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Acknowledgements

The development of the International Trans Fund’s (ITF) first strategic plan was the result of deep engagement and collaboration to imagine, design, develop and articulate our path forward. This was a project of co-creation and we worked with several consultants who shepherded us through this process. We are immensely grateful to Masen Davis for holding crucial space for us to have deep and nuanced discussions about where we have been and where we are going and guiding us through the development (and writing) of this plan. We would also like to thank Leigh Ann van der Merwe and Liesl Theron who worked with us to ensure stakeholder engagement and that this process reflected the organization’s participatory grantmaking ethos. We would also like to extend our gratitude to Happy Mwende Kinyili, a member of our Steering Committee at the time, who helped us kick off this work and develop the roadmap for the strategic planning process.

The ITF’s leadership also took a central role in guiding the strategic planning process. We would like to thank the Director (Broden Giambrone) and Steering Committee Co-Chairs (Tuisina Ymania Brown and Chaber) who worked closely with the Strategic Plan Working Group (with various members over the years): Zhan Chiam, Alex Rodrigo Castillo Hernández, Natasha Jiménez, Jabu Pereira and Amaranta Gómez Regalado.

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This work would not be possible without the generous support of our funders: American Jewish World Service, Arcus Foundation, Foundation for a Just Society, Ford Foundation, Global Equality Fund, Open Society Foundations and Wellspring Philanthropic Fund.

The ITF is hosted at the Astraea Lesbian Foundation for Justice, a feminist grantmaker with 40+ years of experience in LGBTQI grantmaking with a focus on LBQ, trans and intersex-led groups.

Copy editor: Kenrya Rankin
Graphic design: Upasana Agarwal
Trans rights are under attack across the globe, from the epidemic of violence against trans women of color, sex workers and immigrants, to the rise of anti-gender ideology that is fueling the backlash against hard fought progress. Trans activists are fighting for rights and justice with grit and grace in unbelievably hostile environments and with very limited resources. There is an urgent need to provide flexible funding to grassroots trans-led groups working on the frontlines. In addition, the COVID-19 pandemic continues to create new challenges and exacerbate existing inequities in the communities we support, and it has left an indelible mark on the philanthropic community as we all struggle to adapt and respond.

Despite these challenges, the ITF is well placed to direct much-needed resources where they need to go. Our participatory grantmaking model is founded upon trans leadership and decision-making at all levels, and we are deeply committed to embodying the adage of "nothing about us, without us" in every fiber of the organization because we know that our movements are best placed to come up with the strategies and solutions to make real lasting change in their communities. We hold the fundamental belief that there is a transformational potential of philanthropy when it is grounded in intersectionality and responsive and accountable to our movements.

This is the ITF’s first strategic plan and the culmination of an in-depth and engaged process of co-creation. Here are the four goals that will drive and propel our work over the next five years:

1. Increase and expand the ITF’s direct grantmaking to trans-led organizations with limited resources that are engaged in movement building activities.

2. Build and sustain the ITF as an efficient, effective and independent participatory grantmaker.

3. Increase the capacity of grantee partners to secure additional funds and effectively respond to the needs of their communities.

4. Catalyze more and better funding for global trans movements through philanthropic advocacy and be acknowledged as the leading expert in international trans funding.
What drives our work is imagining a world where all trans people are safe and free, and can live with dignity and respect. A world where we uplift and celebrate our diverse communities’ unstoppable creativity, joy, defiance and innovation to make change. A world where trans movements are resourced, resilient and robust, working intersectionally to promote liberation and transform inequities. We are building a future where gender diversity is celebrated and where trans people have the power to live as our true, authentic selves in communities across the globe.

Broden Giambrone
Director, International Trans Fund
Introduction

The International Trans Fund (ITF)’s 2021-2025 strategic plan was developed over a two-year period (2018-2020) to identify the ITF’s organizational identity and aspirations; set robust, but attainable, goals and benchmarks to guide the work through 2025; and provide guidance to staff as they develop annual work plans to execute the ITF’s strategy.

The strategic planning process was divided into three phases. In the preliminary phase, the ITF’s Steering Committee met in Johannesburg, South Africa, in July 2018, to engage in a visioning session led by Happy Mwende Kinyili that explored the ITF’s Theory of Change and developed the roadmap for the strategic planning process. At this meeting, the Strategic Plan Working Group, a subcommittee of the Steering Committee, was formed to guide and support this process.

During the second phase, the ITF focused on input from the community to ensure the process would reflect the organization’s participatory grantmaking ethos. In this phase, consultants Liesl Theron and Leigh Ann van der Merwe were engaged to bring together the voices of stakeholders—including the Grant Making Panel (GMP), staff and the grantee partners—and presented those reflections to the Steering Committee at a meeting in Buenos Aires, Argentina, in September 2019.

Masen Davis led the final phase, which consisted of an integration of previous work and a thorough review of the ITF’s activities and impact since its inception. It also included a series of consultations and a February 2020 planning meeting with the ITF Steering Committee and Director in San José, Costa Rica. This document serves as a high-level strategic roadmap for the ITF. It will be complemented by detailed operations and fundraising plans.
The creation of the ITF was the culmination of the vision and persistence of a transnational group of trans activists and funders who wanted to create a participatory mechanism to ensure the flow of resources to trans movements. In 2013, Global Action for Trans Equality (GATE) and American Jewish World Service (AJWS) undertook a survey of 340 trans and intersex groups from across all regions. This groundbreaking survey found that groups led by trans and intersex activists were severely under-resourced. But they were doing remarkably successful work to promote the rights and improve the lives of their constituents and communities, despite this challenging funding context. Later that year, trans activists and funders convened in Berlin to discuss the needs of trans communities and how to best financially support international trans movements. As a follow-up to that meeting, a group of funders and activists—including representatives from GATE, Arcus Foundation, the Global Philanthropy Project (GPP), Open Society Foundations (OSF) and Anonymous Funder—agreed to organize a working meeting to explore the possible creation of a new collaborative, activist-led fund to support global trans communities. The working meeting was held in Istanbul in 2015, and from that meeting, the ITF was born. In 2016, the ITF formed an interim Steering Committee and held a worldwide series of participatory community consultations designed to assess the needs of global trans movements and determine the priorities and design of the ITF. A year later, the ITF launched its formal structures, including a governing Steering Committee; a participatory Grant Making Panel to review proposals and make funding decisions; and a Secretariat, led by its first Director, Broden Giambrone.
Since making its first grant in 2017, the ITF has disbursed US$2.677 million to 105 trans-led groups in 66 countries worldwide.

The number of grants and monies distributed has grown steadily— from US$500,000 distributed to 29 groups in 2017 to US$830,000 for 52 groups in 2020—with plans to increase grantmaking to US$1,000,000 in 2021. The ITF also distributed an additional US$32,000 to grantee partners to support with the negative impact of COVID-19.
The ITF is often groups’ first and only funder. As a result, grant sizes are relatively small, with a range of US$10,000 to $30,000 and an average grant amount of US$17,445 over the Fund’s first four years. As a new fund without an endowment, the ITF has not yet been able to provide multi-year grants. Nevertheless, ITF grantee partners are encouraged to reapply for funding if their current grant is in good standing and their interim report has been submitted. In the fourth funding cycle, 42% of grantee partners selected by the Grant Making Panel had been previously funded by the ITF, and one in three had been funded the prior year.

To encourage geopolitical equity among ITF grantee partners, funding was allocated by region. Understanding that the classification of regions is complicated and political, in 2017 the Steering Committee developed five regional classifications to guide the ITF’s grantmaking. A list of countries by region can be found in Appendix B.

<table>
<thead>
<tr>
<th>Region</th>
<th>Region Description</th>
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<tbody>
<tr>
<td>1</td>
<td>Africa and West Asia</td>
</tr>
<tr>
<td>2</td>
<td>East, South, Southeast Asia and the Pacific</td>
</tr>
<tr>
<td>3</td>
<td>Eastern Europe and Central Asia</td>
</tr>
<tr>
<td>4</td>
<td>Latin America and the Caribbean</td>
</tr>
<tr>
<td>5</td>
<td>USA, Europe, Australia, New Zealand and Canada</td>
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</table>

<table>
<thead>
<tr>
<th>Region</th>
<th>Year</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>Africa and West Asia</td>
<td>2017</td>
<td>$100,000</td>
</tr>
<tr>
<td></td>
<td>2018</td>
<td>$133,000</td>
</tr>
<tr>
<td></td>
<td>2019</td>
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<td></td>
<td>2020</td>
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<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>US$587,000</strong></td>
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East, South, South East Asia and the Pacific

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<thead>
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<td>2018</td>
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<tr>
<td>2020</td>
<td>$176,000</td>
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<tr>
<td>Total</td>
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Eastern Europe and Central Asia

<table>
<thead>
<tr>
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<td>2018</td>
<td>$79,500</td>
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<tr>
<td>2019</td>
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<tr>
<td>2020</td>
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<td>Total</td>
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Latin America and the Caribbean

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<tbody>
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<td>$140,000</td>
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<td>2020</td>
<td>$191,000</td>
</tr>
<tr>
<td>Total</td>
<td>US$589,000</td>
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</table>
The creation of the ITF was the culmination of the vision and persistence of a transnational group of trans activists and funders who wanted to create a participatory mechanism to ensure the flow of resources to trans movements. In 2013, Global Action for Trans Equality (GATE) and American Jewish World Service (AJWS) undertook a survey of 340 trans and intersex groups from across all regions. This groundbreaking survey found that groups led by trans and intersex activists were severely under-resourced. But they were doing remarkably successful work to promote the rights and improve the lives of their constituents and communities, despite this challenging funding context. Later that year, trans activists and funders convened in Berlin to discuss the needs of trans communities and how to best financially support international trans movements. As a follow-up to that meeting, a group of funders and activists— including representatives from GATE, United States, Europe, Australia, New Zealand and Canada—

<table>
<thead>
<tr>
<th>Year</th>
<th>Amount ($)</th>
</tr>
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<tbody>
<tr>
<td>2017</td>
<td>110,000</td>
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<tr>
<td>2018</td>
<td>139,000</td>
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<tr>
<td>2019</td>
<td>117,500</td>
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<tr>
<td>2020</td>
<td>129,000</td>
</tr>
<tr>
<td>Total</td>
<td><strong>US$495,500</strong></td>
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In addition to direct grantmaking, the ITF engages in capacity building for its grantee partners. To encourage competitive applications, particularly from underrepresented groups and regions, staff delivered funding webinars and provided individualized support around the ITF’s eligibility criteria, funding priorities, grantmaking process and how to write a competitive application. The ITF has seen benefits from the webinar program: In 2017, 148 individuals from 65 countries attended at least one of eight ITF webinars. In the next grant cycle, the ITF saw a 69% increase in eligible applications.
In 2019, the ITF piloted a Draft Review Service for twenty trans-led organizations in areas underrepresented in the applicant pool (e.g. the Pacific, West Asia, North Africa and Central Asia) and in those with a high level of applications that were proportionately less likely to be funded (e.g. Eastern and Southern Africa and South Asia). The program centered on developing an application for the ITF, but the overarching goal was to build groups’ grantwriting skills and increase their capacity to pursue other funding opportunities.

<table>
<thead>
<tr>
<th>Year</th>
<th>Webinars</th>
<th>Languages</th>
<th>Participants</th>
<th>Countries Represented</th>
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<tr>
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<td>3</td>
<td>148</td>
<td>65</td>
</tr>
<tr>
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<td>2019</td>
<td>12</td>
<td>3</td>
<td>144</td>
<td>36</td>
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<tr>
<td>2020</td>
<td>12</td>
<td>6</td>
<td>131</td>
<td>46</td>
</tr>
</tbody>
</table>
The ITF has engaged in philanthropic advocacy to increase funding for trans groups since its creation. The staff and Steering Committee members have participated in a wide range of donor convenings and individual meetings with foundations, governments and multilateral donors. The staff has also advocated for increased support for trans groups while speaking at donor conferences and on funder panels at civil society events. In 2019, the ITF became a formal member of the Global Philanthropy Project and its Trans and Intersex Working Group.
ITF grants have supported a wide range of work based on the needs and priorities of local trans communities. Funding has been purposefully flexible, and groups are encouraged to apply for general support, recognizing that each geopolitical context and local culture is different. The majority of grantee partners have engaged in community building activities to create or expand their collective organizing. In addition, groups have addressed a range of issues, such as discrimination; healthcare, including mental health care and sexual health; policy and legal changes, including legal gender recognition; access to employment and economic stability; access to education; and safety and security.

The impact of these funds, as reported by 2019 grantee partners, includes:

1. The emergence of new trans groups in contexts where there has been little trans organizing.

2. An increase in the number of trans people reached due to grantee partners’ growth in memberships, expanded service areas and increased capacity to serve more people.

3. Stronger networks, including new grantee partnerships with healthcare service providers, governmental ministries, legal aid service providers and educational institutions.

4. More resources for intersectional work, as the ITF has supported trans groups that represent the realities of the most marginalized trans persons, including trans people of color, trans refugees, trans sex workers, trans elder persons and trans persons living in vulnerable areas.

5. Targeted advocacy to improve the health and safety of trans people, and increased empowerment training and organizing to help trans people access medication and binders in nations like Malawi and Guatemala.

6. Organizational development that strengthens the internal structures of small, trans-led groups so they can do their work sustainably and efficiently (especially in the Global South).

7. Increased support for legal gender marker changes via investment in legal aid, which has helped grantee partners better support trans persons who need to make this change.
In addition, it appears that the first four years of ITF grantmaking has potentially impacted the overall resources available to smaller, trans-led groups. In the first three years of grantmaking, the ITF saw the percent of grantee partners with budgets under US$10,000 decline over the years (from 55% in 2017 to 26% by the third cycle in 2019). In 2020, this number increased as there was a focus on ensuring funding was going to groups with limited resources. Additionally, the percent of groups with budgets more than US$50,000 increased from 14% in 2017 to 25% in 2020.
The Philanthropic Model

Participatory Grantmaking
The ITF is the only global participatory grantmaker that is exclusively dedicated to supporting trans-led groups as they work to secure rights for trans people and improve their lived realities. It exists to resource trans-led organizations that seek to positively impact the lived realities of trans people through social, legal, political and cultural change. From the very beginning, the ITF has centered the voices of trans activists and espoused the ethos, “nothing about us, without us.” To live this value, the ITF works as a participatory activist fund, with all funding decisions—from what groups are funded to how much each group receives—made by a Grant Making Panel that consists entirely of trans activists from various regions.

Grantmaking Priorities
To be considered for funding, groups must be led by trans people and have trans people constitute at least 75% of staff and board (or other decision-making body); have an operating budget under US$150,000; be focused on benefiting the trans community; and contribute to collective action and movement building.

Resourcing trans movements means supporting, sustaining and amplifying the work its leaders are already accomplishing. As a result, the ITF prefers to provide groups with core/general support and trust groups to know what they need. To that end, the ITF’s grantmaking priorities are to:

1. Fund a diverse collection of groups, inclusive of various regions, languages, gender identities, strategies and issues;
2. Reach trans communities facing high levels of marginalization (e.g. racism, classism, ageism, ableism, misogyny, etc.); and,
3. Support trans groups whose work contributes to social justice, movement building and the liberation of trans people.

The ITF also supports a wide range of movement building activities, which includes awareness raising events, direct actions, educational seminars, trainings, support groups, media projects, political advocacy, resource development, art and activism collaborations, community-based research, community spaces, skills sharing courses, leadership and personal development programs, educational campaigns, demonstrations and mobilizing communities.

Because the ITF values collective, trans-led action and aspires to encourage the growth of emerging, historically-marginalized groups, the ITF does not fund individuals; organizations not led by trans people; groups that do not specifically work to benefit trans people or communities; groups, collectives and networks with operating budgets above US$150,000; or groups and projects that only provide direct services to individuals without contributing to movement building in some way.
The ITF has experienced considerable financial growth over the past three years. In 2017, the ITF’s expenditure was just US$234,000, which has expanded to more than US$1,500,000 in 2020. The ITF has successfully leveraged over US$8,500,000 to resource global trans movements during this time, including multi-year grants that will be used to support the work outlined in this strategic plan.

However, despite this growth, the ITF is funded by a small number of private foundations and multilateral donors who support its mission and rely on its expertise to reach small, trans-led groups. The Director and Steering Committee members have strong relationships with donors and anticipate their continued support; however, the reliance on a small number of donors presents a risk for the ITF, especially during major crises like the COVID-19 pandemic. To that end, the ITF is diversifying its funding and in 2020 secured first-time grants from Foundation for a Just Society and the European Instrument for Democracy and Human Rights. See Appendix A for more details on the ITF’s financials.

In the most recent fiscal year (FY20), 45% of the ITF’s expenses were directly allocated to grantees partners, 55% went to internal operations and grantmaking processes. While high operating expenses are common among participatory funds, which spend considerable funds bringing the Grant Making Panel together, the ITF strives to increase direct grantmaking.

Three entities work together to govern and execute the ITF’s work:

1. The ITF is governed by a 12 to 14-member Steering Committee composed of trans activists and funders from around the world. It currently has 11 trans activist members and two donor members, and it was explicitly designed to be activist-led. Defined by the leadership and engagement of grassroots trans activists, the Steering Committee provides critical support and guidance to the organization and supervises decisions related to strategy, governance and finance.

2. The Grant Making Panel (GMP), a group of 15 trans activists from around the world, reviews all eligible applications to the ITF and comes together once each year to discuss the top applications and select grantee partners. That decision is then ratified by the Steering Committee.

3. The day-to-day work of the ITF is conducted by its Secretariat, currently consisting of four full-time staff working remotely from different countries: Brazil, Canada, US and Uganda. The staff is currently composed of the Director, two Program Officers and a Program Associate.
2021-2025

Vision, Mission, Purpose & Values

**VISION**

The ITF envisions a network of robust, resilient and well resourced trans organizations and movements working inclusively and intersectionally to increase safety and liberation for trans people worldwide.

**MISSION**

The mission of the ITF is to mobilize and facilitate sustainable resources for strong, trans-led movements and collective action, and to address and eliminate funding gaps impacting trans groups across the globe.

**PURPOSE**

The purpose of the ITF is:

1. To develop and sustain a mechanism to support trans-led groups of different sizes working on a range of issues at the international, regional, country and local levels, with emphasis on smaller groups with limited resources.

2. To educate our peers in the philanthropic community on trans issues and influence other funders and strategic allies in trans related commitments and strategies.

3. To increase and enhance access to resources to support trans movements by increasing financial resources dedicated to trans-led organizations and groups; providing access to non-financial resources for trans organizations, such as skills building, organizational strengthening, leadership development and activist support; and improving advocacy in philanthropy to increase access to new donors.
The ITF is a dynamic, responsive and intersectional organization. Collectively, we:

1. Come from multiple places, histories, experiences, politics and identities. We value the diversity of trans movements (including gender identity, bodily autonomy, gender expression, sex characteristics, sexual orientation, race, ethnicity, geography, age, disability, religion and class/socioeconomic status), and respect and honor our differences. We are intersectional in our approach.

2. Believe in working together to create a world where all people are valued, respected and celebrated.

3. Value the wellbeing, safety, security and sustainability of trans activists and movements, and strive to do no harm. We believe trans people should be equitably compensated for their expertise and labor.

4. Hold self-determination as a core value. Trans leadership, decision making and power are critical to the ITF. We believe trans people are creative and resilient, and fully capable of creating, improving and sustaining their communities and movements.

5. Respect each other, acknowledging we have different levels of power and privilege. We work together with integrity and hold ourselves accountable to trans movements.

6. Strive to be transparent in our work while protecting the safety and confidentiality of activists and organizations.

7. Are audacious. We take calculated risks, break down barriers and embrace new initiatives inspired by our communities.

8. Are responsive to trans communities and believe the ITF’s responses must be flexible and accessible to meet the needs of trans movements.


10. Treat each other with kindness, generosity, humor and best intent.

Heartbeat Statement
The ITF’s work is motivated by imagining a world where all trans people are safe, free and can live with dignity and respect. Where we celebrate and uplift our community’s unstoppable creativity, joy, defiance and innovation to make change. Where trans movements are resourced, resilient and robust, working intersectionally to promote liberation and transform inequalities.
In February 2020, the Steering Committee and Director identified a series of robust goals to inform the Fund’s priorities and activities through 2025. Since that time, the world has been significantly altered by COVID-19, and all regions (and the ITF) will be affected by the economic impact of the pandemic for several years. Already, trans communities are experiencing significant hardships due to COVID-19, making ITF support more important than ever. At the same time, some of the ITF’s core donors are responding to the pandemic by reallocating funds from LGBTQ and other programs to COVID-19 response. Given the many uncertainties of the pandemic, it will be important for the ITF to stay grounded in what it does best—while also being nimble and adjusting to rapid changes in the funding environment.

IDENTITY STATEMENT

The essence of the ITF is represented by its identity statement. This statement should be reviewed regularly, and the components should be revised as needed as the ITF’s environment changes.

The mission of the ITF is to mobilize and facilitate sustainable resources for strong, trans-led movements and collective action, and to address and eliminate funding gaps impacting trans groups across the globe.

We advance our mission and seek to (1) increase the funding available to trans-led groups, both through the ITF or by influencing other donors; (2) help trans groups become increasingly sustainable, autonomous and responsive to the needs of their communities; and (3) increase the representation and influence of trans activists in social justice advocacy and philanthropy. We accomplish this by partnering with trans-led groups around the world, especially in under-resourced regions such as the Global South. Through participatory grantmaking, philanthropic advocacy, and select capacity building with grantee partners and trans-led groups, we build on our strategic advantage as the only participatory fund that exclusively supports trans-led groups across the globe, with trans leadership and regional expertise at every level of decision making. We cherish our trusted relationships with trans activists and funders alike and believe in helping develop the skills of trans groups and leaders to help make stronger social justice movements. We are sustainable through deep partnerships with private foundations, governments and multilateral donors.
Given the severe and pervasive needs of trans communities worldwide, the ITF aspires to get as much money as possible to trans-led groups working on the frontlines and engaged in movement building activities. The ITF aims to increase its annual grantmaking from US$830,000 in 2020 to US$1,200,000 by 2025. In the current environment shaped by the COVID-19 pandemic, it is difficult to plan for growth. The Steering Committee and Secretariat will review these goals and projections at least annually to adjust strategies, tactics and timelines as needed. In addition, the Steering Committee may want to consider the potential usefulness of a responsive, out-of-cycle grantmaking process.

1.1 From 2021 through 2025, continue to allocate funding by region (as defined by the ITF) and limit eligibility to groups with operating budgets under US$100,000.

1.2 By 2021, review and revise grantmaking processes to make them as equitable, efficient and effective as possible—and adaptable to a virtual decision-making process if required.

1.3 By 2021, conduct an impact assessment to document the impact of the ITF’s first five years of grantmaking.

1.4 By 2021, create a two-tiered funding strategy with one-year grants for first-time grantee partners and the option of two-year grants for returning grantee partners in good standing while earmarking at least 50% of annual grantmaking to first-time grantee partners.
1.5 By 2022, increase the efficiency of grantmaking processes to build staff capacity to manage more grants per cycle.

1.6 By 2023, dedicate at least 55% of the ITF’s budget to grantmaking, with no more than 45% allocated to ITF operations.

1.7 By 2023, explore the feasibility of a dedicated funding stream to support grantee partner capacity building.

As the ITF develops, we seek to promote trans leadership, decision-making and power within the organization. The ITF is born from the global trans movement, which is undergoing its own process of growth and maturation. Our institutional strengthening activities promote the development of a robust infrastructure that will eventually enable the ITF to become autonomous. The ITF undertakes these strengthening activities to develop management structures and decision-making processes, expand human resources, and build strong infrastructure for program delivery and internal operations.

GOAL 2
Institutional Strengthening

Build and sustain the ITF as an efficient, effective and independent participatory grantmaker.
2.1 By 2021, conduct an internal capacity assessment to determine staffing needs and organizational development priorities.

2.2 By 2021, investigate accounting regulations and best practices to assess opportunities to more accurately reflect the ITF’s participatory processes as program expenses, rather than as operational expenses.

2.3 By 2021, create a fund development plan to sustain the ITF and achieve its financial goals and assess the feasibility of hiring fund development staff and/or consultants.

2.4 By 2022, develop a communications strategy and re-launch the ITF’s website.

2.5 By 2022, develop evaluation plan and tools to track progress, impact and success.

2.6 By 2022, become an independent and autonomous organization.

2.7 By 2022, create and launch plan to strengthen the Steering Committee’s fundraising skills and ability to represent the ITF with donors.

2.8 By 2022, adopt a policy about what kinds of funds the ITF will and will not accept.

2.9 By 2022, conduct a funder landscape assessment to understand the universe of potential donors to the ITF.

2.10 By 2022, increase the number of ITF donors by 25% (from eight to ten).

2.11 By 2023, build ITF’s internal capacity, infrastructure, fundraising skills and political relationships to secure and manage grants and contracts from governmental and multilateral donors.

2.12 Annually assess the impact of the COVID-19 pandemic on current and potential ITF funders and revise financial projections if needed.
In January 2020, The ITF Steering Committee empaneled a Capacity Building Working Group to explore the ITF’s role and focus in this area of work. Given the ITF’s mission, it was determined that capacity building activities should focus on increasing the ability of trans-led groups to access funding. To this end, the ITF’s capacity building program for 2021 through 2025 will focus on skills most critical for organizational sustainability and growth, including: organizational development, financial management, grantwriting, and grant management and reporting. Many trans groups have asked the ITF for additional types of support vital for organizations to be effective and sustainable, such as safety planning, personal care, and issue expertise; however, the Working Group agreed the ITF should “be driving philanthropy, not activism.” Thus, during the current plan, the ITF will (1) build its own expertise and focus its capacity building program on areas critical to fundraising and grants management and, (2) develop, and help grantee partners connect with networks to address other capacity building needs.

**GOAL 3**

**Capacity Building**

*Increase the capacity of grantee partners to secure additional funds and effectively respond to the needs of their communities.*

**Strategies and Benchmarks**

3.1 By 2021, increase the stability and sustainability of trans groups by offering the possibility of two-year grants to returning grantee partners in good standing.

3.2 By 2021, evaluate the Draft Review Service to understand its effectiveness and any lessons learned.

3.3 By 2021, organize a convening focused on capacity-building in partnership with trans-led groups in the Global South and East (assess if this should be an annual event).

3.4 By 2022, develop a program to increase grantee partners’ fundraising capacity, including grantwriting and reporting.

3.5 By 2023, identify trans-led capacity building subcontractors in each region who are fluent in the dominant languages spoken there. Ideally these will be current or former grantee partners.

3.6 By 2024, survey current and former grantee partners to inform future grantmaking strategies.
GOAL 4
Philanthropic Advocacy

Catalyze more and better funding for global trans movements through philanthropic advocacy and be acknowledged as the leading expert in international trans funding.

If ever there was a time to influence philanthropy it is now. The economic downturn caused by the COVID-19 pandemic is projected to extend through at least 2022 and is likely to negatively impact foundation and governmental funding through 2025. It is too early to know what this may mean for the ITF and its grantee partners, but at least one of the ITF's core donors has already begun to reduce grants to their grantee partners, including several trans groups. Meanwhile, governments and multilateral donors are focused on the pandemic—sometimes at the expense of trans groups and human rights. Making connections to new and existing donors in an all-virtual environment is going to be increasingly important, urgent and complicated as we seek to protect the ITF and our grantee partners.

Strategies and Benchmarks

4.1 By 2021, document the impact of COVID-19 on trans groups—including what grantee partners are doing to respond to the pandemic—to support philanthropic advocacy efforts.

4.2 By 2021, identify intersectional philanthropic spaces where the ITF needs to be strategically represented, including virtual convenings, affinity groups and working groups where relationships can be built with current and potential donors.

4.3 By 2021, continue to deploy ITF staff and surrogates to virtual and in-person donor conferences and convenings, ideally as a recognized speaker or expert.

4.4 By 2022, develop funder-focused communication strategy, messaging and materials to strengthen connections with peer donors and influence their philanthropy.

4.5 By 2023, coordinate at least two donor-centered events each year to influence the philanthropic sector. If meetings are in person, ideally one should be in the Global South and one in the Global North.
How we measure success

The ITF has ambitious goals to grow in the coming years – and rightfully so, given the intense needs of trans communities worldwide. While some goals are easy to measure (such as how many dollars are granted in a year), others are much harder. It is not easy to quantify organizational capacity, for example, or to know for certain what influence the ITF has on other funders. Thus, as the ITF develops more formal evaluation plans, this strategic direction document should be updated accordingly.

In the long run, the ITF aspires to impact philanthropy, trans movements and trans groups worldwide. We will know the ITF is successful if it...

- Generates changes in the way resources are assigned to global trans movements.
- Models a fund embodied and led by a trans rights agenda and accountable to trans movements.
- Supports more trans people to actively engage in philanthropy.
- Increases the visibility and legitimacy of the ITF as a funder in donor spaces.
Creates a world in which trans groups/movements are resourced to create social change.

Supports well-funded trans movements that are strong, sustainable and responsive to the needs of their communities.

Sees more interventions by trans-led groups in global spheres with expanded participation and alliances.

TRANS MOVEMENTS

Supports the development of powerful, transparent and effective trans-led groups that are strong, sustainable and responsive to the needs of their communities.

Encourages strong trans organizing and advocacy.

Builds the capacity of trans groups to apply for, secure and manage grants, including ITF grants, and have the financial stability to become autonomous if desired.

TRANS GROUPS
### Appendix A

**ITF SOURCES OF REVENUE**

<table>
<thead>
<tr>
<th></th>
<th>FY18</th>
<th>FY19</th>
<th>FY20²</th>
<th>FY21²</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Foundation Grants</strong></td>
<td>$1,497,655</td>
<td>$1,419,899</td>
<td>$1,373,936</td>
<td>$1,102,079</td>
</tr>
<tr>
<td>(Carryover)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Foundation Grants</strong></td>
<td>$1,010,000</td>
<td>$1,056,454</td>
<td>$1,306,048</td>
<td>$3,289,000</td>
</tr>
<tr>
<td>(New)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Government Funding</strong></td>
<td>$0</td>
<td>$450,000</td>
<td>$0</td>
<td>$752,720</td>
</tr>
<tr>
<td><strong>Unrestricted Funding</strong></td>
<td>$806</td>
<td>$10,090</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>(Individual donors, etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Revenue</strong>³</td>
<td>$2,508,461</td>
<td>$2,936,443</td>
<td>$2,679,984</td>
<td>$5,143,799</td>
</tr>
<tr>
<td><strong>Direct Grants</strong></td>
<td>$500,000</td>
<td>$640,000</td>
<td>$707,000</td>
<td>$1,830,000</td>
</tr>
<tr>
<td><strong>ITF Operations</strong></td>
<td>$411,125</td>
<td>$700,878</td>
<td>$665,760</td>
<td>$776,000</td>
</tr>
<tr>
<td><strong>Host Fee</strong></td>
<td>$177,437</td>
<td>$221,629</td>
<td>$205,145</td>
<td>$243,500</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>$1,088,562</td>
<td>$1,562,507</td>
<td>$1,577,905</td>
<td>$2,849,500</td>
</tr>
<tr>
<td><strong>Surplus⁴ (Deficit)</strong></td>
<td>$1,419,899</td>
<td>$1,373,936</td>
<td>$1,102,079</td>
<td>$2,294,299</td>
</tr>
</tbody>
</table>

¹ All figures in US dollars.
² Accounts not yet audited.
³ Includes multi-year grants.
⁴ Any surplus in funds is carried over to the future. The ITF does not retain any profits.
## Appendix B
### ITF Regions

#### REGION 1
**Africa and West Asia**

- Algeria
- Angola
- Bahrain
- Benin
- Botswana
- Burkina Faso
- Burundi
- Cabo Verde
- Cameroon
- Central African Republic of Chad
- Comoros
- Cote d’Ivoire
- Democratic Rep of the Congo
- Djibouti
- Egypt
- Equatorial Guinea
- Eritrea
- Ethiopia
- Gabon
- Ghana
- Guinea
- Guinea-Bissau
- Iran
- Iraq
- Jordan
- Kenya
- Kuwait
- Lebanon
- Lesotho
- Liberia
- Libya
- Madagascar
- Malawi
- Mali
- Mauritania
- Mauritius
- Mayotte
- Morocco
- Mozambique
- Namibia
- Niger
- Nigeria
- Oman
- Qatar
- Republic of the Congo
- Réunion
- Rwanda
- Saint Helena
- Sao Tome and Principe
- Saudi Arabia
- Senegal
- Seychelles
- Sierra Leone
- Somalia
- South Africa
- South Sudan
- State of Palestine
- Sudan
- Swaziland
- Syrian Arab Republic
- Tanzania
- The Gambia
- Togo
- Tunisia
- Turkey
- Uganda
- United Arab Emirates
- Western Sahara
- Yemen
- Zambia
- Zimbabwe

#### REGION 2
**East, South, Southeast Asia and the Pacific**

- Afghanistan
- American Samoa
- Australia
- Bangladesh
- Bhutan
- Brunei Darussalam
- Burma (official name: Myanmar)
- Cambodia
- China
- Cook Islands
- Fiji
- French Polynesia
- Guam
- Hong Kong
- India
- Indonesia
- Japan
- Kiribati
- Lao People’s Democratic Republic
- Macao
- Malaysia
- Marshall Islands
- Micronesia
- Mongolia
- Nauru
- Nepal
- New Caledonia
- Niue
- Norfolk Island
- North Korea
- Northern Mariana Islands
- Pakistan
- Palau
- Papua New Guinea
- Pitcairn Islands
- Samoa
- Singapore
- Solomon Islands
- South Korea
- Sri Lanka
- Taiwan
- Tasmania
- Thailand
- The Maldives
- The Philippines
- Timor Leste
- Tokelau
- Tonga
- Tuvalu
- Vanuatu
- Vietnam
- Wallis and Futuna
REGION 3
EASTERN EUROPE AND CENTRAL ASIA
Albania
Armenia
Belarus
Bosnia and Herzegovina
Bulgaria
Croatia
Czech Republic
Estonia
Hungary
Kazakhstan
Kyrgyzstan
Latvia
Lithuania
Montenegro
North Macedonia
Poland
Republic of Moldova
Romania
Russian Federation
Serbia
Slovakia
Slovenia
Tajikistan
Turkmenistan
Ukraine
Uzbekistan

REGION 4
LATIN AMERICA AND THE CARIBBEAN
Anguilla
Antigua and Barbuda
Argentina
Aruba
Bahamas
Barbados
Belize
Bermuda
Bolivia
Bonaire, Sint Eustatius and Saba
Brazil
British Virgin Islands
Cayman Islands
Chile
Colombia
Costa Rica
Cuba
Curacao
Dominica
Dominican Republic
Ecuador
El Salvador
Falkland Islands
French Guiana
Grenada
Guadeloupe
Guatemala
Guyana
Haiti
Honduras
Jamaica
Martinique
Mexico
Montserrat
Nicaragua
Panama
Paraguay
Peru
Puerto Rico
Saint Kitts and Nevis
Saint Lucia
Saint Martin
Saint Vincent and the Grenadines
Saint-Barthélémy
Sint Maarten
Suriname
Trinidad and Tobago
Turks and Caicos Islands
United States Virgin Islands
Uruguay
Venezuela

REGION 5
USA, EUROPE, AUSTRALIA, NEW ZEALAND AND CANADA
Åland Islands
Andorra
Australia
Austria
Belgium
Canada
Channel Islands
Denmark
Faeroe Islands
Finland
France
Germany
Gibraltar
Greece
Greenland
Guernsey
Holy See
Iceland
Ireland
Isle of Man
Israel
Italy
Jersey
Liechtenstein
Luxembourg
Malta
Monaco
New Zealand
Norway
Portugal
Saint Pierre and Miquelon
San Marino
Sark
Spain
Svalbard and Jan Mayen Islands
Sweden
Switzerland
The Netherlands
United Kingdom
United States