INCLUSION – BELONGING

...BECAUSE THE WORLD ISN'T ONLY BLACK AND WHITE

*Joanne Lockwood*  
INCLUSION &  
BELONGING SPECIALIST

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- Our core business services are;
  - Transgender Awareness and Inclusion
  - Subject Matter Expert
  - Workshops, Seminars and Executive Briefings
  - Keynote and Conference Speaking
  - Diagnostic and Advisory Services
  - Training and Workshops
  - Mentoring and Coaching
  - Blogging, Vlogging and Podcasts
  - TV and Radio Interviews
  - Panel Host and Participant

# About Us

Founded in 2017 to provide  
Diversity, Inclusion &  
Belonging Advice and  
Consultancy to businesses and  
organisations throughout the  
UK, Europe and elsewhere

# Who are we?

Our Principal Consultant



Joanne Lockwood

Founder & CEO

Joanne is a leading authority on Diversity, Inclusion & Belonging and specialises in promoting Transgender Awareness. She provides support to businesses and organisations throughout the UK, Europe and elsewhere. With her IT and Technical background she is well placed to advise on platform solutions and integrations across systems.

As an International Keynote Conference speaker, Joanne delivers workshops, seminars. Through her engagement with organisations, she helps to develop policy & best practise in order to promote inclusion & belonging for all people. By challenging biases, existing thinking and processes she helps them to develop a Vision and Strategy for Conscious Inclusion.

In addition to her consultancy to she is an Advisory Friend of The Institute of Equality & Diversity Professionals, a Member of The Rotary Club and The Professional Speaking Association. She sits as an Expert by Experience member for University of Southampton. As a Fellow of the Royal Society for the Encouragement of Arts, Manufactures and Commerce, she believes passionately that “people are people” and, no matter who they are, deserve to be treated with dignity and respect.

Joanne lives by the mantra of “*Smile, Engage and Educate*” in order to promote awareness and understanding to overcome people’s fear of getting it wrong, because the world isn’t only black and white!

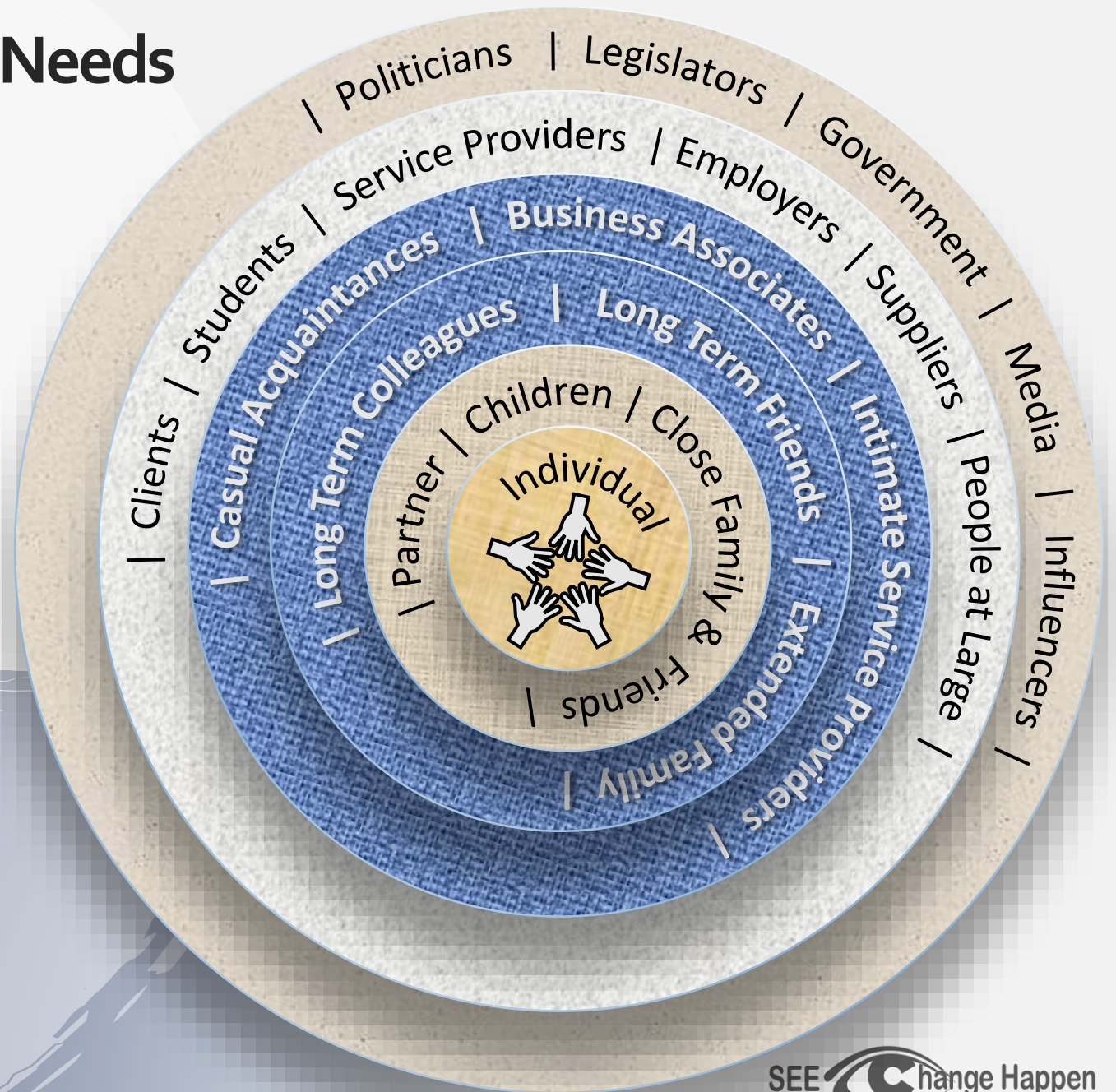


# Differing Support and Training Needs

## SPECIFIC

- ☐ Mentoring & Counselling
- ☐ Awareness
- ☐ Terminology
- ☐ Allyship
- ☐ Policies & Procedures
- ☐ Inclusion & Belonging
- ☐ Representation & Visibility
- ☐ Integration & Protection

## GENERIC





Learning &  
Development



Mentoring  
Programmes



Diagnostics and  
Consultancy



Seminars and  
Speaking

# How we can help?

We are able to engage and  
work with your organisation  
across a wide platform of  
initiatives

## Learning & Development

Our engagement services compliment and work with your existing Talent Acquisition, People and D&I teams to empower and support them to deliver your organisation's vision and values.

We believe that collaboration is at the heart of evolving culture and belonging

- Training delivery
- Talent Acquisition
- Facilitated workshops
- Executive briefings
- Video and written materials
- Co-developed materials
- E-learning modules

## Mentoring and Coaching Programmes

Our engagement services compliment and work with your existing Talent Acquisition, People and D&I teams to empower and support them to deliver your organisation's vision and values.

We believe that collaboration is at the heart of evolving culture and belonging

- 1-2-1 mentoring and coaching
- Group facilitated workshops
- Assigned mentor/champion
- Peer-to-Peer & 180 feedback
- Coaching Managers & HR
- Support and guidance
- On-Line or face-2-face



## Diagnostics and Consultancy

Our engagement services compliment and work with your existing Talent Acquisition, People and D&I teams to empower and support them to deliver your organisation's vision and values.

We believe that collaboration is at the heart of evolving culture and belonging

- Trans Inclusion Diagnostics
- Policy and Process Reviews
- Employee Engagement
- Fairness of Experience Review
- Communication & Briefings
- Challenge Thinking

## Seminars and Speaking

Our engagement services compliment and work with your existing Talent Acquisition, People and D&I teams to empower and support them to deliver your organisation's vision and values.

We believe that collaboration is at the heart of evolving culture and belonging

- Lunch & Learns
- Executive Briefings
- Conference Keynote
- Webinars
- Pride Events

# Your Challenges

What we hear is...



## Engaging People

With a global talent shortage in an fast changing world, it is important to widen our appeal and keep the people we value.

Being open and an employer of choice for all will reap rewards.



## Nurturing Culture

Knowing how staff feel, allowing them to bring their whole selves to work, means they will be more productive and engaged. Less presenteeism.

Engagement backed by data, metrics and insights is the key.



## Living on a Budget

Many D&I Teams have little or no budget or head count to implement or utilise systems and processes

Expenditure can be offset against reduced cost per hire, improved sickness records, staff retention and other productivity gains



## Getting Buy-in

D&I projects often fail due to lack of buy in at the most senior level.

Leveraging data and metrics allows C-Suite to track progress and support D&I initiatives.



## Finding the Start

The D&I mountain often seems dauntingly high. Knowing where to start is important.

Breaking the project down once the values and vision are established is critically important.

# Core Values and Objectives

All of our programmes are underpinned by common values and objectives

## Trust & Confidentiality

- Fundamentally all initiatives must have trust and confidentiality at their heart
- People will only buy-in and share themselves if they understand the purpose of the data collected and how it will be put to use
- Authenticity and a genuine ambition to evolve culture is essential



## Evidence and Metrics

- Initiatives must have an output, they must be measurable and inline with the vision and values of the organisation
- Reporting will highlight areas of impact and expose areas of insight for further investigation
- The D&I journey is a continual process not a final destination



## Return on Investment

- In order to realise an ROI initiatives should generate opportunities through; retention, productivity, and employee engagement
- Diverse teams will leverage insightful opportunities for creativity and alignment with customers and stakeholders
- Intangible “doing the right thing” is important



# Learning and Development

Different depths of knowledge are required to meet the level of detail required

## 101

Introductory Level

For Everyone

Terminology

Language

Allyship

## 201

Intermediate Level

For Leaders

Culture

Inclusion & Belonging

Awareness

## 301

Advance Level

For HR + D&I

Policies

Procedures

Governance

## 101

Introductory Level

For Everyone

Terminology

Language

Allyship

# 101 - Introductory Level

**Who:** Suitable and Relevant for all

**Duration:** Typically 15 – 60 mins

**Format:** Lecture with Interaction plus Q&A

**Equipment:** Projector, Screen, Audio, Internet

**Platform:** Zoom or Microsoft Teams

**Audience:** Workplace, Club, Organisation

**Cost:** £POA + Travel & Expenses + VAT

## Overview

These presentation are a 101 introductory level and awareness sessions as either a standalone or a preparation for deeper dive 201 and 301 sessions and workshop.

These can be timed as a keynote, a lunch and learn, or plenary session.

They are delivered in an interactive lecture presentation style often utilising Smart Phones to interact, and YouTube video content with Q&A.

Our principle topics are covered in overview format and is suitable and relevant for all staff, members and stakeholders.

## 101

Introductory Level

For Everyone

Terminology

Language

Allyship

# 101 - Introductory Level

**Who:** Suitable and Relevant for all

**Duration:** Typically 30 - 90 mins

**Format:** Lecture with Interaction plus Q&A

**Equipment:** Projector, Screen, Audio, Internet

**Platform:** Zoom or Microsoft Teams

**Audience:** Workplace, Club, Organisation

**Cost:** £POA + Travel & Expenses + VAT

## Empowering Effective Trans Allies

- Positioning the principles of Inclusion and Belonging, with an overview of Unconscious Biases, Intersectionality & Privilege
- Explaining the various different Sexual Orientations and Gender Identities (S.O.G.I.)
- Explaining the various Terminology and Language that is important to Transgender individuals
- Highlights the impact of Hate Crime and discrimination on Trans and LGBTQ+ individuals
- Explore ways to become effective allies and to support someone transitioning

## Key Takeaways

- What I can do now, personally?
- How can I advocate and support others?
- What can I do in the future to learn more?



**101**

Introductory Level

For Everyone

Terminology

Language

Allyship

## 101 - Introductory Level

**Who:** Suitable and Relevant for all

**Duration:** Typically 30 - 90 mins

**Format:** Lecture with Interaction plus Q&A

**Equipment:** Projector, Screen, Audio, Internet

**Platform:** Zoom or Microsoft Teams

**Audience:** Workplace, Club, Organisation

**Cost:** £POA + Travel & Expenses + VAT

## Supporting Trans Inclusion in the Workplace

- An overview of Privilege, Inclusion, Exclusion and Valuing People.
- Asking if existing recruitment methods contribute to discrimination against Transgender individuals
- Discussing what should employers be doing to support individuals more effectively
- Highlighting the responsibility organisations have to improve cultural attitudes towards LGBTQ individuals

### Key Takeaways

- What I can do now, personally?
- How can I advocate and support others?
- What can I do in the future to learn more?



## 101

Introductory Level

For Everyone

Terminology

Language

Allyship

# 101 - Introductory Level

**Who:** Suitable and Relevant for all

**Duration:** Typically 30 - 90 mins

**Format:** Lecture with Interaction plus Q&A

**Equipment:** Projector, Screen, Audio, Internet

**Platform:** Zoom or Microsoft Teams

**Audience:** Workplace, Club, Organisation

**Cost:** £POA + Travel & Expenses + VAT

## Awareness of Trans and Gender Diverse identities within Health and Social care

- Overcoming the fear of saying and doing the wrong thing
- Tools and Techniques to become an effective and valued trans ally
- An understanding of the various gender identities, with examples of "good and bad" language and terminology
- Ways of minimising the challenges trans people, and their close network, can face engaging with the health & social care system.

### Key Takeaways

- What I can do now, personally?
- How can I advocate and support others?
- What can I do in the future to learn more?

## 101

Introductory Level

For Everyone

Terminology

Language

Allyship

# 101 - Introductory Level

**Who:** Suitable and Relevant for all

**Duration:** Typically 30 - 90 mins

**Format:** Lecture with Interaction plus Q&A

**Equipment:** Projector, Screen, Audio, Internet

**Platform:** Zoom or Microsoft Teams

**Audience:** Staff in an Educational Establishment

**Cost:** £POA + Travel & Expenses + VAT

## Awareness of Trans and Gender Diverse identities within an Educational environment

- Overcoming the fear of saying and doing the wrong thing
- An understanding of the various gender identities, with examples of "good and bad" language and terminology
- Tools and Techniques to become an effective and valued trans ally
- Ways of supporting young trans people in an educational environment.

### Key Takeaways

- What I can do now, personally?
- How can I advocate and support others?
- What can I do in the future to learn more?

## 101

Introductory Level

For Everyone

Terminology

Language

Allyship

# 101 - Introductory Level

**Who:** Suitable and Relevant for all

**Duration:** Typically 30 - 60 mins

**Format:** Lecture with Q&A

**Equipment:** None – Standalone

**Platform:** Zoom or Microsoft Teams

**Audience:** Workplace, Club, Organisation

**Cost:** £POA + Travel & Expenses + VAT

## “The Making of Me” – A personal story

- A heartfelt and authentic story by Joanne Lockwood where she talks about her transitional journey
- Anecdotes from her life about what sparked her and held her back
- Her experiences as a contributor to a Channel 4 documentary and appearing featured on Gogglebox
- Some do's and don'ts about what to say to trans people
- Misconceptions and Facts that will make you a better trans ally
- Some good and some not so good language to learn
- Relatable topics that everyone can use to become better workplace allies and supporters

## Key Takeaways

- An understanding of Trans Identities through Jo's lens
- Tools to support friends, family, colleagues in their journey
- Being entertained, inspired and enlightened

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# 201 - Intermediate Level

**Who:** Leaders and People who have People

**Duration:** Typically 60 – 180 mins

**Format:** Lecture with Interaction plus Q&A

**Equipment:** Projector, Screen, Audio, Internet

**Platform:** Zoom or Microsoft Teams

**Audience:** Workplace, Club, Organisation

**Cost:** £POA + Travel & Expenses + VAT

## Overview

These sessions are often used as a kick off to a D&I consultancy engagement and programme to set the scene and bring people to the same level of knowledge and understanding.

They are generally delivered as a half-day standalone deep-dive workshops that contains a presentation, facilitated round table discussions, together with actions, summarisations and agreement on next steps and priorities.

Typically sessions have between 10 and 25 people in a cabaret style room layout or with breakout rooms online, and are often most relevant for leaders and those with people or customer responsibility.





# 201 - Introductory Level

**Who:** Leaders and People who have People

**Duration:** Typically 180 mins

**Format:** Videos, Quiz, Presentation, Interaction

**Equipment:** Projector, Screen, Audio, Internet

**Platform:** Zoom or Microsoft Teams

**Audience:** Workplace, Club, Organisation

**Cost:** £POA + Travel & Expenses + VAT

## Building a Trans Inclusive Workplace Culture

- An in depth positioning the principles of Inclusion and Belonging, with an overview of Unconscious Biases, Intersectionality & Privilege
- Exploring the various different Sexual Orientations and Gender Identities (S.O.G.I.) and creating a deeper understanding individual challenges
- Understanding how to work with external stakeholders, suppliers and customers.
- Being able to use and understand various Terminology and Language that is important to Transgender individuals in the context of your organisation
- Look at Anti-Discrimination, Anti-Bullying and support mechanisms in Hiring and Employment lifecycle
- Explore ways to become effective allies and to support someone transitioning and build trust.

### Key Takeaways

- Actionable ideas and strategies
- Knowing how to support and advocate
- Be able to address culture and better peoples' experiences



## 201 - Introductory Level

**Who:** Leaders and People who have People

**Duration:** Typically 180 mins

**Format:** Videos, Quiz, Presentation, Interaction

**Equipment:** Projector, Screen, Audio, Internet

**Platform:** Zoom or Microsoft Teams

**Audience:** Educational Focused Organisation

**Cost:** £POA + Travel & Expenses + VAT

## Building a Trans Inclusive Education Environment

- An in depth positioning the principles of Inclusion and Belonging, with an overview of Unconscious Biases, Intersectionality & Privilege
- Exploring the various different Sexual Orientations and Gender Identities (S.O.G.I.) and creating a deeper understanding individual challenges
- Understanding how to work with Pupils, Students, Parents/Guardians.
- Being able to use and understand various Terminology and Language that is important to Transgender individuals in the context of your organisation
- Look at Anti-Discrimination, Anti-Bullying and the support mechanisms for young people.
- Explore ways to become effective allies and to support someone transitioning and build trust.

### Key Takeaways

- Actionable ideas and strategies
- Knowing how to support and advocate
- Be able to address culture and better peoples' experiences



201

Intermediate Level

For Leaders

Culture

Inclusion & Belonging

Awareness

## 201 - Introductory Level

**Who:** Leaders and People who have People

**Duration:** Typically 180 mins

**Format:** Videos, Quiz, Presentation, Interaction

**Equipment:** Projector, Screen, Audio, Internet

**Platform:** Zoom or Microsoft Teams

**Audience:** Health and Social Care Environment

**Cost:** £POA + Travel & Expenses + VAT

## Trans Inclusion in Health and Social Care

- An in depth positioning the principles of Inclusion and Belonging, with an overview of Unconscious Biases, Intersectionality & Privilege
- Exploring the various different Sexual Orientations and Gender Identities (S.O.G.I.) and creating a deeper understanding individual challenges
- Understanding how to work with service users, staff and family members.
- Being able to use and understand various Terminology and Language that is important to Transgender individuals in the context of your organisation.
- Understanding how to be Trans inclusive in a Health and Social Care environment and the challenges that are often faced.
- Explore ways to become effective allies and to support someone transitioning and build trust.

### Key Takeaways

- Actionable ideas and strategies
- Knowing how to support and advocate
- Be able to address culture and better peoples' experiences



# 301 – Advanced Level

- Who:** D&I, HR and People Professionals
- Duration:** Typically a Full or Multi-Day Workshop
- Format:** Presentation, Facilitation and Interaction
- Equipment:** Projector, Screen, Audio, Internet
- Platform:** Zoom or Microsoft Teams
- Audience:** Workplace, Club, Organisation
- Cost:** £POA + Travel & Expenses + VAT

301

Advance Level

For HR + D&I

Policies

Procedures

Governance

## Overview

These sessions are designed as part of a consultancy assignment or project in order to help organisations develop policy, and to gain a more personal experience of how to handle conversations through role-play, talking through example videos and facilitation to draw out the specific and relevant needs.

They will often revolve around templates that are provided as the basis for discussion, and working through a Transgender Inclusion Audit Questionnaire to understand current situation and areas to be prioritised.

These are aimed at people who are implementing and supporting policy and their people.





# 301 – Advanced Level

**Who:** D&I, HR and People Professionals  
**Duration:** Typically a Full or Multi-Day Workshop  
**Format:** Presentation, Facilitation and Interaction  
**Equipment:** Projector, Screen, Audio, Internet  
**Platform:** Zoom or Microsoft Teams  
**Audience:** Workplace, Club, Organisation  
**Cost:** £POA + Travel & Expenses + VAT



## Designing Policy to Support for Trans Identities

- Bespoke facilitated day or multi-day workshop for around 12-20 people
- Working through a trans inclusion audit to identify key areas to improve, train or address
- Identify key challenges, with stakeholders, clients, suppliers that will need to be involved and included.
- How to engage with staff networks and how build trust with an allies programme.
- Consider how to implement privacy policies and protect trans people from being “outed”
- Be able to walk through and role play a “transition at work” conversation and framework
- Understand how you as an organisation have to protect and advocate for your trans employee
- Implement guidelines on how to interact with trans service users or customers and the challenges that may bring
- Look at implementing Anti-Discrimination and Anti-Bullying reporting mechanisms
- Draft a company wide training plan needs analysis for implementation.

## Key Takeaways

- Tailored Policy Outline to support trans identities
- Knowledge to be able to support those who are transitioning
- Identifying Areas when improved support is need for trans people

# CASE STUDIES



# Case Study #1: Wakefield District Housing (WDH)

## Project title: Transgender Policy Review and Training

We were engaged by WDH for two purposes.

1. To review their transgender inclusion policy and advise on gendered facilities
2. To deliver overview and awareness training to their trustees and stakeholders.

The policy review took the form of an offline document which was studied and marked up with comments and suggestions. It was found that the document was outdated, terminology and language was inappropriate and in need of extensive review.

These proposed changes we then discussed face-to-face with WDH and clear explanations and examples were given to bring the suggestions to life. WDH took this mark up to complete the changes themselves and for their own internal approval.

The training and awareness was a 2 hour interactive workshop with Q&A, Videos and mixed with live experience to their key stake holders and trustees. It covered terminology, language, an exploration of Gender Identities, impact of Hate Crimes and Social Media on Gender Diverse individuals, and how to become effective “Trans Allies”

There was a subsequent follow up to review the updates to policy drafted by WDH for approval and publishing within the organisation.

### Client Testimonial:

“Jo has provided WDH with invaluable insight into practical transgender issues that affect WDH. This has included advice on the design of an inclusive changing room facility, the redesign of a transgender policy and the education of employees and other stakeholders on transgender awareness.

I would have no hesitation in recommending Jo to any organisation that wants a common sense, insightful approach to treating people fairly”

*Des Johnson, WDH Organisational Development Service Manager*

# Case Study #2: Epsom & St Helier University Hospital

## Project title: Transgender Awareness and Consultancy

We were engaged by Epsom & St Helier University Hospital for two purposes.

1. To deliver overview and awareness training to their staff and stakeholders.
2. To review their transgender inclusion policy and advise on working with their service users.

In total we delivered four sessions over the course of 6 months. 2 x intro/taster 90 minute sessions, and 2 x full day facilitated workshop with full audience engagement, participation and actionable outcomes. The materials included Q&A, Videos and mixed with live experience and covered terminology, language, an exploration of Gender Identities, impact of Hate Crimes and Social Media on Gender Diverse individuals, and how to become effective “Trans Allies” in a Health and Social Care context.

The work with the hospital is continuing and the outcome of the workshops is the start of an on-going programme to enhance the experience of trans and gender diverse individual. The next phase to present to the trust board and get C-Suite sponsors for a further rollout in 2020. As part of this follow up work we have reviewed the policy documents, for both the internal staff and also the service users and are in the process of implementing these. There was a subsequent follow up to review the updates to policy drafted for approval and publishing within the organisation.

### Client Testimonial:

I have been really lucky to have been working with Jo for almost a year now, as part of my organisation's work to improve equality, diversity and inclusion. Jo has worked particularly closely with us on LGBTQ+ awareness, with a focus on better working with and support transgender and gender non-conforming people in healthcare. Jo developed and delivered an introductory session for staff, which was perfectly pitched, engagingly delivered, and left people feeling not only more aware and people confident (a great expression Jo uses), but keen to do more. As a result, Jo agreed to do more work with us, taking her recommendation for a more comprehensive session and turning it into another excellent session - this time delivered over a full day. A testament to the impact of Jo's first sessions, a majority of people who had attended the introductory sessions signed up to be part of the more in-depth full day workshops.

Jo delivered a programme that was varied, so it fit different learning styles, and that reached people on a personal and professional level. The materials were professionally put together, and Jo was always happy to answer any questions and to hear people's thoughts. Jo has a very personable, down-to-earth style, weaving her own lived experience with her broad expertise in inclusion. In addition to these sessions, Jo has provided willing and expert guidance on how to approach a scheme of work in this area, including expert review of policy and guidance, and feedback on a range of ideas and materials developed locally. Thank you, Jo!

*Adam Watkin, Head of Patient Experience, Epsom and St Helier University Hospitals NHS Trust*

# Case Study #3: Newcastle City Council

## Project title: Supporting Trans & Gender Non-Conforming individuals in Social Care

**Content:** The aim of this interactive workshop was to raise awareness and to be able to take away implementable ideas and solutions. The focus was on supporting the needs and views of Trans and Gender Non-Conforming individuals within Social Care.

### Participant Feedback:

- Presentation was fantastic
- Helped me explore my current understanding and establish some new ways of seeing and understanding the 2 kids I support
- I will be able to support my young people in a more holistic way and feel more confident to challenge professionals in a more appropriate approach
- I feel more able to support a young person through the things that have been highlighted today. Awareness of giving space to 'just be'
- Excellent training session brought alive through her own lived experiences. Great!
- Should be filtered across the whole organisation.
- I struggled with accepting that this is real. I have strong cultural and religious feelings and this has made me re-evaluate my feelings.

### Organiser feedback:

- The learner who wrote the final comment above gave the course consistently 'excellent' gradings and put his knowledge at '1' before the course and '9' afterwards. For us this feedback demonstrates a real a real success story! Joanne created a learning environment where honesty was possible and she managed other delegates reaction to his views in a professional, friendly and completely empathic manner in order to not shame or stigmatise him for speaking openly.
- Several people gave verbal feedback at the end and said how excellent it was and that we should definitely get Joanne back so more people can attend.
- On a personal level, Joanne was great to work with: responsive, professional, organised and approachable.

*Barbara Seale, Senior Workforce Development Officer, Newcastle City Council*



# WE ARE HERE TO HELP

We will meet with you either in person or  
via a video chat to discuss how we can  
engage with your organisation

Let's continue the conversation

## CONTACT US

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