



GATE



**ORGANIZATIONAL
STRENGTHENING
TOOLKIT**

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About GATE

GATE is an international advocacy organization working towards justice and equality for trans, gender diverse and intersex communities. Rooted in our movements, we work collaboratively with strategic partners at the global level to provide knowledge, resources, and access to international institutions and processes. Our vision is a world free from human rights violations based on gender identity, gender expression, and sex characteristics. Our strategy is to transform the landscape of global advocacy, knowledge creation and resource distribution through critical inclusion of trans, gender diverse and intersex movements at all levels of political, legal and socio-economic processes.

Find out more about GATE by visiting www.gate.ngo



Click on sections to navigate

ORGANIZATIONAL FOUNDATIONS

"I'm just beginning to create my organization, and want to know what to keep in mind."

STRATEGIC PLAN

"Our organization exists but we want to write our first strategic plan or redevelop our current one."

ORGANIZATIONAL ASSESSMENT

"Our organization has been around for quite some time and we feel all over the place. We want to pause and reflect on how we are doing but we don't know where to start."

THREATS FROM WITHIN

"We don't have any conflict resolution policies and are afraid that internal tensions might hurt our organization"

THREATS FROM OUTSIDE

"Our organization is at risk, we want to build its strength and resilience to face external threats"

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Introduction

What is this Toolkit about?

Organizational strengthening refers to the process of improving and enhancing an organization's overall effectiveness, efficiency, and sustainability. It involves developing the necessary structures, procedures, systems, skills, infrastructure, and resources to better achieve an organization's vision, mission, and objectives. Organizational strengthening aims to build a strong foundation for the organization and empower it to adapt to challenges, make informed decisions, and create a positive and lasting impact.

This Toolkit has been designed for trans, gender diverse, and intersex (TGDI)-led organizations. However, it applies to any community-led organizations that want to pause and reflect on how they are doing organizationally. Often, community-based and community-led organizations focus, as activists, on taking action. However, there is value in taking a step back and looking at your overall strategy. An organizational strategy can ensure that you are making the most of your available resources to achieve your goals and that your staff/volunteers/community members, and values are prioritized and centered in your work. Thus, you can ensure that you retain your authentic mission while creating space for flexibility to respond to ongoing changes faced by your communities.

In the context of TGDI movements, organizational strengthening is crucial for effectively protecting and advancing the rights of TGDI individuals. It does this by:

- **Empowering** the activists you engage with by providing them with the training, resources, and support they need to be effective advocates.
- **Supporting** network-building and collaboration. Strong organizations are better positioned to collaborate and form alliances with other organizations and stakeholders.
- **Helping** you better protect the safety, security, and well-being of the people who contribute to your organization. The more robust, transparent, and stable your organization is, the safer it becomes.
- **Increasing** your ability to mobilize resources, including financial support, partnerships, and in-kind contributions. Ultimately, this supports your organization's sustainability and growth.
- **Enhancing** your advocacy impact. Strong organizations can design and implement more strategic and impactful advocacy campaigns. This helps amplify their impact, ensuring that the voices of their community are heard by policymakers, stakeholders, and the public.
- **Improving** your governance and management. Strong organizations have clear governance structures and effective management practices. This ensures transparency, accountability, and responsible decision-making, crucial elements for building trust in your team and credibility with external stakeholders.
- **Boosting** your capacity to address challenges. Organizational strengthening equips the organization with the skills and tools to address internal and external challenges effectively. This includes conflict resolution and learning from setbacks.

Overall, the stronger an organization is, the more empowered the communities it represents and the more sustainable the movement.



Non-profits, for-profits, social enterprises... What is the difference?

Unlike most for-profit businesses, non-profits aim to achieve political, social, cultural, or environmental goals without seeking to make a profit. They rely on donations and grants for funding and invest these funds into their mission. However, a non-profit civil society organization is not the only structure your initiative can take. A **social enterprise** combining social goals with business strategies is also viable. Like non-profits, they address societal issues but generate revenue through sales of goods or services, thus reducing reliance on donations and fundraising. In a social enterprise, profits are reinvested into the organization's activities to support its mission, thus making it financially self-sustaining. In essence, social enterprises merge non-profit values with entrepreneurial methods.

As you start your collective journey, it is important to **ask yourself which structure best fits your needs, opportunities, and context**. Asking yourself this question is critical as, realistically, not all collective initiatives can be funded through donations and grants. A 2017 global study into [*The State of Trans Organizing*](#) and [*The State of Intersex Organizing*](#), conducted by GATE, AJWS (American Jewish World Service), and Astraea Lesbian Foundation for Justice found that 40% of TGDI organizations surveyed had no external funding.¹ Moreover, more than half (56%) of the TGDI organizations surveyed had budgets of less than \$10,000 per year, and a staggering 78% operated with annual budgets of less than \$50,000.

TGDI groups and organizations worldwide face significant resource challenges, often with limited or no financial support. The lack of access to financial resources directly impacts the ability of TGDI organizations to survive and sustain their efforts, let alone thrive. As TGDI activists, we must advocate for more financial resources for our movement. However, until this becomes a reality, we need to recognize that there are significantly more TGDI organizations applying for grants than there are grants available. With this in mind, consider carefully the structure of your initiative.

For this Toolkit, we will specifically address non-profit organizations.

¹ Howe, E, Frazer, S, Dumont, M. and Zomorodi, G. (2017). *The State of Trans Organizing* (2nd Edition): Understanding the Needs and Priorities of a Growing but Under-Resourced Movement. New York: American Jewish World Service, Astraea Lesbian Foundation for Justice and Global Action for Trans Equality.

Is this Toolkit for me?

Some comprehensive toolkits have already been developed on the topic of organizational strengthening. The purpose of this Toolkit is not to duplicate existing resources but to enhance and adjust them to the realities of TGDI-led organizations. **This Toolkit has the added value of collecting recommendations that speak to the most common gaps TGDI-led organizations face worldwide.**

Want to explore others on organizational strengthening? We recommend the following:

- Toolkit of the NGO GONG, [Organizational Development for NGOs](#)
- [The Essential Guide to Managing Your USAID Award](#) by FHI 360, MSI, and USAID, and especially Chapter 7
- The [resources database](#) developed by the Strengthening Civil Society Globally (SCS Global) Program

For many years, GATE has been collecting the priorities of our communities through one-on-one consultations, convenings, and surveys.² These are, and continue to be, all opportunities to assess the needs of TGDI communities worldwide and to inform GATE's programmatic work. The latest community consultation conducted by GATE in 2023 was a survey to determine the impact of anti-gender opposition on the work of TGDI activists and organizations, as well as their capacity and advocacy needs.³ The resulting report provides a comprehensive analysis of the data gathered through the survey, highlighting key findings and trends. The survey findings confirmed the qualitative data collected through ongoing community consultations. The majority of identified needs related to organizational development and strengthening skills: fundraising skills, emergency measures development, strategic planning, allies mobilization, internal conflict resolutions, and more.

How to Navigate this Toolkit

This Toolkit aims to contribute to filling these gaps by addressing the most critical aspects of organizational development in the context of TGDI organizing. It is structured in **two chapters**, representing two levels for reflecting on your organization:

- **Develop your organization:** How to build strong and sustainable foundations and strategies that will set your organization on the path to success;
- **Boost your organization:** How to further develop your organization's capacity by assessing its performance and equipping it to overcome challenges.

² For instance GATE: Appenroth, M.; Castellanos, E. (2022) *Trans and Gender Diverse Communities Values and Preferences for HIV, Hepatitis, and STI Services: A Qualitative Study*. New York: GATE. <https://gate.ngo/trans-values-and-preferences-hiv-services/> or GATE. (2023). *Impact of Anti-Gender Opposition on TGD and LGBTQI Movements: Global Report*. New York: GATE. <https://gate.ngo/global-reports-ag-impact/>

³ GATE. (2023). *Capacity Needs of TGDI and Wider LGBTQI Organizations and Collectives: Report 2023*. New York: GATE. For security reasons, the report is not available publicly. However, feel free [to reach out to us](#) if you want to further discuss the results.



In practice, processes are not this linear, and you will organically go back and forth between the two levels. However, the Toolkit has been divided into two levels to facilitate a structured approach to this work. Each level is broken down into entry-point. You can take the time to go through all the steps or **jump to some of the five entry-points that specifically speak to your needs:**

- **Develop your organization**



"I'm just beginning to create my organization, and want to know what to keep in mind."

Go to: [Organizational Foundations](#)



"Our organization exists but we want to write our first strategic plan or redevelop our current one."

Go to: [Strategic Plan](#)

- **Boost your organization:**



"Our organization has been around for quite some time and we feel all over the place. We want to pause and reflect on how we are doing but we don't know where to start."

Go to: [Organizational Assessment](#)



"Our organization is at risk, we want to build its strength and resilience to face external threats."

Go to: [Threats from Outside](#)



"We don't have any conflict resolution policies and are afraid that internal tensions might hurt our organization."

Go to: [Threats from Within](#)

We acknowledge the immense diversity in organizing approaches within TGDI communities, full of brilliant initiatives that redefine traditional paradigms of leadership, work culture, and focus areas. **The recommendations presented in this Toolkit are not prescriptive.** We encourage you to follow them only if they align with your organization's 'true essence'. Some of these tools can be double-edged swords. While these approaches can boost the efficiency and impact of the work accomplished, that might be at the cost of resources you would like to redirect elsewhere or within a structure that you envision differently from those outlined in this Toolkit. Organizational theory and practice are often based on Western-centric, for-profit organizational structures. These structures are not always practical when applied to community-based organizing approaches. For instance, even if your organization does not want, or have the resources, to develop clear vision and mission statements, **it is important to know that most donors or high-level stakeholders expect these to further collaborate with your organization.** Ultimately, your decisions should be based on your organization's context and ideals, weighing the pros and cons of using such frames, approaches, and tools. **This toolkit aims to help you make the most informed decisions possible while respecting the diversity of TGDI-led initiatives.**

DEVELOP YOUR ORGANIZATION





Organizational Foundations

"I'm just beginning to create my organization, and I want to know what to keep in mind."

Vision and Mission

The stronger your organizational foundations are, the higher the chances are that your work will be more sustainable and impactful. Your starting point should be clearly setting your organization's vision, mission, and purposes. This is who you are as an organization: the **why and what** (*Why does your organization exist? What would the world look like if your vision came true?*) and the **how** (*How are you going to make your vision a reality?*). These are the foundations of your organization and should directly inform everything your organization does. They should be clear to whoever is working with you, whether they are permanent staff, volunteers, or occasional supporters.

Historically, most well-established TGDI-led organizations started as spontaneous and grassroots initiatives that organically grew into something more. It is rare that a group of activists comes together and agrees from the start on the theoretical structure and a 10-year strategy before initiating any actions. So, whether you plan on founding an organization or retroactively reflecting on what you created, take the time to explore these elements.

WHY & WHAT - Vision: Your vision statement describes the ideal future your organization aspires to in the long run. In other words, the **vision statement summarizes changes you would bring into the lives of the community you serve**. The vision statement should be expressive so that it appeals to people and, at the same time, also gives direction to your organization. While drafting your vision statement, ensure that you are making it:

1. **Simple and concise** so that it can be understood by people of all backgrounds (tip: to find out if the wording is accessible, have a friend or family member with little knowledge of the problem you want to address read the statement)
2. **Appealing and inspiring** to engage with (tip: vision statements are usually written in the present tense)
3. **Focused on positive** long-term impacts
4. **Idealist** (dream big!)

What can a vision statement look like? Check the vision of GATE's partner organization [Sisters Foundations](#) based in Thailand:

"SISTERS envisions a Thai society where transgender people, gender diverse people, and people of all gender identities fully enjoy their human rights, including sexual rights, and the highest standards of healthcare and wellbeing."



Organizational Foundations

HOW - Mission: Now that you have a vision for your organization, you will need a plan to achieve it. This is where mission statements come into play. It describes the process of how the organization will achieve its vision. While drafting your mission statement, ensure that you make it:

1. Simple and concise (just like the vision statement)
2. Explicit in the problem it addresses (don't forget essential elements such as your location or the community you serve)
3. Solution-oriented by describing how you intend to solve the problem(s)
4. Outcomes-oriented by stating the long-term changes that you would bring
5. Comprehensive and inclusive of all
6. Community-informed and consensus-based

What can a mission statement look like?

Check the vision of GATE's partner organization [*Dynamiques Trans*](#) based in Morocco:

"Dynamiques Trans mission is to mobilize transgender, non-binary, and gender non-conforming people in leading the struggle for trans rights and to fight against all forms of violence and structural oppression based on gender identity and gender expression in Morocco. Its main programmatic areas include social support and community wellbeing, community organizing and capacity building, education and awareness raising, research and knowledge production, human rights advocacy and decriminalization."

Developing compelling vision and mission statements requires time and consultation. You will have to write and rewrite the statements several times before they clearly describe your organization's identity. **Don't rush the process or overlook** seeking perspectives from the key stakeholders you are working with. Your work should always center on the voices and priorities of the community you serve and represent. Once you know how your communities feel about the changes they want to see, it will be easier to articulate the vision statement.



EXERCISE: Generate your vision and mission statements

Step 1 - Brainstorming

Compile a selection of 5-10 sample vision or mission statements, including the suggestions below and additional ones from like-minded organizations. Discuss what you like or dislike about them.

For your vision statement:

[International Network of People who Use Drugs \(INPUD\)](#): Our vision is a world where people who use drugs are free to live their lives with dignity.

[Organisation Intersex International \(OII\) Europe](#): OII Europe's vision is of a world where the human rights of intersex people are fully implemented and where bodily autonomy, physical integrity, and self-determination of all people, including but not limited to intersex individuals, is guaranteed and intersex people are respected and celebrated as being part of human diversity and society.

[Fem Alliance Uganda](#): To promote human rights and restore human dignity of LBT/Q persons through education, personal development, advocacy and strategic partnerships.

For your mission statement:

[International Trans Fund \(ITF\)](#) - The mission of the ITF is to mobilize sustainable resources for strong, trans-led movements and collective action, and to address and eliminate funding gaps impacting trans groups across the globe.

[BlackLivesMatter \(BLM\)](#) - Black Lives Matter Global Network Foundation, Inc. is a global organization in the US, UK, and Canada, whose mission is to eradicate white supremacy and build local power to intervene in violence inflicted on Black communities by the state and vigilantes. By combating and countering acts of violence, creating space for Black imagination and innovation, and centering Black joy, we are winning immediate improvements in our lives.

[Blue Diamond Society \(BDS\)](#) - We facilitate the empowerment of sexual and gender minorities who are socially excluded to achieve social justice. This will be attained through:

1. Advocacy for sexual and gender minorities' rights and social justice
2. Delivery of immediate and lasting improvements in the lives of sexual and gender minorities in Nepal and beyond.





Step 2 - Visioning

For your vision statement:

Ask participants how an ideal news headline regarding your organization would read 50 years from now. What do you want to be newsworthy about your organization? Without getting into the details of how it might come about, answer the question: what is our organization working to accomplish?

For your mission statement:

Ask your staff and volunteers to imagine (or remember) an ideal day at your organization when it worked effectively, at its 'peak'. Ask them to write a short paragraph specifying who is involved, the nature of their contributions, the impact of their work, and the overall atmosphere.

Prompt questions can include:

- What problem are you trying to solve?
- What are your major programs and services, and what purpose do they serve?
- Who or what is your work serving?

Once the paragraphs are written, ask everyone to highlight in three different colors:

- Everything they mention that relates to actions taken (your programs - what you do)
- Everything they mention that relates to people impacted (your community - who you do it for)
- Everything they mention that relates to changes driven or impact made (your outcomes - what are you aiming for?)





Step 3 - Play around with words

Either individually or in small groups, start drafting potential statements. Keep in mind the key elements identified in step 2. Use a 'fill in the blanks' statement format as outlined below if it is helpful.

For your vision statement:

[Your organization's name] envisions a [country/region/world] where [description of what things would look like in 50 years if you achieved all your goals].

Now, shorten what you've just written into 200 characters. This is your vision statement!

For your mission statement:

The mission of [your organization's name] is to [measurable outcomes you drive] by [how you do it], for [who you serve].

Step 4 - Gather feedback before finetuning!

As described in the [Vision and Mission section](#), finalizing a vision and/or mission statement requires time and consultation. If you have followed the steps outlined above and in the Toolkit, various stakeholders should have already engaged in the process. This includes members from your Board, staff, volunteers, beneficiaries, external partners, etc.

However, it's essential not to stop here. Many stakeholders may be unable to actively participate in the vision and/or mission development process, but their insights are often the most influential. Explore options involving a broader range of stakeholders, such as anonymous surveys, listening sessions, focus groups, one-on-one interviews, and other feedback mechanisms.





Organizational Foundations

Organizational Structure

Let's imagine your organization is a ship. Now that you know where you want to go (your vision) and how you want to get there (your mission), **you need to agree on who is going to be on the ship, how it is going to be steered, and what its internal structure should look like** to ensure you're fully prepared for the journey ahead.

Leadership

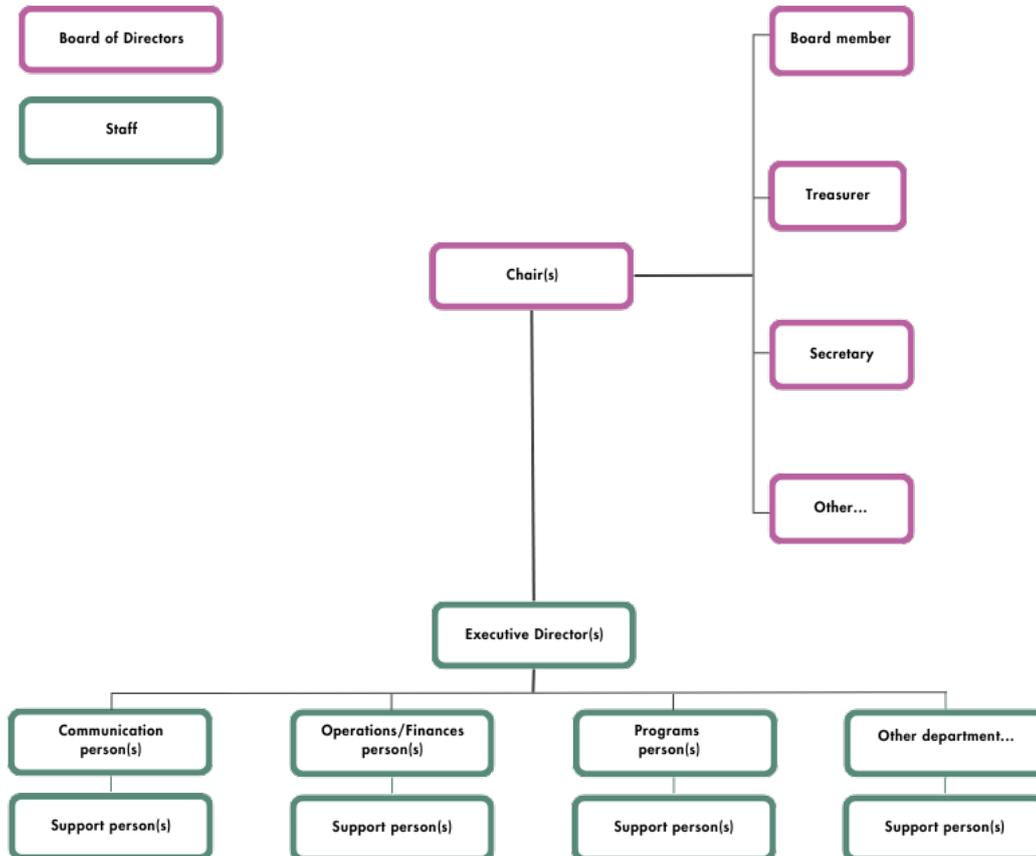
Generally speaking, in the non-profit sector, leadership encompasses two aspects: governance and management. **Governing is typically the business of the Board of Directors** (or Steering Committee, or any similar body) under the guidance of one or several Chair(s) (or President(s), or any similar role). **Managing is typically the business of the Staff** (or Executive Office, or any similar body) under the guidance of one or several Executive Director(s) (or CEO(s), or any similar role). This way of structuring leadership is the most commonly used, although **it is not the only way** things can be done. Feel free to think outside of the box and explore other leadership models. However, before doing so, keep in mind that:

1. Whether you identify them explicitly or not, **these two components of leadership should always exist**. If, through another way of structuring your organization, these leadership components either overlap or disconnect completely, make sure that the decision to do it is informed and justified.
2. Ensure you have developed enough experience with 'traditional' organizational structures before getting creative. While this structure may not be ideal for your organization, it is the one with which most external stakeholders are familiar (donors, policy-makers, and more). **You don't want to discourage their engagement, particularly if you are just starting.**



Organizational Foundations

A TYPICAL ORGANIZATIONAL CHART



What is the difference between governance and management?

Governance is considered the 'big picture' part of an organization. The people governing provide oversight that is in the best interests of the organization as a whole. In simple terms, **governance is like the GPS that sets the route, guiding decisions for the organization to stay on track and ensure it's going in the right direction.**

Governance involves:

- Setting the mission, vision, and strategy by defining your organization's primary purpose, long-term goals, and strategic directions.
- Establishing rules by creating guidelines and policies that everyone in the organization should follow.
- Selecting the right people (typically the Executive Director) to manage the organization and who will oversee the day-to-day business.
- Ensuring legal compliance by ensuring the organization follows all the laws and regulations that apply to it.



Organizational Foundations

The people responsible for governance are most often volunteers. If your organization is membership-based, they can be elected by a body representing your membership (i.e., a General Assembly). Often, this role is perceived as a simple formality, as, to register as a non-profit organization, most national laws of associations (or equivalent) require registering a group of people who will act as the legal entity accountable for the organization. However, a Board (of Directors) can play a much more significant role than that and, for many organizations, can make the difference between success and failure.

Boards are important because they:

- **Help prevent organizational failure**, as the Board is in charge of assessing the achievement of goals and ensuring the effectiveness of your strategy.
- **Protect the interests of the community you serve**, especially when they are the representatives of your membership. If you lose their support, your legitimacy as a community-led and community-serving organization will be challenged.
- **Contribute to building trust among stakeholders** (governments, funders, partners, community members, etc.). In that regard, having highly trusted community members and/or allies as board members who can share their expertise is good practice.

Becoming a Board member is not a responsibility that should be taken lightly. In most contexts, being a Board member has legal implications, and Board members can be held liable for the organization's actions.

Board members have **three primary duties**:

- **Diligence:** They must keep themselves informed of the high-level management of the organization's affairs (review minutes, policies, audits, financial statements, staff management) and remain engaged (attend meetings, and sit on committees or working groups as needed).
- **Care:** They must be prudent (carefully make decisions, operate within the law, and question the organization's direction beyond it), and provide insight and perspective (voice opposition when necessary or assist with donors outreach or public representation).
- **Loyalty:** They must act ethically (disclose conflicts of interest, set personal agendas aside) and work in solidarity.



Organizational Foundations

As you formalize how your Board should operate, **we recommend you consider the following good practices.** These can help foster transparency, efficiency, and power sharing.

- **Chairperson rotation:** Rotating the chair encourages diverse leadership, fresh insights, and knowledge transmission while preventing gatekeeping.
- **Term Limits:** Agreeing on a maximum number of years or mandates serving on a Board will allow your organization to foster continuity while encouraging shared decision-making and knowledge transmission.
- **Staggered Elections:** Implementing staggered elections, where only a portion of the Board is renewed at each election cycle, can foster continuity, preserving institutional memory while allowing for a gradual infusion of new perspectives and skills within our organization's leadership.
- **Succession Planning:** As your current Board is coming to a term, prioritize succession planning to ensure a smooth transition. This can include identifying gaps in your community knowledge about how to become a Board member, strategically planning the call for application and election process, or highlighting the need for changes in your current organizational policies.

This doesn't mean that your organization's Board should be in charge of everything!

As your organization grows and maybe even gets the financial capacity to hire paid staff, the **Board can delegate responsibility to an Executive Director** (or equivalent). This is where 'management' comes into play.

Management is all about the day-to-day operations of the organization. If your Board is your GPS, then **your management is the engine that keeps the organization running smoothly.** It oversees tasks, people, relationships, resources, infrastructure, and technology necessary to achieve your purpose.

Management involves:

- **Ensuring the smooth implementation of programs** that support the organization's mission.
- **Handling finances** by leading the organization's money, budgeting, financial reporting, and fundraising efforts.
- **Supervising staff and/or volunteers** by making sure everyone knows their roles and has what they need to thrive and work collaboratively.
- **Handling resources** by taking care of the organization's assets, like equipment and facilities.

To summarize, if governance is about setting and monitoring the big picture, management is about implementing it. Both governance and management are essential for an organization to be successful and sustainable.



Organizational Foundations

Areas of work

Congratulations! At this stage, you should have a good idea of your destination (your vision), your route (your mission), who your captains are and how they coordinate with each other (your leadership). **Now, you need to build a ship fit for your journey.** Among other things, this includes your programs, your operations, and your communications work. There are only so many details this Toolkit can get into. Only you, as a collective, can decide what areas of work you should focus on, depending on your capacity, needs, and context.

Here are a **few recommendations** to keep in mind as you start defining your areas of work:

- **Programs** (also see [Programmatic strategy](#)): As activists, we tend to operate (to our own cost) as if we had unlimited capacities. However, in reality, you - your organization and your people - have limited time, resources, and energy. You will have to set your organizational and personal limits and narrow your programmatic strategy to a few key areas. **Be strategic about this!** What is your organization's expertise? If you don't work in a certain area, who will? Does this area speak to the needs of the community you serve? What will be your priorities? Why and why not? How will you ensure your organization is best positioned to achieve your goals?
- **Operations** (also see [Operational strategy](#)): Develop clear and transparent processes and **reflect on your administrative needs, reporting requirements, legal compliances, budget plans, finances, and accounting system.** Are all your organizational needs covered? Are the people doing the work supported enough (e.g., through training, resources, and equipment)? Although they are key to the organization, these areas of work (and the people holding them) tend to be overlooked and undervalued. These can also be the hardest ones to fundraise for. However, they are critical to developing a well-functioning organization.



Organizational Foundations

Work culture, accountability, and intersectionality

You now have the foundation needed to sail to your destination: the appropriate people on a fitting ship and heading towards the chosen shared destination. Before setting sail, make sure you collectively reflect on how, as a cohesive team, you will spend your time together. Together, you are a small community, and as in any community, **behavior is dictated by certain agreements. Whether these agreements are explicit or not, they contribute to your organization's culture.** Ensure that your core values align with the type of work culture you are building. Be aware that, without a conscious decision to enable an appropriate and inclusive work culture, the capitalist hierarchical and often exclusionary framing can take over with the resulting expression of various power dynamics that can be ableist, misogynistic, and racist, among others. This is even more important in community-based settings as, often, team members in community-led organizations are working directly with issues that often relate directly to trauma that they have experienced in their own lives. **This can lead to burnout, re-traumatization, and various dysfunctional workplace dynamics.** Your organization needs to be aware of the impact of trauma on the work culture and plan how they will manage it.⁴

What kind of work culture do you want to create? Prompt questions might include:

- How do you divide up work?
- Who prepares and who signs off on final materials/plans?
- How do you ensure the inclusion of the voices, perspectives, or experiences of marginalized or underrepresented communities impacted by your work? Note that this can include community members with intersectional identities that might be overlooked or ignored within your community.
- How do you delegate projects and responsibilities to one another?
- How do you nurture relationships and a sense of belonging on your team?
- How do you provide feedback and foster growth?
- How do you equitably address performance issues?
- How do you support one another to stay organized and use your time effectively, even with an overflowing plate? How do you address periods of low motivation? Lack of capacity?
- How do you ensure your team gets results while incorporating an ethical lens of equity and inclusion?
- What approach do you implement to understand and mitigate the impact of trauma on the cognition, emotion, behavior, and perception of the people you work with?

⁴ Want to explore more about how to develop trauma-informed approaches? Check out: Menschner C, Maul A. Center for Health Care Strategies. (2026). [Strategies for Encouraging Staff Wellness in Trauma-Informed Organizations](#).



Organizational Foundations

Many organizations suffer from being either too personality-driven or too loosely structured. In the first case, one individual perceived as ‘irreplaceable’ ends up gatekeeping most of the processes and knowledge. In the first case, this can happen for different reasons: because they have been around for longer, have a particular set of skills, or have more capacity than others. In the second case, it’s the opposite. The organization lacks drive because no one wants to take responsibility, leading to large amounts of resources (time, energy, money) spent on discussions that rarely result in decisions and actions. Ideally, many of us strive to find alternatives to strict hierarchies and create flat power structures. You might not have any distinction between your Board and Staff or any official structure at all. However, even in such contexts, if you have already been working as a team, these roles exist, whether or not you have consciously identified them. Make them explicit, reflect on their nature, value, division, and the power dynamics they rely on, and agree on ways to mitigate imbalances. Not naming and addressing these issues will only result in further issues later. In the first case, the **main risk is that you will overburden some of your members, leading to gatekeeping and burnout.** In the second case, the **main risk is disengagement of some (or all) of your members, which will lead to gaps in knowledge and skills transmission and leave behind certain voices.**

It is your responsibility to collectively define the decision-making structure you are most comfortable with, balancing a fair and empowering structure with the need for efficiency. It is not easy to do, and that’s why **using intersectionality as a core value, framework, and tool can be critical in your decision-making processes and actions.**⁵ This entails considering the historical, social, and political context to create strategies and practices that reflect and challenge systems of oppression. Does the solution to the problem look the same for everyone? Who are the most impacted, marginalized, or invisibilized? Who gets to make decisions, and what power dynamics are involved? To address this, it is always best practice to start from the margins (those further marginalized within the TGDI community, such as those who are homeless, sex workers, living with disabilities, etc.) and work towards the center.⁶ Whether it is in your programs, processes, structures, or representation, always center the priorities of those further marginalized in your work.

⁵ We owe the concept of intersectionality to the Black feminist movement, and was coined by the civil rights advocate Kimberlé W. Crenshaw. According to the [Center for Intersectional Justice](#), “the concept of intersectionality describes the ways in which systems of inequality based on gender, race, ethnicity, sexual orientation, gender identity, disability, class and other forms of discrimination “intersect” to create unique dynamics and effects. [...] All forms of inequality are mutually reinforcing and must therefore be analysed and addressed simultaneously to prevent one form of inequality from reinforcing another.”

⁶ hooks, b. (1984). From the Margin to the Center. South End Press.



EXERCISE: YOUR ORGANIZATION IS A HOUSE!

Step 1 - What does your current organization look like?

Let's be creative and imagine that your organization is a house. **What would it look like?** Take all the necessary materials and start drawing your house-organization as it is today. To help you reflect, you might want to consider the following questions:

- How big/small is it?
- How many floors and rooms does it have? Who has access to which room? How big/small is each room in comparison?
- How many people are living in the house? Where are they staying? Are they always in the house?
- What equipment do you have access to? What is missing?
- What do the walls look like? The roof? The foundation?
- Where is it located? In a crowded city, in the middle of nowhere...?
- How close to other houses is it? Who are your neighbors?
- How many people live permanently in the house? How many live there temporarily? How many are just passing by? Who are they?
- What safety and security equipment or measures does your house have in an emergency?

Step 2 - What would your ideal organization look like?

Now, draw a second house. This time, the drawing should reflect what you want it to look like. You can either start a new how or use a different color to highlight what would be different in your previous drawing.

Step 3 - Moving out!

Now, compare your two drawings and translate the metaphor into your organizational foundation.

- From the first to the second drawing, what has changed?
- What is missing? What gaps do you identify?
- What needs to happen for this vision to come true?
- What should be your priority?





Strategic Plan

Strategic Plan

“Our organization exists but we want to write our first strategic plan or redevelop our current one.”

At this stage, your organization should be well thought out. However, it remains theoretical. A mission statement is too broad to provide a detailed plan, and there are various directions to consider. Developing a Strategic Plan is one way to translate your foundations into action. **This plan acts as a structured roadmap, outlining your organization’s goals, priorities, and steps for moving closer to the vision.** It serves as a guiding document, aiding informed decision-making, resource allocation, and maintaining focus on long-term goals while adapting to an ever-changing environment.

Concrete steps to developing your strategic plan

1. Prepare for the planning process

Start by assembling a diverse working team representing various stakeholders within the organization. It can be people from your Board, Staff, volunteers, beneficiaries, external partners, or donors. If you are membership-based, this team should include your membership. Your constituency’s insights are crucial to understanding your organization’s capacity and ensuring your work is tailored to their priorities. **Preparing for the planning process should be evidence-based and community-centered.** It can, for instance, include the results of a community-need assessment or some desk research you conducted to gather relevant qualitative or quantitative data (the state of the funding in the sector you work, reports on challenges your communities face, etc.). If you lack resources, this stage should include strategic thinking around your communication and engagement work (see step 7). Finally, this step involves establishing a common understanding of what you aim for, what can (or cannot) be expected out of this process, and how you want to go about it (for instance, with a timeline and a division of roles).

Are you unsure how to ensure your community directly informs your Strategic Plan? You might want to start by conducting a community needs assessment to document the needs of your community and identify ways forward.

Check [GATE Learning Hub online course](#) to learn how to develop and implement an impactful community needs assessment.



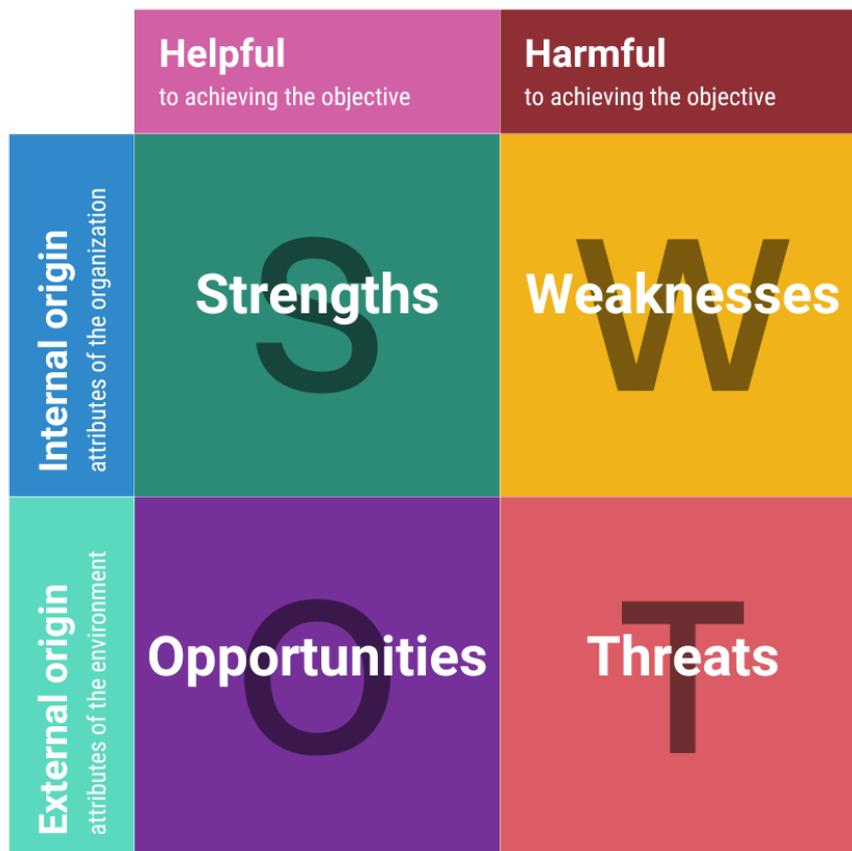


Strategic Plan

2. Assess your organization

By evaluating internal and external factors that impact your organization, you will gain insights into your organization's current position and any potential challenges ahead. **A SWOT analysis is one of the most popular tools for traditional strategic planning.** This is a simple yet powerful tool used to evaluate an organization's **Strengths and Weaknesses (internal factors)** and **Opportunities and Threats (external factors)**. As you embark on this journey, you will want to know how well-prepared you are and what challenges you might face. The SWOT analysis is like a compass that guides you to understand your current situation and make better decisions. You can leverage your strengths to seize opportunities and work on improving your weaknesses. You can also be prepared to tackle threats and find ways to overcome challenges.

Conduct a SWOT analysis in simple steps:





Strategic Plan

Strengths

First, identify your strengths. These are the things you are good at or your positive qualities.

- What is your organization good at?
- What unique resources do you have?
- What do others see as your strengths?
- Once you have identified those, ask yourself: how could you build on them?

Example: One of your strengths might be that you are the only fully TGDI-led and focused organization in your country and have a track record of solid community trust and engagement.

Weaknesses

Next, think about your weaknesses. These are areas where you might need improvement or things that might hold you back.

- What are your organization's limitations or challenges?
- Where do you have fewer resources than others?
- Once you have identified those, ask yourself: how could you eliminate them?

Example: One of your weaknesses might be your lack of funding (or heavy reliance on a single source of funding), essential gaps in your team's professional skillsets (grant-writing, strategic communication, project management, etc.), or internal conflicts.

Opportunities

Look at the external factors that could benefit you. These are opportunities that you can take advantage of to move forward.

- What developments are happening around you? Towards the communities you serve?
- What opportunities or trends can you take advantage of?
- Once you have identified those, ask yourself: how to exploit them?

Example: An opportunity might look like a recent development in your legal or political landscape (presidential or parliamentary elections, pro or anti-LGBT bill in the drafting, etc.)



Strategic Plan

Threats

Consider the external factors that could be potential threats to your journey. These are challenges or obstacles that might come to you.

- What could go wrong?
- What are your opponents doing?
- Once you have identified those, ask yourself: how to minimize them?

Example: Threats might look like increasing anti-TGDI sentiment translating into loss of funds or anti-LGBT laws entering into effect.

Before diving into this group exercise, discussing **how to conduct a meaningful SWOT analysis is essential**. The SWOT analysis is a powerful tool, but only if conducted with radical honesty (and kindness). If you have previously undertaken SWOT analyses, you may have noticed that, despite the unique nature of each initiative, SWOT analyses often end up with similar strengths and weaknesses across organizations. This is because we tend to provide plain statements, such as *"We have a great leader," "We have a talented and dedicated staff,"* or *"Our community is resilient."*

Conducting a SWOT analysis with a group of colleagues can be challenging as **it may lead to uncomfortable and necessary truths**. This is less difficult when addressing the OT section of the analysis, as these factors are external to the organization and the participants undertaking the SWOT analysis and, thus, are less likely to upset any individual or group of people. However, you will not get far with a relevant OT section if combined with a meaningless SW list. Remember, a SWOT analysis is a valuable tool that can help you strategically plan and prepare for your journey. However you conduct your SWOT analysis, avoid generic observations and get specific with internal (and external) factors. This will lead to actionable decisions and help you lead organizational behavior changes.



Strategic Plan

3. Set strategic goals and objectives aligned with your mission and vision

By this stage, you should already have a compelling vision that reflects your organization's long-term aspirations and a powerful mission that communicates how you will move towards this vision. If not, return to the [Vision and Mission section](#) and use this opportunity to finetune it. From there, start identifying your strategic goals and objectives: these will be the backbone of your strategic plan. Formulating goals aligned with your mission and vision will set the direction for the organization's work.⁷ These goals are supported by actionable objectives, outlining the steps needed to achieve each goal. What specific and actionable objectives will help you move closer to your goals? These should be directly informed by the outcome of your SWOT analysis, which will help you prioritize based on potential impact and available resources and ensure you develop a realistic yet ambitious approach. At the very least, your strategic goals should cover your operational, programmatic, and communications work.

What does a strategic plan look like?

Next are two examples of organizational strategic plans from trans-led organizations.

⁷ Developing goals that can truly make a difference is not an easy task. Have you tried the "SMART-IE" tool? For your goal to be impactful they need to follow the SMART-IE rule by being Strategic Measurable Ambitious Realistic Time-bounded Inclusive and Equitable. Follow the Management Center's worksheet for more information: <https://www.managementcenter.org/resources/smartie-goals-worksheet/>



Strategic Plan

Strategic Plan Example 1

GATE's 2022-2026 Strategic Plan has a long-term goal for "TGDI people [to] freely exercise their rights and enjoy the highest standard of health and well-being," which translates into the following specific goals and objectives:

1. Advance TGDI people's human rights

- **Objective:** Advance the inclusion of TGDI people and their issues in the human rights framework.
- **Objective:** Advance political mobilization to defend and promote the human rights of TGDI people.

2. Strengthen TGDI movements

- **Objective:** Increase training, support, and capacity-building opportunities for TGDI communities.
- **Objective:** Increase the availability and accessibility of financial support for TGDI movements.

3. Advance health rights and access to health services for TGDI communities

- **Objective:** Support TGDI activists' effective engagement with technical processes concerning their health and rights.
- **Objective:** Support TGDI activists' effective engagement with political processes concerning their health and rights.

4. Strengthen GATE's sustainability and internal and programmatic capacity to be a global TGDI advocacy and expert organization

- **Objective:** Improve GATE's operative capacity (communications, systems, human resources, etc.).
- **Objective:** Strengthen GATE's governance and consultative structures.
- **Objective:** Increase staff's access to institutional support systems (well-being, safety, professional development).
- **Objective:** Increase and expand GATE's fundraising and sustainability



Strategic Plan

Strategic Plan Example 2

The [Asia Pacific Transgender Network's 2018-2020 Strategic Plan](#) outlines their main goals and objectives as follows:

1. Well-being and self-care for trans advocates in Asia and the Pacific

- **Objective:** Improve well-being and decrease burn-out within trans-led advocacy in the Asia-Pacific region
- **Objective:** Improve donor understanding and awareness of the need for well-being support Build a platform that recognizes and praises the work of trans advocates

2. Increased funding for trans organizations and groups in the region

- **Objective:** Increase access to funding in the Asia-Pacific Region for trans organizations and groups
- **Objective:** Support the movement towards an improved distribution of HIV/AIDS funding to trans-specific programs in Asia and the Pacific

3. Improved trans leadership and organization development in the region

- **Objective:** Leaders can build skills through capacity-building opportunities, including language programs

4. Improved representation of trans people from the region

- **Objective:** Increase diverse representation of trans people from Asia and the Pacific in the trans and broader LGBTI movements globally based on accurate and current information



Strategic Plan

4. Define performance measures and targets

No strategic plan is complete without a clear performance measurement system.

Establishing performance targets will allow you to track progress, and regular monitoring and evaluation will help identify areas that need adjustments. To do so, **start by identifying the most important outcomes you want to achieve**. For instance, if you aim to improve healthcare access and quality of care for TGDI people, your key outcomes might be an increase in the number of healthcare providers delivering TGDI-informed services or an improvement in how they deliver their services. To help you assess your progress against your expected outcomes, **you need to define measurable indicators (qualitative and/or quantitative)**. In this case, this could be the number of medical professionals you are offering training to (quantitative indicator) or the satisfaction rate of the community members engaging with these professionals (qualitative indicator). **These indicators should be quantifiable (numbers, percentages, rates, etc.) and directly linked to your goals**. Gather data on your chosen indicators before implementing any changes and decide on realistic targets for each of them, as well as sources of verification (i.e., where do you get this data from?). This will serve as your starting point for measuring progress, your baseline. [Here](#) is an example of what a Monitoring and Evaluation (M&E) spreadsheet can look like and that you can use as a template.

[Réseau de Santé Trans \(ReST\)](#)

The ReST (Network for Trans Health) is a health network that brings together trans activists, trans-led grassroots organizations, and trans-friendly healthcare professionals based in France. One of their **primary goals is to improve healthcare access and quality of care for trans people**. To do this, one of their projects involved conducting a training program jointly led by trans-led organizations and healthcare providers. Under this project, there is a module to train prescribing physicians in Hormone Replacement Therapy (HRT) and good practices of trans-sensitive care. An expected outcome resulting from this module is to increase the number of physicians prescribing hormones to trans people in a trans-sensitive way across the country. To evaluate their progress, they closely monitor the number of prescribing physicians trained and where they are based, invite them to participate in good practice exchange groups, and follow up to monitor how many trainees effectively started prescribing HRT via direct contact and survey dissemination. Based on what they achieved during the first year (2021, their baseline), they can set realistic yet ambitious yearly targets on the number of physicians they aim to train each year, what geographic gaps they aim to fill, and how many they can expect to start prescribing hormones. As of early 2023, ReST had trained more than 200 prescribers across the country.



Strategic Plan

5. Align resources and budget

At this stage, your strategic plan should be taking shape. **It is now time to talk about money and resources.** Aligning resources and budgeting is crucial to making your strategic plan a reality. This process involves a transparent, thoughtful, and accountable allocation of available resources. To begin, revisit the goals and specific objectives outlined in the strategic plan. Identify the required resources, including finances, staff time, materials, equipment, and potential external expertise. Realistically estimate the associated costs for these resources, considering market prices and potential fluctuations. **Prioritize initiatives based on their alignment with the organization's mission and potential impact, especially if resources are limited.** Construct a well-balanced budget with a clear grasp of resource needs and costs. Allocate funds to each initiative according to estimated costs, ensuring the financial plan accommodates income and expenses.

Uncertain how to create a budget?

Check our [Grant Proposal Writing Toolkit](#) and use the template provided on page 17.



This budget serves as a financial guide and a tangible representation of the organization's commitment to its strategic goals. Sometimes, you will have to make difficult decisions about where to spend. **Just remember, your budget should match values and priorities!** The allocation of your resources, whether it is funding, time, or effort, will show what you truly prioritize. As the plan is executed, closely monitor the actual resource utilization and expenditures, comparing them to the budget. Adjustments may be needed to accommodate unexpected changes or emerging needs. Regularly communicate resource allocation and utilization to your Board, members, or any stakeholders you are accountable for. **This transparency fosters trust, keeps stakeholders informed, and ensures collective ownership of the strategic plan's execution.**



Strategic Plan

6. Create an implementation roadmap

Now, it's time to turn your strategic plan into actions and plan its implementation. **Your implementation roadmap should be a detailed plan.** Clearly define roles and tasks to ensure accountability and establish a timeline for each initiative, outlining start and end dates for key deliverables. Align the timeline with the organization's goals and consider potential dependencies or interrelated activities. Plan necessary resources, such as personnel, time, funding, and equipment, to support the successful execution of each initiative and avoid burnout, bottlenecks, or delays. The implementation plan should have some degree of flexibility as it will need to be regularly reviewed and updated to reflect challenges or emerging opportunities. Your implementation plan should also include a monitoring and evaluation plan based on the performance measures and targets you defined earlier (see step 4). Maintain open communication among team members to address issues and adapt the plan as needed. It should allow you to compare actual results collected with the desired outcomes you set for yourself and identify any gaps between them. If your organization is falling short of its targets, it's important to analyze the reasons behind the gaps.

7. Communicate and engage

This last step is a pivotal phase for organizations aiming to establish robust connections with stakeholders. It is about properly communicating your new strategic plan and ensuring stakeholders engage with it. **To begin, prepare a detailed communication plan outlining information that will be effectively disseminated.** This might involve holding regular town hall meetings, sending out informative newsletters, maintaining an active social media presence, or organizing targeted webinars. Transparency is key when sharing your plan. For instance, if your organization aims to combat TGDI youth homelessness, clearly explain how each initiative, such as establishing shelter partnerships or launching educational programs, contributes to this mission. Stakeholders can better grasp the plan's significance by providing a tangible connection between each action and the larger goal. Timely updates on progress and challenges to maintain stakeholder engagement. If your organization is working to end gender-based violence, share concrete data on the decrease in cases thanks to your initiatives, alongside the hurdles faced in securing funding for TGDI-friendly infrastructure. Finally, actively seek input and feedback from stakeholders, making them an integral part of the decision-making process. For instance, if your organization focuses on empowering intersex people with disabilities, host focus groups with intersex activists with disabilities to gather insights on the effectiveness of your programs and suggestions for improvement. This will foster a sense of shared ownership, transforming the strategic plan into a collaborative journey toward a common objective.



Strategic Plan

What makes a Strategic Plan... strategic?

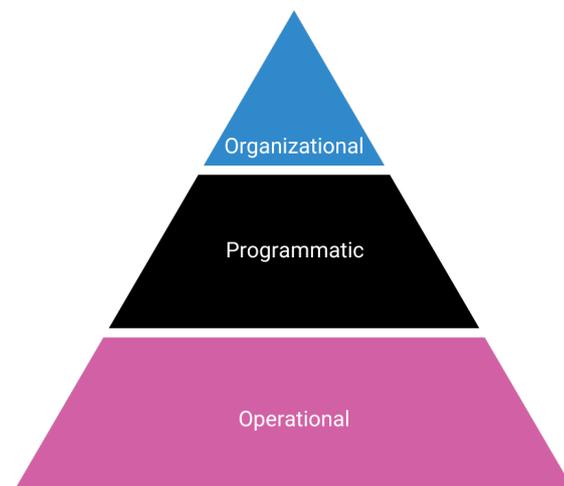
Any organization can develop a strategic plan, but unfortunately, not all organizations are successful in developing a strategic plan that is strategic. It is not just a box to tick. Your strategic plan only makes sense if it supports moving closer to your vision. When developing your strategic plan, **keep in mind the following common mistakes that hinder the effectiveness of strategic plans:**

1. Develop a real-time approach

This might be the most important aspect of a relevant strategic plan, and yet the most often overlooked. Your strategic plan doesn't have to be overly complicated to the point where it becomes unmanageable. For example, it doesn't have to outline your strategy for the next ten years. We live in a constantly changing world, and no one can predict where we will be in 10 years. In a rapidly evolving environment, traditional long-term strategic plans may become outdated quickly. Plan for 3-5 years and focus on a real-time approach that will allow your organization to be more flexible and adaptive in response to emerging challenges and opportunities. It also means that while developing a strategic plan might be a great team-building exercise, **we highly encourage you not to spend an enormous amount of time preparing it.** Some organizations spend years developing their strategic plans. The risk with doing this is that not only are chances high that by the time you develop a final version of it, parts of it will already be outdated, but it is also a massive drain on your team's time, capacity, and energy.

2. Ensure balance in the way resources are allocated throughout your organization

An organization is composed of **three distinct 'tiers'**, each necessitating distinct forms of strategy: **organizational strategy, programmatic strategy, and operational strategy.** These tiers are visually represented as a *Strategy Pyramid*.⁸



⁸ To further explore this notion, check: La Piana, D., & Mendes, M. (2018). *The Nonprofit Strategy Revolution*, Second Edition.



Strategic Plan

Organizational Strategy: This encompasses the broader direction and goals of the organization as a whole. It addresses key questions about the organization's mission, vision, values, and long-term objectives. The organizational strategy considers the external environment and trends, as well as the organization's unique strengths, weaknesses, opportunities, and threats (from the SWOT analysis). It provides the overarching framework that guides both the operational and programmatic strategies.

Programmatic Strategy: This centers on the organization's core programs and initiatives. It outlines the specific interventions, activities, and services the organization will undertake to achieve its mission and bring about social impact. This strategy involves designing, implementing, and evaluating program activities to ensure they align with the organization's vision and desired outcomes.

Operational Strategy: This focuses on the day-to-day activities and processes required to run the organization efficiently. It addresses how the organization will manage its resources, administrative functions, and internal systems to support its programs and achieve its mission. This often involves streamlining operations, optimizing workflow, and enhancing internal capacities. It ensures that the organization's core functions are well-coordinated.

It is no coincidence that the strategy tiers are represented by a pyramid shape, with the operational strategy at the base. Operations form the foundation upon which the other two levels – programmatic strategy and organizational strategy – are built. As mentioned before ([Areas of Work section](#)), this aspect of work tends to be overlooked. It is very common among organizations to observe imbalances between each tier and in the way resources are allocated.

This can, for instance, translate into conducting a great number of projects but with only one person ensuring they are financially and administratively running smoothly. Or spending a lot of time developing ambitious organizational goals but allocating insufficient resources to programs to deliver them.

3. Monitor its implementation and collect data

Developing your strategic plan and launching its implementation are only the first steps of a long-term and ongoing process. This is an evolving process, so ensure that the time invested into crafting a strategic plan is not wasted. Make sure that you are continuously collecting data on your progress and challenges. Neglecting to do this will prevent your organization from learning, adapting, and improving through analyzing what works and what doesn't. This will also make it easier to implement your plan. Focusing solely on the planning phase without a clear implementation plan can lead to a well-intentioned plan that remains unrealized. However, a robust system for measurement and evaluation will ensure accountability by clearly defining who is responsible for reporting on progress. Finally, **it will help demonstrate your impact to donors, stakeholders, and supporters, showcasing the organization's effectiveness and results and supporting future fundraising efforts.**



BOOST YOUR ORGANIZATION

Now that you are all set for your journey, it's time to prepare for the challenges that lie ahead. **Have you ever felt that your organization has reached an invisible ceiling?** Are some things working very well while other aspects are unmanageable? Are you unsure what is not working, why, and how to fix it? If you answered yes to any of these questions, then it might be time for you to assess the effectiveness of your organization. Ask yourself one more critical question: **Is our organization successful?**

The following section is relevant to all organizations, but even more so to those functioning long enough to have experienced a few challenges and successes already. Building an organization with a strong foundation and strategy will not happen overnight. **It takes time to try, fail, readjust, and try again.** As you become increasingly comfortable with the foundations you set for your organization, it is time to shift your focus toward the next crucial phase: strengthening your organization's capacity to navigate challenges and unlock its full potential.



Organizational Assessment

“Our organization has been around for quite some time and we feel all over the place. We want to pause and reflect on how we are doing but we don’t know where to start.”

Evaluating success enables you to celebrate your accomplishments while also identifying gaps and putting a plan in place to bridge them. There are many ways to assess how your organization is doing. Most of the time, it happens organically as you discuss with colleagues, fellow activists, stakeholders, or your constituency. However, when dedicating time and energy daily to your organization, stepping back and seeking a fresh perspective on the situation can be hard. In this case, assessing your organization’s performance against a list of core organizational domains can help. How is your organization doing in the following areas?

1. Governance, leadership, and strategic oversight

This is where all aspects of the organization’s board governance, leadership style, capacity, and strategic management are considered. At an overview level, this is where the various mechanisms intended to lead, manage, and coordinate the execution of the organization’s mission are discussed. This is also where you ensure that the organizational identity and culture remain true to your organization’s vision, mission, and values. Ultimately, one guiding question matters the most: **how successful is your organization addressing your constituency’s needs and priorities?**

Prompts can include:

- Do you have a mission statement or vision? Strategic objectives and/or goals? Have you written them down and shared them with all relevant stakeholders? Do they need to be updated to respond to a changing context?
- How do you ensure you are well-aligned and responsive to your constituency’s needs and priorities? How do you collect community insight and measure its satisfaction? How do you ensure that the further marginalized voices are heard?
- Do you have a Board of Directors? Do Board members meet regularly, and what is their purpose? Do they have terms of reference written down? Do you have an organizational chart with reporting lines?
- Do you have a succession plan for leadership and staff changes/turnover?
- How do you address management changes?
- How do you document your work and knowledge?
- How do you involve stakeholders? How do you address new opportunity developments?



Organizational Assessment

2. Administration, finances, and operations

This is where the financial health of the organization is ensured by exploring systems, policies, vulnerabilities, sources of income, and risks. Focuses can include administrative procedures and management systems, management of finances (budgeting, accounting, fundraising, sustainability), and other non-financial resources (information, equipment, infrastructure).

Prompts can include:

- Do you have documented operational policies, procedures, and systems?
- Do you have policies and procedures that protect your staff and/or constituencies? (i.e., whistleblowing policy, safeguarding policy)
- Do you have an accounting system in place? Accounting policies?
- Do you regularly create financial status reports?
- Do you have a fundraising strategy?
- Do you undertake regular audits?
- Do you have good relationships with your donors?
- Do you have diversified income sources?

Would you like to boost your grant proposal writing skills?

Check out our course on [Grant Proposal Writing](#) via the GATE Learning Hub!

3. Program management:

This is where your organization focuses on planning, implementing, and evaluating programs. This domain ensures that projects are designed effectively, resources are allocated efficiently, and program activities are tracked for progress and quality.

Prompts can include:

- What documentation is undertaken for technical reporting?
- How is the community involved in the project/s?
- How do you document your relationship with your constituency? How do you



Organizational Assessment

monitor its engagement?

- How do you keep track of reporting requirements?
- If you have subgrantees, what systems are in place to manage these organizations?
- How do you monitor progress and adjust if needed?
- What are the topics you do not cover? Why?

4. Human resources management and team dynamics

This domain looks at all the policies and systems relating to staff, from recruitment, management, and development to efforts to develop an ethical and collaborative team culture.

Prompts can include:

- Do you have written job descriptions for each role?
- Do you have recruitment policies? Onboarding systems?
- Are there staff time and performance review policies? What is the end goal of your performance reviews?
- Is there a staff professional and salary history documentation?
- What is the role of volunteers and interns?
- Do you have an employee handbook that has been shared with all staff?
- How do you foster collaboration among your team?
- How do you address conflicts?
- Do you consider the impact of trauma in your approach to your people?
- How do you address staff burnout and well-being (inc. safety and security)?

For more prompts and insights, check the section [Work culture, accountability, and intersectionality](#).

Does reflecting on how you ensure and center safety, security, and well-being in your work sound interesting?

Take our course on [Safety, Security, and Well-Being for Activists](#) at GATE Learning Hub!



Organizational Assessment

5. Communication and external relations

This domain considers how the organization relates and engages with external stakeholders. This includes public relationships, communications, advocacy, and feedback processes.

Prompts can include

- How do you involve stakeholders?
- Do you have a communication strategy? A visual identity?
- Do you have dedicated communication channels per work area or target audience?
- Do you have communication policies per channel?
- Do you have communication policies tailored to output or target audience?
- Do you have digital security practices in place?

The [NonProfit Marketing Guide website](#) provides tips and guidance around communications strategies and actions, and the [Smart Chart](#) provides a template for creating a communications plan.

Your organization might not be structured in such a way that these domains are segregated or even explicitly identified. However, even if you don't name each domain, they still exist. Any well-functioning organization needs to address the realities of all five domains.

After identifying the areas where your organization is falling short, you will better understand the gaps you need to address. These can be skills that need to be strengthened (i.e., fundraising, project management) or processes that need to be developed (i.e., recruitment policies, communication channels). Learning how to develop new skills or processes also takes time and resources. The good news is that a wealth of useful resources are available: offline or online training, networks, mentorship, manuals, and toolkits.



Are you unsure about where to start?

Check out the [GATE Learning Hub](#), where you will find free capacity-building courses to follow at your own pace!



Capacity to respond to threats (Introduction)

Our communities, initiatives, and organizations are constantly under threat, whether we operate in legally hostile environments, face opposition from anti-TGDI actors or struggle with sustaining ourselves financially. You might have identified these threats in your organizational SWOT analysis (see [Strategic Plan section](#)). However, whether internal or external, most of the threats identified are specific to the context in which your organization operates. To meaningfully tackle them, **you need to identify their political or social roots very specifically and explore tailored opportunities.** This Toolkit does not attempt to provide comprehensive guidelines for mitigating or responding to all contexts. Instead, **it will address two specific types of threats commonly faced by TGDI organizations around the world and from which we can identify sets of good practices translatable into various contexts.**¹

¹For more insight on responding to threats, you can check GATE. (2023) We need to talk about anti-gender, baby. New York: GATE.





Capacity to Respond to Threats

Threats from outside: Lack of 'people power'

"Our organization is at risk, we want to build its strength and resilience to face external threats."

'People power' and 'mapping power'

In contexts where our very existence is threatened, we cannot assume that our organizations will thrive without facing external attacks that will compromise our survival. While you cannot (always) foresee the external threats your organization will face, you can proactively build enough people power to serve as a shield as the threat materializes. **'People power' refers to the collective strength, influence, and agency that organizations can harness through building strong and interconnected networks, alliances, and coalitions.** It emphasizes that when people come together, unite around shared values, and work collaboratively, they can protect one another while driving meaningful change. But who should you be focusing on as you build your people power? **The first step is to comprehensively analyze the power structures surrounding you and identify key stakeholders that can either support you or hinder you. We call that 'mapping power'.**

In the context of TGDI movements, stakeholders refer to individuals, groups, organizations, or institutions that have a vested interest or are concerned with promoting, protecting, or realizing TGDI people's rights and lives. They can even be people who, while not interested in these topics, have influence and power over them. These stakeholders play essential roles in shaping TGDI issues, policies, and actions and can positively or negatively impact the enjoyment of our human rights. These can include:

- **Affected individuals and communities:** Those whose human rights are directly impacted or violated are essential stakeholders. Their voices and experiences are critical in human rights advocacy, as they provide firsthand insights into the challenges and consequences of human rights violations. In this case, this would be TGDI people, especially those further marginalized, and also their families and other close relationships.
- **Civil Society Organizations** (like your organization!): Non-governmental organizations (NGOs), community groups, human rights organizations, and advocacy groups are crucial stakeholders in human rights advocacy. They work on the ground to raise awareness, monitor human rights violations, support communities, and advocate for policy changes and legal reforms.
- **Corporations and businesses:** Private sector entities impact human rights through their operations, supply chains, and labor practices and can be held accountable for promoting human rights.
- **Donors and funders:** Individuals, foundations, and governments that support human rights initiatives financially. They can sometimes be inclined to support TGDI groups and initiatives specifically.



Capacity to Respond to Threats

Threats from outside: Lack of 'people power'

- **Governments:** National, regional, and local governments play a central role in promoting and protecting or threatening human rights through legislation, policies, and enforcement. They are responsible for upholding the human rights of their citizens and residents.
- **International human rights bodies or entities:** Entities like the United Nations or regional human rights bodies (IACHR, OSCE, EU, CoE...) are significant stakeholders in global human rights efforts. They develop international norms and standards, conduct investigations, and support human rights initiatives worldwide.
- **Media:** The media plays a crucial role in disseminating information about human rights issues, raising public awareness, and either holding governments and institutions accountable for their actions or supporting their actions (in situations where the media is closely controlled by government policies aimed at restricting freedom of speech).
- **Professional unions:** They represent workers across various industries and sectors. They can play an important role in advocating for inclusive workplace policies, non-discrimination, and protections for TGDI employees.
- **Religious Institutions:** Religious institutions, such as churches, mosques, synagogues, temples, and other faith-based organizations, can influence public opinion and policy on TGDI rights as they may hold varying positions on gender identity, sexual orientation, and sex characteristics.
- **Researchers and academia:** Scholars, researchers, and academics contribute to collecting data and producing knowledge on human rights issues through studies, reports, and analysis, which can inform advocacy efforts and policy-making.

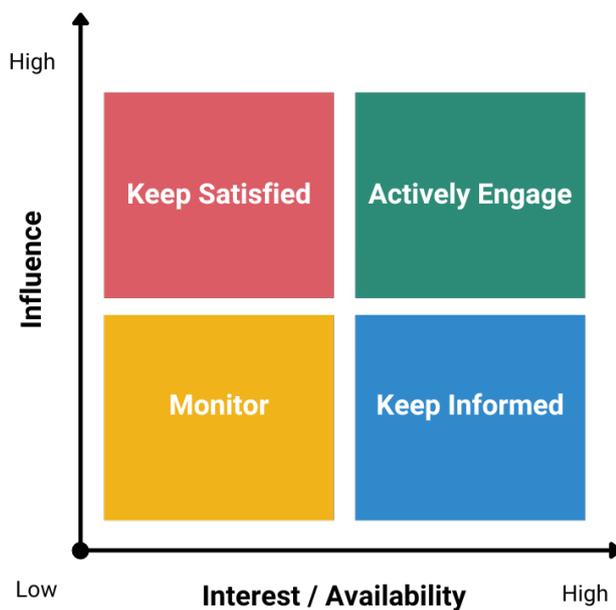
There are several ways to map out the most critical stakeholders you need to engage with or keep an eye on to achieve your mission. **The easiest way is to classify them by the level of support or interest they have towards your cause.** They can be your opponents (those who oppose your position), your allies (those who support your vision or can help you achieve your mission), or anyone somewhere in the middle (they are neither opposing nor supporting but somehow persuadable either way). The problem is that this approach doesn't provide any insight into the power these stakeholders have over the issues your mission is concerned with.



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Threats from outside: Lack of 'people power'

Mapping levels of support will help you identify allies and opponents but doesn't say much about their influence, hence potential impact. One complimentary way to proceed is to classify them according to how influential they can be. This is an efficient way to identify power holders.



Source: *The Stakeholder Management framework for teams, programs and portfolios, Scaled Agile, Inc, 2012*

Recognizing the sources of power will help your organization understand who can influence policy decisions and public opinions on the issues you address. This approach enables you to make informed decisions about where to invest your resources and how to engage with stakeholders. For example, some groups or individuals may be strongly opposed to your cause but only have little power to harm you and your community. On the contrary, some stakeholders might not be openly supportive of your work but are quite persuadable and have significant power leverage. You need to ask yourself which relationship is worth investing your resources in.

You will then be able to tailor your approaches when engaging with various actors by mitigating the damage your opponents might have on your work and building alliances with like-minded organizations or individuals. **Your opponents will be those you need to mitigate the impact of or defend yourself from. Unlike allies, who can contribute to your 'people power,' opponents can (and often will) hinder it.** In the next section, we will dive into ally mobilization.



Capacity to Respond to Threats

Threats from outside: Lack of 'people power'

Ally mobilization

Key tips for building allyship

Allies are individuals, groups, organizations, or institutions who actively support and stand in solidarity with TGDI communities in advocating for human rights. Allies can include direct beneficiaries (those you represent and serve), but they can also include those who do not directly belong to TGDI communities. However, they must demonstrate genuine commitment and involvement in advancing TGDI people's rights and well-being. **Mobilizing allies is a way to amplify our collective voice and expand the impact of our advocacy.** Allies bring diverse perspectives, resources, and expertise to our work. Explore all the sectors in [People Power](#) and identify key allies among influential actors.

A thoughtful and inclusive approach can make all the difference for new organizations looking to engage allies effectively. **Here are some practical steps to keep in mind when engaging with allies:**

- **Educate and raise awareness:** Some potential allies may not fully understand the challenges faced by the TGDI community.⁹ It is important to remember that having good intentions does not prevent potential allies from doing more harm than good, but good intentions are a great starting point for ally engagement. **Begin by offering allies accurate information about the challenges of the TGDI community** and highlighting how overcoming them would benefit everyone (including themselves). **Organizing workshops, webinars, or informational sessions can help dispel misconceptions and empower allies to become informed advocates.** For instance, consider running campaigns that shed light on the diverse experiences of intersex individuals and foster familiarity. The SOGI Campaign's course on [Campaign Communication](#) provides guidance around building strong public campaigns.
- **Foster collaborative partnerships:** Join forces with existing organizations and social justice movements. For example, partnering with LGBTI+ youth organizations can address the unique challenges faced by intersex youth, such as economic precarity and mental health. To build trust and relationships, consider your interests and those of your partners. Allies may have different motivations for supporting TGDI rights, including human rights principles, social justice values, religious beliefs, or business interests. Recognizing and understanding these diverse interests is important to ensuring that your decision to partner is informed. **Your alliance will be effective and sustainable only if you invest time and effort in cultivating strong relations built on mutual respect, open communication, and shared commitments.**

⁹ There are a few interesting training programmes you can join, or draw inspiration from for your own community. Check for instance [Stonewall's LGBTQ+ Allies Programme](#) or [Trans Allies Programme](#).



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- **Strengthen your alliance** through concrete actions that prioritize marginalized voices: Engage allies in advocacy efforts by inviting them to participate in creating platforms that amplify the voices of TGDI individuals from marginalized backgrounds. This can include rallies, protests, lobbying efforts, social media campaigns, whatever aligns best with everyone's capacity and strategies. Allies play a vital role by providing space, resources, and opportunities for these voices to be heard. Initiatives like storytelling workshops or social media campaigns can spotlight narratives from TGDI people of color, refugees, or those with disabilities. A concrete idea could be for trans organizations to collaborate with labor unions to advocate for inclusive workplace policies and nondiscrimination laws. Together, they can use their collective strength to pressure institutions for policy changes that promote TGDI rights in the workplace.
- **Celebrate allyship:** Take the time to acknowledge and celebrate allies' contributions to the movement. Organize events or online campaigns that honor individuals and organizations for their dedication. Share success stories highlighting the positive impact of ally support, whether it's a legislative victory, a successful awareness campaign, or an inclusive policy change. Recognizing and appreciating the efforts of allies boosts morale and reinforces the bond between the TGDI community and its supporters and inspires others to join.

Fearless allies by the Global Interfaith Network

GIN is a global network of gender and sexual minority people of faith who use their faith traditions as a source of insight and energy to advocate for the human rights of LGBTIQ+ people globally. In 2021, they launched *Fearless allies*, a brilliant alliance-building campaign that invites religious leaders from around the world to share how they became allies to the LGBT+ movement and expand on the theological ideas underpinning their allyship. At times when anti-gender actors around the world weaponize religions, these stories provide strategic testimonies challenging anti-right narratives and roadmaps for other religious leaders to become allies as well. Through this campaign, agents of faith are empowered to become agents of justice, promoting TGDI people's human rights.

Avoid the common mistake of:

- **Assuming that because you are allies, your partnership will organically work smoothly:** conflicts happen, even in the most well-intentioned partnerships. As in your organization, **you need to define roles and responsibilities clearly** (see [Work culture, accountability, and intersectionality](#)). Collectively agree upon the division of responsibilities for each ally to minimize confusion and tensions.



Capacity to Respond to Threats

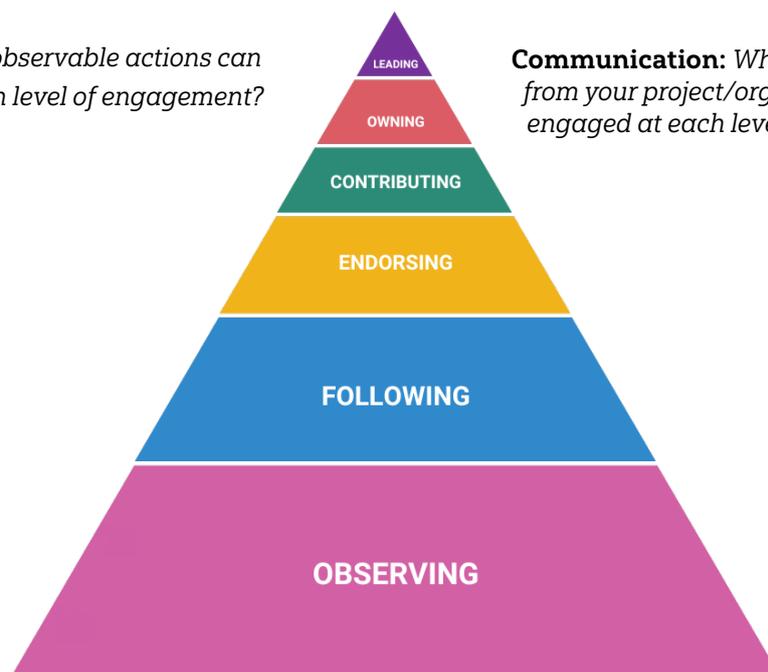
Threats from outside: Lack of 'people power'

- **Not prioritizing partnering with further marginalized community-led allies:** If this is not intentionally addressed, mobilizing allies tends to reinforce already existing power dynamics and exclude marginalized voices. Even if it is unintentional, it is often easier to recruit, engage, or organize with individuals or groups with more resources, influence, or time. This leads to overlooking those who face systemic barriers to engagement. Even if it sometimes means investing more in building the capacity of your ally, it is important to partner with a range of organizations wide enough to represent the full diversity of the community you serve.
- **Hesitating when sharing your resources:** Alliances are formed because working together benefits both parties and advances your respective agendas. Avoid the temptation to withhold what you could share, and instead openly discuss with your allies what mutual exchange you are comfortable with. Share resources, expertise, and networks to the best of your capacities. Collaboration should be mutually beneficial, with each party contributing their unique strengths.

Ally engagement strategy

Now that you understand what it takes to build effective allyship, you may still need a concrete way forward, in other words, a strategy. There are various ways to proceed. One straightforward and proven approach in the field is to apply the *Engagement Pyramid* model.

Actions: *What observable actions can you track at each level of engagement?*



Communication: *What do people need from your project/organization to stay engaged at each level, or to move up?*

Source: ["The Commons Social Change Library"](#)



Capacity to Respond to Threats

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According to the *Engagement Pyramid*, there are **six stages** when engaging your allies. It is up to you to decide at what point you want to bring in potential allies.

- 1. Observing:** The first step, at the pyramid's base, is 'observing.' Allies can start by simply observing and learning about the challenges and experiences your communities face. Here, their main role is to visit your website or social media and, eventually, attend a public event you organize to get a first impression of your work. You wouldn't expect them to take any significant action or involvement at this stage. To measure how your allies are doing in this stage, you can measure your website or social media traffic, track mentions in media or social media, or keep track of 'first-time' registrants.
- 2. Following:** The next step is 'following', where allies can be invited to demonstrate a slightly higher level of engagement by actively following the organization's activities and updates. This could include subscribing to newsletters, following social media accounts, and staying informed about the organization's campaigns and initiatives. Their main engagement is based on an unspoken agreement to read and watch your communication and attend events. Important indicators to monitor if you wish to bring allies to this stage of engagement are the number of subscribers you have on your mailing list or newsletters, the number of followers you have on social media, or the number of people interested in volunteering with your organization or in joining internal communication channels (messaging groups, internal mailing lists, etc.).
- 3. Endorsing:** Then comes the 'endorsing' stage, where allies publicly express their support for your organization and work. They may share the organization's content on their platforms, participate in online advocacy efforts (such as petitions), make one-time or small donations, and use their influence to amplify the voices of the community your organization serves. At this stage, you have gathered allies comfortable conducting single-step or straightforward actions with low-risk/investment. Important indicators to monitor if you wish to bring allies to this stage of engagement are the number of one-time donors, petition signers, people sharing your communication, or participating in a volunteer welcome program.
- 4. Contributing:** At the 'contributing' stage, allies can actively participate by offering their skills, resources, or expertise to support the organization's work. This could involve volunteering or engaging in grassroots activities such as assisting with specific projects, providing pro bono services, becoming active members, or making large donations. At this stage, allies are comfortable conducting multi-step assignments or actions and offering significant time, money, or social capital contributions. Important indicators to monitor if you wish to bring allies to this stage of engagement are the number of regular donors, volunteers, or content creators that are not part of your organization's core team (staff or Board, for instance).



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- 5. Owning:** The 'owning' stage represents a deeper commitment. Owning allies become deeply invested in the organization's success and take ownership of the vision and mission of the organization, to the point of becoming more actively involved in planning and decision-making. They may collaborate closely with the organization on joint initiatives, co-host events, or actively fundraise to support its programs. At this stage, being allies represents a major investment of time, money, and social capital. They consider themselves belonging' to your organization and are passionate about engaging with your work. Important indicators to monitor if you wish to bring allies to this stage of engagement are your number of fundraising leaders or lead volunteers.
- 6. Leading:** At the top of the engagement pyramid is the 'leading' stage. Leading allies play a significant role in driving the organization's initiatives at this stage. They may join advisory boards, provide strategic guidance, and use their influence to advocate for policy changes that benefit TGDI communities. At this point, the engaged has transformed into the engager, as leading allies focus on training others. They can easily be confused with the organization's core team (staff or Board). The contributions of leading allies are more difficult to measure by metrics alone. Still, you may have qualitative and quantitative benchmarks such as the number of hours spent by the ally contributing to decision-making processes, the amount of money fundraised by their initiatives, or the number of community leaders they contribute to recruiting.

For example, a women's rights organization could start by observing and attending events organized by a trans-led organization to understand better the challenges faced by TGDI individuals. As their engagement deepens, they could start endorsing the trans-led organization's campaigns on gender equality and LGBTQ+ rights, using their platform to raise awareness. Further up the pyramid, the women's rights organization could contribute by offering workshops on gender justice and bodily autonomy in collaboration with the trans-led organization. As the relationship strengthens, the women's rights organization could become a key partner, actively co-leading initiatives addressing both women's and TGDI rights. This could involve joint advocacy efforts, policy development, and fundraising activities.

Take it a step further: coalition building

The *Engagement Pyramid* model has some limits, including its hierarchical nature, assumption of linearity, and lack of flexibility. Most importantly, it overly emphasizes individual engagement and one-to-one allyship building. **One way to complement it is to consider the relationships you form with allies as bilateral connections and opportunities for network building through coalitions.**



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In this context, a coalition is a strategic alliance created by multiple groups, organizations, or entities with shared goals and objectives. Often from diverse backgrounds or sectors, these entities come together to address a specific issue, challenge, or goal collectively. It is a network of allies organizing themselves for a shared goal. **The purpose of a coalition is to pool resources, expertise, and efforts to amplify their impact, influence decision-makers, and drive positive change in policies, practices, or societal norms.** Simply put, it is harder to ignore something when multiple actors hold it at once. As you strengthen your coalition(s), remember the following best practices of successful cross-movement coalitions. **A coalition is more likely to be successful when:**

- Fewer groups are making decisions, sharing resources, and focusing on a narrow agenda. Bigger is not always better.
- There are individuals from each coalition group who can work well together and are good at building bridges and communities.
- The coalition is focused on setting an agenda that feeds the direct strategic needs of its organizational partners while connecting to the public interest. Organizational self-interest is necessary but not sufficient to build a strong coalition.
- The coalition has long-term strategic plans for building its strengths and manifesting its goals.
- The coalition takes action at multiple scales and has a clear system for gaining and addressing feedback from different scales and managing all the moving parts.
- The coalition has clear, transparent, collectively discussed roles, communication channels, and conflict mitigation mechanisms. These must guide the coalition to manage language, culture or tactics differences.

A **Memorandum of Understanding (MoU)** is a good way to formalize long-term partnerships between two or more organizations. This doesn't need to be used in all cases, just for when there is significant collaboration over a long period or within a project where significant resources will be invested.



Uncertain how to develop a MoU?

Check out the template provided on the next page.



Memorandum of Understanding Template

This template provides an example of the way a MOU can be set out. It is a guide only. It is not legal advice and not all clauses may be relevant to your needs.

Between

[Organization Name 1], a nonprofit organization incorporated under the laws of [Country], having its principal place of business at [Address], hereinafter referred to as "Organization 1."

and

[Organization Name 2], a nonprofit organization incorporated under the laws of [Country], having its principal place of business at [Address], hereinafter referred to as "Organization 2."

1. Purpose of the Memorandum of Understanding

The purpose of this Memorandum of Understanding (MoU) is to formalize and establish the terms and conditions under which Organization 1 and Organization 2 agree to collaborate on [Specify the project or initiative].

2. Scope of Collaboration:

- a) Objective: Define the specific goals and objectives of the collaboration.
- b) Roles and Responsibilities: Detail the respective roles, responsibilities, and contributions of each organization towards the project.
- c) Activities: List the specific activities, tasks, or deliverables to be undertaken collectively or individually by each organization.
- d) Timeline: Establish a timeline for the project, including key milestones, deadlines, and the date the MoU will expire.

3. Resource Commitment:

- a) Financial Commitment (if any): Specify any financial contributions or funding commitments made by each organization.
- b) Human Resources (if any): Detail the personnel, expertise, or skills each organization will allocate to the project.
- c) Material Resources (if any): Identify any equipment, facilities, or resources required for the project and the responsible party for providing them.

4. Governance and Decision-Making:

- a) Decision-Making Process: Define how decisions related to the project will be made, including voting procedures or consensus-building mechanisms if applicable.
- b) Communication Channels: Establish communication channels and contact points for regular updates and coordination.

5. Intellectual Property and Confidentiality:

- a) Intellectual Property Rights: Address ownership and usage of any intellectual property developed or utilized during the collaboration.
- b) Confidentiality: Define the confidentiality obligations regarding sensitive information shared between the organizations.

6. Monitoring and Evaluation:

- a) Performance Measurement: Define indicators and methods for monitoring progress and evaluating the success of the project.
- b) Reporting: Specify reporting requirements and frequency for progress updates and milestone achievements.

7. Termination and Amendment:

- a) Termination Clause: Describe the conditions and procedures for terminating the MoU or the collaboration.
- b) Amendment Clause: Detail the process for amending the terms of the MoU if necessary.

8. Dispute Resolution:

Outline procedures for resolving disputes that may arise during the collaboration, including mediation or arbitration mechanisms. For instance:

"Any dispute or misunderstanding arising between Organization 1 and Organization 2 will be resolved first by mutual agreement between the two parties. An arbitrator or arbitrators mutually agreed upon and acceptable to both parties may be engaged only upon exhaustion of avenues for consensual resolution."

9. Governing Law and Jurisdiction:

Specify the governing law under which the MoU will be interpreted and the jurisdiction for resolving any legal disputes.

Signatures:

This Memorandum of Understanding shall enter into effect upon signature by authorized representatives of both organizations.

[Signature and Title of Authorized Representative
- Organization 1] [Date]

[Signature and Title of Authorized Representative
- Organization 2] [Date]





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Of course, coalitions can also be challenging and limiting in certain cases. For instance, reaching a consensus between members might be difficult, leading to complicated and slow processes. This is particularly true when there are power dynamics within the coalition, for example, smaller organizations that neglect their general activities or partially lose their autonomy in place of the coalition's imperatives. In this situation, coalition forming can lead to domination by particular members and undemocratic decision-making. If you aim to form a coalition, keep these risks and challenges in mind and develop strategies to mitigate them.

The THRIVE Consortium

In late 2021, one global and three regional organizations dedicated to promoting the human rights of trans and gender diverse people came together to form the THRIVE Consortium: [GATE](#), [EATHAN](#), [TGEU](#), and [UCTrans](#). The Consortium's primary goal is to strengthen the connections among trans rights groups worldwide and to develop a more cohesive international trans movement. This movement aims to counter anti-rights agendas, ensure that trans people enjoy a high quality of life, and enhance their access to human rights. In just two years, the coalition has been able to define and tap into each partner's strengths and uplift one another. For example, together, the partners were able to amplify the voices of TGDI communities within multiple policy bodies: WHO, PEPFAR, Global Fund, COP 27, Africa Forum, the European Parliament, and more. Beyond advocacy, the resources enable each organization to grow further and build key organizational capacities such as governance and management, financial sustainability, human resources, and programs. Building such a wide coalition does not happen overnight and requires much thinking, discussion, and planning. For this to happen smoothly, partners agreed upon a clear frame of partnership formalized by a Memorandum of Understanding, engaged with regular online check-ins, attended a yearly consortium in-person gathering, and worked within a clear set of expectations and commitments. By joining forces around a common goal and setting transparent collaboration mechanisms, each organization is growing, strengthening its capacity, and amplifying its communities' voices.

If you are already at this stage in your allies' mobilization journey, congratulations! You have a substantial base that will support and shield you from external threats.

Final tip: As you further strengthen your relationships with your allies, bilaterally or in a coalition, make sure you reflect on the allies: **TGDI community ratio to avoid the movement being either overwhelmed or taken over by allies.** Ensure that affected communities, especially those further marginalized, are centered in these partnerships and are always the ones leading and holding decision-making power. Allyship is critical but cannot happen at the cost of community ownership and leadership.



Capacity to Respond to Threats

Threats from within: Internal Conflicts

“We don’t have any conflict resolution policies and are afraid that internal tensions might hurt our organization.”

Conflict resolutions: Why is this important?

While activists tend to be well-prepared for external threats, as a community, we often find ourselves ill-equipped to face a threat from within - **internal conflicts**. This doesn’t mean that internal and external threats are not closely interconnected. Internal challenges also happen because we operate within hostile environments where civil society is shrinking, resources are scarce, and we work within situations fraught with stigma, violence, and discrimination. Additionally, just because we share a common sense of belonging to the TGDI community, that does not mean that other power dynamics cease to exist: global north-south relations, racial or gender dynamics, and more can pose internal and external threats. As TGDI people, many threats can affect us, yet we, too, can harm one another if we fail to acknowledge and appropriately address potential points of conflict within our communities.

This section is an opportunity to pause and reflect on how to protect your organization further as you navigate through internal conflicts. **Internal conflicts can encompass those within your community but external to your organization and conflicts entirely contained within your organization.** In this section, **we will explore approaches applicable to addressing conflicts internal to your organization.** It’s important to note that while the dynamics of a conflict contained within an organization and those extending beyond its boundaries are not identical, similarities can be drawn.

Understanding the nature of conflict is essential to recognize that conflicts are common and expected occurrences within our movement. While the term ‘conflict’ may encompass various forms of interactions, **it is essential to distinguish conflict from abusive or violent behavior to ensure the appropriate approaches are used for different situations.** This section of the Toolkit is not intended for responding to instances of violence or abuse. Abuse or violence involves a pattern of power and control over others through behavioral manipulation, coercion, and possibly physical, economic, psychological, and sexual violence. For example, addressing harassment or inappropriate behaviors from your organization’s upper management is not included in this Toolkit. Here, we define conflict as disagreements, non-violent outbursts, or interpersonal disagreements and will focus only on these instances.



Capacity to Respond to Threats

Threats from within: Internal Conflicts

Conflict resolution: 'First aid kit'

Let's start by recognizing conflict as an opportunity for growth, learning, and collective transformation. Conflicts are a natural part of human interactions, including within social justice movements like our TGDI movement. Healing is not distinct from direct action. On the contrary, it is an integral part of building effective and sustainable movements for social change. To transform our environment, we need to recognize the emotional and mental toll activism has on us and advocate for intentional spaces that prioritize healing practices alongside direct action efforts. Collective healing creates spaces for activists to come together in solidarity and promotes a sense of belonging and support within the movement, fostering a deeper level of connection. However, **this healing will be restorative and transformative only if it is both collective and intersectional, acknowledging the diverse experiences and needs within the movement.** It encourages activists to be mindful of different identities and experiences while providing healing support and creating inclusive spaces.

The first step to conflict resolution is to center the importance of creating brave and inclusive spaces where individuals involved in the conflict can **express themselves freely** while remaining open to owning their mistakes and being called in for them. These spaces allow for open and honest dialogue and promote understanding. In this sense, **actively listening to and fostering empathy** with each other's experiences will play a central role in addressing conflicts. The goal is not to build consensus at all costs, nor to dismiss or invisibilize power dynamics (remember, this is about conflict, not violence) but to **foster mutual understanding, even when opinions or outlooks are divided.** Challenge the 'either/or' mindset, as two experiences and perceptions can be true simultaneously.

As you navigate your conflicts, **keep in mind two key concepts - restorative justice and transformative justice** - and how they both relate to collective accountability.

- **Restorative justice is about centering healing and reconciliation rather than enacting punitive measures as you manage conflicts.** Through open dialogue and understanding, restorative justice aims to find ways to affect justice and promote healing for everyone involved.
- **Transformative justice takes it a step further and recognizes that conflicts are rooted in larger systems of oppression,** such as colonialism, racism, ableism, or (cis)sexism, among others. To create lasting change, transformative justice aims to challenge and transform the oppressive systems and structures contributing to harm. It empowers communities to come together, support each other, and work collectively towards creating a more just and equitable society. In this approach, the needs and voices of those most affected by harm are prioritized, and their perspectives become central to healing and change.



Capacity to Respond to Threats

Threats from within: Internal Conflicts

Both approaches call for collective accountability, where all members take responsibility for resolving conflicts. Conflicts are not about two individuals fighting in the corner while the rest listens passively. Resist the urge to treat the conflict as an individual one. It is not about one 'bad apple' that needs to be blamed, punished, and removed from the basket. A collective problem requires a communal solution: personal and structural preventative actions, collective intervention, and communal reparation. Accountability fosters an environment that values and upholds the well-being of all community members.

Steps to resolving conflicts through these approaches can include:

- **Setting guiding principles** that center:
 - » **Intersectional justice.** This can mean recognizing that conflicts are complex, rooted in tangled systems of oppression, and may intersect with various identities and experiences.
 - » **Community leadership.** This can mean prioritizing the well-being and empowerment of community members throughout the conflict resolution process.
 - » **Trauma-informed approach.** This can mean emphasizing the need to be mindful of the impact of trauma on the way parties involved in the conflict are affected or reacting. It can include acknowledging and validating emotions experienced by those involved in the conflict and emphasizing the need to identify and address the underlying structure(s) of oppression.

These guiding principles should be discussed ahead of any conflicts. It allows everyone to take ownership of the process and agree on being held accountable when needed. Once tensions arise, traumas can be triggered, and communication can be challenged. Thus agreeing on common rules becomes trickier.

- **Securing mediation and facilitation:** Engaging skilled mediators or facilitators is recommended to guide conflict resolution processes, avoid conflict of interests, or simply unburden individual team members from holding space for conflict they are more than likely already engaged in. A system of mediation or facilitation techniques agreed upon collectively will help to ensure that all voices are heard, that the guiding principles you agreed upon are maintained, and that solutions are co-created.
- **Holding a space that enables co-created solutions:** Have you ever been in a situation where you were simply told, in a top-down hierarchy, how you should or shouldn't behave to resolve a conflict? This is usually not a very efficient or sustainable approach. Engaging in collaborative brainstorming to co-create solutions that address the needs of all parties involved is more efficient and empowering. This inclusive approach promotes buy-in and commitment to the agreed resolution.



Capacity to Respond to Threats

Threats from within: Internal Conflicts

- **Making it concrete:** Avoid rushing into solving a conflict without carefully considering what is at stake and engaging all parties involved to avoid getting stuck in endless loops of draining (and often fruitless) conversations. A conflict resolution process is meaningful only if it leads to a collectively shared action plan with clear steps, timelines, and responsibilities.
- **Regularly evaluate your process and identify the collective learnings:** After implementing conflict resolution measures, it is essential to evaluate their effectiveness and document any learning from the process. Reflecting on the conflict resolution process helps to identify areas for improvement and growth and nurtures a collective sense of accountability and responsibility to prevent further conflicts.

There is no great secret: the more you try and practice conflict resolution, the more you collectively learn from your mistakes, and the more successful you will be. To take your learning further, you can follow the great work of Black Lives Matter's Healing Justice Working Group on [addressing chapter conflict](#) or [healing in action](#) and the resources of the collective [What Really Makes Us Safe](#).

Conclusion

In this Toolkit, we have taken a journey together to help you strengthen your organization, ensuring it survives and thrives in the complex world of advocacy and activism. We started by emphasizing the importance of solid foundations, exploring the significance of vision, mission, leadership, and collaborative work culture from an intersectional lens. We then dived into crafting a truly strategic plan that guides your organization toward its long-term goals while adapting to an ever-changing world.

And our journey didn't stop there! Understanding that every organization faces its unique challenges, we ventured into the realm of self-assessment, seeking to identify areas where you can grow, adapt, and genuinely center further marginalized voices. We talked about the power of building 'people power' through engaging allies, recognizing that collective strength lies in constant effort to bridge gaps and collaborate. Finally, we navigated the delicate territory of internal conflicts, providing you with tools to heal and strengthen your organization from within.

As we wrap up this journey, **it is essential to remember that this Toolkit is not a rulebook.** The tips and recommendations provided are simply signposts guiding you toward **making more informed decisions.** Your organization's path is as unique as a fingerprint, and the tools here are yours to use as they best fit your vision and mission. While challenges may abound, always remember that your work is vital, and your impact immeasurable. GATE is dedicated to supporting organizations like yours on this journey. Keep an eye on [our website](#) to learn more about our **capacity building and support opportunities.**

Stay up to date with our work:



We encourage you to stay true to your mission, keep your vision in sight, and continue to adapt, evolve, and grow. The journey of organizational strengthening is ongoing, and each step you take brings you closer to creating a world where the voices of the oppressed are heard, and the rights and well-being of all are upheld.

Thank you for your dedication to making a difference. **Keep going, and may your organization thrive and flourish.**

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