

# EXECUTIVE SUMMARY

## PURPOSE AND GOALS

*Growing Trans\* Funding and Strategy* details the findings of a multimethod study of the funding landscape for trans\* organizations in a global context. The primary long-term goals of this study are to *increase the amount of funding* available to trans\* organizations and to *promote strategic use of existing and new funds*. In order to increase the quantity of funding, it is important to establish a baseline of the current amount of funding so that the growth of the “pie” can be tracked accurately over time. In order to promote strategic use of new and existing funds, this report offers a comparison of the current and potential areas of work of trans\* organizations with the strategic priorities of donors, a description of the capacity building needs of these organizations, and case studies of very different types of trans\* organizations and their advocacy work.

In December 2013, ten donors came together to form the Global Philanthropy Project’s (GPP) Trans\* Working Group: American Jewish World Service, Arcus Foundation, Astraea Lesbian Foundation for Justice, East African Sexual Health and Rights Initiative (UHAI-EASHRI), The Foundation for AIDS Research (amfAR), Hivos, Mama Cash, Open Society Foundations, Urgent Action Fund (UAF), and Wellspring Advisors. Program staff at these foundations were interested in increasing the funding available for trans\* work—“increasing the size of the pie”—and ensuring funding is used as effectively and efficiently as possible—“improving donor performance.”

For this project, *trans\** is used to describe people whose gender identity or expression differs from the gender assigned at birth, many of whom face human rights issues as a result. Some trans\* people identify and present themselves as either a man or a woman; others identify with a nonbinary gender category. Trans\* is an abbreviation; the asterisk denotes a range of possible gender identities including, but not limited to, transgender, transsexual, and genderqueer people.

This executive summary presents an overview of the methods and data sources used for this project, highlights the findings of the research study, and summarizes the eight key recommendations offered as a result of those findings.

*Growing Trans\* Funding and Strategy* offers recommendations from the findings of a three-part project that includes the re-analysis of data collected from 340 trans\* organizations; a new survey of 38 donor organizations; and three case studies.

This study of trans\* organizations is a re-analysis of existing data collected in late 2013 by American Jewish World Service, Global Action for Trans\* Equality, and Strength in Numbers Consulting Group. The current analysis extends previous work by examining organizational configurations; funding; trans\* leadership; priorities for current and future areas of work; capacity building needs; and barriers to achieving funding. The 2013 trans\*

## METHODS AND DATA SOURCES

donor survey includes detailed information on total donor investment and funding patterns; strategic priorities; areas of grantee support and capacity building activities, as well as efforts to simplify and streamline funding applications. This report also includes case studies on the successful passage of the Gender Identity Law of 2012 in Argentina; on the diversity of contexts and opportunities for trans\* activism in East and Southern Africa; and on key policy and cultural activism in the United States.

The remainder of this Executive Summary outlines the findings of this research and the strategic grant making, coordination, and research opportunities identified by placing these three data collection and analysis activities in dialogue with one another. It also provides highlights from a dissemination plan to share results with trans\* organizations and donors funding trans\* work, including a presentation that highlights key findings and a list of venues for donors to consider sharing results.

### **The Trans\* Movement is Growing but Underfunded**

The trans\* movement has grown exponentially since 2003. Three hundred forty trans\* organizations responded to the survey, many of them founded in the last ten years. However, the donor survey found just nine million dollars that were targeted to trans\* issues and organizations. Of the 340 organizations in the 2013 survey, one in five trans\* organizations (20%) had zero budgets and only just over a quarter (27%) had foundation funding. While 71 percent of donors added at least one new trans\* organization to their portfolios in 2013, only 7 percent added five or more new trans\* organizations.

### **Donor Priorities Align with Trans\* Organizations in Advocacy but Not Service and Healthcare Provision**

Donor priorities are already well aligned with two of the three top current areas of work for trans\* organizations: policy and legal advocacy and working to improve attitudes. Trans\* organizations are interested in expanding safety and antiviolenace work, which is also a priority area for donors supporting trans\* work. Trans\* organizations would like to expand their work to provide health care and social services, areas that were of lesser priority for current donors. Case study interviews revealed how important the provision of services is to trans\* communities, with a number of activists saying that without access to health and social services, it is difficult to sustain staff and mobilize communities to do advocacy work.

### **Trans\* Organizations Need Networking and Mentoring as well as Skills Training in Areas Not Previously Supported by Donors**

Globally, trans\* organizations wanted support around networking, skills training, and mentoring. Organizations in the Global South were very interested in skills training and mentoring, while all regions prioritized networking with the exception of Central America

and the Caribbean. In terms of skills training, trans\* organizations prioritized fundraising and grant writing, program strategy and development, and budgeting and financial management. However, the majority of donors that supported skills training focused on advocacy and community organizing.

Trans\* organizations continue to experience significant barriers to accessing foundation funding. This includes lack of staff that have the skills to fundraise or write grants; not knowing where to look for applicable funding; long delays in payment or responses from funders; and long and complicated funding applications. In 2013, there were a small number of donors that reported creative ways that they addressed these challenges, such as reducing the information required for grant renewals.

### **Context is Crucial for Determining Trans\* Affirming Policy and Practice Opportunities, Tipping Points and Wins**

While robust funding and strong organizational strategies can help promote organizing for trans\* affirming policies and practices, the context in which trans\* activism is operating is the most important factor determining success or failure of these efforts. In the case study interviews, activists in Argentina, East and Southern Africa, and in the United States, emphasized how important understanding the political opportunities, current policies and laws, and relevant decision makers were to their advocacy efforts.

As many trans\* organizations and activists are fairly new to this work, they may benefit from assistance in assessing and adapting to opportunities in their specific contexts. By ensuring that activists and donors understand the context, trans\* organizations can be more strategic in their work and donors can adopt a customized approach to funding that recognizes the divergent contexts within the countries where they make grants. In addition, trans\* organizations and donors can work together to identify opportunities for advancing issues of importance for trans\* movements, such as the new constitution in Kenya.

### **Trans\* Leaders Struggle for Autonomy**

Almost half (45%) of trans\* organizations globally are programs of another organization. Being a program of another organization has both benefits and drawbacks for trans\* organizations. Trans\* organizations that are programs of another organization are three times more likely to have paid staff; independent trans\* organizations are twice as likely to have external funding. Nearly one third (30%) of trans\* organizations that are programs of another organization say that the larger organization makes content decisions about their work and 42 percent say the larger organization makes financial decisions about their work.

Gaps between trans\* constituents and decision makers exist in every region of the world except Australia and New Zealand. These gaps are particularly pronounced in Asia and Pacific Islands and Eastern Europe and Eurasia. While gaps exist for both transwomen and

transmen, gaps in transwomen in leadership positions are significant. Transwomen are 2.6 times more likely to be able to make decisions that impact their work when they work in independent trans\* organizations, as opposed to those that are programs of another organization.

Donors with fewer resources to spend on trans\* work (under US\$50,000) were most likely to support independent trans\* organizations while donors with the most resources (US\$500,000 or more in 2013) were most likely to make grants to LGBTQ organizations to work on trans\* issues.

One quarter of donors (25%) do not track trans\* leadership within trans\* organizations. Of donors that do track trans\* leadership, just over two-thirds (67%) say that most or all of the organizations they support are trans\* led. Clear—and shared—definitions of what constitutes trans\* work and trans\* leadership would increase the accuracy of these measurements.

### **Donors Work to Simplify and Streamline Applications, but These Remain Difficult for Trans\* Organizations**

In addition to needing to build skills in fundraising, program planning, and financial management, trans\* organizations in the Global South reported long and complicated funding applications and long delays in payment or response from funders as barriers to obtaining foundation funding. Trans\* activists also expressed a desire for more flexible funding, including more general operating support and multi-year grants. Nearly half of donors supporting trans\* work said most or all of their grants included at least 50 percent general operating support. However, more than one quarter (28%) of donors award no general operating support grants and more than half of donors do not award multi-year grants (56%).

### **Tracking and Coordination are Improving but Remain Difficult**

Nearly 40 percent more donors participated in the trans\* donor survey in 2013 compared to 2012 (23 vs. 38). Nearly three-quarters of respondents reported tracking trans\* funding. More than half (57%) of donors committed US\$100,000 or less to supporting trans\* work in 2013.

Donors were asked to self-report their trans\* funding, excluding LGBTQ work that includes trans\* people, but is not exclusively dedicated to trans\* work. While self-reporting and to some extent self-defining their trans\* funding gave donors flexibility, this also revealed some inconsistencies in what is counted as trans\* specific work. In addition, a smaller number of donors fund through intermediaries; not collecting information about individual grants made it challenging to de-duplicate this funding. In order to accurately track trans\* funding over time, a sustainable coordination mechanism is instrumental to collecting grant level information and analyze trends in trans\* funding.

The findings of the trans\* organization survey, the trans\* donor survey, and the case studies provide rich information for trans\* activists to reflect on the growth of the trans\* movement and for donors to provide additional and more targeted support to trans\* organizations. Members of the GPP Trans\* Working Group will be critical allies in publicizing these results to peer donors that fund trans\* organizations as well as to new donors that may be open to funding trans\* work. To initiate these efforts, a presentation on the key findings will be developed by Strength in Numbers Consulting Group. In addition, the Executive Summary of the report and the regional and population fact sheets will be circulated to relevant trans\* organizations, civil society networks, interested donors, and donor networks enumerated in the dissemination plan. In addition, the dissemination plan includes the dates and locations of several conferences and meetings where these findings could be shared with interested organizations and donors.

**Recommendation 1: Align donor support with priority areas of work for trans\* organizations**

- Donor priorities are already well aligned with two of the three top current areas of work for trans\* organizations: policy and legal advocacy and working to improve attitudes.
- Expand donor support for anti-violence work, a key priority donors share with trans\* organizations, as well as support for social services and health care provision.

**Recommendation 2: Create a common language and standards around trans\* leadership and community representation**

- Create a robust, shared working definition of trans\* leadership.
- Create an assessment tool for trans\* leadership to self-assess participation and power in key decision making about finances and content related to trans\* people, especially when granting money for trans\* specific programs to organizations with a wider focus (such as HIV/AIDS prevention or services or LGBTQ issues).
- Include mechanisms to ensure and measure trans\* community representation and equity, not just in leadership roles.
- Invest in more than one person in an organization or region to ensure that capacity remains if staffing changes.
- Attend to the intersection of sexism and transphobia; support transwomen leaders in disempowering situations, particularly when trans\* work is taking place within a program of another organization.

### **Recommendation 3: Find creative ways to support emerging trans\* organizations**

- Develop creative funding mechanisms that take into account donor constraints and the context-specific needs of trans\* organizations as part of identifying new/unfunded trans\* organizations to support.
- Find intermediaries that can fund unregistered organizations and/or support larger, more established organizations with strong connections to community groups that could be fiscal agents and provide capacity building support to unregistered organizations.
- Establish a collaborative fund specific to trans\* organizations, coordinated by a donor, that could administer small grants and fund unregistered organizations.
- Support individual and/or small groups of activists to found trans\* organizations by establishing a fellowship program(s) to incubate new organizations or support an activist as a consultant before an organization is registered.

### **Recommendation 4: Adopt a region specific approach to capacity building to build networks and mentorship and increase skills in fundraising, nonprofit management, and program planning**

- Conduct regional or area needs assessments to tailor capacity building efforts to the needs of trans\* organizations.
- Re-prioritize capacity building efforts to support those most needed by trans\* organizations including networking, mentoring, and skills training.
- Focus training on most needed skills, such as fundraising, nonprofit management, and program planning.
- Conduct regional or area needs assessments to tailor capacity building efforts to the needs of trans\* organizations.
- Evaluate capacity building success regularly; needs change quickly, as do available resources.

### **Recommendation 5: Build on existing and emerging interest in supporting trans\* organizations to fill gaps in the funding landscape**

- Identify key trans\* donors interested in cultivating relationships with new or existing donors to fill specific gaps such as lack of funding for social services and health care or the lack of funding and donor capacity in Central America and the Middle East and North Africa.

- Use information and work products from this study to inform and persuade donors who are interested in awarding funds, but need more information to fund in trans\* areas of work that may be new to them.

**Recommendation 6: Create and sustain robust donor coordination and monitoring mechanisms**

- Establish an ongoing monitoring mechanism to track donor support for trans\* organizations.
- Continue institutionalizing survey research on the needs of trans\* organizations, and priorities, funding, and organizational development.
- Circulate the benchmarks for trans\* funding to donors currently funding or interested in funding trans\* work.

**Recommendation 7: Invest in assessing context to support improvements in trans\* related policies and practices at the country and regional levels**

- Invest in mapping policies and practices in 4–6 regions where there is shared interest in advancing specific issues such as name and gender marker change and access to health care.
- Provide trans\* organizations with information about the political opportunities, current policies and laws, and relevant decision makers in their specific context to increase the strategic impact of their advocacy work.

**Recommendation 8: Expand efforts to simplify application procedures and increase entrée to donors and funding**

- Provide technical assistance and curated opportunities for first-time applicants for funding and previously funded trans\* organizations to meet donors.
- Exchange and share application adaptations that have been useful for lowering barriers to new applicants.
- Continue to gather feedback on new, simpler application procedures from trans\* activists.
- Translate applications and reporting materials into additional languages, specifically Russian and Spanish. Regional assessments for East and Southern Africa and South-east Asia would be useful to better understand language needs in these regions.