



Committee Meeting: Policy & Governance Committee	Date: March 3, 2021
Committee Chair: Kathleen Masiello	
New or Edited: New	

POLICY NAME: Preferred Name Policy

POLICY TYPE: Board

SUBMITTED BY: Tracey Cleveland, Vice President Human Resources, Equity & Inclusion and Petrina Hill-Cheatom, Dean of Students.

ISSUE OR STATEMENT OF PURPOSE:

Given the diverse and inclusive philosophy of SUNY Erie, and in order to encourage an environment for personal expression within community standards, SUNY Erie recognizes the needs of students and employees who wish to be identified by a “preferred name” other than their legal given name.

NEW OR EDITED POLICY: New

POLICY:

SUNY Erie recognizes the need or preference for students and employees to refer to themselves by a “preferred name” other than their legal given first and/or middle name. This is consistent with Title IX federal law which protects against discrimination based on gender identity and expression, which is currently recognized as a best practice for supporting transgender and gender non-conforming members of college communities. Usage of a preferred name will not be limited to transgender and gender non-conforming students and employees, however; this policy applies to anyone who uses a preferred first and/or middle name on a daily basis.

Where a student or employee seeks to use a preferred name and such use is not intended for the purpose of avoiding legal obligations, in jest, or for misrepresentation, the College acknowledges that, where possible and practical, a preferred name can be used in the course of College business and education. The College reserves the right to remove a preferred name if it is deemed inappropriate. Please note that preferred name requests must adhere to the following:

1. Only the first and/or middle name may be changed to a preferred name;
2. Last/family name must remain the same as the full legal last name in the College records system;
3. Preferred names are limited to alphabetical characters (a-z)

SUNY Erie business processes requiring use of a legal name include but are not limited to:

1. Financial aid applications, student account records, medical, law enforcement documents; official transcripts; diplomas; W-4 forms; I-9 forms; 1098-T forms; payroll documents; visa/immigration



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documents; employment applications and related documents; background check documents; insurance documents; student conduct records and other legal documents as required by law and SUNY policy;

SUNY Erie advises preferred/chosen name will be allowable under the following circumstances, unless a technical or administrative burden that would make it extremely challenging to support this change:

1. Class rosters;
2. Grade rosters;
3. Campus directories;
4. Time and attendance records;
5. Learning Management System;
6. Email display names; and
7. Identification cards

To initiate a preferred name change, employees should contact Human Resources and students should contact Registration for further instructions.

DOES IT SUPERCEDE A POLICY/WHICH ONE (if so, attach redline version): N/A

POLICY & GOVERNANCE COMMITTEE RECOMMENDED ACTION:

Policy & Governance Committee recommends the Board of Trustees approve this Board policy under Committee Briefings, Policy and Governance Committee. This Policy supersedes all prior policies/procedures and practices related to Preferred Name Policy.

POLICY & GOVERNANCE COMMITTEE MEMBERS PRESENT: Trustee Kathleen Masiello, Trustee Leonard Lenihan, Interim President William Reuter, Provost and Executive Vice President of Academic and Student Affairs Douglas Scheidt, Vice Provost of Institutional Research Assessment, Accreditation & Planning Fabio Escobar, Employee Relations Manager Daniel Kaufmann, Interim Vice President of Enrollment Management Phil Struebel, Dean of Liberal Arts and Science Joanne Colmerauer, Dean of Liberal Arts and Science Jamie Smith, Dean of Students Petrina Hill-Cheatom, College Senate Representative Colleen Quinn, Instructor, William Falls, SGA Representatives Andrew Gonzalez Kennedy and Malika Sultonova.

DATE OF BOARD APPROVAL: March 25, 2021

POLICY & GOVERNANCE COMMITTEE TEAM FOLLOW-UP:

Following Trustee approval, this Board policy will be included in the SUNY Erie Community College Board of Trustees Policy Manual.



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INFORMATION/INPUT CONSIDERED DURING POLICY & GOVERNANCE COMMITTEE DELIBERATIONS:

SUNY Guidance on Gender Markers and Chosen Name dated August 7, 2020. Gender Expression Non-Discrimination Act (GENDA), and federal privacy laws, including Family Rights and Privacy Act (FERPA)

The Policy has been reviewed and discussed at the Policy & Governance Committee meeting of September 14, 2020 and March 3, 2021.

History

Item:	Date:	Explanation:
Policy adopted	March 25, 2021	
Annual BOT Review/Reaffirmed		
Previously Reviewed and Extended		
Renamed		

SUNY Erie Cross References

Policy Name or Procedure:	Where to find:
FERPA	Confidentiality Statement (FERPA)
Procedure	How to change your preferred name in Workday

Next Steps

Include in College Catalog? Yes
