

# Growing Trans\* Funding and Strategy: A report from the field in 2013

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# 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 2103 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.

# TRANS\* ORGANIZATION SURVEY

## PURPOSE AND GOALS

This section describes the quantitative data collected from 340 trans\* organizations globally. It provides information about the regional distribution of survey responses and the organizational structures, funding situations, areas of work, and areas of needed capacity building within trans\* organizations. The conclusion suggests ways to strengthen each area in ways that are sensitive to the specific needs and preferences of each subregion.

Trans\* organizations do a variety of work all over the world with very low levels of resources. While these data were collected with a limited number of options for trans\* organizations to express the type of work that they do, some clear patterns emerged around priorities for the projects and programs that trans\* organizations currently engage in and those that trans\* organizations wish they could engage in. For example, while organizations tended to say that they currently do policy and legal advocacy, trans\* organizations also wanted to expand activities related to social services. Both strategies are important to ensuring the current and future wellness and empowerment of trans\* communities but these approaches may be organizationally disconnected due to the different strategic priorities of donors who provide resources to trans\* groups.

The findings also focus particular attention on the lack of representative leadership for organizations whose constituents are trans\* but whose financial decisions are not made by trans\* people. Trans\* organizations may be programs or projects of larger organizations in order to facilitate institutional stability and access to funding but this may also decrease their autonomy. Trans\* organizations that include mostly transwomen constituents face sexist as well as transphobic barriers to moving transwomen into leadership positions.

Data from the trans\* organizations were originally collected by GATE (Global Action for Trans\* Equality) and AJWS (American Jewish World Service) and are used by agreement with these organizations. GATE and AJWS distributed the Trans\* Organization Survey (TOS) through an open call in English, Spanish, and French. Three hundred and forty organizations that self-identified as serving trans\* and/or intersex people reported information in November 2013. All participants were assured confidentiality. All data are self-reported by organizations.

The TOS survey included questions about trans\* organizational funding budgets in 2012 and 2013; priority work areas, including the main populations they serve (e.g. transmen, transwomen, intersex people) and current and potential areas of work; leadership by trans\* and non-trans\* people within organizational structures; capacity building needs; and barriers to funding. The responding organizations selected current and potential areas of work areas of capacity building and barriers to funding from discrete lists created by staff from GATE and AJWS, with options to write in additional responses. “External funding” refers to funding acquired through means other than membership fees, meaning that some organizations that reported non-zero budgets may have reported no external

## METHODS AND DATA SOURCES

funding. When not otherwise specified, 2013 budget data are reported.

The United Nations Population Division *World Population Prospects* (2012 Revision) was used for country classification with the few exceptions noted here. Northern Europe, Southern Europe, and Western Europe are categorized together. Eastern Europe is categorized with West and Central Asia in a region called Eastern Europe and Eurasia, and Pacific Islands are categorized with Asia rather than with Australia and New Zealand. While all countries are included in global totals, the Middle East and North Africa are excluded from analysis by region because of their very small number of respondents.

SurveyMonkey online survey software was used for data collection and SPSS and Stata statistical software were used for data analysis. Odds ratios are reported only if significant ( $p < .05$ ). Australia and New Zealand results are affected by the small number of responses from this region ( $n=10$ ). The Eastern Europe and Eurasia region is affected by the lack of translation of the survey into Russian, while East Asia is almost entirely absent from the dataset due to translation issues. The Middle East and North Africa were not included in regional analysis due to very small sample sizes.

### Overview of Respondent Organizations

Survey respondents represented a wide variety of global contexts. About two in five (43%) came from the Global North, with the remainder from the Global South. Nearly half (47%) came from countries categorized by the UN as “high income,” while 14 percent came from low-income countries. The largest number of organizations came from the North America region (26%); among Global South regions, Sub-Saharan Africa and Asia and Pacific Islands were most represented (16% each). SEE FIGURE 1.1

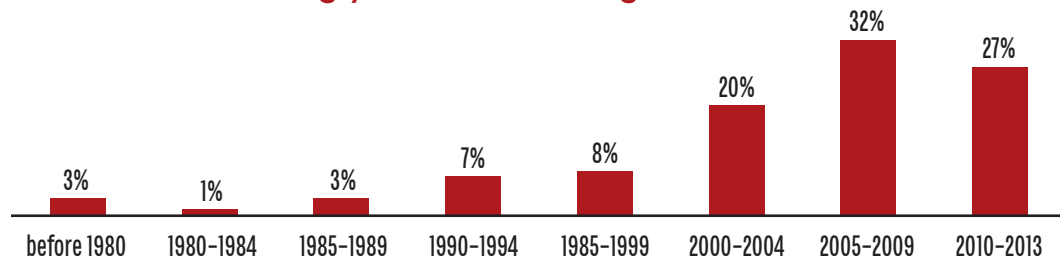
**FIGURE 1.1 Respondents by region**

| REGION                                 | NUMBER OF RESPONDENTS | PERCENTAGE OF TOTAL RESPONSE |
|--|-----------------------|------------------------------|
| Asia and Pacific Islands               | 55                    | 16%                          |
| Australia and New Zealand              | 10                    | 3%                           |
| Central America and Caribbean          | 30                    | 9%                           |
| Eastern Europe and Eurasia             | 16                    | 5%                           |
| North America                          | 90                    | 26%                          |
| Northern, Southern, and Western Europe | 49                    | 14%                          |
| South America                          | 29                    | 9%                           |
| Sub-Saharan Africa                     | 54                    | 16%                          |
| Other/Unknown                          | 7                     | 2%                           |

Note: Organizations responding to this survey do not necessarily represent all organizations working in the region.

The majority of trans\* organizations have been founded since the year 2000 (79%), with nearly one third founded between 2004 and 2009 (32%) and more than one quarter founded between 2010 and 2013 (27%). Trans\* respondents from low income countries were more likely to say they had been founded in the late 2000s, while middle and higher income country respondents were more likely to have been founded prior to the 2000s or since 2010 (data not shown). SEE FIGURE 1.2

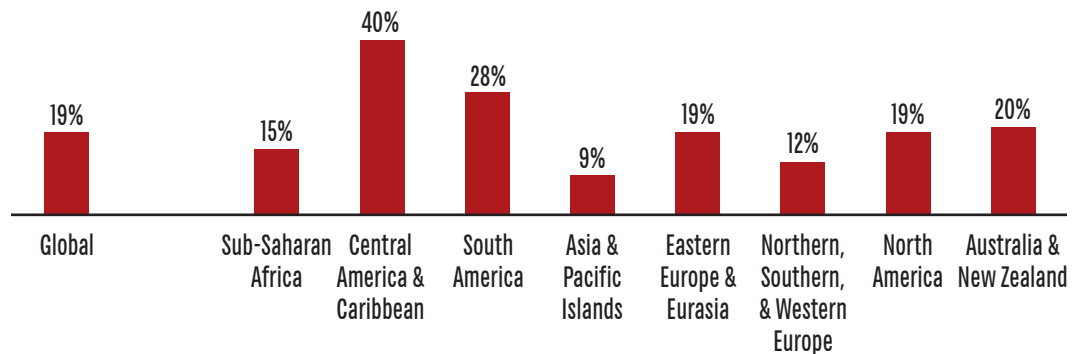
**FIGURE 1.2 Founding year of trans\* organization**



### Funding

Globally, most trans\* organizations have very small or no budgets. Nearly 20 percent of trans\* organization respondents had zero budgets in 2013 (19%). Trans\* organizations in Central America and the Caribbean are more likely to report zero budgets (40%) than other regions. SEE FIGURE 1.3

**FIGURE 1.3 Trans\* organizations reporting zero budgets in 2013**



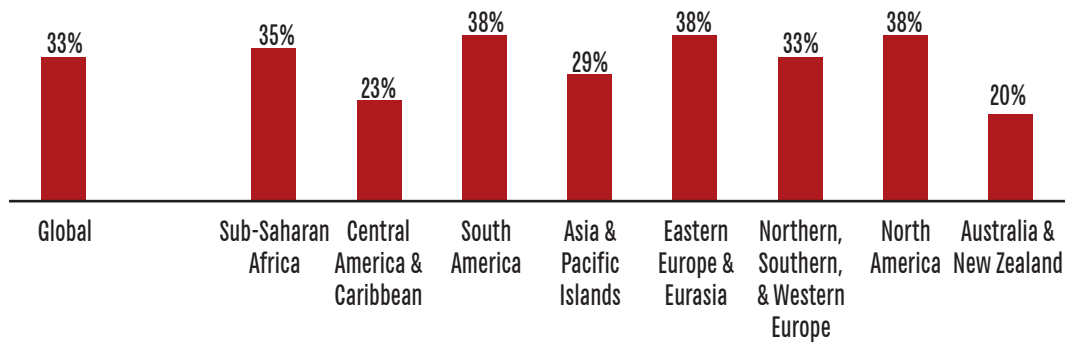
Note: Organizations responding to this survey do not necessarily represent all organizations working in the region.

While most organizations had under US\$5,000 budgets, a smaller number of organizations have larger budgets. While in the context of global philanthropy, a US\$20,000 budget is small, in the context of the distribution of resources across trans\* organizations, this is a difficult threshold to reach.

Globally, about one third of trans\* organizations have a budget of US\$20,000 or more (33%). Trans\* organizations in South America, Eastern Europe and Eurasia, and North America (38% each) were most likely to have budgets greater than or equal to US\$20,000.

SEE FIGURE 1.4

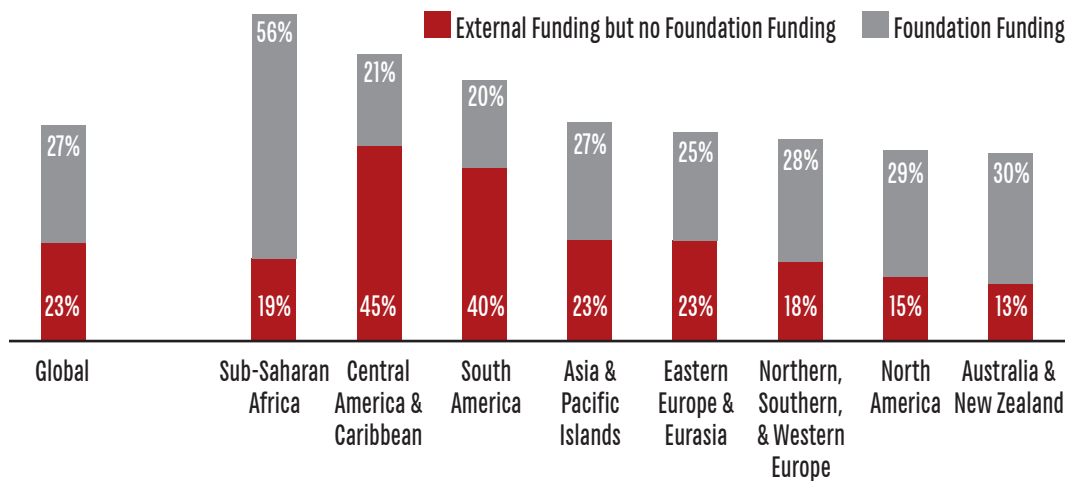
**FIGURE 1.4 Trans\* organizations reporting budgets of US\$20,000+ in 2013**



Note: Organizations responding to this survey do not necessarily represent all organizations working in the region.

Regions where the most organizations receive external funding are Eastern Europe and Eurasia (75%), Northern, Southern, and Western Europe (66%), and Australia and New Zealand (60%). Globally, 27 percent of trans\* organizations have foundation funding, with higher rates of foundation funding in Eastern Europe and Eurasia (56%), Sub-Saharan Africa (30%), and North America (29%). SEE FIGURE 1.5

**FIGURE 1.5 External and foundations funding for trans\* organizations**

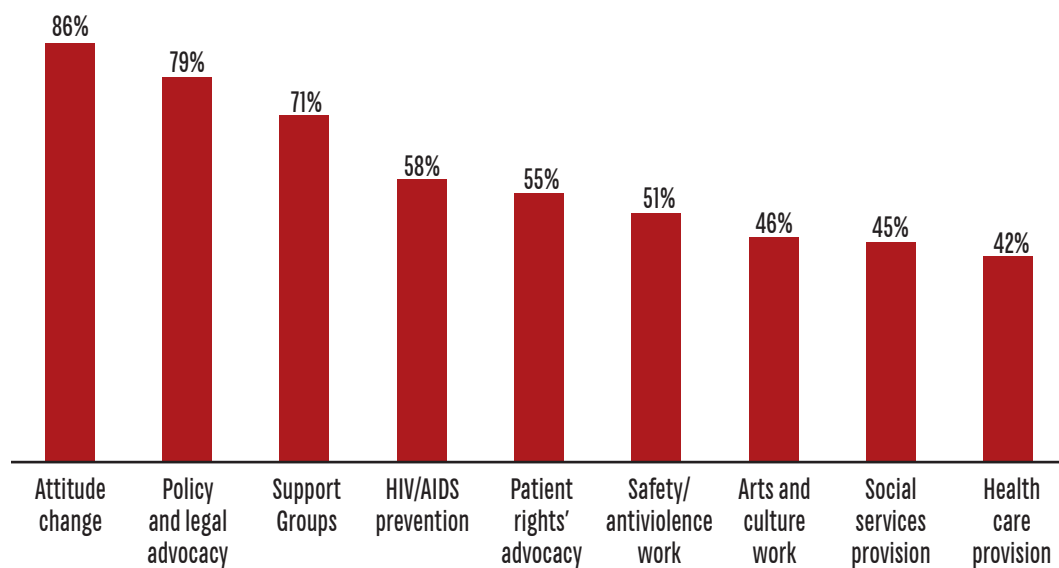


Note: Organizations responding to this survey do not necessarily represent all organizations working in the region.

## Priority Work Areas

Globally, the most common areas of current work done by trans\* organizations include working to improve attitudes (86%), policy and legal advocacy (79%), and support groups (71%). All global regions except Sub-Saharan Africa report working to improve attitudes or policy and legal advocacy as their most common areas of work. Trans\* organizations in Sub-Saharan African report HIV prevention and services (79%) as their most common area of work. SEE FIGURE 1.6 AND FIGURE 1.7

**FIGURE 1.6 Overall priority work areas for trans\* organizations**



Note: Organizations responding to this survey do not necessarily represent all organizations working in the region.

**FIGURE 1.7 Priority work areas for trans\* organizations by region**

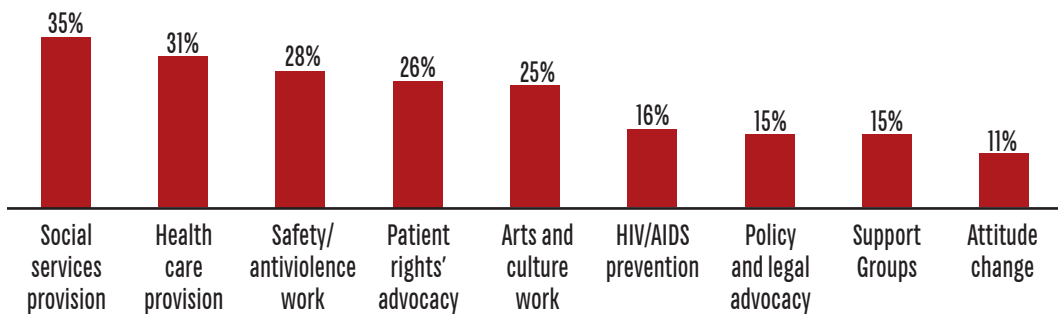
| RESPONDENTS                    | FIRST PRIORITY                  | SECOND PRIORITY                 | THIRD PRIORITY            |
|--------------------------------|---------------------------------|---------------------------------|---------------------------|
| Asia and Pacific Islands       | Attitude Change (89%)           | Support Groups (88%)            | HIV/AIDS Prevention (76%) |
| Australia and New Zealand      | Attitude Change (89%)           | Policy and Legal Advocacy (77%) | Support Groups (70%)      |
| Central American and Caribbean | Attitude Change (93%)           | HIV/AIDS Prevention (86%)       | Support Groups (74%)      |
| Eastern Europe and Eurasia     | Policy and Legal Advocacy (87%) | Attitude Change (86%)           | Support Groups (73%)      |

| RESPONDENTS                           | FIRST PRIORITY                  | SECOND PRIORITY                 | THIRD PRIORITY                              |
|---------------------------------------|---------------------------------|---------------------------------|---|
| North America                         | Attitude Change (91%)           | Policy and Legal Advocacy (77%) | Support Groups (60%)                        |
| Northern, Southern and Western Europe | Policy and Legal Advocacy (93%) | Attitude Change (87%)           | Support Groups (65%)                        |
| Sub-Saharan Africa                    | HIV/AIDS Prevention (79%)       | Policy and Legal Advocacy (73%) | Attitude Change (69%), Support Groups (69%) |

Note: Organizations responding to this survey do not necessarily represent all organizations working in the region.

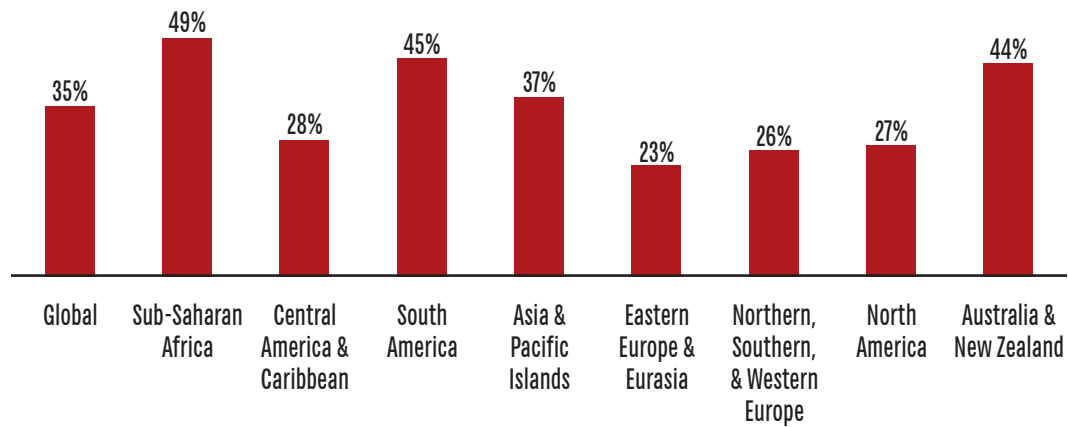
Globally, the work trans\* organizations are not currently doing what they most want to do include providing social services (35%), provision of health care (31%) and safety and antiviolence work (28%). Growing their capacity to provide social services, health care, and safety and antiviolence work are particularly important to trans\* organizations in Sub-Saharan Africa and trans\* organizations in South America. The areas of work trans\* organizations wanted to expand are more focused on providing health and social services than on policy and advocacy, which are current work priorities. SEE FIGURES 1.8, 1.9, 1.10, AND 1.11

**FIGURE 1.8 Work areas that trans\* organizations would like to expand**

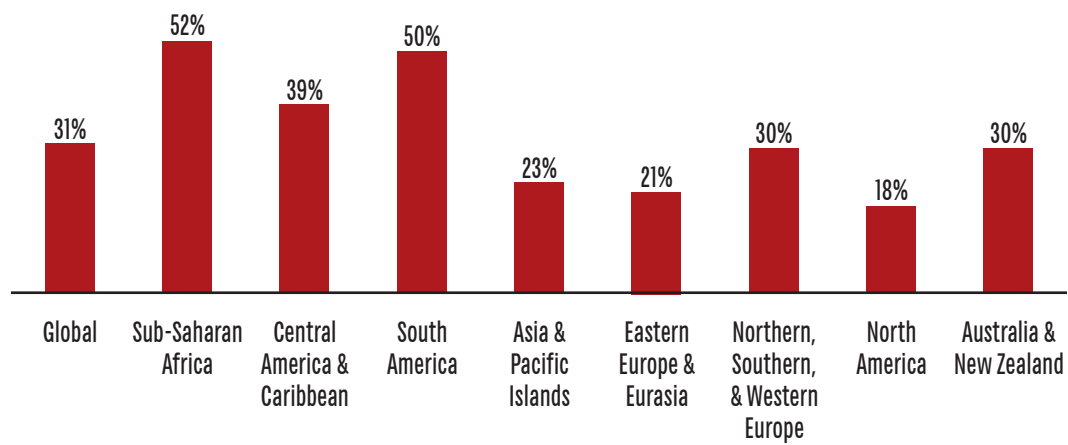




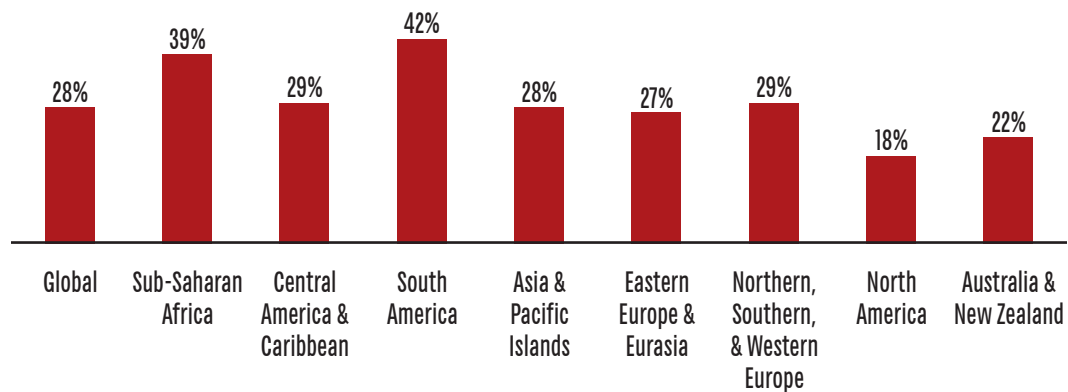
**FIGURE 1.9 Trans\* organizations that would like to work on social services provision**



**FIGURE 1.10 Trans\* organizations that would like to work on health care provision**



**FIGURE 1.11 Trans\* organizations that would like to work on anti-violence work**

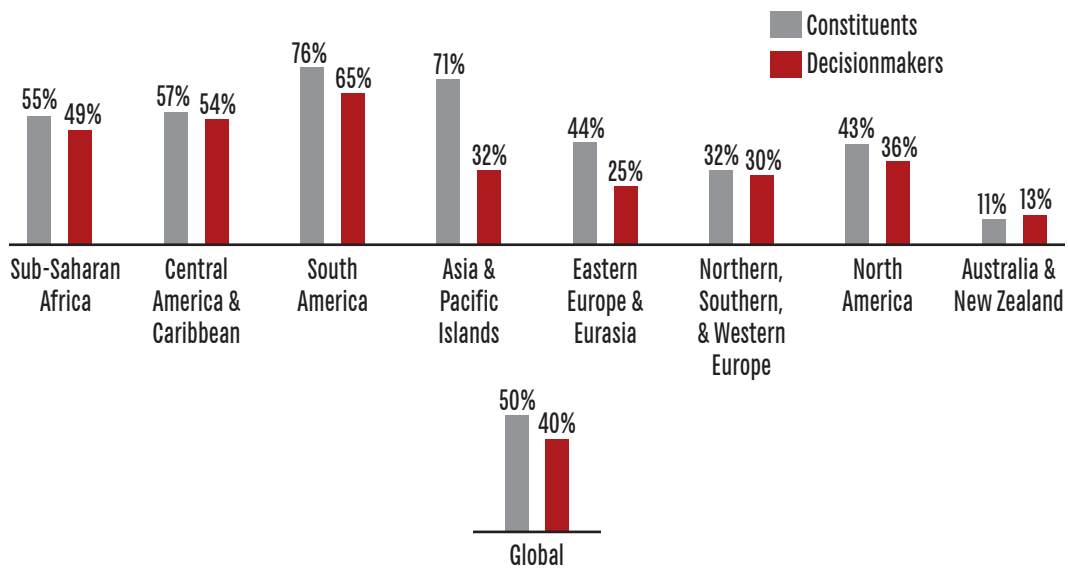


Note: Organizations responding to this survey do not necessarily represent all organizations working in the region.

## Leadership and Decision making

For the trans\* organization survey, self-leadership was determined by asking whether the persons making financial decisions for the organization were trans\* identified. Financial decision making was chosen as an indicator of leadership because the extent to which trans\* people participate in financial decision making is a strong indicator of their power to represent their own needs, interests, and voices within an organization and with funders. Overall, 50 percent of organizations report that “most” or “all” of their constituents are transwomen, while just 40 percent say that most or all of their financial decision makers are transwomen. These gaps between the identities of constituents and financial decision makers were particularly striking in Asia and Pacific Islands (71% vs. 32%) and in Eastern Europe and Eurasia (44% vs. 24%); however, they existed in all regions with the exception of Australia and New Zealand. SEE FIGURE 1.12

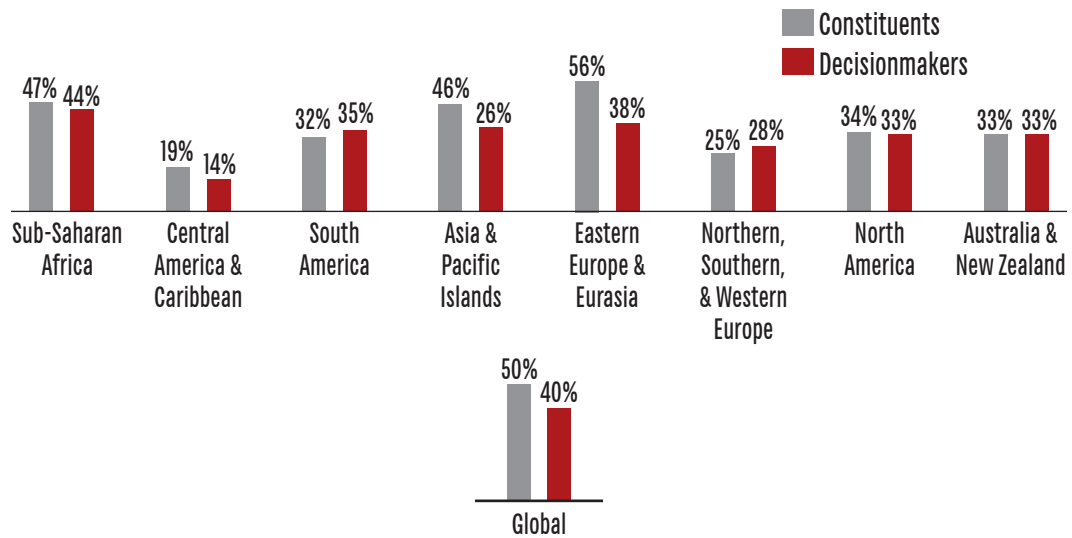
FIGURE 1.12 Transwomen leadership: constituents and decision makers



Note: Organizations responding to this survey do not necessarily represent all organizations working in the region.

The gap in financial decision making was smaller for transmen, but so were the overall numbers of organizations reporting that transmen were “most” or “all” of their constituents. Globally, over one third of trans\* organizations (36%) reported this, while just under one third (32%) reported that “most” or “all” financial decision makers are transmen. The gaps in financial decision making were largest in the same regions as the gap found for transwomen in leadership positions: nearly half (46%) of organizations in Asia and Pacific Islands said that most or all constituents were transmen, while just over one quarter (26%) said that transmen made most or all financial decisions. In Eastern Europe and Eurasia, the numbers were 56 percent vs. 38 percent. SEE FIGURE 1.13

**FIGURE 1.13 Transmen leadership: constituents and decision makers**



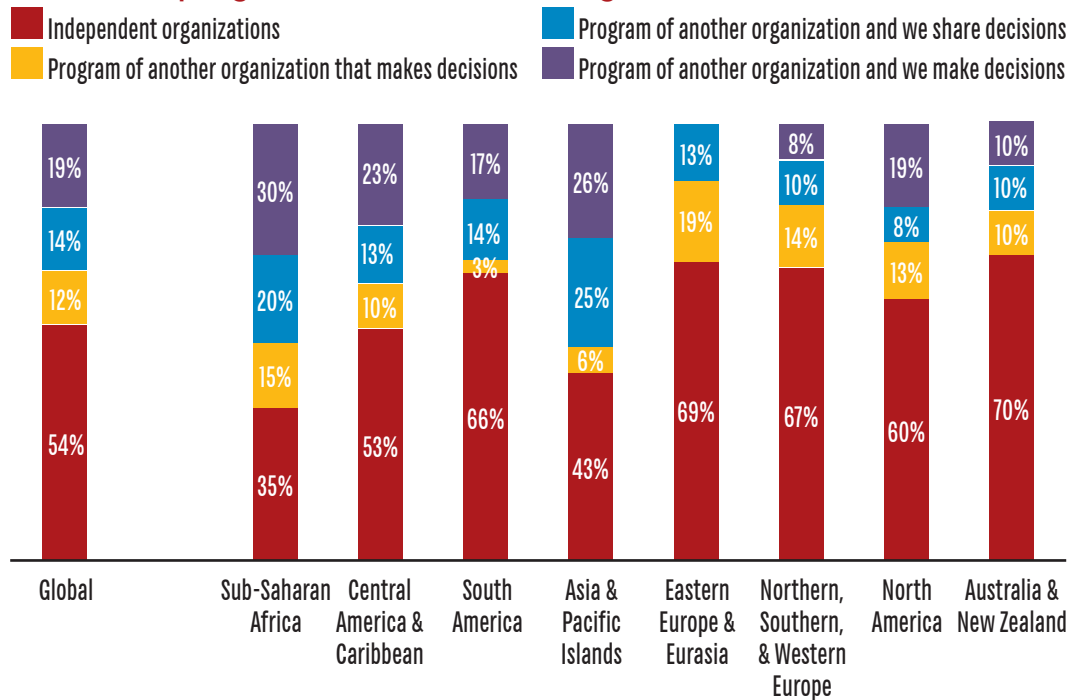
Note: Organizations responding to this survey do not necessarily represent all organizations working in the region.

Within organizations that say that transwomen are most or all constituents, those that were independent organizations were more than two and a half times as likely (OR=2.6,  $p<.001$ ) to also have most or all transwomen as financial decision makers. These effects were also present for transmen, but were not statistically significant and are not presented here.

Being in a program of another organization meant that the trans\* organization itself, regardless of the identity of its leaders, might be unable to make its own content and financial decisions. Overall, 42 percent of the 151 organizations that were a program of another organization said that the larger organization made all financial decisions; 30 percent said that the larger organization made content decisions. Thirty two percent of trans\* organizations that were programs of another organization share control equally when making financial decisions, while 39 percent share control equally when making content decisions. Twenty six percent said that the trans\* organization itself made the financial decisions and 31 percent said this was true for content.

Across the Global South, trans\* organizations were particularly likely to be programs of other organizations AND to not be making their own financial decisions. SEE FIGURE 1.14

**FIGURE 1.14 Trans\* decision making: independent organizations and programs within another organization**



Note: Graphs for content decisions look similar and are not presented here. Organizations responding to this survey do not necessarily represent all organizations working in the region.

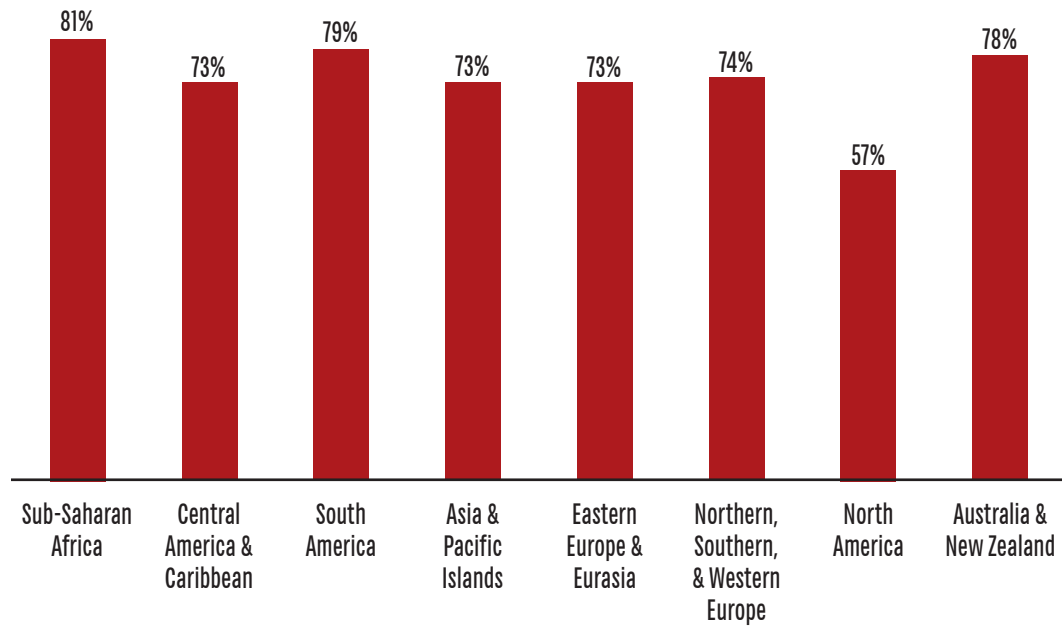
### Organizational Structures

The TOS respondents were asked about the structure of their organization. Specifically, they were asked whether they were programs of another organization (such as an HIV/AIDS prevention, LGBT, or human rights organization) rather than being an independent organization. Survey respondents were also asked whether the organization is registered as a nonprofit organization and whether the organization has paid staff. Trans\* organizations that were programs of another organization were also asked whether they drive content and financial decisions or whether these decisions are made by the larger organization. The charts reflecting content and finance data look virtually identical; only the financial graph is shown.

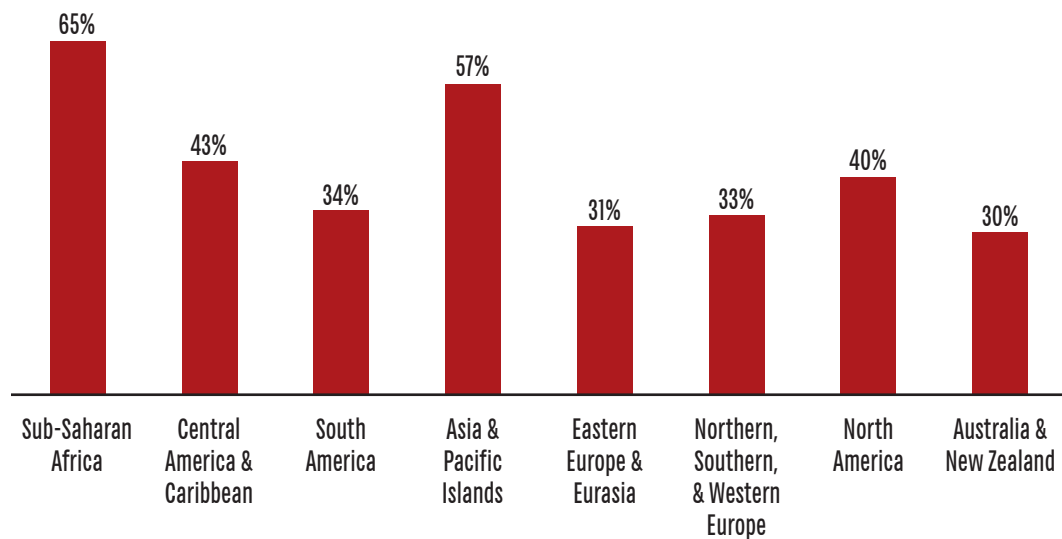
Overall, 45 percent of organizations responding to this survey were programs of another organization. In Sub-Saharan Africa, nearly two thirds (65%) of trans\* organizations were a program of another organization; the percentage was nearly as high (57%) in the Asia and Pacific Islands region. Trans\* organizations that are programs of other organizations are much more likely to focus on HIV prevention (74% vs. 46%, OR=3.30, p<.001).

SEE FIGURES 1.15, 1.16, 1.17

**FIGURE 1.15 Trans\* organizations that are registered as a nonprofit organization**



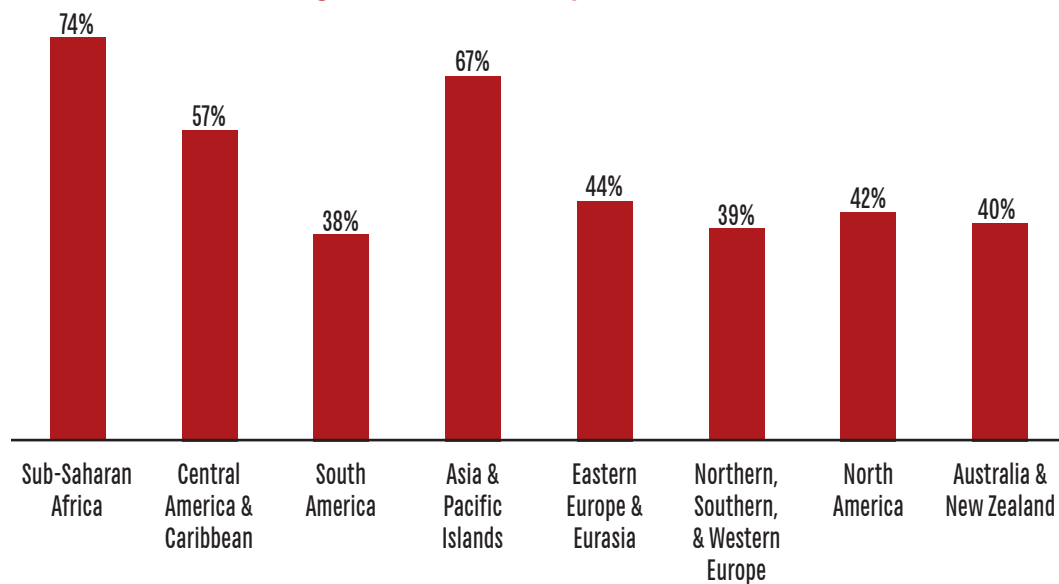
**FIGURE 1.16 Trans\* organizations that are programs of another organization**



Note: Organizations responding to this survey do not necessarily represent all organizations working in the region.

Overall, 70 percent of trans\* organizations were registered as nonprofits and about half (51%) have paid staff. North American organizations were least likely to be registered (57%). Just half of organizations in the TOS had paid staff (50%), with trans\* organizations in Sub-Saharan Africa (74%) and trans\* organizations in Asia and Pacific Islands (67%) particularly likely to have paid staff.

**FIGURE 1.17 Trans\* organizations with paid staff**



Note: Organizations responding to this survey do not necessarily represent all organizations working in the region.

Trans\* organizations that are programs of another organization are more than three times as likely to have paid staff as those that are autonomous (OR=3.13,  $p<.001$ ). Organizations registered as a nonprofit were almost four times as likely to have paid staff than those that were not registered (OR=3.82,  $p<.001$ ). However, independent trans\* organizations were nearly twice as likely to have external funding than those that are a program of another organization (OR=1.90,  $p<.001$ ). Organizations registered as a nonprofit were also far more likely to have external funding (OR=3.83,  $p<.001$ ).

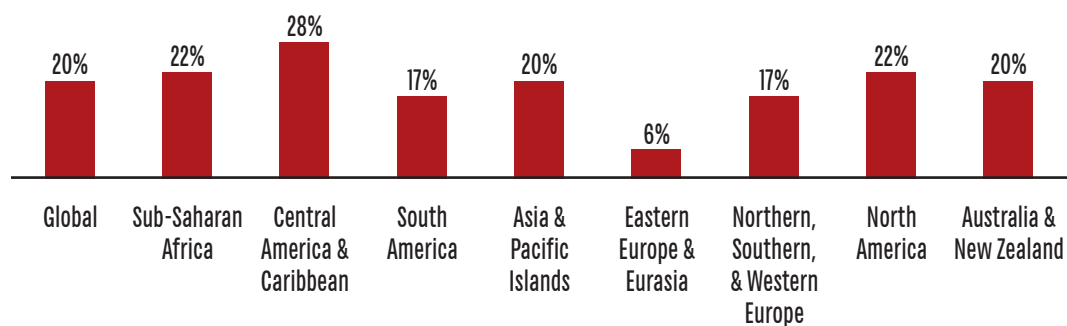
In addition to having a variety of organizational structures, trans\* organizations work on different levels of social change, from the local to the multinational. Across regions, trans\* organizations are most likely to work at the local (38%) or national (34%) level, with a smaller number working at the provincial/state (20%) or multinational/continental/global level (8%). Organizations in North America are particularly likely to work at the local level (58%), although this may be an artifact of the large number of organizations in North America; when there are more organizations in a large country, it makes sense for each to work in its own geographic locale. In addition, many issues that concern trans\* people

in the United States, such as birth certificate laws, are often resolved at the state and local levels. The case studies in Chapter 3 discuss this in further detail.

Organizations in Central America and Caribbean are particularly likely to say they work at the state or provincial level (28%). About one in five North American organizations also work this way (22%) as do a similar number of Sub-Saharan African organizations (22%).

SEE FIGURE 1.18

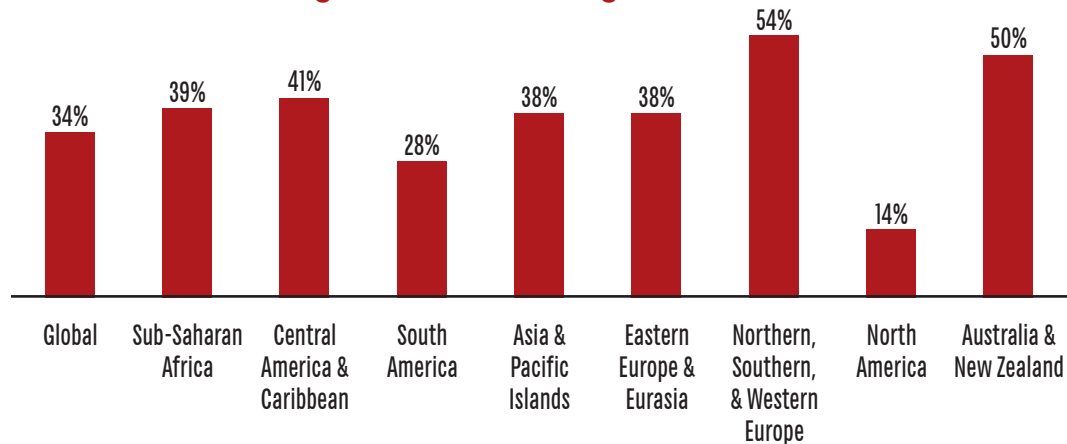
**FIGURE 1.18 Trans\* organizations working at the state/provincial level**



Note: Organizations responding to this survey do not necessarily represent all organizations working in the region.

Among high income regions, trans\* organizations in Northern, Southern and Western European and Australia and New Zealand were more likely to work at the national level. Organizations in Eastern Europe and Eurasia were most likely to work at the multinational level (25%), followed by Northern, Southern, and Western Europe (13%). The high proportion of organizations working at the multinational level in Eastern Europe and Eurasia may be affected by the survey not being available in Russian, as English-speaking respondents might be more likely to be the ones working multinationally. SEE FIGURE 1.19

**FIGURE 1.19 Trans\* organizations working at the national level**



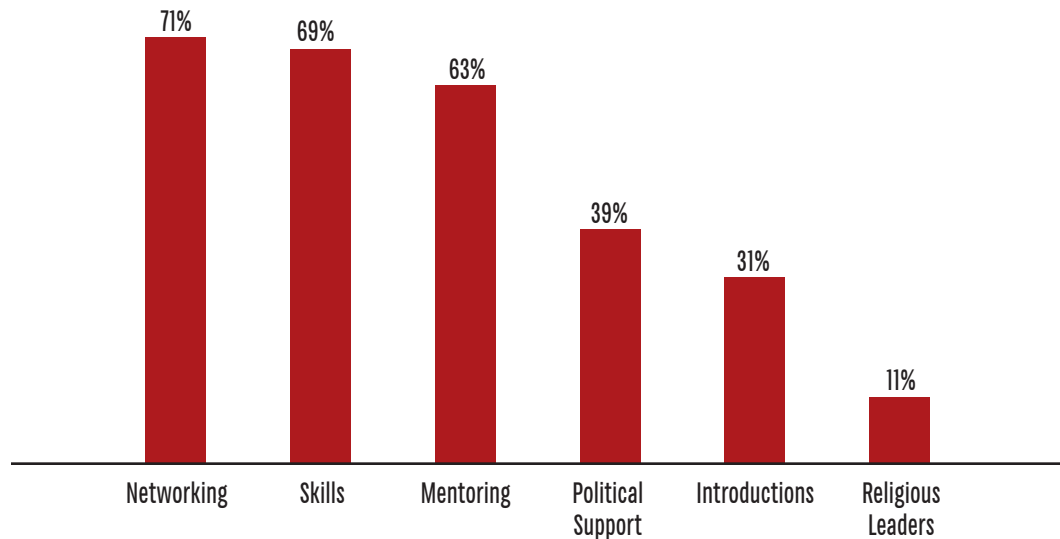
Note: Organizations responding to this survey do not necessarily represent all organizations working in the region

### Nonfinancial Support and Capacity Building Needs

Globally, trans\* organizations most want support around networking (71%), skills training (69%), and mentoring (63%).

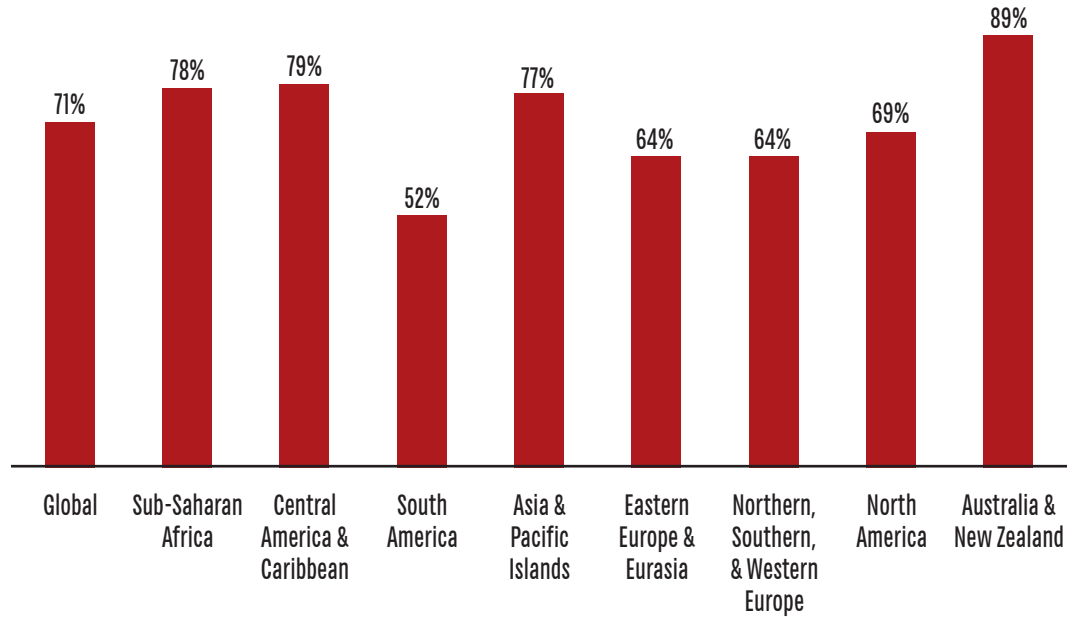
With the exception of organizations in South America, trans\* groups globally were very interested in networking opportunities. In contrast, Global South organizations were most interested in skills training compared to organizations in the Global North. Patterns were similar for mentoring. Organizations in Sub-Saharan Africa and Asia and Pacific Islands are most interested in mentoring. SEE FIGURES 1.20, 1.21, AND 1.22

FIGURE 1.20 Nonfinancial support to trans\* organizations

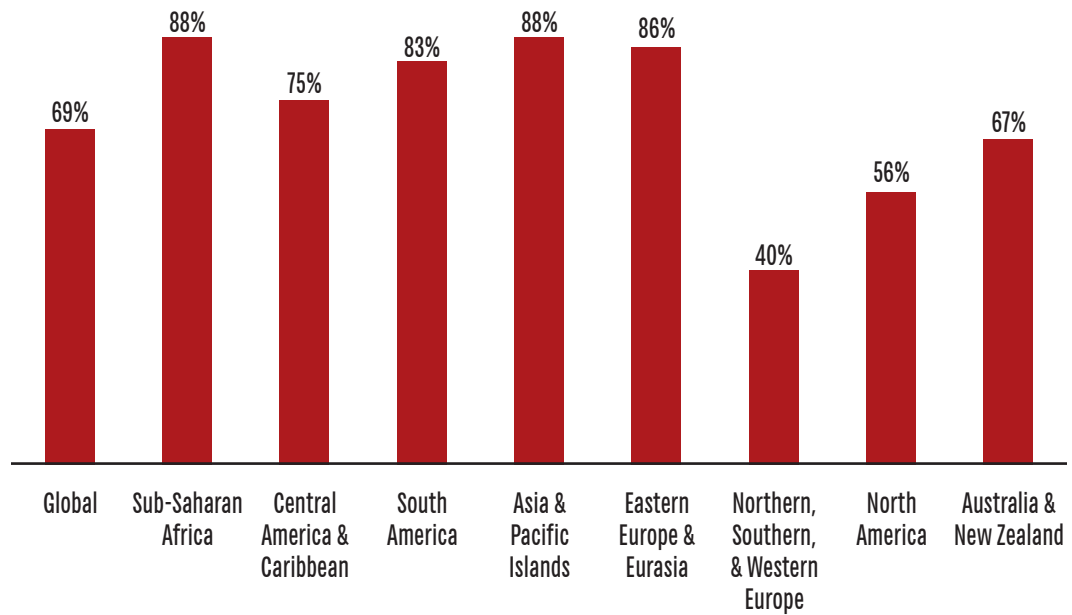




**FIGURE 1.21 Nonfinancial support by region: networking**

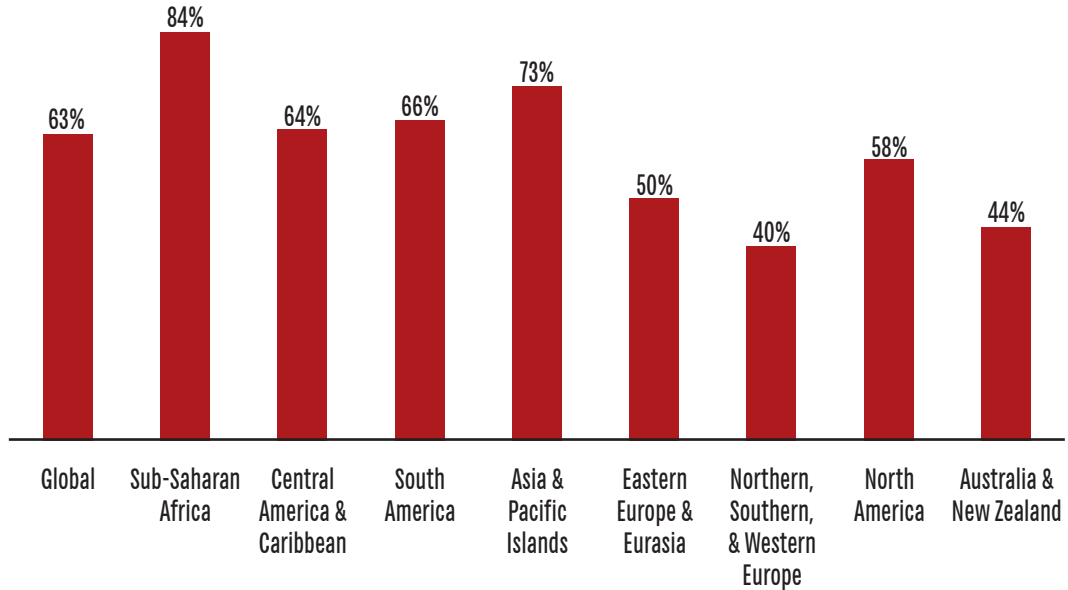


**FIGURE 1.22 Nonfinancial support by region: skills training**



Note: Organizations responding to this survey do not necessarily represent all organizations working in the region

**FIGURE 1.23 Nonfinancial support by region: mentoring**

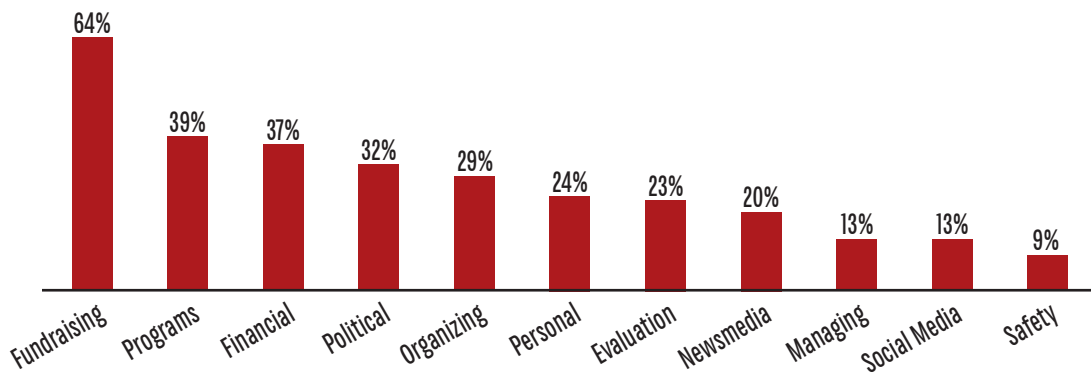


Note: Organizations responding to this survey do not necessarily represent all organizations working in the region

### Skills Needed

Globally, trans\* organizations overwhelmingly and consistently prioritize skills training in fundraising and grant writing (64%). Trans\* organizations are also interested in building skills in program strategy and development (39%) and budgeting and financial management (37%). SEE FIGURE 1.24

**FIGURE 1.24 Skills training needed reported by trans\* organizations**

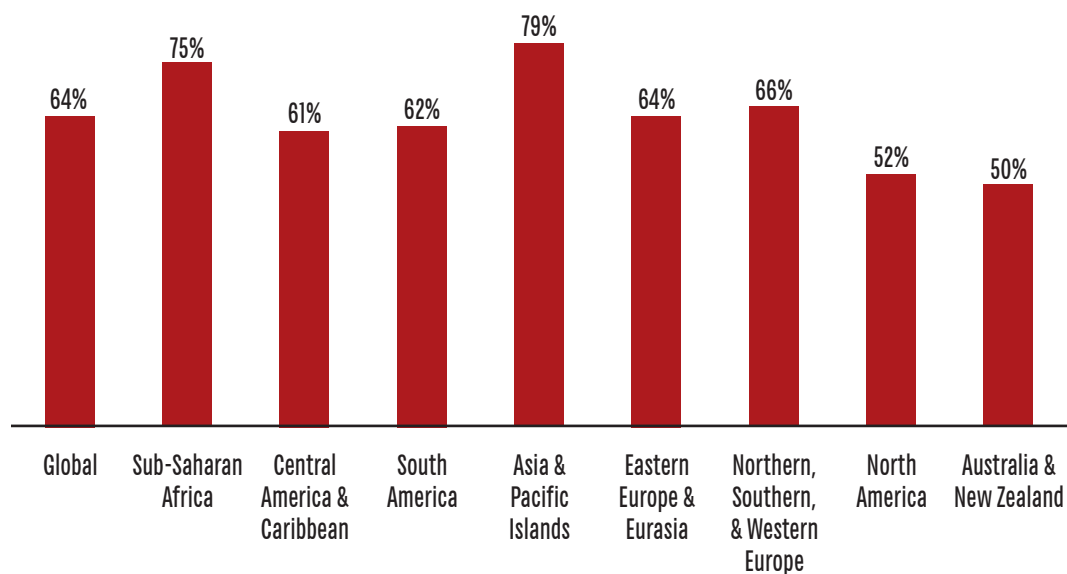


Of the trans\* organizations in Asia and Pacific Islands that said that skills training would advance their work, 79 percent said that training in fundraising and grant writing would be helpful, while two in five (40%) requested opportunities to build skills in budget and fi-

financial management, and 36 percent said training in monitoring and evaluation would be useful. Most common areas of work for these organizations include support groups (88%), working to improve attitudes (86%), and policy and legal advocacy (83%). Trans\* organizations in Asia and Pacific Islands are interested to expand their work to include providing social services (37%), patients' rights advocacy (31%), and arts and culture work (29%).

Of the Sub-Saharan African organizations that said skills training would be helpful, the largest number (78%) said that they would appreciate training in fundraising and grant writing. A smaller number (49%) said that budgeting and financial management skills would help and just over one third (36%) expressed interest in political advocacy skills training. SEE FIGURE 1.25

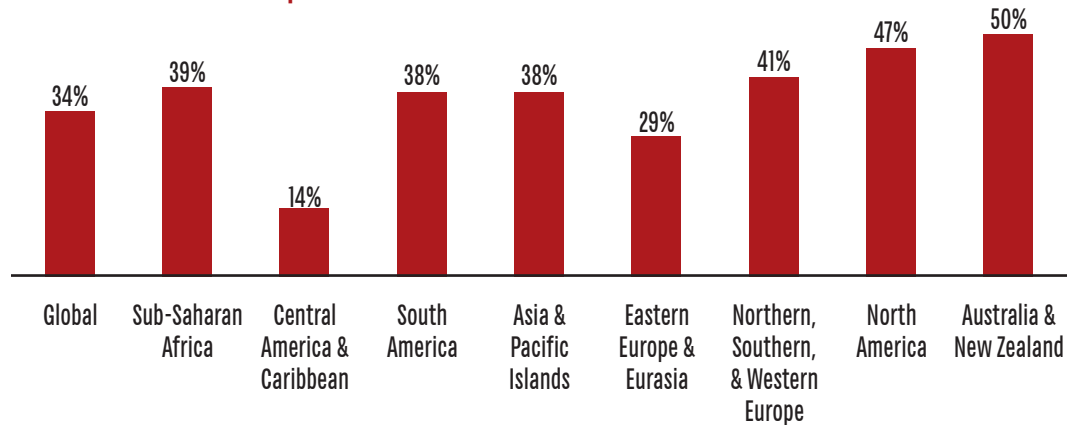
**FIGURE 1.25 Skills training by region: fundraising**



Note: Organizations responding to this survey do not necessarily represent all organizations working in the region.

Of the 79 percent of groups in Sub-Saharan Africa who said they need fundraising skills, most were currently working on HIV/AIDS prevention and services (86%), policy and legal advocacy (76%), and improving attitudes (69%). Most would like to provide health care (58%), and/or social services (45%) and do safety and antiviolence work (39%). Opportunities for trans\* organizations in Sub-Saharan Africa and Asia and Pacific Islands to raise funds to support the areas of work where they would like to expand would be particularly helpful. SEE FIGURE 1.26

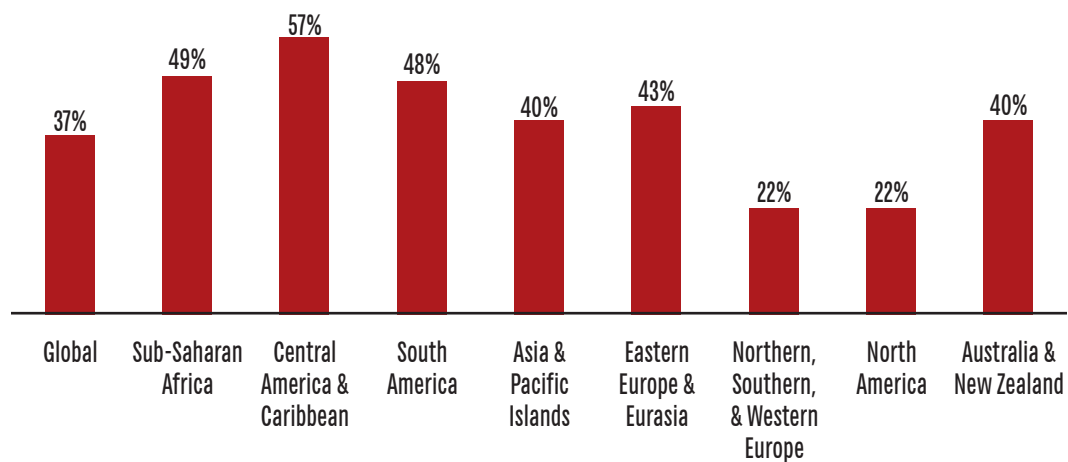
**FIGURE 1.26 Skills training by region: program strategy and development**



Note: Organizations responding to this survey do not necessarily represent all organizations working in the region.

In North America, the organizations that said they need program strategy and development skills were most likely to be currently working on improving attitudes (92%), policy and legal advocacy (79%), and safety and antiviolence work (69%). SEE FIGURE 1.27

**FIGURE 1.27 Skills training by region: budgeting and financial management**



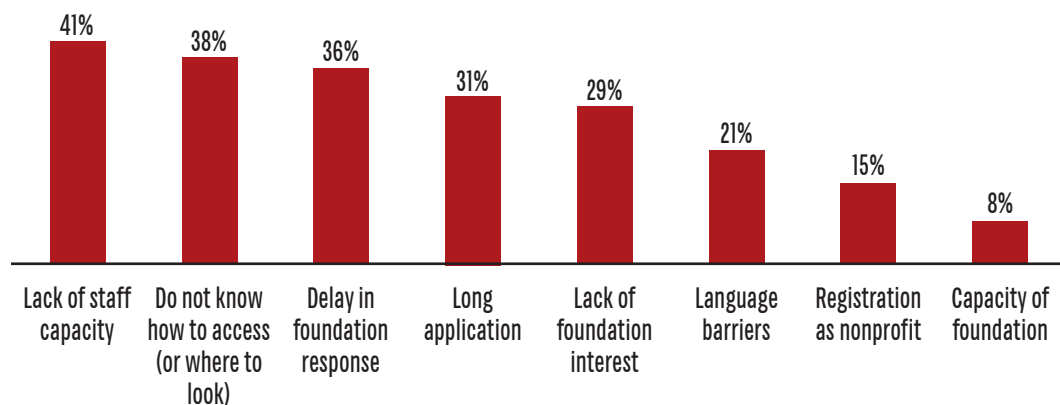
Note: Organizations responding to this survey do not necessarily represent all organizations working in the region.

## Barriers to Successful Fundraising and Grant writing

While the TOS survey asked trans\* organizations about barriers to a variety of types of funding, this section will focus on the barriers and capacity building needs relevant to funding by foundations.

Many trans\* organizations (41%) reported that they lack staff/volunteers who know how to fundraise or write grants. As only 70 percent of trans\* organizations are registered as nonprofits and just over half (51%) have paid staff, many organizations likely lack specific development staff with skills in fundraising and grant writing. As a result, this barrier may need to be addressed both by foundation donors simplifying their application requirements and foundation donors building the capacity of program staff at organizations doing trans\* work to secure grants to support their work. SEE FIGURE 1.28

FIGURE 1.28 Barriers to foundation funding globally

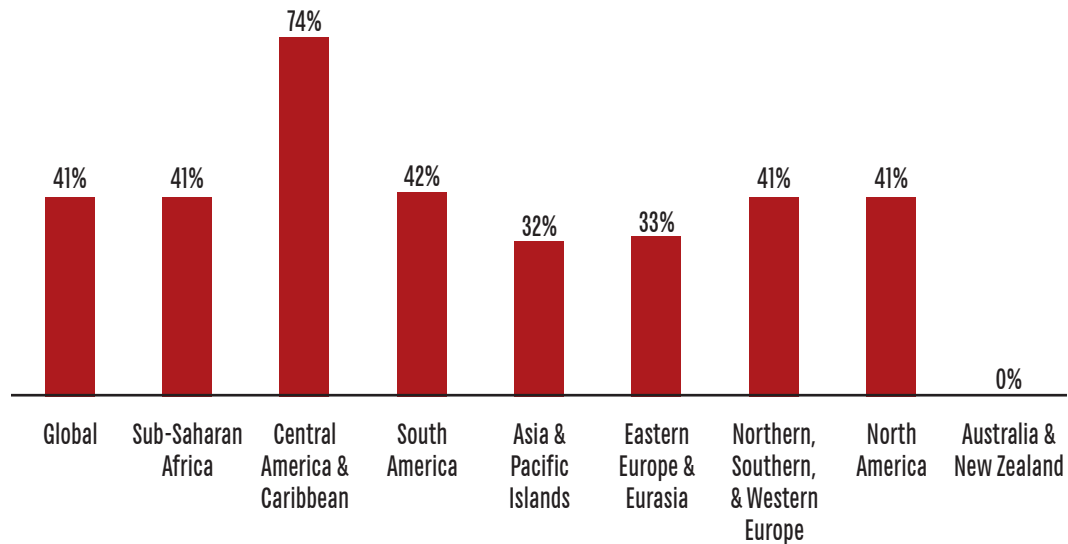


While the relative need for increasing staff capacity for fundraising and grant writing is relatively consistent across regions, organizations in South America (57%), Central America and Caribbean (55%), and Asia and Pacific Islands (43%) are most likely to not know where to look for applicable funding. Organizations saying they did not know where to look for applicable funding were nearly three times as likely to lack such funding (OR=2.7,  $p < .001$ , 77% vs. 55%). In contrast, organizations in Northern, Southern, and Western Europe did not report this as a common problem. SEE FIGURE 1.29 AND 1.30

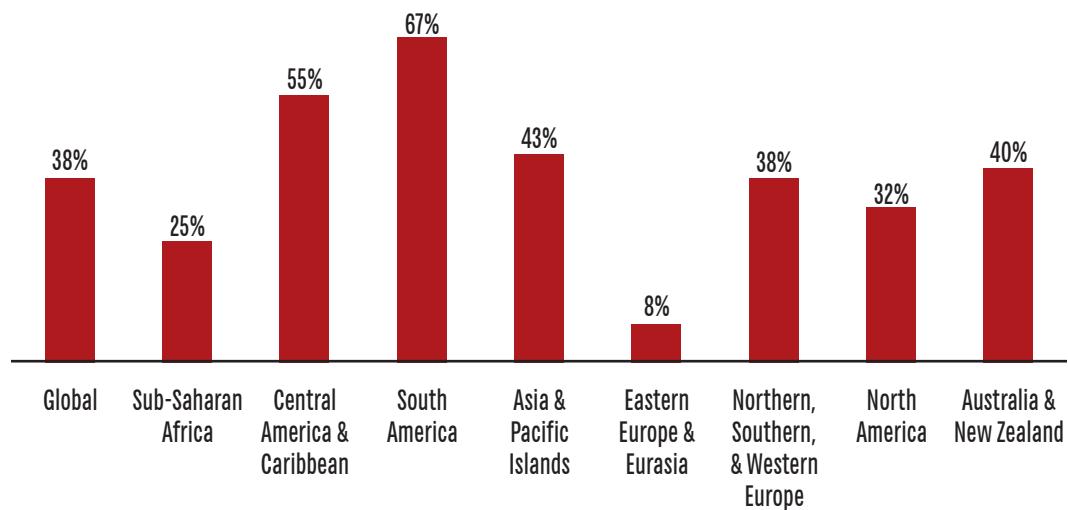
Other common problems trans\* organizations experienced in accessing foundation funding included long delays in payment or response from funders; long and complicated funding applications; and applications available in languages they do not understand. More than half of trans\* organizations in Eastern Europe and Eurasia (58%) and Sub-Saharan Africa (56%) identified long delays in payment or response from funders as a barrier to accessing foundation funding. Trans\* organizations in the Global South—South America (50%), Central America and Caribbean (42%), Sub-Saharan Africa (39%), and

Asia and Pacific Islands (35%)—were most likely to report long and complicated funding applications as a barrier to accessing foundation funding. SEE FIGURE 1.31 AND 1.32

**FIGURE 1.29 Barriers to funding by region: lack of staff/volunteers who know how to fundraise and write grants**

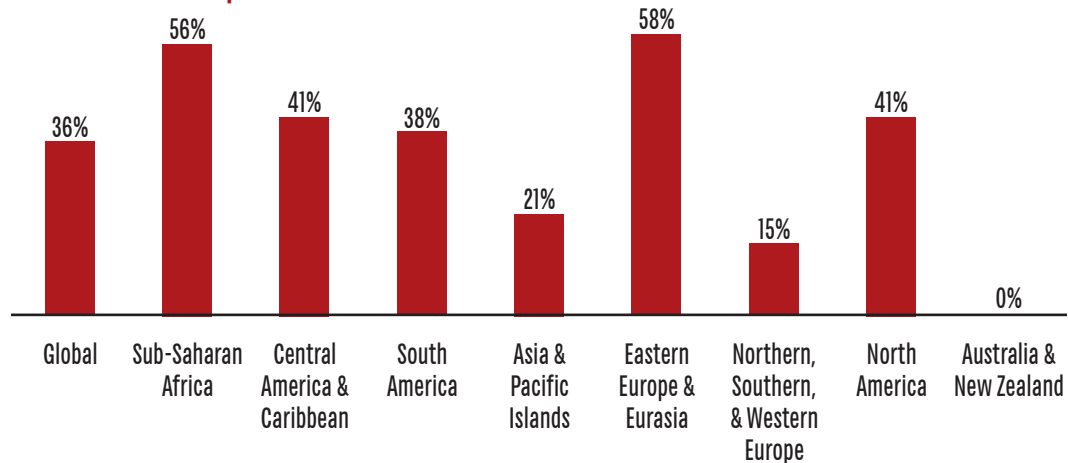


**FIGURE 1.30 Barriers to funding by region: not knowing where to look for applicable funding**

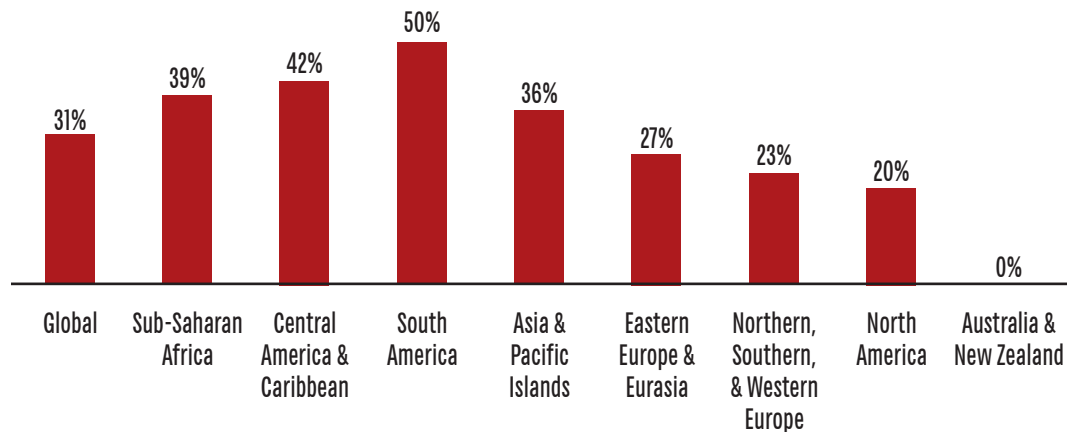


Note: Organizations responding to this survey do not necessarily represent all organizations working in the region.

**FIGURE 1.31 Barriers to funding by region: long delays in payment or response from funder**

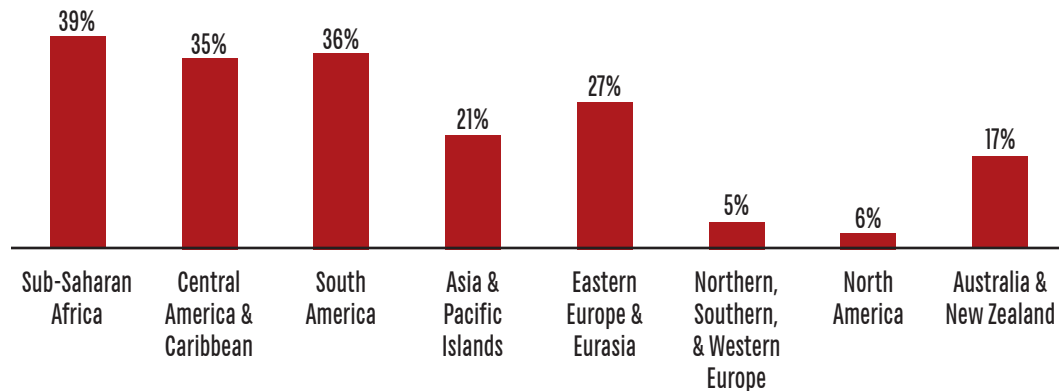


**FIGURE 1.32 Barriers to funding by region: long and complicated funding applications**



Note: Organizations responding to this survey do not necessarily represent all organizations working in the region.

Language barriers were most significant for trans\* organizations in Sub-Saharan Africa (39%), South America (36%), Central America and Caribbean (35%), and Eastern Europe and Eurasia (27%). Forty-five percent of donors supporting trans\* work translated funding applications into Spanish, one third (33%) had applications available in French, and nearly one quarter (24%) translated applications into Russian. SEE FIGURE 1.33

**FIGURE 1.33 Barriers to funding by region: languages available**

Note: Organizations responding to this survey do not necessarily represent all organizations working in the region.

The trans\* organization survey was a unique effort to understand the scope and scale of trans\* work globally. The TOS gathered information from a variety of trans\* organizations, from those already connected to foundation funding and capacity building efforts to unregistered organizations with zero budgets in 2013. Twenty percent of trans\* organizations responding to the survey had zero budgets and over half (54%) had budgets under US\$10,000 in 2013. Trans\* organizations are currently working in policy and legal advocacy, improving attitudes, and support groups, and would like to expand to work on health care, providing social services, and antiviolence work. There are large gaps in trans\* leadership, particularly for transwomen working in organizations that are programs or projects of a larger organization.

Information from trans\* organizations can be used to identify funding needs and barriers and to plan and organize capacity building opportunities. While some donors may solicit and receive this type of information from the cohort of trans\* organizations that they support, the analysis and reporting of the trans\* organization survey provides a more holistic view of the status and needs of trans\* organizations globally. The TOS also includes a number of organizations that do not receive foundation funding and/or have sought external funding unsuccessfully—organizations that would be particularly important for donors to reach to better support the growth of trans\* movements.

While this survey represented the first effort of its kind, it is important to note its limitations. First, the original data collection effort was conceived prior to the trans\* donor survey and thus does not harmonize perfectly with donor needs and data collection. For example, questions about trans\* leadership do not reflect a consensus definition or measurement that allows for robust comparison. Trans\* organizations were also not asked



directly about their strategic priorities; rather, their rankings of the importance of various kinds of work was used as a proxy. Further research might ask directly about the importance of these priorities, as the trans\* donor survey did (as discussed in the next section). Additional research might also ask what type of organizations serve as the main sponsor of trans\* organizations that are projects of larger organizations (e.g. feminist, LGBTQ, HIV/AIDS prevention and services), since patterns may differ.

The 2013 TOS is also limited in that it may not represent the global pool of trans\* organizations; it is a convenience sample composed of trans\* organizations that were contacted through known outreach channels. In particular, trans\* organizations that do not have English, French, or Spanish speaking staff may be under-represented. Particular care should be taken when interpreting responses from Eastern Europe and Eurasia, where many Russian-speaking organizations may not have responded.

Further survey research might make use of skip logic to collect region specific information; for example, leadership by ethnic minority groups was not assessed because of the heterogeneity of racial and ethnic patterns globally. In addition, more detailed information could be collected from trans\* organizations about their capacity building needs by region.

Further qualitative research might ask about what social services and health care provision is needed, as these are large, heterogeneous categories, and what types of local and regional advocacy are most important to individuals and organizations working for trans\* rights.

# FUNDER SURVEY

## PURPOSE AND GOALS

The trans\* donor survey was intended to describe 2013 foundation funding on trans\* issues in order to inform both growth and strategy in trans\* funding. The survey was in follow up to one conducted on 2012 funding patterns. The 2013 survey updated information about the levels of trans\* funding and gathered new information on donor practices. The new questions are intended to measure things of importance to trans\* organizations, such as leadership by trans\* identified people, ease of the application process, and capacity building and technical support from donors.

In addition to describing the current state of trans\* funding and informing future strategies, the survey was intended to establish benchmarks to measure donor performance. The findings of the trans\* donor survey serve as a baseline for measurement of future progress to grow the total amount of funding for trans\* organizations and to improve the efficiency and strategic nature of trans\* funding. Together with interested donors, the following benchmarks were identified and used to develop the trans\* donor survey questions:

- Total funding investment in trans\* organizations
- Number of donors that identify underfunded priorities as one of their top areas of funding (i.e., providing social services, provision of health care, safety and antiviolence work, patients' rights advocacy, and arts/culture work)
- Funds spent on priority nonfinancial support areas (i.e., networking, skills training, and mentoring)
- Number of donors publicly stating trans\* issues as part of their strategy and/or outreach around funding opportunities
- Instances of donor efforts to simplify application procedures and/or provide direct support to first-time applicants

## METHODS

Donors were included in the list of organizations for outreach if they (1) participated in the 2012 donor survey; (2) were in the top ten by amount of giving to LGBTQ organizations for (a) private and (b) public funders; (3) attended session on trans\* funding at the International Human Rights Funders' Group meeting in July 2014, or (4) were part of one of the following networks: International Network of Women's Funds (INWF), Funders Concerned About AIDS (FCAA), Ariadne (European Funders for Social Change and Human Rights), or the International Human Rights Funders Group (IHRFG). Donors who were willing to participate elected to complete the survey via phone or online. All were assured confidentiality of individual responses.

All questions were about grant making in 2013. Donors were asked to count grants where substantive work was specifically dedicated to trans\* issues, not only broader LGBTQ issues; for grants that included work on both issues, to count only the portion that was specific to trans\* work. *Trans\* led* was defined in the survey as the majority of the key decision makers for the organization identifying as trans\*.

The term *general operating support* was defined as 50 percent of the grant funds being flexible and that could be used in any way to assist the organization in achieving its mission. *Multiyear grants* were at least 24 months in length; 18 months is not considered a multiyear grant. Multiyear grants committed in 2013 were counted in 2013 and thus are included in the final total grant number and assume an accrual based accounting system.

Data analysis was conducted using the software package Stata. Phone and online survey versions were combined and data were cleaned prior to analysis.

If a donor did not fund trans\* work in 2013, they were still able to complete the survey, but could skip to the question about their strategic priorities for trans\* work.

In analyzing information from the trans\* donor survey, we have disregarded intermediary funding; for example, Arcus Foundation gives funds to Hivos for trans\* work and these funds have been reported by both groups. This has led to some double counting, but without line information about each grant, it would be difficult to de-duplicate this information systematically.

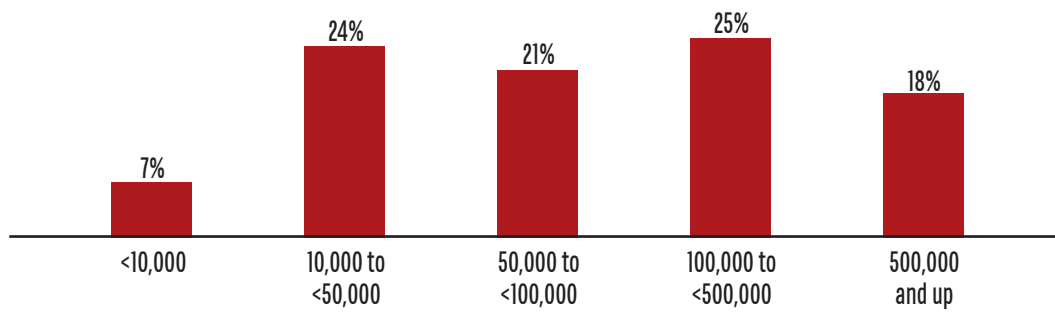
### **Total Investment**

Thirty-eight donors answered the survey (see Appendix B for a list of participating donors). Just over two thirds of respondents completed an online version of the survey (68%), while 32 percent completed the survey via phone with a researcher (Howe). Of the 38 respondents, one was a multilateral agency, two were bilateral donors, 23 were public foundations (including 11 women's funds), and 12 were private foundations.

Of the 38 donors who completed the survey, 36 (95%) said that they funded trans\* work in 2013. Of those 36, 28 provided information about the total amount of funding their organization committed to trans\* organizations and programs. These totaled nearly 9 million U.S. dollars (US\$8,872,214) in 2013.

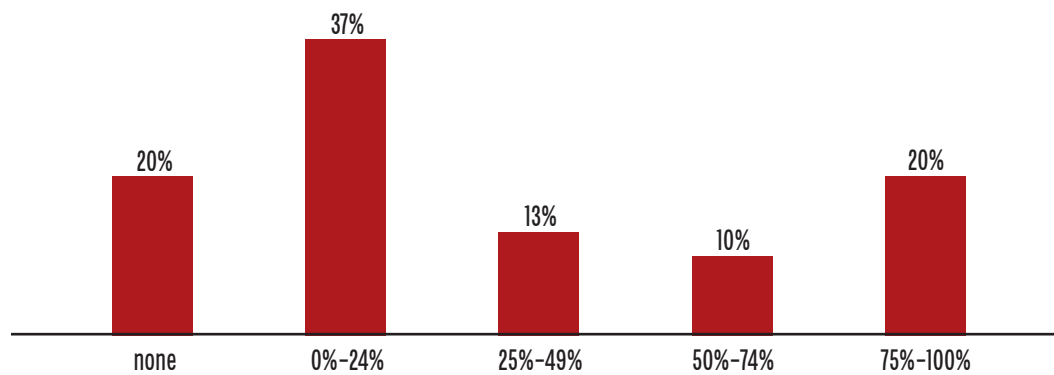
Nearly all donors had funded trans\* work before 2013 (94%). Eighteen percent made grants of US\$500,000 or more, while 25 percent made grants between US\$100,000 and US\$500,000. Just over one fifth of donors made grants totaling US\$50,000 and 36 percent made grants totaling less than US\$50,000. SEE FIGURE 2.1

**FIGURE 2.1 Total funding donors committed to trans\* work in 2013  
LGBTQ Organizations and Trans\* Funding**



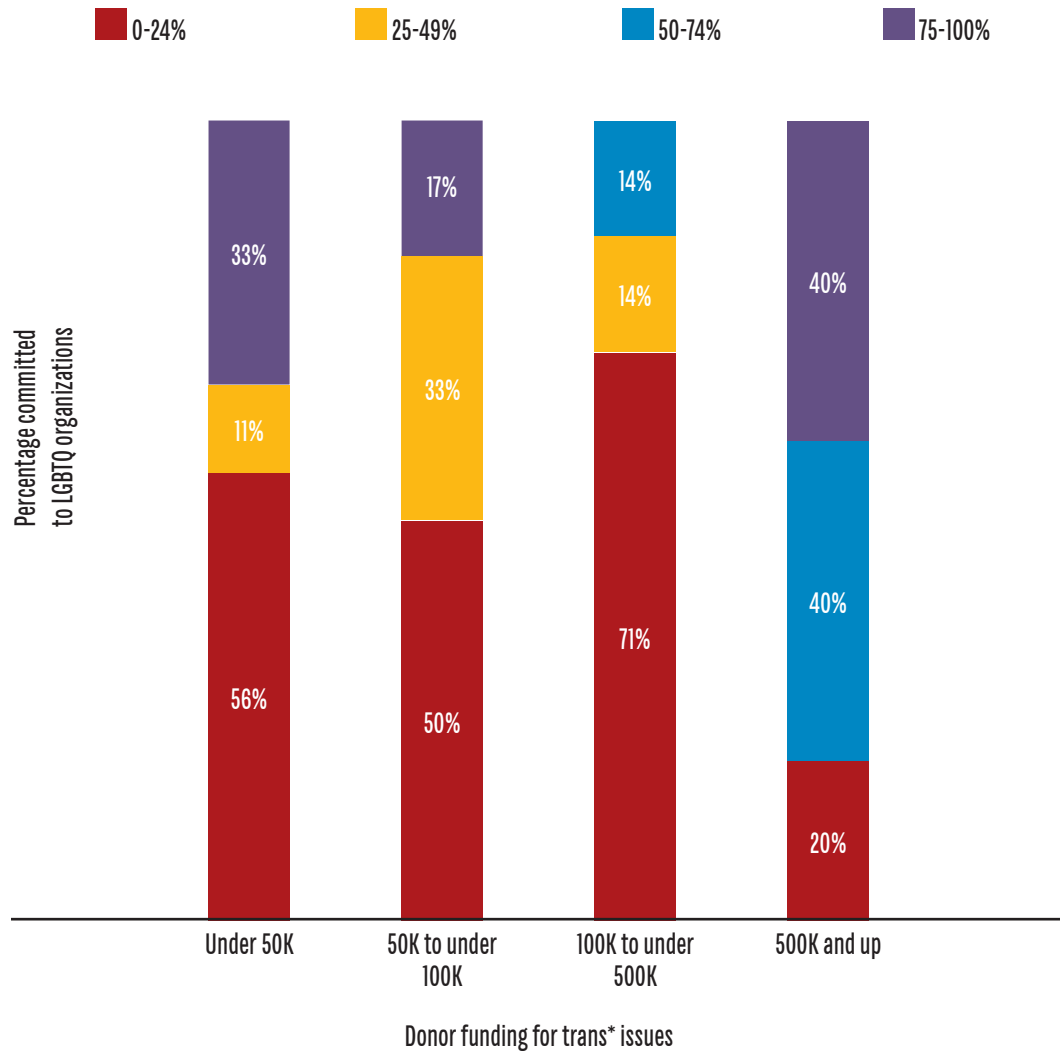
Donors were asked about the percentage of funds supporting trans\* work that went to LGBTQ organizations to do trans\* work in 2013. One in six (14%) did not track this information. Of those that do track this information, one fifth (20%) said that none of their trans\* grant making went to LGBTQ organizations and the same number (20%) said that nearly all (75–100%) of their trans\* grant making went to LGBTQ organizations. The largest percentage of donors (37%) gave up to 25 percent of their support for trans\* work to LGBTQ organizations. SEE FIGURE 2.2

**FIGURE 2.2 Overall percentage of funding for trans\*work committed to LGBTQ organizations**



Donors that committed more than US\$500,000 to trans\* work in 2013 were more likely to make grants to LGBTQ organizations to do trans\* work (80%) compared to those that committed US\$50,000 or less (33%). SEE FIGURE 2.3

**FIGURE 2.3 Donor funding for trans\* work by percentage committed to LGBTQ organizations**

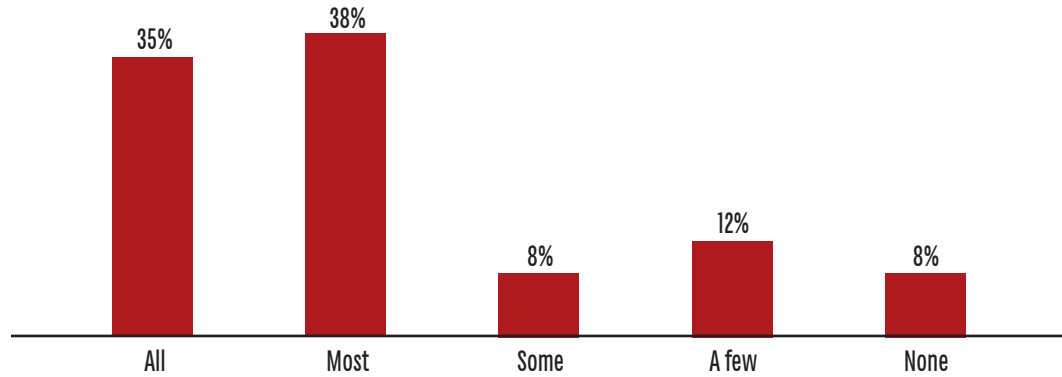


**Trans\* Leadership, General Operating Support, and Multiyear Grants**

For the purposes of this survey, trans\* leadership was defined as the majority of key decision makers for the organization identify as trans\*. Many donors (25%) do not track this information about the organizations they fund. Of those who do track this information, nearly two thirds of donors said that all (35%) or most (38%) organizations they funded were led by trans\* people.

SEE FIGURE 2.4

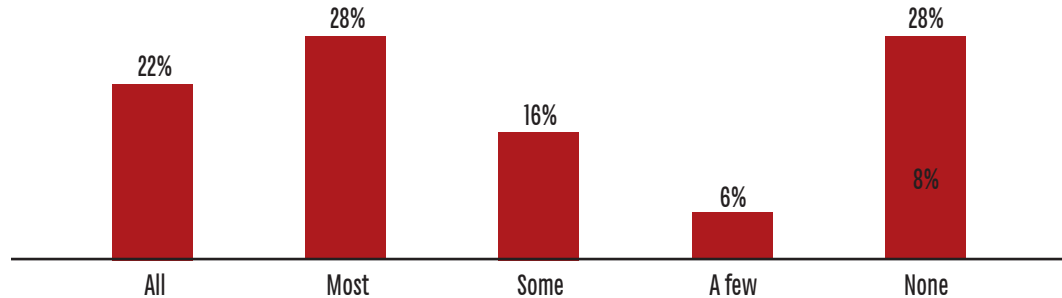
**FIGURE 2.4 Donor support of trans\* led organizations**



Most donors (91%) track the type of funding —general vs. project support; one year vs. multiyear grants— that they grant to organizations. Of those who track general operating support and project grants, half of the donors surveyed said that most (28%) or all (22%) of the organizations they fund receive at least 50 percent unrestricted or general operating support. Just over a quarter of donors (28%) said they give no grants of this type.

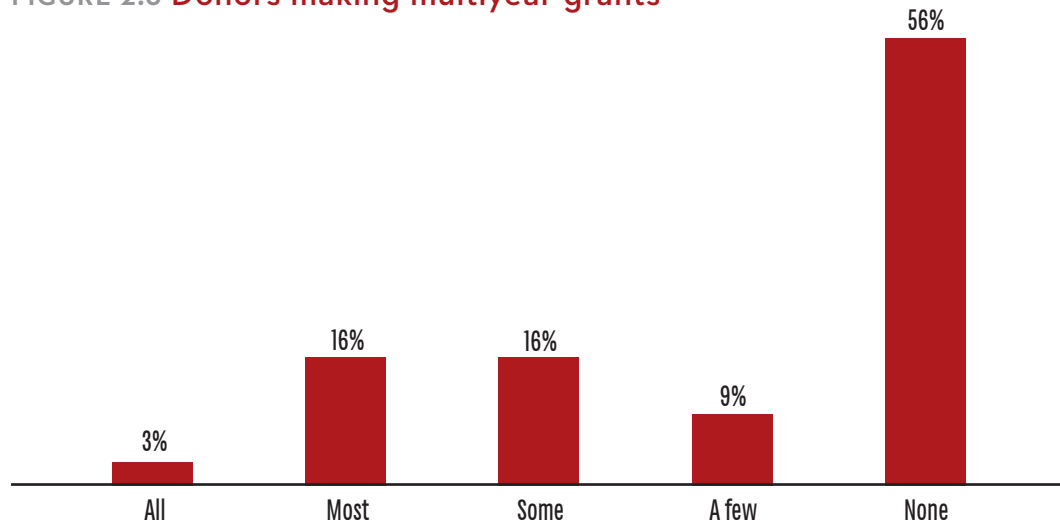
SEE FIGURE 2.5

**FIGURE 2.5 Donors making general operating support grants**



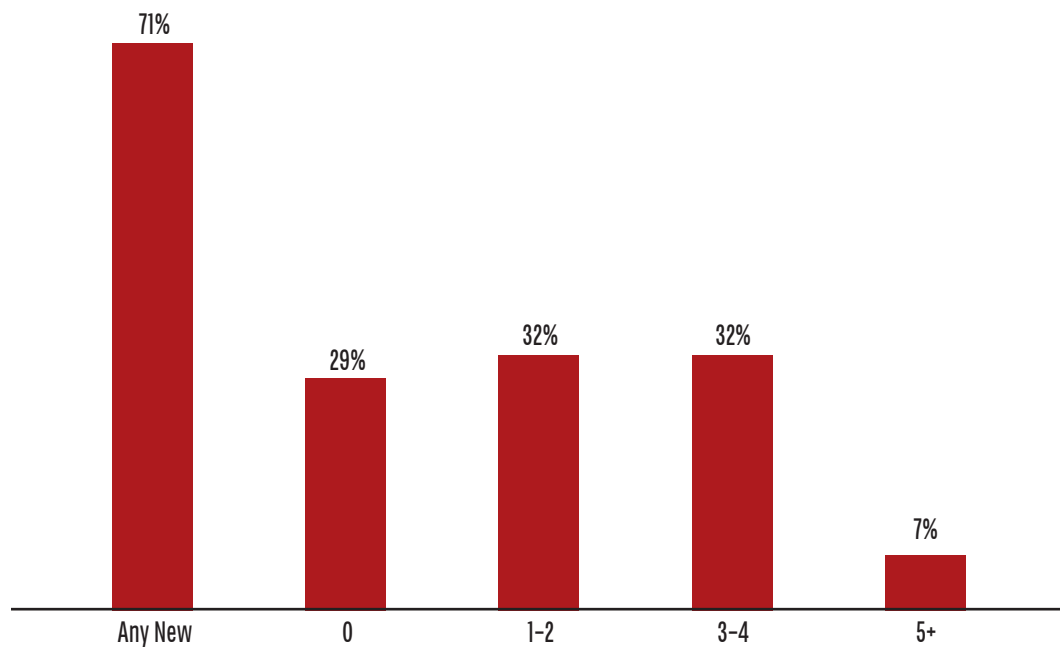
Of those donors who track multiyear grants, over half said they gave no multiyear grants to trans\* organizations (54%). Of those donors who track multiyear grants, over half said they did not give any to trans\* organizations (54%). SEE FIGURE 2.6

**FIGURE 2.6 Donors making multiyear grants**



Donors were asked if they funded trans\* organizations that they had never funded before in 2013, even if these organizations received funding from other sources. Overall, 71 percent of donors supported at least one or more trans\* organizations that were new to the donor, and that the donor had not supported before in 2013. One third of donors (32%) had funded one or two new trans\* organizations, one third (32%) had funded three or four new trans\* organizations, and just seven percent of donors had funded more than four new trans\* organizations. SEE FIGURE 2.7

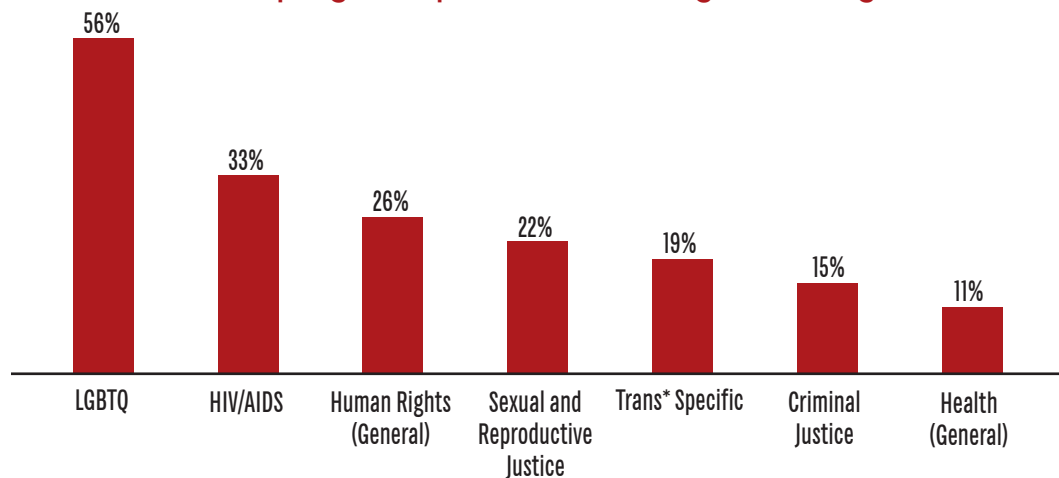
**FIGURE 2.7 Donors making first time grants to trans\* organizations**



### Donor Programs/Portfolios and Strategic Priorities

Donors were given a list of seven common programs or portfolios through which trans\* organizations are funded. Of the 27 donors that use a program or portfolio structure for their grant making, the largest number (56%) said they fund trans\* work within LGBTQ programs or portfolios. There were also large numbers of donors that said they funded through HIV/AIDS (33%) and human rights (25%) programs or portfolios. Nearly one in five donors said they funded through sexual and reproductive justice (22%) or a trans\* specific portfolio (19%). Smaller numbers of donors said they funded through criminal justice (15%) or general health (11%) programs or portfolios. SEE FIGURE 2.8

**FIGURE 2.8 Donor programs/portfolios funding trans\* organizations**

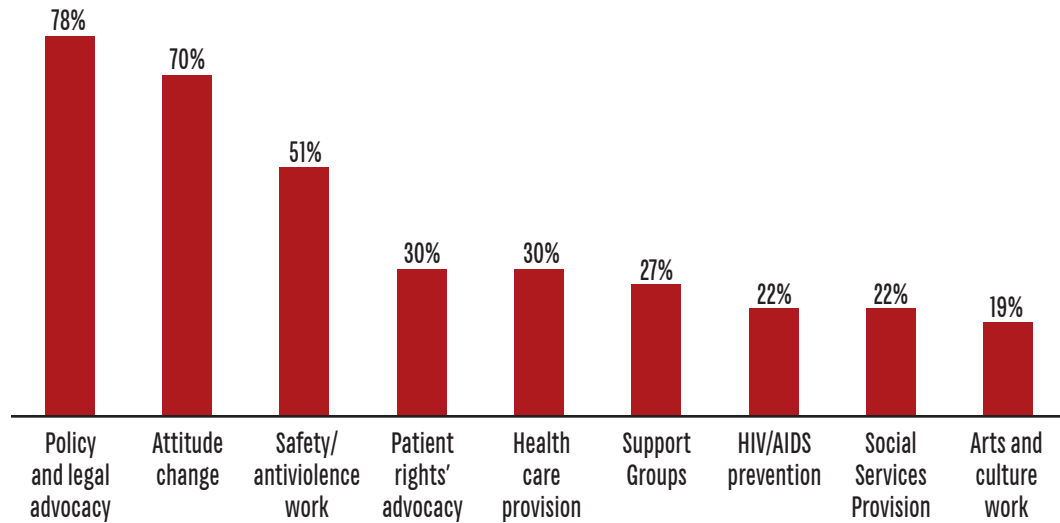


Several donors wrote in additional responses about how they fund trans\* work, including through other programs or portfolios, such as violence and security (2); sex work; emergency funding; social justice; regional programming; sex work; immigrant rights; and “all programs” (one each).

Common strategic priorities for donors funding trans\* organizations included legal and political advocacy (78%), attitude change (70%), and antiviolence work (51%). Strategic priorities related to direct services such as health care (30%), support groups (27%) and social services (22%) were less common. SEE FIGURE 2.9



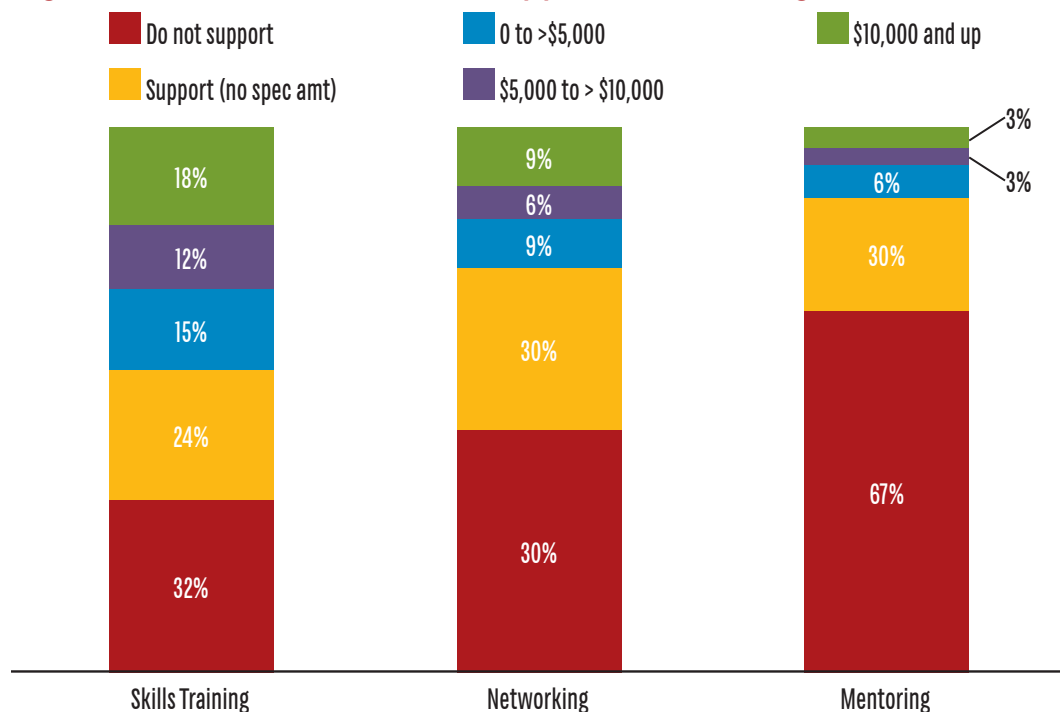
**FIGURE 2.9 Donor strategic priorities for trans\* funding**



**Nonfinancial Support and Capacity Building**

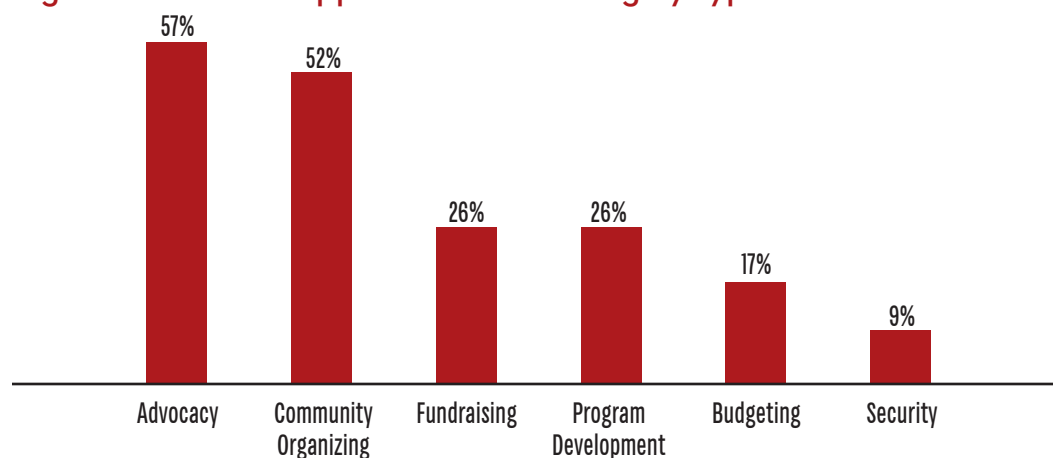
Donors supported trans\* organizations with nonfinancial capacity building opportunities such as skills training (68%), networking (55%) and mentoring (33%). While many donors did not specify the amount they spent on these activities, those donors that did typically spent under US\$10,000. SEE FIGURE 2.10

**Figure 2.10 Donor nonfinancial support of trans\* organizations**



Of the 23 donors who indicated that they support some kind of skills training, the largest number of donors said they support advocacy training (57%) or community organizing training (52%). Smaller numbers of donors said they support fundraising (26%), program development (26%), budgeting and financial management (17%), and security (9%) training. Donors also reported supporting skills training in other areas including leadership, job skills, communication and media training, and movement building. SEE FIGURE 2.11

**Figure 2.11 Donor support of skill training by type**



### **Donor Visibility, Application Procedures, and Language Access**

The majority of donors report that their promotional materials include trans\* information as part of LGBTQ information on their website (71%) and in printed/electronic materials (72%). A smaller number of donors say that they have a separate focus area on trans\* issues that is stated on their website (23%) or in printed/electronic materials (21%).

The most common change donors made to their application processes was to simplify their application form and to reduce the amount of information required (5 donors). Three donors improved their application process by allowing organizations to self-identify as doing trans\* work for tracking purposes and two donors made their applications available online. Three donors made applications more accessible by making them available in additional languages and two donors developed a mechanism whereby previous grantees could “update” their applications and/or submit less information than was required in their original application.

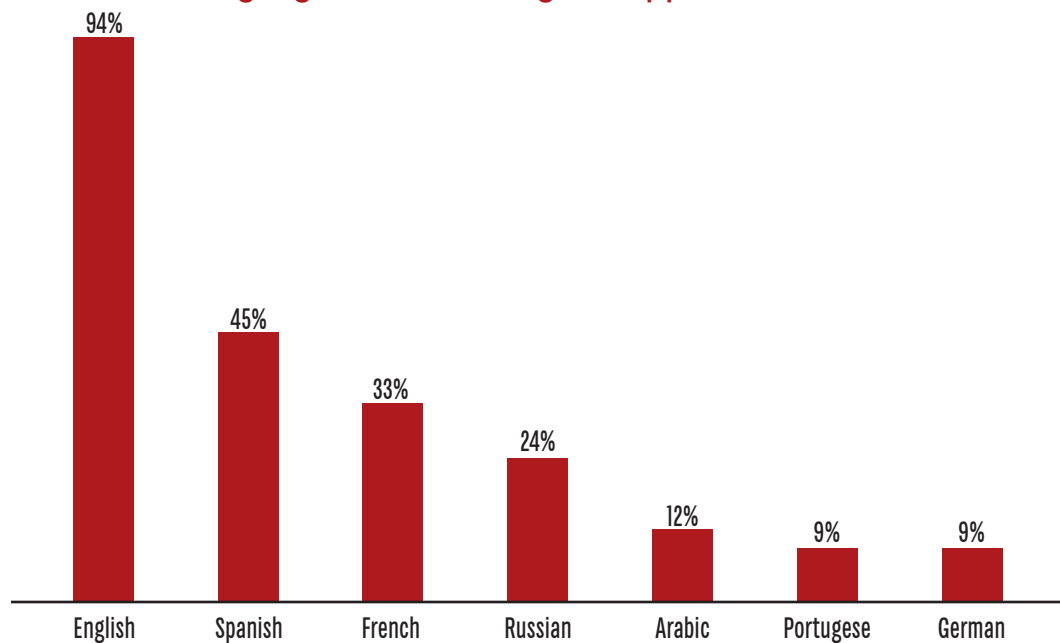
Three donors also reported having no formal application process. One donor reported that they reduced the barriers for trans\* organizations and community groups to apply by not requiring groups to be registered as a nonprofit or to have a bank account. Another donor reported instituting a formal, regularly scheduled request for proposals process.

The most common type of support donors provide to first-time applicants is one-on-one technical assistance from program staff to complete the proposal, including reviewing drafts, sending feedback, and answering questions. Twelve donors reported providing this type of support. Five donors had convened and/or met with potential grantees, organized informational sessions about their grants, and/or did research and direct outreach to trans\* organizations they would like to consider for funding.

Three donors reported having strategic discussions with prospective grantees about their work and/or providing on the ground support to new applicants through a network of advisors and/or local program staff. Two donors reported supporting new grantees by building technical assistance and/or capacity building opportunities into their proposals and/or providing direct support for new grantees to develop work plans and detailed budgets. Only one donor followed up with interested, but unsuccessful applicants to give feedback about why the organization did not receive the grant and what the organization could do differently next time.

Nearly all donors reported that their materials were available in English (94%) and nearly half (45%) were available in Spanish. One third of donors surveyed (33%) have application materials available in French and almost one quarter (24%) have application materials available in Russian. A smaller number of donors translated materials into Arabic (12%), Portuguese (9%) and German (9%). There were very small numbers of other languages represented in application materials. For example, only one donor reported translating into Chinese. SEE FIGURE 2.12

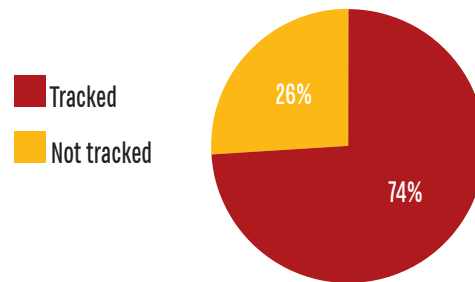
**FIGURE 2.12 Languages available in grant applications**



### The Overall Picture of Tracking Trans\* Funding

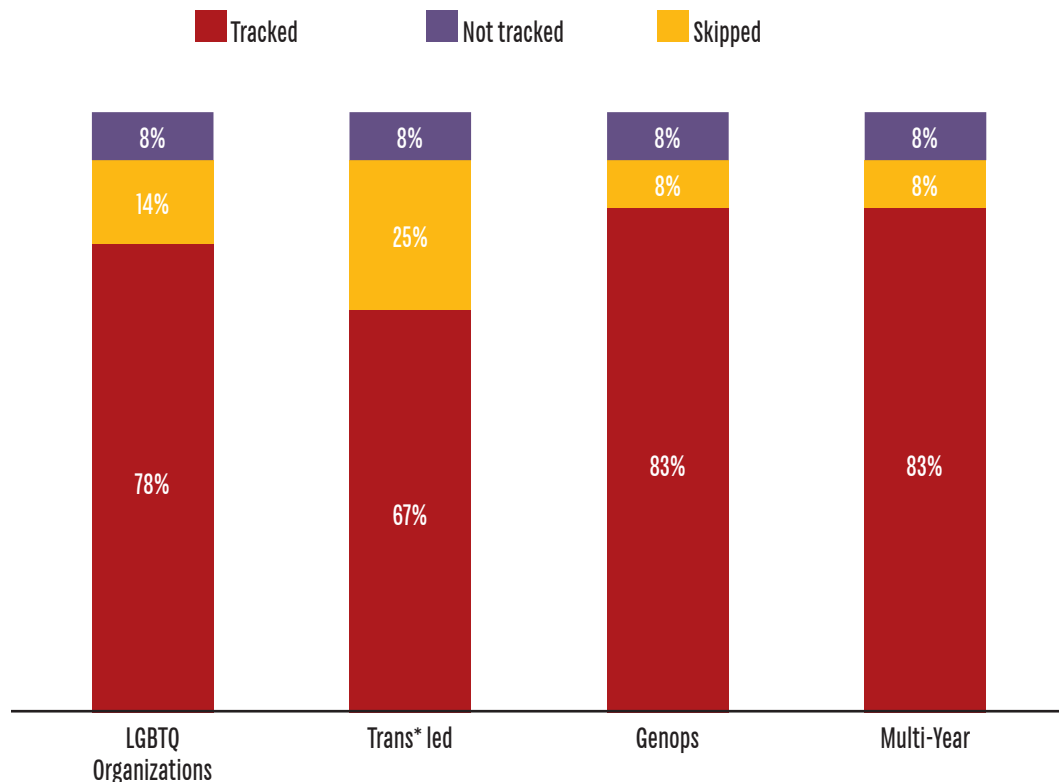
Nearly three quarters (74%) of the donors responding to the trans\* donor survey tracked the amount of funding committed to trans\* work in 2013, while just over one quarter (26%) did not track this information. SEE FIGURE 2.13

Figure 2.13 Donor tracking of trans\* funding



Of donors that track trans\* funding, nearly 89 percent track general operating support grants and multi year grants, while 83 percent track whether trans\* funding goes to LGBTQ organizations. Less than three quarters (72%) of donors track trans\* leadership. SEE FIGURE 2.14

FIGURE 2.14 Donor tracking of information about trans\* funding



Donors who responded to the survey committed nine million dollars to trans\* work in 2013; this number represents a baseline to track future growth in trans\* funding. Nearly 40 percent more donors participated in the trans\* donor survey in 2013 than in 2012. (23 vs. 38). Nearly three quarters (74%) of respondents reported tracking trans\* funding. More than half (57%) of donors committed US\$100,000 or less to supporting trans\* work in 2013. 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 reported not providing general operating support grants and more than half of donors did not provide multiyear grants (56%).

In the future, it would be helpful to track grants over several years and average them to even out one time larger grants and get a more accurate picture of the funding landscape. Funders' for LGBTQ Issues uses this approach in their annual tracking reports. To further streamline information collection, data could be compiled at the grant level by an individual or small team that classifies each grant according to a set list of criteria. Data about the proportion of trans\* funding that goes to LGBTQ organizations, trans\* leadership, general operating support, and multiyear grants could be tracked more accurately in this way.

Respondents were free to define what counted as “substantive” trans\* work for their own portfolios and as a result, there was variability. In addition, donors were not asked to separate trans\* and intersex funding, particularly since there was a high degree of correlation between trans\* organizations serving trans\*, intersex, and gender non-conforming constituents in the trans\* organizations survey.

In analyzing information from the trans\* donor survey, we have disregarded intermediary funding; for example, Arcus Foundation gives funds to Hivos for trans\* work and these funds have been reported by both groups. This has led to some double counting, but without line information about each grant, it would be difficult to de-duplicate this information systematically.

## CASE STUDIES

### PURPOSE AND GOALS

Quantitative data, such as those presented in the trans\* organization survey and trans\* donor survey, provide information about and from a broad group. The qualitative data generated through case studies allow for in-depth analysis of a smaller number of cases. This, in turn, enhances the ability to understand data in context and to make strategy and funding decisions that emerge directly from the experiences and information shared by trans\* people and organizations themselves.

The case studies presented here focus on the following geographic areas: Argentina, East and Southern Africa and the United States (New York City, Washington, DC, and Atlanta). They provide a variety of examples of successful and unsuccessful efforts to change both policies and daily practices that impact the lives of trans\* people. In conjunction with other data, these contribute to a general framework for identifying new areas of work and understanding the context of policy and practice change. The case studies also provide some specific recommendations to inform future investment.

### METHODS

These cases differed considerably in their scope based upon the availability of written records and information about the topic of the case. Thus, while each case began with a search for background information and donor contributed documents, this information was more available for Argentina and New York City than they were for East and Southern Africa, Atlanta and Washington, DC. Each case includes interviews with trans\* activists and, where relevant, the donors that support them.

We provide some background and the descriptive findings of the work within each country, region, or city context. The findings are organized thematically as per each case rather than as a universal set of themes. Conclusions specific to each case are offered at the end, while donor opportunities are offered as sidebars. At the end of the case studies, we offer a synthesis of the findings and general recommendations.

### ARGENTINA

Trans\* people around the world need access to identity documents that reflect current names and preferred gender marker. Without such documents, they are unable to live safely in their preferred gender identity. Many trans\* people without correct vital documents such as birth certificates also have difficulty finding jobs, voting, or obtaining other types of documentation.

Many jurisdictions require that trans\* people have irreversible surgeries and submit letters from medical practitioners attesting that they have done so, which creates barriers to gender transition (Mottet, 2012). However, Argentina has one of the most progressive gender identity laws in the world (Decree No. 773/2012 of the National Executive passed on May 24, 2012). Decree No. 773 is a remarkable law because it allows people to change name

and gender marker on national identity cards simply by filling out a form—without surgical requirements or an affidavit from an external source such as a medical provider. It affirmatively streamlines gender marker changes and requires all insurance providers to cover gender affirming care. Further, the law provides no standard for gender presentation, allowing self-definition for transgender people and those who wish to live in nonbinary genders.

This case study examines the context, process, and lessons learned from the passage of the Gender Identity Law in Argentina. There are several important reasons that this progressive law passed successfully and key reasons for its partial success in implementation. First are the reasons specific to Argentinian legal and cultural traditions: a strong human rights tradition that protects the right to identity; the rights of women and minorities that established Argentina as a pioneer in the related field of sexual minority rights; a robust civil society that is well-integrated into government via funding for organizations; and an ability for trans\* people to work directly in government, which is rare in the global context. Second, the tenacity and strategic actions of the trans\* organizations and allies involved and their diverse use of tactics and strategies that were well executed, despite the (all too common) experiences of conflict and disagreement at key points in the process.

There were many organizations and individuals involved in the struggle to pass this law, including la Asociación de Lucha por la Identidad Travesti (ALITT), La Comunidad Homosexual Argentina (CHA), Asociación de Travestis, Transexuales y Transgéneros de la Argentina (ATTTA), Federación Argentina Lesbianas, Gays, Bisexuales y Trans (FALGBT), Instituto Nacional contra la Discriminación, la Xenofobia y el Racismo/the National Institute Against Discrimination, Xenophobia and Racism (INADI), Red Latinoamericana y del Caribe de Personas Trans (REDLACTRANS), the International HIV/AIDS Alliance, and many others.

## **Background**

Argentinian trans\* people have faced violence and prejudice that would be sadly familiar to many trans\* activists around the world. Prior to the 2012 passage of the Gender Identity Law, activists documented experiences of violence from police and civilians against transwomen who were or were perceived to be sex workers. Local police were also able to use archaic laws—such as prohibiting dressing in clothes atypical for assigned gender—to arrest and hassle trans\* people. Sex reassignment surgery was illegal and trans\* people had to go to Chile or Thailand to obtain gender transition services.

The first case of a request to change name and sex on identification documents in Argentina occurred in 1965 (Farji Neer, 2012). By the 1980s, there were several rulings that allow changes to both name and gender marker for trans\* people who had received sex reassignment surgery in other countries despite the illegality of these procedures in Argentina.

As evidenced by the large number of groups working on the Gender Identity Law, trans\* activists built on a robust infrastructure for their policy advocacy work. Several trans\* organizations formed in the 1990s in Argentina, working on issues related to community safety and freedom from violence. For example, Asociación de Travestis, Transexuales y Transgéneros de la Argentina (ATTTA) began in 1993 as a reaction to police harassment and repression. These organizations had strong and mobilized networks and communities that laid the groundwork to advocate for a progressive law.

### **Contextual Factors**

Like many post-dictatorship Latin American democracies, Argentina has a strong legal commitment to human rights. Along with a strong commitment to the rights of women and minorities, Argentina has a unique history with regards to individual rights to understand and express identity. The birth records of the “living disappeared,” children of those killed by the military dictatorship, adopted and raised by military families, were altered so that these children appeared to be the biological children of their adoptive families. Over one hundred have been successfully identified through the National Bank of Genetic data and established that they are, in fact, children of the disappeared (Vaisman, 2014). The argument for a “right to identity” is not a common legal framework and it is one that is useful to struggles for trans\* rights.

Civil society in Argentina is strong and citizens participate in protests and general strikes to hold the government accountable for their rights (Faulk, 2012). This is in part a reaction to the military dictatorship (1976–1983), which is still remembered by many alive today. Strong civil society has also meant that the government is expected to pay for many services that are offered through non-governmental organizations (NGOs) in other contexts, including activist organizations working on trans\* issues. As several interviewees reported, there are also an extraordinary number of opportunities for previously un-, under- or non-legally employed trans\* people to do full time, paid work in government ministries, allowing them access to influential people, as well as opportunities to build relationships and work experience. Social attitudes towards gay people have improved since the dictatorship ended; in 2010 Argentina was the first country in Latin America to legalize same sex marriage (Carballo-Diéguez et al., 2013). While the passage of same sex marriage was controversial and divisive, the passage of the Gender Identity Law was not. Several interviewees agreed that the contention of the first helped the second pass with less notice. In addition, these discussions were part of inclusion of LGBT and intersex people in el Plan Nacional contra la Discriminación (PND). The PND is a policy that provides recommendations regarding the rights of stigmatized groups (Cabral, 2014). Twelve of these policies relate to LGBTI people, including several that focus on trans\* and intersex people’s rights to recognition of their gender identity.



### Advocacy Strategies

The most recent push for the Gender Identity Law began in 2007 with a group of leaders convened by ATTTA. In 2009, the Buenos Aires government passed a law allowing trans\* people to use their preferred name and pronoun on their identity documents (Cabral, 2014). This was a pioneering shift away from medicalization and autonomy for trans\* people in determining their gender identity on legal and identity documentation.

There were also trans\* people and allies working in various government agencies during and after the push for the Gender Identity Law. As one interviewee who worked for the health department clarified, government agencies could not take a leadership role in drafting the law; however, there were allies in the health ministry who held seminars and discussions related to the law for physicians, who were important stakeholders in passing the law. Interviewees reported that activists were able to work collaboratively with the staff of government agencies to shift votes towards their cause and to change language in the drafts of the bill to be more favorable. Several interviews and written reports from ATTTA mentioned that were a number of universities whose faculty and students supported the law, including the University of Buenos Aires and the National University of Rosario.

However, organizations did not hesitate to use confrontational tactics as well as collaborations with institutions and government stakeholders. Several interviewees recounted a strategy involving *amparo*, which is a process designed to protect the fundamental rights of a class of citizens to and rule on the constitutionality of fundamental rights related to that class. One activist recounted 14 trans\* people involved in this type of action, while written sources from ATTTA cited as many as 87 people involved.

Activists also created a small number of protest opportunities. One activist suggested that there were about 15 marches in total; compared to same sex marriage. However, activists clarified in interviews that this was strategic because the trans\* activists did not want to attract unnecessary attention from potentially opposed religious groups. Many interviewees, including those working for government agencies as well as civil society organizations, felt that it was strategic to work on trans\* issues directly after same sex marriage passed, but in a different and less divisive way.

Finally, there was also a media strategy. There were several prominent trans\* women, including actress Florencia de la V, who helped to raise the profile of the effort for the law. The *amparo* case was used to leverage interest in the law, for example, and distributing leaflets about the law occurred both before and after it passed. In addition, organizations created media binders and toolkits for reporters covering the issue.

## **Organizational Relationships and Roles**

Interviewees recounted that a large number of organizations and individuals worked in coalition on this project. This was particularly true towards the end of the push to pass it.

Non-trans\* LGB people and organizations worked with trans\* organizations on the proposed law but not always without conflict. While one or two non-trans\* gay and lesbian activists were involved in drafting the law itself, and were clear that they were doing this as allies to trans\* people and not in service to a larger LGBTQ movement; they were involved largely due to the need for specific expertise. Many trans\* activists said in their interviews that they would have preferred to work autonomously from LGBTQ movements, who did not always act in good faith or in the best interests of trans\* people.

Interviewees noted that there was conflict about whether to do one or two bills (separating the identity documents and health care sections), the wording of the law, and the treatment of those under 18. The proposed law went through countless drafts and re-drafts, with input from a large group of trans\* activists and some interested non-trans\* people. There is a strong tradition of legal scholarship around gender and sexuality rights in Argentina, and scholars' ability to use the language of rights was crucial to drafting a law that was both realistic to pass and pushed forth goals beyond passage of a law and toward a new standard of trans\* autonomy, dejudicialization, and depathologization.

## **Beyond the Law**

Nearly all interviewees mentioned that while the regulations for implementation of the identity documents portion of the law have been written and used successfully, the health care part has been less so. The identity documents system, while it has not been entirely free of complaints and mishaps, has been much simpler than activists feared it would be. As of this writing, access to trans\* related health care was still negligible for most trans\* people, particularly those insured under public systems. Health care in Argentina is delivered through three separate and parallel systems: private health insurance (also called "pre-paid" or *prepagado*), social security through labor unions and provincial governments, and the public system (Caporale, Elgart, & Gagliardino, 2013).

A government official interviewed for this report indicated that the relevant health department official has let the implementation of the law fall to the bottom of a large pile of priorities. In the meantime, Argentina has experienced another economic crisis, making it difficult to carry out projects that have costs attached. Activists were cautiously optimistic about the implementation of the health care part of the law, as were those who worked in or closely with the government. Because sex reassignment surgery was illegal prior to the law, and there are few providers who can do this type of work, there are plans, funded by the government, to do exchanges with health care professionals in other countries to increase opportunities for training in sex reassignment surgery. No activists were concerned

about repeal of the law, although several were concerned about the possible halt to implementation if the government were to change.

As implementation begins, several activists mentioned that politicians are using their support of the law to argue that they are modern and progressive compared to their opponents. This suggests that the fight for trans\* rights is part of a larger political process around Argentina's political sense of place in South America and in the world. In parts of the world where LGBTQ rights are associated negatively with Westernization rather than positively with modernity and futurity, politicians may pay a high cost for supporting this sort of law rather than basking in the halo of its success.

### **Lessons Learned**

Argentina has offered other jurisdictions a model of depathologized and dejudicialized gender identity legislation. While there are specific features of Argentina's political opportunity structure and its trans\* social movement that allowed this law to pass that are not generalizable to most other settings, there is an analytic framework suggested by the factors that contributed to this success. There are also lessons learned for funders interested in implementation post policy change. Jurisdictions considering whether and how to work on reforming trans\* identity documents and health care provision might scan the political opportunities using the following questions:

- Who regulates identity documents and health care in this context?
- Who implements regulations on these issues?
- Do we have any insiders or opportunities to cultivate or place insiders in these settings?
- Are trans\* issues in this context considered to be similar or different from LGB issues? In what ways?
- What, if any, recent policy wins on LGB or T issues have happened?
- What are the relevant ally organizations and issues, beyond LGB and T? (e.g. feminist, patients' rights, human rights)? Are there any risks to these alliances? If so, how can they be mitigated?
- What civil, political and/or human rights languages or concepts have traction in this setting? How do they relate to various aspects of trans\* rights? (e.g. identity rights, rights to bodily integrity, minority rights)

While many trans\* activists might undertake this process inductively, the creation and

implementation of a strategy is assisted by an organized method to assess opportunities and constraints in these areas.

Funders might facilitate the process of organizing a realistic scan of the environment and opportunity structure. They might also consider funding implementation plans for places that have succeeded in changing policy but are stalled in implementation.

### **Background**

The regions of East and Southern Africa include countries that vary widely in their political and social contexts for trans\* people and organizations. This case study focuses on regional advocacy opportunities in East and Southern Africa specific to trans\* organizations. Emphasis is placed on opportunities for donors to support and strengthen trans\* organizations and advance advocacy efforts in both regions.

Interviews were conducted with eleven activists and four donors with intimate knowledge of the work on the ground. The case study includes a summary and analysis of some of the work trans\* people are doing on two advocacy issues that were prioritized by trans\* activists: gender marker change for trans\* people and healthcare services and access to health care. This case study highlights the gaps between affirming legislation and implementation and also demonstrates how activists have made progress in resource poor and politically and socially challenging settings. It also provides a brief analysis of the opportunities for intra and cross regional work and capacity building. Although this case study is focused on trans\* specific opportunities, many organizations identified their constituencies broadly, to include trans\*, intersex, and gender non-conforming individuals.

### **Advocacy Issues**

#### **Name and/or Gender Marker Change**

**South Africa** has the most progressive policy on gender marker change in East and Southern Africa. Act 49, the Alteration of Sex Description and Sex Status Act of 2003 states,

*Any person whose sexual characteristics have been altered by surgical or medical treatment or by evolution through natural development resulting in gender reassignment, or any person who is intersexed may apply to the Director-General of the National Department of Home Affairs for the alteration of the sex description on his or her birth register.*

Despite this affirming policy, trans\* organizations in South Africa reported that their constituents frequently experience long delays in processing gender marker change applications, arbitrary denials, or requests for unnecessary documentation, such as proof of sex reassignment surgery. Community members report that officers at the Department

of Home Affairs who process these applications are not aware of the documentation required by law.

To facilitate community access to gender marker change, activists have created accessible instructions for how to apply and a template for the required letter from a medical provider, and are making efforts to provide legal resources for applicants who experience challenges. In some cases, when the staff of trans\* organizations have tried to provide community members with technical support in the application process, the Department of Home Affairs has refused to allow them to assist without obtaining power of attorney.

Despite both written and verbal commitments by the Department of Home Affairs to resolve problems with gender marker change applications in a timely manner, applicants continue to experience unresolved and long delays. Activists are trying to address this both through direct advocacy with government officials to improve implementation and by preparing a legal challenge to the Department of Home Affairs. Activists have approached the national office of the Department of Home Affairs and sought assistance from Parliament to encourage implementation of the gender marker change policy. Efforts have also been made to identify an appropriate case for litigation. However, this has been a challenge as the Department of Home Affairs has immediately resolved these cases when they learn of plans to litigate. This has led to frustration by trans\* organizations, as they feel they are working to resolve individual cases as opposed to finding institutional remedies.

Act 49 also lacks specific guidelines for implementation. These guidelines would be generated by Parliament and activists fear that implementation guidelines could actually restrict what is fairly flexible legislation. Activists felt it would be important to work together to decide how/whether to address the lack of implementation guidelines, especially since the results could be mixed.

Since 2010, a number of opportunities have emerged in **Kenya** for changes in government policies as they are redrafted to align with the new constitution. Trans\* activists have taken advantage of these political opportunities by meeting individually with decision makers within relevant government departments and drafting memoranda to inform Parliament and key stakeholders as bills are drafted. In several instances, activists have been able to ensure new policies do not adversely impact the rights of trans\* people. For example, when a bill related to identity cards was proposed, input from trans\* activists helped preserve the right to change one's name.

Kenyan law currently provides for name changes in identity documents, but not gender marker change. Name change on birth certificates, passports, and national identity cards is governed by the Minister of Interior and Coordination of the National Government. Activists have received varying responses to their attempts to change their gender marker

on each of these documents, including requests for a court order, proof of medical transition (including sex reassignment surgery), and long delays without explanation.

Activists in Kenya have primarily used strategic litigation to address the issue of gender marker change. The Open Society Foundations initially supported a legal consultative forum to train lawyers on trans\* issues. Several of the lawyers participating in this initial forum have worked closely with trans\* organizations to launch strategic litigation challenges, including one to obtain a precedent for gender marker change. Activists hope to set a precedent for gender marker change that will not require sex reassignment surgery. Trans\* organizations have also used the legal support emerging from this forum to support name changes for their trans\* constituents.

In Zimbabwe, Zambia, and Botswana there has been a strong interest in doing work on gender marker change. In **Zimbabwe**, activists were not aware of any relevant policies. However, they have been successful in applying for gender marker change with the Department of Home Affairs. Activists reported that government officials were amenable to gender marker change and requested a letter from either a medical doctor or psychologist to process the application. Activists have developed relationships with friendly providers in order to obtain the necessary documentation to apply. Not many trans\* people are familiar with the process for gender marker change, so demand has been low. Despite long delays in processing applications, activists said they were not aware of anyone being denied gender marker change.

In **Botswana**, there is no specific legislation to criminalize trans\* and intersex people. While activists knew of one case where an intersex person was able to change their gender marker without a court order, this is not the norm. Activists have identified a number of relevant cases to litigate the issue of gender marker change, including with clients who are transwomen, transmen, and intersex. They also have one case of an intersex person who would like to change their gender marker to non-specific. Trans\* activists have made strong efforts to identify friendly lawyers to take these cases, including current and former lawyers at human rights organizations and private lawyers who have shown interest in these issues. However, they have found it challenging to find legal support that is sensitive and informed about trans\* issues and frequently do not have adequate resources to obtain the best possible legal support.

In **Zambia**, activists were not aware of a policy on changing gender markers. With the support of Mama Cash, they are currently investigating the local policy context and contacting their Department of Home Affairs to see what would be possible.

Several other countries in Southern Africa have progressive name and gender marker change legislation, but lack a critical mass of trans\* activists. For example, in **Namibia**,



## Opportunities for Funding

**Commission a review of policy and practice for name and gender marker change in East and Southern Africa.** Such a review could reveal opportunities to support trans\* activists to better understand and utilize existing policies on name and/or gender marker change or increase demand in environments where name and gender marker change has been possible without a policy. This could also lay the groundwork for regional advocacy on the issue of gender marker change. Some donors, such as Mama Cash, have already been supporting this type of review at the national level at the request of trans\* activists, but it may be strategic to look more holistically at the opportunities in both regions and work with someone with expertise in policy review who could make this information available to activists in a comprehensive and timely manner.

**Develop and expand legal resources sensitive to trans\* issues at the national level; support regional networking opportunities to nurture lawyers involved in this work.**

Activists have been very creative in identifying legal resources in their countries to support cases related to name and/or gender marker change and health rights violations. However, in some countries human rights lawyers are not sensitive to trans\* issues and/or available legal resources are not sufficient to meet needs. The Open Society Foundations has worked to develop legal resources in Kenya, which has led to a number of relevant court cases. Developing legal resources in other countries and supporting opportunities for lawyers to exchange information and tactics would be a useful way to further catalyze the trans\* legal response.

the Open Society Initiative for Southern Africa (OSISA) reported that under current legislation it is possible to change documentation and obtain sex reassignment surgery. There have been instances where individuals who have transitioned were issued identity documents without a problem. However, few people know about these provisions and even fewer have used them. In **Angola**, there is a legal reform process currently underway and OSISA is anticipating that the legislation currently under consideration will be signed into law and may represent the most progressive on the continent. Public opinion on trans\* people in Angola has been heavily influenced by pop star/hip hop artist Titica, an out transsexual. In both countries, the legislation may provide an opportunity to strengthen LGBTQ work on trans\* issues and support trans\* activists and organizations to publicize these gains at the community level and monitor the implementation of new legislation.

## Access to Health Care

Organizations working with trans\*, intersex, and gender non-conforming people in East and Southern Africa identified access to comprehensive primary health care, gender transition, and HIV prevention services as a priority. All organizations interviewed conducted some activities related to facilitating access to services and/or advocating for improvements in service delivery for trans\* people. Activities included:

### *Assessing health needs of trans\* communities*

Activists in **South Africa** conducted a needs assessment focused on health among their trans\* and intersex constituencies. A gap was identified in HIV and sexual health-related services specific to trans\* men who have sex with men, particularly those living in black, rural townships. Using this information, activists were able to develop education materials specific to trans\* men who have sex with men and

make lube distribution a priority in the communities where they work to reduce HIV transmission, along with condom distribution originally prioritized by service providers.

Trans\* organizations in **Lesotho and Uganda** have used needs assessments to better understand the health challenges and access to services in their communities. In Uganda, activists saw that HIV prevention services were the only services to specifically mention trans\* people. They undertook a baseline study to understand more about the types and quality of services trans\* people were accessing. Using the results of the baseline survey, activists opened a discussion with health officials and shared the results in venues where decisions were made about national policy and practice. In Lesotho, Hivos supported activists to assess the health needs of trans\* communities and found that trans\* and intersex people found stigma and discrimination by health care providers to be a significant deterrent for trans\* and intersex people to access services. They are now seeking additional funding to sensitize health practitioners.

*Identifying and cultivating relationships with trans\* friendly providers; training and sensitization of healthcare providers*

In **Kenya**, trans\* organizations worked with the Ministry of Health to train county level health care practitioners in the public health system on trans\* health issues. While additional resources will be needed to provide these trainings and establish the necessary relationships with county level heads, the trans\* organizations have experienced openness and a positive response from representatives within the Ministry of Health. Activists have also developed relationships within Kenyatta International Hospital with several endocrinologists and one surgeon and have used these relationships to facilitate transition related services for their constituencies in Nairobi.

In both East and Southern Africa, activists have found it easier to work with private providers, as these providers have more autonomy over their work and are more responsive to client needs and requests. In **Zambia**, activists have developed educational materials and a fifteen-minute training for nurses in private clinics. In **Zimbabwe**, trans\* activists have identified a few friendly doctors willing to write necessary letters to substantiate requests for gender marker change. They have also identified providers to obtain prescriptions for hormones through the public system, but trans\* people continue to pay out-of-pocket for their hormones at the pharmacy. Many activists mentioned a desire to work with public systems to make health services, including gender transition related services, more accessible and available at a lower cost.

At the regional level, activists in **South Africa** have organized health focused conferences for the last two years, where more than forty percent of attendees were health care providers. Activists have found this a useful place to identify and train friendly providers and encourage professional exchange among the medical community.



## Opportunities for Funding

### Consider intra-region and cross-regional exchange opportunities focused on health.

As health is an area prioritized across the board by trans\* organizations in East and Southern Africa, opportunities to learn from one another are an important opportunity to build the movement. Such exchanges could be a fruitful way to coordinate work between organizations in the same country as well as infuse new programmatic and advocacy strategies. As the context varies significantly between countries, peer exchange would be a preferred strategy for identifying regional advocacy priorities to address jointly. However, peer exchange could also lay the groundwork for activists to engage jointly at regional and international levels.

**Investigate instances where trans\* people are able to get transition related services through the public health system with an eye toward replication.** Many activists reported the availability of hormones through the public health system. However, in many cases trans\* people were not able to access them as providers do not have the necessary skills and information to prescribe hormones for gender transition and/or are not sensitized to the needs of trans\* people. To increase access to and demand for gender transition related services, availability of sensitive and knowledgeable providers within public health systems will be critical. For donors that already work with national public health systems around HIV/AIDS prevention and services or LGBTQ health services, integration of gender transition services into these discussions could be an opportunity to facilitate the expansion of public health services to meet the needs of trans\* people. In addition, such work could also be supported through a consultant review of practices related to gender marker change or through grants to interested organizations as part of their health work.

### *Connecting trans\* people to health services and advocating to resolve barriers to access*

**South Africa** is one of the few countries in the region where gender transition related services are available within the public health system. Although on paper there should be sixteen clinics where surgeries are available, only one clinic is currently offering these services. This clinic has twenty-year waitlist. South African activists have also found the denial of psychosocial support services to trans\* people in the public health system. They are trying to resolve these issues by launching complaints through relevant government mechanisms, such as the Commission for Gender Equality within the Department of Health. These experiences highlight that even when services are guaranteed within policy, they are often unavailable in practice.

In **Lesotho**, LGBTQ activists have been working with one clinic to ensure a favorable environment for LGBTQ people to access health services. They have found increasing demand for services to be as important as creating an enabling environment.

### *Advocating for clinical guidelines and/or standards of care specific to transition related services*

In **Kenya**, an activist was denied sex reassignment surgery and made a complaint to the ombuds-person. At this time, there was a commitment from the medical board to develop national guidelines for the treatment of transsexuality. A technical working group was formed, but in practice, the development of guidelines did not happen in a timely way. In June 2014, activists brought a legal case to try to enforce the development of guidelines. Kenyan activists have prioritized the development of treatment guidelines as they feel this would provide a mechanism for trans\* people to access gender transition related services.

In other countries in the region, including **Botswana**, activists are thinking carefully about the unintended consequences of developing treatment guidelines for transsexuality, as it has the potential to over medicalize the bodies of trans\* people. The guidelines could be linked with access to gender marker change in a way that may limit options for trans\* people who do not want particular gender transition related services, but would like to change their gender marker.

#### *Pursuing legal redress in cases of rights violation in health care settings*

In **Botswana**, activists have identified a number of violations of health rights for which they would like to pursue legal redress. Specific issues include: denial of hysterectomies based on transsexual identity, surgeries performed on intersex individuals without patient consent, and botched surgeries. Identifying sensitive legal resources for these cases has been a challenge.

#### **Capacity Building and Donor Support**

Trans\* organizations in East and Southern Africa face particular challenges with regard to their organizational capacity and accessing adequate funding to support their work. Activists from a number of countries emphasized that trans\* activists lack capacity in community organizing, advocacy, and organizational management. The majority of trans\* organizations in both regions are less than five years old. A number of trans\* activists had not had previous experience in social movements. In addition, many did not finish secondary school due to discrimination and poor treatment. Activists urged donors not to measure trans\* organizations according to standards for LGBTQ organizations, where activists may have had more formal training and organizations have had more time to build skills, experience, and credibility. In particular, the following issues were highlighted where donors could play an important role in building capacity in trans\* movements:

#### *Supporting new groups/support to do community outreach*

Almost all trans\* organizations interviewed had a challenging time obtaining their first grant and registering as an independent organization. Activists reported difficulties identifying donors that would be willing/able to support their work and long delays in receiving funding even when they were able to identify an interested donor. Initial grants were frequently so small that activists found it challenging to establish more sustainable governance structures and to do the necessary outreach to their constituencies in environments where trans\* and intersex issues may not be well understood at the community level.

Some interviewees cited positive interventions donors made to support new groups, such as OSISA funding a consultancy for a trans\* activist, which allowed her to do the ground-work for establishing a new organization at a time when she lacked the necessary elements to receive a grant. Other donors, such as UHAI have brokered activist participation in

social justice fellowship programs and/or incubation relationships with larger organizations, which provide activists with support and training prior to starting an independent organization.

### *Supporting skills and capacity development for trans\* organizations*

To build capacity among trans\* activists and organizations, activists in East and Southern Africa stressed the need to develop skills in the following areas:

- Fundraising, including writing proposals and developing budgets
- Financial management and budgeting
- Organizational governance, including human resources
- Understanding laws and policies
- Advocacy writing, including bills, legal correspondence, and policy briefs
- Program and strategy development
- Communication skills and use of media

There was a strong sense that these opportunities did not need to be specific to trans\* organizations but could be more general as these skills are applicable to a wide range of organizations. Several activists leading newer organizations mentioned that they have a difficult time finding out about these opportunities and being included. Activists working with more established organizations mentioned that there is a high degree of donor duplication related to these opportunities and that better coordination of skills building among donors supporting the same organizations would be helpful.

### *Need for additional flexibility/general operating support*

A number of trans\* organizations reported challenges obtaining general operating support and/or flexible funding. Multiple one year project grants were the primary source of funding for the majority of trans\* organizations receiving external funding in East and Southern Africa. Gaps between project grants often temporarily stall activities and compromise the relationships trans\* organizations have with their constituents and communities. Activists urged donors to build additional general operating support into grants. These funds are critical for investing in staff capacity, equipment, printing and office supplies, and community mobilization efforts. Activists reported that barriers to doing their best work include the need to seek in-kind donations to cover these budget items; sharing a single computer between multiple staff and volunteers, requiring work at

an internet café; and a lack of printed materials for trainings and workshops.

One organization suggested a greater focus on working with organizations to establish solid governance structures and trusting these structures to have greater oversight over shifting organizational priorities and activities, a solution which could work for more established organizations. Other organizations may benefit from support from donors to adequately budget for organizational development activities, in addition to programmatic ones. Better coordination between donors funding trans\* organizations will have the potential to increase the amount available for general support.

### *Leadership, Management, and Sustainability*

Almost all organizations interviewed identified leadership, management, and sustainability as a significant challenge. As most of the trans\* organizations interviewed formed around one charismatic leader, activists urged donors to support additional staff for small organizations and to ensure that these staff members have access to relevant training and capacity building opportunities. Several interviewees have specific examples of how trans\* organizations and advocacy efforts have suffered in particular countries when leaders do not have adequate management training or support to build staff structures that can be sustained after the founding leader departs.

Two promising examples of leadership transition in trans\* organizations occurred with Gender DynamiX (South Africa) and Jinsiangu (Kenya). It would be useful to do a more in-depth analysis of the positive elements of these transitions to identify lessons learned that could be applied to other organizations undergoing leadership transition.

### **Trans\* Regional Advocacy**

There have been several key efforts for regional advocacy among trans\* organizations in East and Southern Africa. In 2012, three trans\* and intersex organizations came together (two from South Africa and one from Uganda) to form Transitioning Africa, an umbrella organization with a mission to engage in regional advocacy work and to facilitate collaboration between trans\* and intersex organizations. Transitioning Africa experienced some significant challenges including interpersonal conflicts, loss of their coordinator, and withdrawal of one of the founding organizations so that organization could focus on domestic work.

In August 2014, Transgender Intersex Africa, with support from the Arcus Foundation, held a regional advocacy and capacity building summit in Johannesburg. During this meeting, activists identified the following priorities for trans\* work: access to primary health care services and gender affirming services, access to medical services for trans\* people, and opportunities for engaging in the global debate on the “depathologization” of gender diversity.

Across countries, trans\* activists wanted more opportunities to exchange information, materials, and advocacy strategies relevant for their work. However, opinions were mixed about the usefulness and feasibility of a regional advocacy strategy on trans\* issues. About half of the activists interviewed felt it was more important to prioritize national work and that it might prove difficult to develop a joint strategy when the contexts vary widely. The other half emphasized the importance of having a trans\* led space for dialogue about issues relevant for both East and Southern Africa. In particular, the following opportunities were identified for regional work:

#### *Leveraging capacity building resources*

There was interest by several organizations in regional and/or international resources for capacity building. Trans\* organizations have found regional and national organizations focused on LGBTQ issues, HIV/AIDS services and prevention, and/or social justice to be invaluable resources for incubating new organizations and providing training and capacity building support to trans\* activists. Resources that were mentioned as particularly valuable include: the Pan African Fellowship Programme of Fahamu Networks for Social Justice; the Trainer of Trainers (TOTS) course of the AIDS and Rights Alliance of Southern Africa (ARASA); technical support to trans\* organizations provided by Global Action for Trans\* Equality (GATE); and the Programme for pan-African LGBTI Advocacy of UHAI-EASHRI. Trans activists also mentioned that these entities have helped them gain access to national, regional, and global advocacy spaces that they may not otherwise be able to access. Mapping the resources available in the region, what they offer, and what kind of support they would need to work with trans\* organizations could be a way to leverage existing resources to benefit trans\* activists and organizations.

#### *Brokering relationships with LGBTQ Organizations and Movements*

Trans\* and intersex activists had varying and complicated relationships to LGBTQ organizations. Throughout East and Southern Africa, activists identified the conflation of gender and sexuality in public attitudes as a challenge to understanding the needs, concerns, and interests of trans\* people. One specific example mentioned by several activists is the conflation of transwomen with men who have sex with men in the response to HIV/AIDS. Activists felt it was important to clearly distinguish gender identity from sexuality in advocacy work. In several instances, both donors and activists felt that advocacy around access to gender marker change and gender transition services could be enhanced by separating it from advocacy specific to sexuality due to anti-homosexuality sentiments.

Trans\* activists also experienced frustration with LGBTQ organizations that receive funding to do trans\* and intersex programming; these programs are often either non-existent or inappropriate in practice. A few activists reported that a specific aim of their work focused on increasing the sensitivity of LGBTQ organizations to trans\* and intersex issues. Many activists throughout both regions felt strongly that donors should do more

to identify and support trans\* led organizations and take extra measures to hold LGBTQ organizations responsible for the presence and quality of their trans\* and intersex programming. The one area where activists felt it would be particularly useful to engage jointly with LGBTQ groups was around regional and global advocacy, where they felt that it might be difficult to highlight trans\* and intersex issues separately and that they could benefit from the experience and access LGBTQ groups have built in these spaces.

### *Intra-country and cross-regional dialogue*

Both trans\* activists and donors were enthusiastic about additional opportunities for dialogue and exchange between countries in East and Southern Africa. There was a strong sense that these efforts should be led by trans\* activists as opposed to donors. Activists in Kenya and Botswana have submitted concept papers to donors, including the Arcus Foundation, to support such a meeting. In addition, Transgender Intersex Africa (TIA) received a limited amount of support through Transitioning Africa for regional coordination activities. Due to fragmentation and personal conflicts amongst trans\* activists, it is critical that donors support a coordination mechanism that activists themselves have chosen for regional work. A meeting would be the first step in establishing such a mechanism and ensuring it holds legitimacy for those involved. However, donors can play a role in ensuring that such a meeting is inclusive of all interested activists in the region.

Activists mentioned aspirations for such a dialogue and coordination mechanism:

1. To gain access to regional and international advocacy spaces, such as African Union, the Global Fund to Fight AIDS, Tuberculosis and Malaria (GFATM), UNAIDS, UNDP, among others, and to represent trans\* experiences in East and Southern Africa;
2. To ensure that trans\* and intersex representation in LGBTQI, health, and HIV/AIDS spaces is consistent and more representative of the diversity of experiences in both regions;
3. To exchange materials, information, resources, and advocacy strategies; and
4. To identify cross-cutting capacity building needs and begin to address them.

### **Overview**

There is a large trans\* movement in the United States—eighty five organizations responded to the trans\* organization survey—yet more than half (52%) had budgets of less than US\$5,000 in 2013. Less than one third (30%) of trans\* organizations in the US have foundation funding. Fifty nine percent of respondents say that their primary barrier to obtaining funding is lack of donor interest in trans\* issues.



Donors supporting trans\* organizations in the United States have expressed strong interest in policy change. In a number of localities, policies and/or court cases on name and/or gender marker change for trans\* people have been in the news, including recent gains in New York City to remove the surgical requirements for trans\* people to correct gender markers on their birth certificates.

The United States case study focuses on trans\* organizations efforts to change policy and practice in New York City, Washington DC, and Atlanta, Georgia. The first section explores efforts to change gender marker policies in New York City (2004–2006) and Washington, DC (2010–2013); the first was unsuccessful and the second successful. The final section describes efforts by trans\* organizations and their allies in Atlanta to make existing name change procedures accessible to trans\* people in a decentralized environment where policy change may be difficult.

### **Washington, DC and New York City: Birth Certificate Gender Marker Change** *Background*

Birth certificates include a designation of sex assigned by the state upon the registration of a newborn infant. This document not only declares the legal sex of the infant and follows him or her throughout their lifetime but also serves as a record, which all future documentation, such as passports, school registration, driving licenses, professional records is based upon. For trans\* people assigned a sex at birth that does not reflect their current gender identity, changing a birth certificate and other vital documents may represent the difference between having control over one's disclosure of trans\* experience and being forced to disclose that experience. This in turn may impact employability and job security and can have serious implications for being able to move through the world without facing violence or harassment. Gender marker change is an issue addressed by trans\* activists throughout the world and is a sentinel policy for future positive changes.

Issues that often arise in efforts to modernize identity document standards to accommodate trans\* people include (1) requirements that surgery be performed and documented and related concerns about the “permanence” of gender marker change; (2) medical affidavits of the need for such a change; (3) concerns about fraud; (4) concerns about changing “historical documents” such as birth certificates; and (5) the age at which people can make gender marker changes, with or without permission of parents for those under the legal age of consent (Mottet, 2012).

In addition to the degree birth certificate policies are trans\* affirming and accessible, there are multiple possible ways to reissue new birth certificates. For example, in New York City, for many years trans\* people were re-issued birth certificates that had no gender marker at all (Currah & Moore, 2009). Other jurisdictions re-issue birth certificates that indicate they have been corrected. Both methods are stigmatizing to trans\* people even though

they are preferable to not allowing changes at all.

Washington, DC and New York City provide contrasting cases of successful and unsuccessful (as of this writing) efforts to provide trans\* people with opportunities to change their birth certificates. Washington, DC is a jurisdiction with about 650,000 people, while New York City has nearly nine million people. In this case study, divergent experiences with gender marker change legislation in Washington DC and New York City are juxtaposed to understand the contextual and strategic factors that impacted the outcomes and draw lessons learned.

### *New York City*

Designation of sex on birth certificates has been contested in New York City (NYC) since 1965; as of this writing, at least three major efforts had been made to create a process for change (Currah & Moore, 2009). In 2002, the most recent unsuccessful attempt began with a coalition of fourteen organizations sending a letter to the NYC Department of Health and Mental Hygiene (NYC DOHMH) suggesting that reforms were necessary. This came on the heels of a difficult but successful effort to add LGBT protections to the city's human rights regulations.

After unsuccessfully approaching the state's birth certificate policymakers, the nascent Sylvia Rivera Law Project, staff at the LGBT Center, and the now-defunct Transgender Law and Policy Institute worked to hold meetings with the NYC DOHMH. For NYC officials involved in these negotiations, the issue of surgical modification and the permanence of any change in sex designation were paramount. In contrast, the activists involved wanted to remove the requirement for surgical permanence as not all trans\* people want or can afford surgical procedures but still need to regularize their identity documents. A compromise was reached in which "appropriate medical treatment"—which did not necessarily have to include surgery—was the standard for changing the sex on a birth certificate.

The activists did not have a specific champion or ally within the DOHMH and, in fact, the commissioner who was their main liaison was a reluctant advocate with many problematic views about surgical requirements and issues of fraud. The group created a compromise policy. However, on the eve of passage, their efforts were halted when other agencies interceded, including those involved in criminal justice. Negative media coverage and letters from the public compounded these challenges, requiring that activists put their efforts on hold until the present day.

### *Washington, DC*

The DC Trans Coalition (DCTC), a local advocacy group working to advance the rights of transgender people in Washington, DC, began efforts to pass gender marker change legislation in 2010. DCTC was connected, via a large national organization, to a staff member



in a Washington, DC council person's office, who helped write early drafts of the bill. This council person went on to be an early supporter of the bill. Several trans organizers worked to lobby the DC Council with the support of the larger national organization.

The bill was named after Deoni Jones, a transwoman of color murdered in 2012. While DCTC has been a predominantly white organization, organizers working for this bill proactively reached out to trans\* people of color. The DC Council staff who were both of color and LGBT supported this intersectional approach. Stakeholder meetings with government officials included the heads of departments so that, unlike in New York City, there were few surprises. The police department was also included as a stakeholder.

Lobbyists built upon Washington, DC's strong civil rights traditions and recent passage of sexual orientation nondiscrimination laws and same sex marriage. They created a bill that would pass on a consent agenda, a group of policies voted on together because of their uncontroversial nature. They were also successful in arguing that the process was one of "technical modernization," because the federal government had already instituted similar standards for passports. "Good government" council people, even if they were not traditionally supportive of LGBTQ rights, were interested in harmonizing municipal documentation with federal standards and this made passage of the bill appealing to them. High school students from a local charter school testified at the hearing and the JaParker Deoni Jones Birth Certificate Equality Amendment Act of 2013 passed unanimously on the consent agenda in May 2013.

The 2013 bill received very little mainstream media coverage that was anything other than supportive. The Deoni Jones Act was described by both the *Washington Post* and *LA Times* newspapers as making sex changes "easier" and a potential "model" for the rest of the nation. This was partly strategic on the part of the organizers behind the passage of the bill, who framed the effort as a "technical modernization" rather than a rights issue.

While both the New York City and Washington, DC cases involved negotiations between government officials and activists, the DC case involved a number of sympathetic insiders with power and reach that did not occur in the earlier New York City case. The Washington, DC activists were also in a more favorable policy environment because other positive changes had already occurred for the LGBTQ community nationwide. They were successfully able to frame the process as a "technical modernization." These factors contributed to their success.

### **Atlanta**

Donors supporting trans\* work and trans\* organizations have placed strong emphasis on policy change related to names and gender markers and access to health services for trans\* people. However, in some contexts, the time may not be right for policy change. In

some areas, activists are making important changes in practice that have an immediate impact on the lives of trans\* people without the presence of an enabling policy. In contrast to the policy efforts related to gender marker change in NYC and Washington, DC, this section of the United States case study will highlight trans\* activists' efforts to navigate existing public systems for name changes and to address problematic police practices that affect trans\* people. The case study will also highlight some of the benefits of supporting changes in practice, particularly where policy advocacy may have greater risk or have unintended consequences.

### *Background*

Atlanta is a large southern city with nearly half a million residents (447,841) (U.S. Census, 2013). Nearly twenty percent (19.4%) of the population is under eighteen years of age and 54 percent is African American (U.S. Census, 2010). Trans\* activists in Atlanta estimate that there are about 5,000 trans\* and gender non-conforming people living in the city. Atlanta has laws that prohibit discrimination based on sexual orientation and gender identity in businesses, housing, and by service providers. The Atlanta Police Department has established an LGBT Liaison Unit to hear community concerns, identify solutions and provide education about safety measures and available resources. Despite these proactive efforts, trans\* activists continue to report difficulty accessing health and social services and experiencing harassment from police. In addition, similar to other areas of the United States, trans\* people experience challenges to obtaining identity documents in their preferred names.

Trans(forming) Atlanta is a membership-based trans\* support group in Atlanta, Georgia that was founded and is led by people of color. Their constituency is anyone who identifies as female-to-male (FtM), transmen, and those on the male spectrum, including those who identify as male instead of trans\*. Trans(forming) is a chapter of Female to Male International (FTMi), a resource organization focused on providing information and support to transmen worldwide, primarily through support to local chapters. Local chapters organize educational activities, support meetings, information, networking opportunities and referral services in their communities. Trans(forming) hosts monthly meetings, social gatherings and provides transition support. The organization also works on issues related to policing, access to health services, and name change. They have built strong collaborations with other organizations focused on racial justice, including SPARK Reproductive Justice NOW, a statewide reproductive justice organization, and the Georgia American Civil Liberties Union. Trans(forming) is also an organizational anchor for the Solutions Not Punishment Coalition (SNaP Co), a network of organizations working to reform the criminal justice system.

To date, Trans(forming) has received minimal donor support for their work—a small grant from the Trans\* Justice Funding Project and an in-kind contribution of office space

for their role as an anchor organization in SNaP Co. Members also contribute what they can to support their work. They would like to establish a legal clinic to provide services for trans\* people beyond support for name change procedures. They are also interested in expanding their work with trans\* immigrants that lack the appropriate legal status to change their names and access public services.

### *Name Change*

Trans(forming) Atlanta identified name change as one of the key issues impacting their constituency. All name changes take place at the level of the county clerk's office. Trans\* people found the name change process to be complex, intimidating to navigate without support, and, in some cases, cost prohibitive. Being able to change one's legal name has many positive impacts on trans\* people, including making it easier to apply for jobs and access public services.

Trans(forming) worked closely with SPARK and the American Civil Liberties Unions (ACLU) to identify the necessary forms and compiled a step-by-step guide to changing one's name in Georgia. Legal support from the ACLU was essential in this process, as their interns checked each county in Georgia to verify the procedures and necessary forms. Trans(forming) and their partner organizations have used this resource with trans\* people seeking to change their name in a number of counties throughout the state. As of November 2014, fifty-seven trans\* people had successfully changed their names and only one was denied a name change. Trans(forming) attributes their success to being knowledgeable, accurate, and thorough in county procedures and accompanying trans\* people to the county clerk's office to ensure they are treated with respect. In the case of the one denial, a judge refused to accept the completed forms. In the future, Trans(forming) may offer trainings and/or make a video to sensitize judges and their staff, but they are still figuring out the best way to do this.

### *Change Police Practices*

Negative interactions with the police is one of the key issues that brings together marginalized communities in Atlanta, including trans\* people, people of color, and sex workers. In 2013, Trans(forming) joined with over fifty to sixty other Atlanta organizations to oppose a ban on sex work. Through this group, they were able to pressure the police to lift the ban and convene a working group on sex work. These efforts strengthened their relationships with allied organizations in SNaP Co.

In October 2014, there was an incident with police in the East Point community of Atlanta, where a transman was arrested during a routine traffic stop. The police referred to him as "it" during the interaction and threatened to conduct a genital search. Within twenty-four hours, Trans(forming) had mobilized seventy-five East Point community members for a meeting about the incident. During these meetings, public support was built in the

community for trans\* people and opposition to this type of mistreatment from police was strengthened. Ultimately, the East Point mayor apologized for police behavior. In tandem with their community mobilization activities, Trans(forming) has worked closely with the Atlanta Police Department to develop a standard operating procedure (SOP) specific to trans\* people. The SOP includes calling people by their chosen name and pronouns, prohibiting genital searches under any circumstances, not arresting people for using what is perceived to be the “wrong” bathroom, and allowing people who are detained to select the gendered area where they feel most comfortable. The new SOP went into effect on November 30, 2014.

### **Lessons Learned**

In both Washington, DC and New York City, activists said that they hoped for a gender marker change policy that did not require either surgery or a medical affidavit. In New York City, activists were entirely unsuccessful in changing the policy despite compromises, while in Washington, DC, activists were successful in passing a policy that does not require medical intervention. This case study suggests that other jurisdictions working to modernize identity documents may benefit from:

- Assessing how identity documents are issued and changed and which government stakeholders are responsible for creating and implementing policies on this matter.
- Involving all of these stakeholders throughout the process.
- Identifying a “champion” or insider within one or more of these areas of government to serve as a liaison arguing for positive change.
- Working in intersectional coalitions.
- Framing gender marker change policy as a “technical modernization” and making efforts not to attract excessive external or media attention.

The Atlanta case study articulates how changing practice can be a powerful way to improve the lives of trans\* people on the ground in contexts where there isn’t a trans\* specific policy in place. For donors, the following criteria can be used to identify organizations with the potential to enact this type of change:

- A strong presence at the local level, including deep roots in the community and a track record of creative problem solving.
- A commitment to ensuring that trans\* people can navigate and access public services and the patience and capacity to understand technical and bureaucratic processes.

- A consistent effort to establish relationships with public employees and institutions.

If trans\* activists lack capacity, partnerships can be developed with other social justice organizations that have the skills they lack and are or can be sensitive to the issues that trans\* activists and organizations face. Changing practice may also be safer and more likely to succeed in a context where trans\* issues are not well understood and/or public attitudes towards trans\* people are not supportive. In addition, for organizations that started their work in a service delivery context, changing practice can be an important way to build advocacy skills that can be transferrable to efforts that change policies and laws. The intimate understanding of public systems required to change practice facilitates the identification of advocacy targets and strategies for reshaping systems. By developing allies within public systems, change can happen in a way that eventually prepares the ground for larger policy and/or advocacy gains to take place.

As this set of three very different case studies shows, the experiences of trans\* activists and organizations at the city/state, national, and regional levels provide an opportunity for donors to examine some common themes. First, trans\* organizations are working in very different contexts. The context, as well as the configuration of trans\* organizations and activism in the area, determine the paths most likely to succeed. This suggests that analyzing context is crucial for both donors and trans\* activists working together to achieve positive changes in policies and practices for trans\* people. It also suggests that even where policy change is not possible because of the constraints in which trans\* organizations are working, positive changes can move forward. Conversely, policy change does not lead inevitably lead to implementation and positive practical changes.

# DISSEMINATION PLAN

This dissemination plan is organized by audience as there are multiple stakeholders interested in the findings of this report. There is a section on conferences and events that are cross audience where findings from this project could be shared. Where possible, the dissemination plan specifies the existing written materials that could be shared with each audience/venue.

Following approval and feedback on this report from the donors, Strength in Numbers Consulting Group proposes the following categories for dissemination:

- **The Trans\* Working Group of the Global Philanthropy Project**, which represents donors committed to growing the funding available for trans\* organizations and improving the efficiency and effectiveness of donor practices
- **Trans\* Organizations** that completed the survey, as well as civil society networks with member organizations that work on trans\* issues
- **Additional Donors** that completed the trans\* donor survey, as well as donor networks with members that have funded trans\* work and/or could be interested to fund trans\* work
- **Relevant Conferences and Events** where findings of this report could be presented

## **Global Philanthropy Project Trans\* Working Group**

A digital slide show presentation of research findings will be developed and shared with GPP Trans\* Working Group members along with the final report and factsheets. Results will be presented to this group of donors at their request, including a specific presentation on regional trends.

## **Trans\* Organizations**

The executive summary of the final report and the regional and population fact sheets will be circulated to the trans\* organizations that completed the trans\* organization survey. Strength in Numbers Consulting Group will also work closely with Global Action for Trans\* Equality (GATE) to post links to the findings on relevant listservs where trans\* organizations can be reached.

## **Additional Donors**

GPP Trans\* Working Group Donors will be invited to make commitments regarding disseminating the findings to donors with whom they have relationships and that may be interested in using the findings to refine existing trans\* funding or inform new trans\* funding strategies.

In addition, the Executive Summary of the final report and the regional and population fact sheets will be shared with specific networks through relevant listservs. A short blurb with links to the findings, the executive summary of the report and fact sheets can also be submitted to the newsletters of the following networks:

- International Human Rights Funders Group (IHRFG)
- International Network of Women's Funds (INWF)
- Funders Concerned About AIDS (FCAA)
- Ariadne (European Funders for Social Change and Human Rights)

### **Relevant Conferences and Events**

Strength in Numbers Consulting Group proposes that a digital slide show presentation is created to communicate the report's public findings. The slide show would be presented at the following conferences:

- *Follow Up to the Berlin Convening*: an event for donors and activists to consider how to best follow up on the dialogue between funders and activists working on gender diversity held meetings in 2013 in Berlin (2013)  
*Early 2015, location TBA*
- *LGBT Health Funding Summit*: an event that brings together funders in the fields of health, HIV/AIDS, and LGBTQ rights and experts from the field to build relationships with like-minded funders and to develop funding strategies for increased impact in LGBT health  
*January 27–28, 2015 in New York, New York, USA*
- *International Human Rights Funders Group Conference*: a global network of donors and grant makers committed to advancing human rights around the world through effective philanthropy  
*January 27–28, 2015 in San Francisco, California, USA*
- *Creating Change: The 27th National Conference on LGBT Equality*: a gathering of activists, organizers, and leaders in the United States LGBT movement  
*February 4–8 2015 in Denver, Colorado, USA*
- *Pathways to Health, the Grant Makers in Health Annual Conference on Health Philanthropy*: conference on health and philanthropy for United States national, regional, and local grant making foundations and corporate giving programs  
*March 4–6 in Austin, Texas, USA*



- *Funding Forward*: an annual gathering of grant makers committed to LGBTQ issues  
March 18–20, 2015 in Atlanta, Georgia, USA
- *Generation Next, Africa Grant Makers' Affinity Group Annual Meeting*: a network of organizations and individuals funding efforts that benefit Africa and its people  
April 16–17 in New York City, New York, USA
- *Annual Meeting of the Council on Foundations*: a group of independent, operating, community, public and company-sponsored foundations, and corporate giving programs in the United States and abroad  
April 26–28, 2015 (pre-meeting April 24–25), San Francisco, California, USA
- *Philadelphia Trans-Health Conference*: three days of workshops and activities focused on the health and well-being of trans\* people and communities  
June 4–6, 2015 in Philadelphia, Pennsylvania, USA
- *8th IAS Conference on HIV Pathogenesis, Treatment and Prevention (IAS 2015)*: a biennial forum to examine the latest scientific developments in HIV-related research, and explore how such developments can be applied in implementation programmes  
July 19–22, 2015 in Vancouver, British Columbia, Canada
- *Funders Network on Population, Reproductive Health and Rights Annual Meeting 2015*: a gathering of United States based affinity group network members that fund on population, reproductive health, and rights in the US and internationally  
November 4–6, 2015 in San Diego, California, USA
- *OutGiving Conference*: a biennial, invitation-only conference sponsored by the Gill Foundation that brings together a network of LGBT and allied philanthropists and funders  
2015
- *International AIDS Society Conference*: a meeting of scientists, leaders, and community members to advance treatment and prevention of HIV  
July 17–22, 2016 in Durban, South Africa

Finally, as part of the dissemination plan, the authors of *Growing Trans\* Funding and Strategy* propose the specific coordination of a dissemination strategy with Funders for LGBTQ Issues. In order to communicate strategically to diverse audiences, it will be important to time the announcements of the present work—which is internationally focused—with their release of information pertaining to trans\* funding in the United States.



## CONCLUSION: RECOMMENDATIONS AND NEXT STEPS

### RECOMMENDATIONS

This concluding section describes the priority recommendations for next steps in trans\* funding. The recommendations are designed to meet the twin purposes of *Growing Trans\* Funding and Strategy*: to help grow the amount of funding available for trans\* organizations globally and to help funders work strategically with trans\* organizations and one another.

#### **Recommendation 1: Align donor support with priority work areas 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. Trans\* organizations are also interested in expanding safety and antiviolence work, which is a priority area for donors supporting trans\* work. Donors currently supporting trans\* work could make a particular effort to expand support for organizations engaged in safety and antiviolence work.

Trans\* organizations would also 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. Donors interested in supporting trans\* work that do not support service provision could identify donors that do support service provision and orient them to trans\* issues and introduce them to trans\* organizations (see also Recommendation 5).

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

Differences in reporting by donors and trans\* organizations about trans\* leadership in the case studies, trans\* organization survey, and the donor survey suggest that donors to trans\* organizations as well as trans\* organizations themselves lack a shared definition of what trans\* leadership means. For example, of the donors that track trans\* leadership, nearly three-quarters report that most or all of the organizations they support are trans\* led; yet is unclear how donors define and assess trans\* leadership. Without a robust, shared definition of trans\* leadership, it is impossible to create valid comparisons between various organizational contexts or note significant changes over time.

Such valid comparisons are necessary in order to conduct ongoing assessments of improvements that result from capacity building efforts (see also Recommendation 4). Comparisons are also important to assess constraints and opportunities that exist for trans\* leaders working in organizations that are projects of larger organizations (LGBTQ, HIV/AIDS prevention and services, etc.). For example, lack of input into financial and content decision-making or greater access to paid staff. By assessing these challenges and opportunities, efforts can be made to maximize benefits and minimize constraints.

Donors invested in autonomous decision making for trans\* organizations and trans\* leadership could consider developing a short checklist and/or assessment tool to use when identifying new organizations to support or when renewing existing grants. Members of the Trans\* Working Group of the Global Philanthropy Project would be an important resource for defining relevant indicators, given the interest in and commitment from the TWG to supporting trans\* leadership. An assessment tool could include indicators such as:

- Number of trans\* identified decision makers;
- Proportion of transmen and transwomen constituents compared with decision makers;
- Degrees to which trans\* people make decisions about grant budget allocations, spending, and changes to planned spending; and
- Degree to which trans\* people make decisions about the strategy and content of their work

Such a tool could be used to promote better tracking of trans\* funding, as well as to help donors determine how/whether their grants are promoting trans\* autonomy and leadership. By more clearly defining indicators on these topics and testing them in practice, it may be possible to use this information to influence donors with more resources to consider issues of trans\* decision making and leadership in their grant making.

While it is important to invest in individual leaders of trans\* organizations, two issues emerge in cases where leaders are the sole focus of capacity building attention. First, these individuals become the only face and voice of large groups of constituents who may not in practice have input on how their trans\* organizations function or who they serve. Thus, we recommend that at least some funding focus on trans\* representation as well as trans\* leadership. This might involve adding the following indicators at the level of the trans\* organization itself:

- Number of meetings or other mechanisms held each year for community input;
- Findings from community meetings;
- Actions taken to address needs that emerge from input from community members;
- Inclusion of community in decision making at the organizational level; and
- Inclusion of particularly disenfranchised community members such as (ethnic minorities, trans\* women, or trans\* men) in these processes

Second, case studies revealed that trans\* individuals who represent their communities and organizations travel extensively and may experience burn out. This may require that they retire from their community work; if they are the sole repositories of information and skills, the information and skills may fade from view when they leave. We suggest that capacity building efforts (see also Recommendation 4) include a larger group of people from a given organization or region and not just individuals identified as “leaders” per se.

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

While most donors who responded to the survey had funded at least one organization that was new to their grant making portfolio, very few donors had added a large number of new organizations to the trans\* work that they fund. A majority of trans\* organizations have either very small budgets (less than US\$5,000) or none at all. Only a third of these organizations possess modest budgets (up to US\$20,000), and very few possess budgets greater than US\$20,000. There are also large numbers of trans\* organizations that have sought funding unsuccessfully (see also Recommendation 4). Further, registered organizations are more likely to be funded, but in some regions of the world registration as a nonprofit is a major undertaking and a significant barrier to funding. This suggests that it is very difficult for emerging trans\* organizations to make the transition from being unfunded to having robust funding.

A strong commitment from donors to identifying new trans\* organizations to support is critical to growing trans\* movements. As part of identifying new/unfunded trans\* organizations to support, creative funding mechanisms that take into account donor constraints and the context specific needs of trans\* organizations will be required. There are a number of options to support emerging trans\* organizations and we offer some suggestions below:

- Find intermediaries that can fund unregistered organizations;
- Establish a donor coordinated collaborative fund specific to trans\* organizations that could fund unregistered organizations and administer small grants;
- Support a larger, more established organization with strong connections to community groups that could be the fiscal agent and provide capacity building support to unregistered organizations; and
- Support individual and/or small groups of activists to found trans\* organizations by establishing fellowship programs 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 to increase skills in fundraising, nonprofit management, and program planning.**

Trans\* organizations almost universally wanted more opportunities to network with other organizations and activists. In the Global South, there was also demand for skills training and mentoring opportunities. While a majority of donors supporting trans\* work made skills training (68%) and networking opportunities (55%) available, only one third supported mentoring (33%).

To better align with the needs of trans\* activists, donors could adopt a regional approach using data from the trans\* organization survey to inform the methods and topics for capacity building. It would also be helpful to conduct region specific needs assessments to understand the specific gaps trans\* organizations face and the best way to address these gaps. During case study interviews, several activists noted that the skills they would like to develop are largely not specific to trans\* organizations and therefore it may be possible to take advantage of existing training in nonprofit management or fundraising. Donors could also develop a common list of available capacity building resources, explaining how they have been used and any lessons learned.

Donors prioritized trainings on advocacy and community organizing, while trans\* organizations universally wanted to build skills in fundraising. In a number of subregions, budgeting and financial management, program strategy and development, and monitoring and evaluation were also indicated as training priorities. However, the content of these program areas varies within different contexts. For example, the barriers to successful fundraising and grant writing differ across regions, as do the types of programs available to trans\* organizations. Thus, rather than replicating content across regions without adaptation, we suggest that region specific needs assessments be conducted prior to allocating intensive resources to fund capacity building efforts.

- What is the status of organizational structures (paid staff, nonprofit registration, governance, etc.) of trans\* organizations in this subregion?
- What are their key areas of work and the skills needed to do this work?
- Are there contextual opportunities in the region that require specific skills for trans\* organizations to respond effectively (policy changes, health system changes, etc.)? What are those skills?
- Are the skills needed related to knowledge, attitude, or practice? What is the best mechanism to build the needed skills?

Donors committed to building trans\* movements could also invest in narrowing the gaps in representation between trans\* identified constituents and decision makers, particularly for transwomen. Leadership gaps can be addressed by donors proactively defining, assessing and tracking trans\* leadership. At the same time, leadership development for trans\* activists is also a necessary component as part of capacity building efforts.

In case study interviews, trans\* activists in East and Southern Africa expressed particular frustration with identifying and securing participation in capacity building opportunities. Donors could make these opportunities more accessible by prioritizing trans\* identified participants, expanding the number of participants and/or capacity building opportunities, and including more than one person per organization to ensure sustainability of the program and/or organization if one person leaves.

Finally, regionally tailored capacity building initiatives will be strengthened if regular evaluations take place. These might take the form of data collection before and after initiatives begin and end as well as ongoing monitoring of the progress of trans\* organizing in the region.

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

This report has identified several opportunities to fund in topics or regions that are markedly under resourced. Four new areas of support are particularly needed, two topical and two region specific. Topical areas in need of expansion include social services and health care; the two regions with particular gaps include Central America and Caribbean and the Middle East and North Africa.

The trans\* organization survey also revealed a particular opportunity to support trans\* organizations in the Central America and Caribbean region. Thirty organizations responded from this subregion. Forty percent had zero budgets in 2013, a higher rate of unfunded organizations than in any other subregion. Nearly sixty percent of unfunded organizations in this region had unsuccessfully sought external funding.

The data presented in this report can be used as powerful tools to persuade new and existing donors to provide leadership in these areas. While most members of the Global Philanthropy Project Trans\* Working Group and donors responding to the survey emphasize advocacy, there are donors focused on social service and health care that have not yet been engaged that may have interest in funding trans\* work. For countries in the Global South where a significant portion of health care services are funded through global funding streams, there may be an opportunity to reduce barriers for trans\* organizations to receive this funding as subrecipients and/or ensure that organizations receiving these funds provide trans\* specific services.

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

Donors were enthusiastic about the trans\* donor survey and willing to participate. Many had relevant questions about how to determine and count their trans\* funding and an interest in how submitted information would be used. Nearly 40 percent more donors participated in 2013 than in 2012 (23 vs. 38). Nearly three-quarters of respondents reported tracking trans\* funding. However, there is not yet a mechanism for sustainable tracking of the work of donors and trans\* organizations, which is important for measuring success and for closing current and future gaps between the two.

The Trans\* Working Group of the Global Philanthropy Project could take advantage of donors' enthusiasm by establishing a more systematic mechanism for tracking trans\* funding globally. In order to obtain more accurate information, a funders' network such as Funders for LGBTQ Issues or the International Human Rights Funders Group may be best positioned to compile this data. Information could be more accurate and streamlined if it were collected at the grant level. This would allow for more accurate tracking of intermediary funding and multiyear grants. It would also allow for common definitions of trans\* work and trans\* leadership and enable better measurements of progress in these areas.

In addition, the GPP Trans\* Working Group could consider making available the benchmarks for trans\* funding to those donors interested in donor coordination. This would establish common goals for the role of donors in supporting trans\* organizations and building trans\* movements. It would also promote efforts to achieve the donors' goals by providing leadership in this area, such as increasing the amount, efficiency, and effectiveness of trans\* funding.

However, surveying trans\* organizations about their access to funding, barriers to success, and capacity building needs is also critical to understanding how donors are meeting their funding needs. Such surveys capture information from organizations not receiving foundation funding and provide valuable information about movement growth. Tracking the funding and capacity needs of trans\* organizations can occur through a separate mechanism from tracking trans\* donor funding to ensure the independence of each body. Findings from the two tracking mechanisms can be triangulated and contextual information from each region used to track progress towards current goals and create new milestones.

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

Both the surveys of trans\* organizations and the three case studies presented in *Growing Trans\* Funding and Strategy: A report from the field in 2013* suggest that policies and practices around trans\* issues—access to revised birth certificates and identify documents,

availability of gender affirming health care—vary widely across jurisdictions. This variation is not random; rather, the policies and practices that determine trans\* people’s daily experiences are influenced by a variety of structural and cultural factors. These include health care policies; availability and quality of health care to the general population; positive changes taking place in related issues (such as same sex marriage) or jurisdictions (such as neighboring or allied countries); the level at which the issue at hand is regulated (such as federal or local levels); current conversations about gender and sexuality; and adoption or lack thereof of human rights frameworks and norms.

Donors could consider investing jointly in mapping policies and practices in 4–6 countries and/or regions where they are interested in advancing specific issues, such as name and/or gender marker changes and access to health services for trans\* people. Such information would assist trans\* activists who may not have the resources and/or capacity to gather this information independently, as well as to identify contextual opportunities to push for change. Questions that could be considered for such a mapping include:

- What, if any, enabling policies are there in place on the issue(s) of interest?
- How, if at all, is the policy implemented?
- What is the state of practice on the ground on the issue(s) of interest? Are there any specific examples of positive change that have taken place in a particular locality or region?
- At what level—local, national, regional, or multinational—does change occur?
- Who are the critical decision makers on the issue(s) of interest?
- What is the capacity of trans\* organizations on the ground?
- Who are the relevant ally organizations? Are there opportunities to join with other social movements and/or specific risks to forming alliances with other organizations?

Such a mapping would also provide a strong foundation for donor coordination and movement building by creating a common platform for discussion between trans\* organizations and donors.



### **Recommendation 8: Expand efforts to simplify application procedures and increase entrée to funders and funding.**

Trans\* activists report significant barriers to completing funding applications, communicating in a timely way with donors about funding, and problems with disbursement of funds. While resolving some of these barriers may be slow and require institutional change, many donors have made efforts to reduce trans\* organizations' barriers to apply for and receive funding. A number of donors reported providing one-on-one technical assistance and support to first-time applicants, including providing guidance and feedback on draft proposals and budgets.

A smaller number of donors reported making proactive efforts to simplify their application forms and processes in 2013. As part of donor coordination efforts, it would be useful to exchange applications and share changes that have received positive feedback from trans\* activists. It may also be worthwhile for donors with substantial trans\* portfolios to solicit specific feedback from trans\* organizations about their application processes to find out which aspects work best for trans\* organizations so they can be replicated. Interested donors may also develop common application and/or reporting forms, particularly for use among organizations that receive support from multiple donors.

Funding for trans\* organizations could be made more accessible through the development of funding applications and reporting forms in more languages. This would be particularly relevant for Spanish and Russian languages, as only 45% percent of donors have applications in Spanish and about a quarter (24%) in Russian.

Some of these recommendations are suggested next steps, while others are changes to existing policies and practices. There are likely more recommendations than donors can implement in a short time span, so we suggest six specific activities to focus their plans in the next 6–12 months. Early wins are important to nascent social change efforts, and we believe that given existing plans, these specific activities would require reasonable resources and time commitments for the short term.

- Policy mapping of 4–6 potential policy change investment locations;
- Capacity building needs assessment, implementation, and evaluation in East Africa and Southern Africa;
- Survey trans\* organizations as follow up to the 2013 TOS;
- Start a fund to make small grants to trans\* organizations;



- Convene a working group to define trans\* leadership and set up standards for monitoring commitments to trans\* leadership and autonomy; and
- Establish a mechanism to track trans\* funding at the grant level

The partnership between funders and the trans\* movement is a nascent but growing one. *Growing Trans\* Funding and Strategy: A report from the field in 2013* is a small step toward increasing the quantity of funding available for trans\* organizing and organizations and the level of strategic coordination by new and existing donors interested in funding in this space.

# APPENDICES

## APPENDIX A PROPOSED BENCHMARKS FOR THE FUNDER SURVEY

| BENCHMARK   | RATIONALE  | DATA SOURCES   |
|---|--|--|
| 1. Total investment in trans* organizations, including LGBTQ organizations doing trans* work and trans* specific organizations                      | This benchmark represents a desire to enlarge the size of the pie/the total amount of funding available to trans* organizations.   | <b>Specifics</b> Checks cut to individuals or organizations in 2013; will also include questions about trans* leadership, how/whether donors track funding to trans* led organizations, and the percentage of trans* funding that goes to LGBTQ organizations.<br><b>Source</b> Pool Donors funding trans* organizations in 2013 |
| 1.a Number of new donors providing grants to trans* organizations   | This benchmark measures interest in trans* issues by donors not currently supporting any trans* organizations.   | <b>Specifics</b> Donors who have made giving their first grant to a trans* organization in 2013.<br><b>Source</b> Pool Donors funding trans* organizations in 2013   |
| 1.b Number of general support grants and multiyear grants   | This benchmark measures the flexibility of funding for small organizations through instances of general support and multiyear grants are a good indicator of flexibility.  | <b>Specifics</b> General support grants are defined as at least 50% of funds can be used in any way to assist the organization in achieving its mission. Multiyear grants are for a period of 24 months or more.<br><b>Source</b> Pool Donors funding trans* organizations in 2013   |
| 1.c Number of trans* groups donors support that have not received prior support from your foundation/donor agency (even if funded by others before) | This benchmark measures donor efforts to reach new trans* groups and/or diversify trans* organizations' donors.  | <b>Source</b> Pool Donors funding trans* organizations in 2013   |
| 1.d Number of donors funding a trans* organization in a portfolio outside of LGBTQ rights   | This benchmark measures the degree of integration of trans* organizations into donor portfolios not focused on LGBTQ rights. It would also be a useful proxy for increased interest by donors focused in other sectors such as health, reproductive justice, criminal justice, etc. in funding trans* organizations. | <b>Specifics</b> Program officer managing the grant is not focused primarily on LGBTQ rights<br><b>Source</b> Pool Donors funding trans* organizations in 2013   |

| BENCHMARK  | RATIONALE  | DATA SOURCES  |
|--|--|---|
| <p>2. Number of donors that identify underfunded priorities such as social services provision, health care provision, safety and antiviolence work, patients' rights advocacy, or arts and culture work as one of their top five areas of funding</p>  | <p>This benchmark is intended to better align trans* movement interests with funder priorities. Results can be compared with those from the 2012 GATE/AJWS survey.</p>         | <p><b>Specifics</b> The same activities used in the 2012 GATE/AJWS survey will be used as options for this benchmark.</p> <p><b>Source Pool</b> Donors funding trans* organizations in 2013</p>   |
| <p>3. Amount of funds spent on nonfinancial support:</p> <ul style="list-style-type: none"> <li>• Networking</li> <li>• Skills training</li> <li>• Mentoring</li> </ul>  | <p>This benchmark reflects the top three priorities for nonfinancial support noted by trans* organizations and a desire to increase support for these types of activities.</p> | <p><b>Specifics</b> Meetings, conferences, trainings, or technical assistance from consultants in 2013 where trans* activists or trans* organizations benefitted. If a capacity building event was not targeted exclusively for trans* organizations, the amount of funds dedicated to trans* activists or organizations can be approximated.</p> <p><b>Source Pool</b> Donors funding trans* organizations in 2013</p> |
| <p>3.a For skills training, how many donors supported interventions primarily focused on the following topics:</p> <ul style="list-style-type: none"> <li>• Fundraising and grants management</li> <li>• Program strategy and development</li> <li>• Budgeting and financial management</li> <li>• Policy and legal advocacy</li> <li>• Community organizing</li> <li>• Other (please list)</li> </ul> | <p>This benchmark reflects the top five priorities for skills training expressed by trans* organizations and a desire to increase resources for these types of activities.</p> | <p><b>Specifics</b> Trainings, meetings, conferences, technical assistance from consultants where skills training on these topics are the primary purpose</p> <p><b>Source Pool</b> Donors supporting skills training for trans* activists or organizations in 2013</p>   |
| <p>4. Number of donors publicly stating trans* issues as part of their strategy and/or outreach around funding opportunities</p>   | <p>This benchmark aims to make it easier for trans* organizations to identify and connect with interested donors.</p>  | <p><b>Specifics</b> RFP on website or distributed through listservs in 2013 and/or clear statement of strategy on website; must state trans* specifically, not just LGBTQ issues.</p> <p><b>Source Pool</b> Donors funding trans* organizations in 2013</p>   |

| BENCHMARK   | RATIONALE  | DATA SOURCES   |
|---|--|--|
| 5. Number of instances of donor efforts to simplify application procedures and/or provide direct support to first-time applicants   | This benchmark records donor efforts to lower the threshold for trans* organizations to receive funding; this information would be used to follow up with trans* organizations and get feedback on whether/how these efforts have impacted them.   | <b>Specifics</b> Record changes to application procedures, technical assistance to trans* organization in their efforts to apply, and/or additional efforts to translate applications in 2013. This would most likely be qualitative data such as provision of TA in proposal process, simplification of proposal format, or the simplification of budget format, etc.<br><br><b>Source Pool</b> Donors funding trans* organizations in 2013 |
| 5.a Number of languages in which grant applications are available, such as African languages, Arabic, Asian languages, English, French, Mandarin, Portuguese, Russian, Spanish, and others. | This benchmark assesses accessibility of grant funding for organizations proficient in different languages.  | <b>Specifics</b> Application materials issued by donors and/or translation of completed applications submitted by applicants in 2013.<br><br><b>Source Pool</b> Donors funding trans* organizations in 2013  |
| 6. Number of events aimed toward donors with an educational component on trans* issues and concerns   | This benchmark responds to the request by trans* groups for knowledgeable program staff and will become increasingly important as new donors take on funding trans* organizations.   | <b>Source Pool</b> GPP Trans* Working Group members and donor resource/coordination bodies, such as International Human Rights Funders Group and Funders for LGBTQ Issues  |
| 7. Presence of a sustainable mechanism to collect data about funding for trans* groups annually   | This benchmark records the development of a cross-donor mechanism to track trans* funding, to inform donors about what is being funded as the movement grows. The Funders Network on Population, Reproductive Health and Rights has a good example of an internal funding directory. One option would be to adjust the current system of the Funders for LGBTQ Issues and/or the International Human Rights Funders Group to collect this information, as their current system does not have specific enough information on trans* funding | <b>Source Pool</b> GPP Trans* Working Group members and donor resource/coordination bodies, such as the International Human Rights Funders Group and Funders for LGBTQ Issues.   |

| BENCHMARK   | RATIONALE  | DATA SOURCES   |
|---|--|--|
| 7.a Number of donors contributing information on their trans* funding to the coordinating mechanism | This benchmark measures the use of a coordination mechanism focused on trans* funding. In follow up, we would ask donors for feedback on the usefulness of this mechanism and how they have used it to advance their grant making. | <b>Source Pool</b> GPP Trans* Working Group members and donor resource/ coordination bodies, such as the International Human Rights Funders Group and Funders for LGBTQ Issues |

- American Jewish World Service
- Arcus Foundation
- Astraea Lesbian Foundation for Justice\*
- Bulgarian Fund for Women\*
- Calala Women's Fund/Calala Fondo de Mujeres\*
- The Calamus Foundation, Inc.
- David Bohnett Foundation
- Dreilinden gGmbH
- Dutch Ministry of Education, Culture and Sciences
- Elton John AIDS Foundation
- Evelyn & Walter Haas, Jr. Fund
- filia.die frauenstiftung\*
- Ford Foundation
- Foundation for AIDS Research (amfAR)—GMT Initiative
- Freedom House
- Fund for Global Human Rights
- Fundación Fondo de Mujeres del Sur (FMS)\*
- German Ministry for Economic Cooperation and Development
- Gill Foundation
- Global Fund for Women\*
- Global Fund to Fight AIDS, Tuberculosis and Malaria

\* International Network of Women's Funds Member

- Groundswell Fund\*
- Heinrich Böll Foundation
- Hivos
- Horizons Foundation
- Human Rights Campaign Foundation
- Komen Foundation
- Levi Strauss Foundation
- Mama Cash\*
- Open Society Foundations
- Pride Foundation
- Red Umbrella Fund
- Sigrid Rausing Trust
- Trans Justice Funding Project (Tides Foundation as fiscal agent)
- UHAI EASHRI (East African Sexual Health and Rights Initiative)
- Urgent Action Fund—Africa\*
- Urgent Action Fund for Women’s Human Rights\*
- Urgent Action Fund—Latin America\*

\* International Network of Women’s Funds Member

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