

Strategic Planning for a Micro Nonprofit Serving the Economically Disadvantaged

PA 690 Project Report

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Abstract

The nonprofit sector is populated with many startup organizations struggling to survive. They compete with better established nonprofits for the same limited pool of financial and human resources. Nonprofits focused on a narrow or single issue are vulnerable to being left out of the limited resource pie. Many of these could cease to exist, especially when better positioned organizations take up at least some of their cause and attract funding streams for which they are in a better position to take advantage. Small nonprofit entities like TransGender Michigan will need to think strategically to survive this potentially hostile environment. Such nonprofits typically limp along with what the literature calls a following board, where the co-founder and/or executive director performs most of the workload. They are typically no match for boards that have evolved into governing boards and can readily adapt to the rapidly changing needs in the environment. TransGender Michigan now has that opportunity to remain relevant, as the go-to organization in Michigan for helping develop the competencies of other public and private sector entities needing to improve their responsiveness to their transgender clientele. To make the most of this changing environment it will need to think strategically, and will be helped along immensely by spelling this out as thoroughly as possible in a strategic plan.

Introduction

My introduction to nonprofit development began in the summer of 2007 when I joined the board of TransGender Michigan, which I quickly learned was operated by only a handful of people. In the two years I served as a board member I observed an informal organizational culture that gave me the impression the organization was struggling to survive and remain relevant. After resigning from the board, I pursued a master's degree in public administration with an emphasis in nonprofit management largely to learn how to help TransGender Michigan find some way it can thrive. I returned to TransGender Michigan convinced that what the organization needed most was to invest its limited resources in the process of its first strategic plan.

Why should any nonprofit invest in strategic planning? As explained by the president of the American Diabetes Association (Chernoff, 1996), the process itself can help

to improve organizational performance through the establishment of a formal plan; to stimulate our thinking about the future and provide us with clear direction; to define and solve organizational problems through purposeful steps; to survive in a rapidly changing environment despite a potential or projected limitation in resources; to build successful models of teamwork in the planning, implementation, and evaluation of our actions; and to provide a framework through which we can focus our options when difficult choices must be made (p. 613).

While these apply to nonprofits big and small, how does a micro-nonprofit¹ find adequate resources to follow through with this labor intensive endeavor? Moreover, will the process reach its goal to impact the strategic thinking of the organization, or will it merely result in another document collecting dust?

¹ As used in this paper, "micro-nonprofit" refers to 501(c)3 entities with an annual operating budget less than \$50,000, having little if any paid staff, with most work performed by a volunteer board, and typically led by its founder(s).

Not all strategic plans are created equal. Poor attempts at strategic planning can result in too broad of a scope that results in a document too vague to be useful, or can result in too narrow of a scope that is little more than a checklist of everything the organization hopes to do (Gross, 2007). By pursuing a research-based approach to strategic planning, one that best fits the unique needs of the organization, this report follows a guided process to be sure that TransGender Michigan's first attempt at strategic planning does not become their last.

TransGender Michigan is an agency serving a traditionally marginalized population, which compounded the strategic planning process in at least three initial areas: a challenge in identifying its scope of service, a challenge in isolating its ongoing purpose, and a challenge of volunteer and board development. Exploring each of these issues would lay the foundation for thinking more strategically about the organization's continuing existence.

Challenge of identifying its scope of service

TransGender Michigan is the statewide human service agency focused on the needs of the trans² population in Michigan. This is their first attempt at strategic planning in their fifteen year history. Except for its target population, TransGender Michigan is typical of many micro-nonprofit organizations serving a small socioeconomically disadvantaged population with little if any political capital.

Besides a paid intern tied to a two-year grant, TransGender Michigan continues as an all-volunteer organization with personnel drawn primarily from the target populations they seek to serve. These volunteers can be central to an agency's core service and possess scarce and important resources: time, talent, and information about clients (Hartenian, 2007). But when

² "Trans" is used here as an umbrella term to include transsexuals and gender nonconforming, in respect to members of these subpopulations who reject "trans" as an umbrella term applicable to them.

such volunteers are drawn primarily from a hidden population, where “public acknowledgment of membership in the population is potentially threatening” (Heckathorn, 1997), the material and immaterial capacities of these volunteers tend to be limited.

Many of TransGender Michigan’s donors are also drawn from a population with fewer economic resources at their disposal. As long as gay and trans people are legally discriminated from robust earning opportunities, their capacity to support their organizations will be severely compromised. The lack of affordable and culturally competent healthcare systems—“those that provide culturally and linguistically appropriate services” (Anderson, 2003, p. 68)—has a further deleterious impact upon marginalized people’s capacities to commit to volunteer hours. Mental health issues arising from complications of external and internal rejection, with its intersectionalities between various forms of social rejection and self-body rejection, exponentially compromises the service capacity of this volunteer corps. The willing servants need essential service themselves.

The damaging prevalence of systematic rejection informed TransGender Michigan’s initial mission statement: “Transgender individuals and significant others, families, friends, and allies (SOFFAs) face discrimination, violence, harassment, and inequality daily. To combat this, TransGender Michigan aims to remedy social injustices and create a better future for all.” In the face of systematic discrimination, those most willing to volunteer were eager to remedy these neglected needs. Exactly how remained an open question. Whether it was healthcare services, countering employment discrimination, access to public accommodations, security from the threat of violence, or simple survival skills, the typical constituent volunteer tended to need more than they could give. The needs of the many easily overwhelmed the resources of the few.

A natural question to ask is why TransGender Michigan is trying to take on all these needs when there is a growing population of nonprofit entities tackling these kinds of issues? What if TransGender Michigan worked more collaboratively with these entities, especially alongside those possessing the necessary resources to redress the many unique needs of the trans population? Indeed, why is there a plethora of nonprofit social service agencies struggling to address social problems in isolation from one other? Since TransGender Michigan's founding, more funders question the wisdom of supporting diverse entities with mission overlap.

Mark Rosenman of Caring for Change, a project completed in 2010 for improving how grant making serves the public, asserts the nonprofit sector already contains too many disparate entities competing for the same narrow pool of funding (Rosenman, 2011). Roseman contends that micro-nonprofits tend to perpetuate the cultural problem of addressing critical social issues as fragmented and unrelated. What if TransGender Michigan found a way to ease one basic need for trans clients but in the process triggered another for which they lack resources? The "broad-based changes needed in our social, political, and economic institutions," as Rosenman characterizes it, tends to stretch far beyond the scope of micro-nonprofits focused primarily, or exclusively, on easing a population's immediate and urgent needs. Single-issue entities are under increasing strain to rethink their existence.

The first answer to why TransGender Michigan functions in relative isolation is transphobia, the generalized discomfort toward trans people or those who transgress gender norms, and the resulting discrimination. Much like racism, transphobia occurs not only at an interpersonal level but also on a systematic institutional level. How can TransGender Michigan build a partnership with healthcare providers when many of those providers repeatedly refuse to serve trans patients

from policies that are dependent upon a patient's anatomy aligning with their gender presentation?

When these entities do become more open to trans clients they often lack cultural competencies to effectively address their unique health needs. Whether from lack of healthcare insurance as a consequence of employment discrimination or inability to find a culturally competent healthcare provider, trans peoples present a high incidence of unresolved health issues (Grant et al., 2011).

Improving cultural competencies of willing providers often falls on trans volunteers lacking adequate health themselves, interfering with their capacity to follow through on their volunteer commitments. This is complicated by how the few healthcare providers willing to respond effectively to the needs of trans healthcare seekers serve only those with proof of insurance.

Standard healthcare tends to remain out of reach for the majority of trans people, with up to 90% of trans people enduring workplace discrimination and suffering double the national rate of unemployment (Grant et al., 2011). Complications with identity papers can prevent trans people from qualifying for Medicaid.

A second and perhaps more enduring answer is the lack of unity within the trans population.

Often the only common ground drawing two trans people together is having a trans experience. The trans population is understandably diverse in their ethnicity, their religious expression, their political outlook, their socioeconomic status, their educational attainment, their economic security, their mental health status, and the like. This diversity undermines a unifying vocabulary, with many terms commonly used in the past now widely contested as inappropriate. Past terms like "post-op" are now replaced with "transition," and could be replaced again. Even the widely applied term "transgender" is contested as an umbrella term (Allen, 2011). How can trans serving agencies raise any unified support to address trans needs while trans people themselves continue disputing the latest labels and definitions?

The political diversity among trans people provides a salient example. I have conversed with trans people who, like myself, were conservative prior to self-accepting their trans status. In the process of developing a deeper understanding of their unique individuality, while their need for social supports became painfully strained, they tended to express more liberal leanings. After transitioning to their target gender and blending back into society, often finding adequate social supports, I have observed trans persons who then expressed more conservative leanings. Then I have observed trans persons who describe themselves as gender nonconforming, who question not only gender and sexuality norms but many other sociocultural norms of society. Their rhetoric can lean toward libertarian or anarchist views. Contention between these factions undermines TransGender Michigan's approach to common problems facing the trans population. Should TransGender Michigan, for example, help employers tolerate trans workers seeking to transition on the job to a presentable opposite gender norm? Or should the organization challenge all the gender and intersecting inequities embedded within the whole capitalistic system? Rachel is a self-described people pleaser and is often reluctant to alienate the very people she is seeking to serve. TransGender Michigan, I have observed, has gained a reputation for trying to please many while actually satisfying few. Strategic thinking can help organizations that are spread too thin to identify where they need to make difficult choices (Gross, 1987).

Challenge of isolating its ongoing purpose

TransGender Michigan was launched in 1997 as the brainchild of Rachel Crandall. Born male, Rachel was reaching her life goal to transition to female, and encountered many of the typical obstacles along the way. She lost her job and marriage, among other things. Then she discovered little if any support existed for others who also risked losing their social supports and their security when coming out publicly as trans. With her new partner Susan Crocker, also a

transwoman, she launched TransGender Michigan to begin to redress the many neglected needs within Michigan's trans population. With Susan's assets as a CPA and Rachel's as a MSW, they incorporated TransGender Michigan in November 1997.

Their initial mission statement captures Rachel's and Susan's ambitious hopes of improving life for all of Michigan's trans population. Awareness of the broad scope of the problems facing trans people, followed by an unspecified approach on how they hope to redress at least some of these problems, characterized the early phase of TransGender Michigan. Rachel and Susan's vision for what could reasonably be accomplished continues to meet resistance from volunteers, some who have left and launched their own initiatives and groups. Which is not necessarily bad.

Instead of providing needed services themselves, Rachel and Susan envisioned TransGender Michigan as a kind of clearinghouse for all things trans in Michigan. They were aware of an emerging movement of isolated clubs and events, with many participants operating in secrecy out of fear of losing their jobs, their families, or even their lives. One of the first projects TransGender Michigan launched was a website with a calendar of trans specific events, including safeguards for attendance. They saw the need for a trans specific help line, which is still in operation. The scope of the need pulled them away from a mere clearinghouse as they struggled to start up much needed services themselves, such as serving as a spokesperson for the local trans community. This appears to have led to mission creep as they overtaxed their limited personnel and financial resources. While attempting to increase trans visibility, their increased involvement in public spaces gave the impression that TransGender Michigan was big enough to take on much more. As Rachel explained to me in 2007, "TransGender Michigan is bigger on the outside than it is on the inside." Constraints upon their resources continue to disappoint their ambitiously stated purpose.

Their stated aim “to remedy social injustices and create a better future for all” was broad enough to include initiatives as varied as the website with its list of trans related resources (which they call “TransPages”) and a help line that Rachel tries to answer any time of day. In reality, their reach remains modest as they are cognizant of the limits to what they could actually accomplish. Disagreement about a nonprofit’s fundamental purpose can be swept under the rug with a vaguely inclusive mission statement, masking the entity’s true intent and undermining needed consensus for programming priorities (Gross, 2009). Strategic thinking can help the organization to focus on its actual purpose.

Challenge of volunteer and board development

Since the creation of TransGender Michigan, the social and cultural climate allows not only more trans people to accept themselves but more of them to openly address the many needs within the trans communities³. In contrast to the early days of TransGender Michigan, there is now a larger pool of visible trans people from which to draw volunteers. Few, however, actually step forward to volunteer their services to TransGender Michigan. The few that do frequently do not stay long. TransGender Michigan continues to struggle to maintain a sustainable volunteer base, despite the popular support the executive director enjoys.

TransGender Michigan was created at a time when few volunteers could risk being “out,” or publicly known as trans, and if non-trans to be associated with trans people. The few pioneers who risked ostracization found themselves performing the bulk of the work, including the co-founders to TransGender Michigan. A form of paternalism emerged, in which other trans people with their own bold ideas and initiatives either subsumed their efforts under these pioneers’

³ “Communities” recognizes the diversity of those living outside of gender norms, who do not see themselves in the same broad community, and “communities” include allies who do not self-identify as trans.

umbrella, or set out on their own with limited success. Increasingly, potential volunteers now arrive with diverse ideas on what is most important and how to resolve them, and enjoy increased service opportunities elsewhere. Appealing to these democratized volunteers will require a more strategic approach to attract and retain them.

Volunteers continue to approach Rachel, the executive director. She enthusiastically collects their contact information, but then finds herself at a loss on informing the volunteer candidate of what can actually be done. Prior to this strategic planning process, Rachel typically invited the volunteer to serve on the board of directors, as she struggled to maintain a “working board” who functioned less as a governing board and more as a panel of available volunteers. The high turnover on the board would suggest discontentment or perhaps even disappointment by volunteer board members seeking to perform more in a leadership than a following role. It appears the lack of a sturdy board is at the root of the organization’s need for strategic thinking. Board development is a key aspect of this strategic planning process.

The board of directors had fallen to three members, including the two co-founders who also serve as TransGender Michigan’s executive director and operations director. In fact, Rachel has been serving both as chair on the board and as executive director, a situation she recognizes is in need of change. To remedy this situation, the strategic planning process examined the potential to transition from a founder board to a governing board, complete with board orientation and training, and board position descriptions. To this end, the literature provides some guidance.

Literature Review

The literature is extensive for strategic planning for the nonprofit sector, but appears sparse when addressing strategic planning for micro-nonprofits, especially for the unique needs of social justice organizations serving marginalized populations. The Management Assistance Group (MAG) is the only literature resource I found that focuses on development of small social justice organizations in the LGBT movement. They publish free booklets to aid in strategic planning, board and personnel development, and other salient issues facing these smaller organizations. These provided the primary resource for TransGender Michigan's first strategic planning process.

MAG's 24-page *Strategic Planning that Makes a Difference* provided a solid foundation to build upon, starting with a rationale to engage in the task of strategic planning: "What end results do we want to produce for society, and what do we need to do over the next few years in order to make the greatest difference toward achieving those goals?" (Gross, 2007, p. 1) Indeed, like any fledgling organization, TransGender Michigan finds itself lapsing into an inward orientation of self-survival that risks losing sight of the grounding purpose for its continuance.

An issue of starting strategic planning

Gross provides nine signs that a social justice nonprofit is ready to consider strategic planning (2007). Two of them connected instantly with Rachel. The first is "feeling overwhelmed." Rachel finds herself doing most of the work, while enduring ongoing health issues. The second flows from the first, and that is "an uninvolved board of directors." Where does the process for strategic planning start for an overwhelmed founder with an inactive board? The process will likely begin with the founder-executive director's initiative in laying out what is their guiding purpose, where they aim to go, their governing values, their specific goals and objectives. Once

these are finely developed it becomes much easier to draft volunteer and board position descriptions, then to invite others to understand and share the workload of responsibilities.

Another sign listed by Gross is when the organization “can’t ever say no” to requests for services or opportunities presented by funders. For Rachel, it is more about not being able to say “yes” to all the emotionally wrenching needs presented to her. However, the apparent issue of scope can easily give the impression that TransGender Michigan is the go-to agency for all things trans in Michigan, and sometimes beyond Michigan, when the agency simply lacks the resources. As Gross points out (2007), “The result is that they do a little bit of everything, but nothing thoroughly or well. The irony is that they often end up disappointing everyone, since nothing receives the focus or resources it needs.”

Gross also suggests “a sense of staleness” is a sign for strategic planning readiness, speaking about organizations that realize a change of direction is necessary to respond to changing realities. The evolving demographics of who self-identifies as trans, including an increasing population of young gender nonconforming people who present a different perspective, along with the changing sociopolitical environment that is becoming less contentious toward trans peoples, prompts any organization serving the trans population to adjust to changing realities. This is something Rachel has recognized.

Considering the demands in time and energy that strategic planning requires, Rachel and Susan discussed whether it was something they could afford to pursue. Recognizing the day would soon come when they would need to pass the reins to the next generation, to have succession planning in place, they agreed to commit themselves to the process of strategic planning. Full buy-in of the process was sparked in part by their desire to realign with their original zeal to

create a better world for trans people in Michigan and beyond, and readiness to take a step back to consider how this could be realistically achieved. Indeed, they struggle to elicit help with the work, and this process was being provided by me without charge. Having been a past board member, I knew board development would inevitably be on the table and delved first into the available literature for board development.

An issue of board development

Early in the process a consensus developed among the existing board that the strategic plan would focus on capacity building, starting with board development. Volunteers for board members are typically handpicked by Rachel. MAG's 16-page *Board Passages: Three Key Stages in a Nonprofit Board's Life Cycle* describes this as an organizing board (Mathiasen, *Board Passages: Three Key Stages in a Nonprofit Board's Life Cycle*, 1998), the first of three typical stages. Mathiasen divides this first stage between following boards and leading boards. TransGender Michigan's board is aptly characterized by Mathiasen's descriptors of this following-the-leader board. The board is usually small to ensure group unity, members generally serve in a support or cheerleading role to the organization's active leader, and they tend to be homogenous with people the leader knows well and trusts as having an alignment of interests. Mathiasen also captures TransGender Michigan's board by describing how this type of leader-led board frequently gets asked to do tasks without question.

Mathiasen notes how following boards tend to be less engaged and realize how tasks left undone are eventually handled by the leader. These following boards tend not to be task-oriented, yet express a strong commitment to the organization's purpose and especially the leader's vision. "Probably as a consequence of their relatively passive role and of the strong role of the leader, following boards usually do not develop as intense a sense of ownership of the organization" (p. 5).

Rachel finds many supporters of her work, but few who are ready to share the workload. In the fifteen years of their existence, TransGender Michigan has experienced a high turnover rate of board members. Besides the two co-founders, only one other volunteer sat on the board at the start of this process, and that board member is rarely engaged. New board members have since joined, but Rachel indicates they too have now moved on and are no longer with TransGender Michigan. Rachel and Susan remain aware of limits to funding when the only stable board members are the two co-founders.

As with many nonprofits its size, Rachel views the board pragmatically as a pool of available volunteers to help perform the work, and then ideally as a governing authority. *Boards Matter, Board Building Tools for the Busy Executive* (Katcher et al., 2007), another MAG publication, describes these following boards as the leader's "baby" and therefore do not take as much ownership of the organization. Mathiasen (1998) characterizes these boards as "being asked to do more than it ever bargained for or agreed to do" (p. 7). They are informed they are a "working board," but the work is informal with little or no training, orientation or follow up. New board members may grow disillusioned with the work if constantly asked and not trusted to do the asking. Mutual frustration emerges during what Mathiasen characterizes as a strained transition to a new board phase. As new board members come online with an expectation of taking a more leading role, older board members resist taking the lead away from the charismatic founder or founders.

Resistance to change is natural for the originating board members, including the co-founders who identify with the old but less effective dynamic. Mathiasen (1998) describes them as naturally suspicious of new members coming in speaking of their "new roles." New members are often frustrated with the older members' apparent lack of progress, wondering why the

executive director is giving directions to the board and not the other way around. During this wrenching transition, easily fraught with unfulfilled expectations, is there any wonder why a board of directors can shrink to a handful of a committed core? As Katcher et al. (2007), put it,

Most executive directors of social justice organizations know they're supposed to build their boards, and most even know something about how to go about doing it. Yet many don't get around to it. Or, even worse, their efforts fail to produce the board they want. No wonder so many executive directors feel frustrated and ambivalent about board development (p. 1).

With the author providing strategic planning as a free consulting service, Rachel was provided informed support to ease these typical concerns and improve the opportunity for a smooth transition toward a governing board. Katcher et al. (2007), offer three general steps to guide the following board to becoming a governing board. "First, the executive director needs to make a conscious shift in how he or she relates to the board, and work to convince the board he or she really wants its involvement" (p. 4). This includes inviting the board's input into shaping the elements going into a strategic plan: the organization's direction, purpose, goals, and priorities. To encourage and sustain this increased ownership the board needs the executive's permission to ask him or her the tough questions, to be free to disagree, and even to challenge the executive's thinking.

"Second," Katcher et al. continues, "the board should add new members who aren't connected to the executive director and who have served as effective board members on other governing boards" (p. 4). This compels current board members to express a degree of ownership by searching for qualified board candidates who are removed from the executive's social circle. Board candidates from outside of the executive's familiar environments can "alter the board's dynamic and break through old patterns and assumptions."

“Third,” Katcher et al. concludes, “the organization should identify a strong board chair to partner with the executive director in board building” (p. 4). This can decenter the leadership solely from the founder-executive and toward a chair capable of enhancing other board member’s emerging ownership. This chair would facilitate meetings, set agenda items in concert with the executive, follow up as needed, and tactfully shift focus away from the charismatic executive to relocate responsibility across the increasingly more involved board. Her charismatic leadership could then transition to what Weber called legal-rational authority (Cohen, 1972). A strategic plan could shift control away from arbitrary personality and toward a more rationally shared basis, inviting more shared investment.

MAG’s “Board Membering” explains how to apply this process of board development to small social justice organizations (Mathiasen, 1986). The chair works with the executive director to first build a board profile, and then establish a process for bringing candidates aboard who fit that profile. Among the first committees to be set up is board development, to ensure the building of a culture of board succession planning. By actively seeking board candidates filling roles instead of seats there is a greater chance the board member will feel valued for his or her contribution and less likely to leave early. TransGender Michigan’s two co-founders are good at what they do, but need to attract board members who can complement their skills. When board members are recognized for bringing something essential to the organization they are more likely to increase their sense of ownership.

An issue of sustainable capacity

A growing volume of literature is emerging about the impact of the recent financial crisis upon nonprofits of various sizes. The financial collapse of 2008 caught many LGBT (Lesbian, Gay, Bisexual, and Transgender) support organizations by surprise (MAP, 2009). Only a handful of the

national LGBT organizations had developed a sustainable endowment, while most organizations leaned heavily upon a limited pool of wealthy donors. Funders who were regularly supporting these organizations with thousand dollars monthly commitments were pulling back, leaving these agencies vulnerable just as their constituents were increasing their requests for services (Kennedy, 2010). A few foundations whose mission focused on LGBT causes did what they could to make up for the slack, sometimes dipping into their endowments to continue funding the demand for services (MAP, 2009). With less resources available, funders reexamined their priorities. Organizations like TransGender Michigan, without an evidence based program demonstrating the widest impact possible with the fewest dollars, would see their funding streams shrink drastically. Arcus Foundation, the major funder for LGBT initiatives in Michigan, pulled support out of Michigan and away from programs without demonstrable results when they moved to New York. Funders strategically applied their shrinking resources only toward programs with documented positive outcomes, which TransGender Michigan lacked.

The shift by funders away from programming without documented results follows a trend throughout the social sector (Poister, 2003). As Kania and Kramer noted in their seminal article “Collective Impact” (Kania & Kramer, 2011), nonprofits tackling social issues in isolation tend to fail in their mission. Only when nonprofits coordinate with other entities to address all angles of a social problem is there significant success to attract funding. This effectively limits the funding pool for smaller nonprofits who lack sufficient capacity to develop satisfying partnerships with more established entities. After all, what does TransGender Michigan have to offer to other nonprofits that those agencies cannot perform more effectively?

One asset that TransGender Michigan possesses and other entities typically lack is cultural competencies toward trans seekers of services. As non-LGBT agencies become increasingly welcoming to serve trans clients they typically cannot keep up with the latest best practices and evolving terminology to effectively serve the emerging diversity of trans clients. The strategic plan positions this asset as key to TransGender Michigan’s future. “The Power of Purpose” (Gross, 2009), another MAG publication, explains how organizations can shift focus away from its central purpose toward individual jobs and projects. Perhaps TransGender Michigan can provide value of much greater impact than its website “TransPages” and its help line, both created at a time before the nonprofit sector was open to developing trans cultural competencies. Perhaps its central purpose is better served by guiding other nonprofits to better serve their trans clients. “That’s why an organization must keep attending to its purpose—refining it, and making sure that it continues to be the central integrating force in the organization’s life” (p. 5). By leveraging its unique asset in an ever changing social environment, TransGender Michigan can demonstrate to funders it can provide for a need where no other entity is ready to deliver. TransGender Michigan already gives “Trans 101” training sessions by request, so they are already in position to respond to this need. Perhaps they can convince funders to help them scale the program to fit the growing need and probable demand, with a results oriented approach.

An issue of finding the most appropriate literature

While the literature is robust for a variety of issues TransGender Michigan will face during its strategic planning process and implementation, busy executive directors like Rachel need the most appropriate information distilled into palatable portions. MAG is the one source I found that provides free literature for small social justice organizations like TransGender Michigan. MAG has its roots in serving fledgling organizations within the LGBT communities, making

presentations at the annual LGBT Creating Chance conference. They are well positioned to create literature that is easy to read and gets quickly to the point for executives and volunteer boards who lack time to sort through dense literature.

Including those already mentioned, MAG publications helpful to this process are:

- “Advancing Your Cause Through the People You Manage”
- “Board Membering”
- “Board Passages; 3 key stages in a NP board's life cycle”
- “Boards Matter: Board Building Tools for the Busy Executive”
- “Strategic Planning that makes a difference”
- “The 10 Most Common Organizational Problems: Getting to their Source”
- “The Planning Dreads: Why Groups Resist Planning”
- “The Power of Purpose”
- “Tools You Can Use; Finding Opportunity in Crisis”

Each of these booklets are available as downloadable PDFs at the Management Assistant Group website. Each publication complements much deeper discussions for nonprofit development in the academic literature, where I found little research on micro-nonprofits serving the LGBT population. These MAG publications provided the core of helpful literature to serve TransGender Michigan's strategic planning needs.

Methods and Data Collection

Having served on the board of TransGender Michigan from 2007 to 2009, I served as an informed yet independent consultant to the strategic planning process. This previous relationship with

TransGender Michigan helped in nurturing buy-in to the need for and promise of strategic planning. During this time I was assisted by two volunteers who together created the grassroots entity Michigan Trans Empowerment Taskforce, maintaining an external perspective to the process. Early in the process, this task force met weekly to discuss needs in the trans community along with options for resolving them, and brought these efforts to the monthly board meetings of TransGender Michigan. At the conclusion of each board meeting, attendees were asked to fill out a brief survey to give their anonymous feedback to me. Not only was this to inform me of my progress, and to convey to the board my accountability to the process, but also to model to the board a routine of survey taking for program evaluation purposes. The usefulness of the feedback itself appeared compromised by researcher bias; respondents seem to provide what they apparently presumed I wanted to hear. Receiving critique of my apparent weak areas, such as my occasional lapses in clear enunciation, would have been helpful not only to me but to the process. But I came to understand their reluctance, especially Rachel's, to coming across as overcritical, and appreciating how anonymity is compromised when the number of respondents can be counted on one hand.

Later in the process, I met one-on-one with Rachel on a nearly weekly basis to put the process into motion. Items discussed were then negotiated with Susan Crocker, co-founder and Operations Director, prior to implementation for board review. With board input, data was then collected from constituents for assessing needs of the organization, and the needs of its constituency for which the organization serves.

Collecting reliable data from the trans population continues to challenge researchers, starting with an agreed upon definition of the population parameters for who exactly is trans, and then finding a representative sample of that population (Grant et al., 2011). Trans people of color,

rural, the many homeless trans and queer youth, and especially trans people of non-Western cultures tend to remain grossly under-represented. Social stigma complicates availability of some respondents more than others, such as American Muslims and Asian Americans. Estimates of the trans population based on those seeking medical interventions is biased toward those with economic means to access such care, and undercounts the many trans people who do not seek or even accept medical interventions (Conway, 2001).

To date, there exists one study that has methodically overcome many of these shortcomings to paint a comprehensive picture of the gravity of unmet needs among trans people (Grant et al., 2011). Published in cooperation between The Gay and Lesbian National Task Force and the National Center for Transgender Equality, the 70-item National Transgender Discrimination Survey was coordinated by Pennsylvania State University. Data was analyzed from 6,450 trans identified respondents, producing the *Injustice at Every Turn* report.

For the needs assessment portion of this strategic planning process, data was provided by a survey created by a volunteer serving the 2011 Detroit Day of Transgender Empowerment, providing a local perspective to many of the concerns highlighted in the national *Injustice at Every Turn* report. Respondents were drawn mostly from a convenient sample of those who frequent Affirmations, the regional LGBT community center, or could be readily networked with the survey takers and reached online to take the survey at Survey Monkey. Consequently, respondents tended to be localized within Oakland and Macomb counties, and underrepresented non-white and homeless trans peoples, including trans people who do not frequently attend Affirmations. To remedy this under representation, current efforts are under way by an ad hoc grassroots committee of trans and non-trans volunteers to create focus groups and individual

interviews to gather a more complete picture of trans experiences and needs, starting in Metro Detroit. Their findings did not materialize in time to be available for this report.

The 2011 Detroit Day of Transgender Empowerment event included a town hall meeting session where attendees, mostly trans, brainstormed what they believed to be the most important issues facing trans people. Attendees were then invited to brainstorm some ideas on how to respond to these needs. The results were used in the strategic plan. These results were also posted on an online application called Idea Scale, to invite attendees and those who did not attend to continue brainstorming ideas and to vote on each idea given. Starting with email contacts shared by the attendees, I anticipated a snowball sample to grow from interested respondents. The software automatically raises the highest vote getters to the top of the list. The lowest voted items sink to the bottom of the list, and cannot be seen until the user scrolls down. The list of needs formed one list, while the list of potential remedies formed another. I added three more topical lists, for each anticipated stage in the development and implementation of the strategic plan, but due to lack of follow up the Idea Scale approach faded from use.

Respondents using the Idea Scale tool indicated economic security as a salient issue among trans people. For the 2012 Detroit Day of Transgender Empowerment, I drafted a brief survey to test that assumption. The single-page survey asked respondents their employment status, workplace sector, whether their trans status is known at work, their interest in job development, interest in entrepreneurial support, and demographic data of respondent's ethnicity, gender identity and age. Discussion of the data follows in the next section. The full survey tool is included in the Appendix.

The sparsely available data is complemented by the researcher's firsthand knowledge of trans issues, from not only being active in the trans community but being trans herself. Albeit this is a biased perspective, yet it provides a starting point for discussions of what is, or is not, salient to the general trans experience. The bulk of the process was pulled from the immense wealth of insight and experience of Rachel Crandall, who would ultimately be utilizing the processed information in the final product of the strategic plan.

Discussion

Soon after Rachel and Susan expressed their buy-in to this project—internalizing the need for strategic planning—the first step involved critiquing their mission statement: “Transgender individuals and significant others, families, friends, and allies (SOFFAs) face discrimination, violence, harassment, and inequality daily. To combat this, TransGender Michigan aims to remedy social injustices and create a better future for all.” The board agreed it needed a facelift. They were presented with what makes for an effective mission statement:

- 1) WHAT: the central purpose for their existence,
- 2) WHO: the central people being served,
- 3) HOW: the central process for fulfilling that purpose, and
- 4) WHY: the central principles guiding their efforts.

Mission statements from similar organizations were compared, with emphasis upon those entities appearing to be most effective. Co-founders Rachel and Susan reiterated their vision for when they began the organization, for TransGender Michigan to serve more as a clearinghouse for other organization's services. Finding themselves filling the void of needed services contributed to mission creep, and this current process empowers them to rectify this by reaffirming their

original intent as more of a clearinghouse for other's services. Several iterations of a new mission statement were explored until they finally decided upon: "Transgender Michigan's primary mission is to provide advocacy, support and education while serving to create coalitions in the state of Michigan to unify and empower trans and gender nonconforming communities."

Some of these early iterations envisioned TransGender Michigan becoming more of a catalyst and clearinghouse for others and this inspired the vision statement: "We will be the catalyst and clearinghouse for all things trans and gender nonconforming in the state of Michigan." The vision statement aims for what the organization can become upon completion of the three year strategic plan or soon after.

Coinciding with this process, the local and even statewide LGBT community had been focusing on ethnic inclusiveness, to improve cultural competencies for the segments of the population that often get left behind by a largely middle class white led leadership. This informed the values the strategic plan would focus upon: collaboration, grassroots activism, gender diversity and cultural competence. While pulling this strategic core together, it was agreed this would largely be a heuristic process, that we would focus more on planning than worrying about the process being perfect (Gross, 1987). If, for example, the list of core values misstated the actual values of their key constituents then they were free to learn how to best adjust to this new information and find ways to integrate agreed upon values into their strategic thinking. This provided an apt opportunity to emphasize the importance of strategic thinking, to clarify how the written plan is not as important as the anticipated mind shift the plan is expected to inspire.

Because Susan is busy each tax season performing her CPA duties, much of this effort was coordinated by Rachel and myself. Rachel would then get Susan's inputs when they could make

time to review the emerging plan, and this reduced the pace of the planning. With a largely inactive board, Rachel and I pieced together an environmental scan of the organization, looking inward at its strengths and weaknesses and outward at opportunities and challenges facing the organization. Despite TransGender Michigan not living up to many people's expectations, its greatest asset continues to be Rachel, a widely respected and charismatic leader in the LGBT communities. Her charisma tends to also be a liability; she takes on the bulk of the direct service work, leaving little of such work for her "working" board to own. Retaining human capital will depend on integrating workforce development and succession planning into the organization's strategic goals (Pynes, 2004). This may require TransGender Michigan to adopt volunteer position descriptions, and board position descriptions, for the first time, along with training and orientation of each volunteer. Development of paid staff positions would then build upon these volunteer development capacities. With human capital firmly in place, TransGender Michigan would improve its position to attract resources for its strategic goals, toward effectively addressing trans specific needs.

Needs assessment looked inward at this lack of human as well as material resources, then looked outward to the more urgent needs in the community that such resources are meant to address. Data was provided by Transgender Detroit, the local trans service agency. At their 2011 Day of Transgender Empowerment event, they hosted a town hall meeting where they invited members of the community to brainstorm a list of what they perceived as the urgent needs trans people face. Then they were invited to brainstorm a list of responses to these needs, which Transgender Detroit and TransGender Michigan could consider in their programming. Data was also provided by a survey facilitated by Transgender Detroit. Both sets of data are integrated into the needs assessment segment of the strategic plan.

For the 2012 Day of Transgender Empowerment I crafted a survey to get a snapshot a year later of the economic situation and concerns of attendees. In this convenience sample, 18 respondents filled out paper surveys at the annual event (a 19th filled one out but did not get it returned to me until after I had processed the data). Respondents were not instructed to provide discrete responses, so the data does not always represent an accurate percentage for each category. The data does provide a helpful glance at the employment and economic concerns of the trans population TransGender Michigan serves.

Economic Empowerment Survey Data

	N	N/S		N	N/S
1. employment status:			5. business development interest:		
fully employed	6	30.0%	I strongly agree	7	38.9%
unemployed	3	15.0%	I agree	3	16.7%
under-employed	2	10.0%	I am unsure	5	27.8%
self-employed	4	20.0%	I disagree	1	5.6%
<i>none of the above</i>	5	25.0%	I strongly disagree	1	5.6%
	20	111.1%		17	94.4%
2. employment sector:			6. demographic - race:		
for-profit private sector	7	38.9%	white	11	61.1%
public government sector	0	0.0%	non-white	2	11.1%
nonprofit sector	3	16.7%	<i>neither</i>	5	27.8%
<i>currently not working</i>	8	44.4%		18	100.0%
	18	100.0%			
3. trans status in workplace:			7. demographic - gender identity:		
not disclosed	3	16.7%	transgender	10	55.6%
disclosed to a select few	2	11.1%	gender nonconforming	7	38.9%
open for all to know	6	33.3%	transsexual	7	38.9%
<i>none of the above</i>	6	33.3%	ally to trans community	2	11.1%
	17	94.4%	<i>none of the above</i>	2	11.1%
				28	155.6%

4. job developer interest:			8. demographic - age:		
I strongly agree	12	66.7%	under 20	0	0.0%
I agree	4	22.2%	20-29	5	27.8%
I am unsure	1	5.6%	30-39	1	5.6%
I disagree	0	0.0%	40-49	1	5.6%
I strongly disagree	0	0.0%	50-64	10	55.6%
	17	94.4%	65 and over	1	5.6%
				18	100.0%

N = number of responses to survey item; N/S = number of responses divided by total sample size of respondents (18)

The first question included two instances of multiple responses by the same respondent. One indicated both self-employment and under-employed and the other indicated self-employed and fully-employed. Of these 20 responses to their employment status, 30% reported being fully employed, 20% self-employed, 10% underemployed, 15% unemployed, and 25% indicating none of these options adequately applies to their situation (e.g., on disability). If this is fairly representative of the organization's constituency, this data helps to underscore the strategic plan's emphasis toward capacity building from outside of the communities it serves. This data also supports addressing the economic needs of trans peoples, whether from TransGender Michigan's programming development or identifying other entities to which TransGender Michigan can refer service seekers.

The second question indicates that almost half (44.4%) are not currently working. Further research could determine whether this indicates layoffs, lulls in one's own business, or those dropping out of the workforce—perhaps out of despair from perceived transphobic employers. Four of the six fully employed work in the private sector. The other two work in the nonprofit sector. If this sample is representative of the employed trans populations, the data suggests there

is little to no representation of trans people in the government workforce. TransGender Michigan may want to keep this in mind if, or when, supporting strategies for job development.

The third question responses indicated half of the six fully employed are out as trans in the workplace, with two disclosed to a select few and the last one not openly trans at work. The two respondents who disclosed they are under-employed both indicated being fully open about their trans status to all. The four self-employed respondents were spread out equally in each of the four available categories.

When asked about their interest in job development, “If others could locate trans friendly employers” for trans job seekers, two-thirds of 17 respondents expressed strong agreement. Four respondents (22.2%) expressed mere agreement, with only one (5.6%) expressing uncertainty. Not one expressed any degree of disagreement to this need. All six of the respondents who are fully out and known as trans in their workplaces expressed strong agreement. All three reporting they were unemployed strongly supported job development. Five of the six fully employed expressed strong agreement, while the other fully employed respondent was the single holdout to express uncertainty. No respondents expressed any disagreement for the need.

When asked their interest in entrepreneurial support, of finding trans appropriate support in starting a business, seven of 17 respondents, or 38.9%, expressed strong agreement (of which three are already self-employed), three (16.7%) expressed mild agreement, five (27.8%) indicated uncertainty, with one respondent disagreeing and another strongly disagreeing. Among the unsure, two were fully employed, one was under-employed, one was self-employed, and one indicated none of the available employment categories applied. The two expressing disagreement also indicated the available employment categories did not apply to them. Three of

the four self-employed expressed strong agreement, which may suggest their need for trans-specific support in a business environment that can be hostile to trans entrepreneurs.

Among the stated values in the strategic plan are gender diversity and cultural competence. Demographic data was included to be sure a snapshot of economic needs represented a diversity of races, gender identities, and ages. Cutting against the grain of stereotypes, all three reporting as unemployed were white. Granted, only two respondents identified as non-white, and another five self-identified as neither white nor non-white. This could suggest that other non-white trans peoples could not or chose not to attend, or agree to fill out a survey. Non-whites without steady income may be among the least likely to find the means to travel to Affirmations. This drives home again the need for TransGender Michigan, along with other LGBT serving entities, to reach out more proactively to less privileged segments of the trans population.

Capturing the gender identities of the respondents was skewed by multiple responses to item seven. With the option to select more than one applicable category, seven of the 18 respondents selected more than one category. One of these selected three categories and another selected four, including the fourth option of “none of the above adequately applies to my situation.” The option to consider a variety of gender expressions and identities appears to be generational. Six of the seven multiply selected gender categories are under 50 years old, five under 40. Ten of the eleven selecting only a single gender category indicated they were over 50. As trans culture continues to evolve, challenging once accepted concepts of gender and identity, I find it is typically the younger generation of trans who continually question not only mainstream gender norms but transgender norms as well, and who will defy simple categorization.

The demographic TransGender Michigan serves is evolving from a generation who grew up during a time of widespread transphobia to a generation who are growing up with increasing

awareness and tolerance for the trans experience. They express different values, different priorities, which challenges TransGender Michigan to find ways to effectively respond to a variety of needs and concerns. Perhaps it is worth noting that all four respondents who indicated they were self-employed are over 50 years old. These respondents likely established their businesses before coming out to others as trans, suggesting this option is not as secure for younger trans who are either still transitioning to their target gender or are remaining gender ambiguous. Only one of the four self-employed respondents indicated being fully out to everyone in their work environment, suggesting the other three were not “presenting” full time in their target gender. I have found this measured openness to be less appealing to younger trans peoples. Instead of trying to “pass” for the “opposite” gender, it is often the younger generation of trans people who write and speak of challenging the gender binary. Their evolving influence upon trans culture shapes the changing social environment that warrants TransGender Michigan to take a more strategic response toward its purpose.

This data was not integrated into the strategic plan, which was already in its final drafts at the time. Rather, the data is intended to keep needs assessment as an ongoing process. Economic need is one of many issues facing the trans communities to which TransGender Michigan may be expected to respond. The heuristic approach to strategic planning affords TransGender Michigan to learn which needs they are positioned to have the most effective impact, along with which needs trans people themselves express as most vital to them. The strategic plan shifts attention toward building partnerships with other entities is position to address these needs, with TransGender Michigan helping these organizations develop trans cultural competencies to increase their effectiveness with their trans clients. Largely through partnerships, the plan sees the need to build capacities—material and human—to be able to consistently deliver this service.

While developing goals and objectives, Rachel conveyed the importance of incorporating their current programming, if it aligned with their revamped mission. The psychological benefit of already working toward some of the goals, and seeing success, could provide significant buy-in from stakeholders. As a result, some of TransGender Michigan's stakeholders are expected to take a greater interest in the organization's more focused direction with their current programs. By raising their profile, TransGender Michigan hopes to attract a pool of board candidates to help it fill its many capacity building needs.

To avoid ballooning into something too ambitious, the strategic plan aims to pursue four SMART goals (Clouser, 2009): Each stated goal was reviewed to be sure it was Specific, Measurable, Attainable, Realistic, and Timely. The first goal emphasizes the purpose of the organization's existence, to develop its current programs to address communities' needs. This is intended to give a strong first impression for its rationale for the subsequent three capacity building goals: to develop volunteers, staff, and the board. The heuristic approach includes the current practice of seeking board candidates among volunteers, with expectation of improving the candidate field in the process. Originally, each objective was to be framed in the ideal format: this aspect of the goal is to be done to this degree by this time. With anemic human capacity at the start, it was understood that this could set TransGender Michigan up for failure. To keep the process realistic and attainable, the language was kept simple. In the heuristic approach, it was agreed to consider this more technically correct format when drafting future objectives. The strategic plan's buy-in depends on how easily it can be applied by an organization of only a handful of people who have other full-time commitments. The sooner the plan can be applied the less risk to being forgotten. Susan has the skills and talents for administering such a plan, and after the latest tax season she will be available to help guide its implementation.

Implementation will resolve around what is the agreed upon priorities at a given time. The plan has the potential to guide daily staff decisions, shifting away from the less efficient process of intermittent board meetings to shape each major decision. It has become impractical for the board of this statewide organization to physically meet each month, so TransGender Michigan will need to explore alternatives like teleconference calls and agenda setting by email. The evolving role of the board may be less as a panel of working volunteers and more as a leader in overseeing the strategic implementation of the plan's goals and objectives.

Rachel has shared with me that volunteers ask her how they can help, but with only an informal utilization of short-term volunteers she rarely has something definite for them to do. Tasks then tend to fall upon the volunteer board, or to the intern, or most often to the co-founders themselves. The volume of potential tasks can easily overwhelm this limited scope of human capacity. The plan anticipates human capacity development as key to TransGender Michigan's future, which could present a need for more robust volunteer development. This need may come sooner than expected.

When the Affordable Care Act becomes fully implemented at the end of 2013, requiring all Michigan residents to have physical and mental healthcare coverage, trans healthcare consumption is likely to increase. TransGender Michigan is positioned to survey members of the trans communities to calculate their anticipated increased demand for healthcare services, and also to survey healthcare providers to determine their level of trans competencies. Trained volunteers could conduct the bulk of the survey work. Surveying healthcare providers could include their interest in receiving "Trans 101" training to help improve such competencies, to attract trans healthcare consumers. TransGender Michigan is already in a position to provide such training, and to train others to increase this capacity. By positioning itself as the go-to organization for

providing for this need, TransGender Michigan may attract funding streams to strengthen its capacity in other areas of need, such as training job developers how to effectively approach potential employers with trans job seekers. This involves training trans volunteers to help keep up with the anticipated demand. I have already drafted a logic model for them to explore this capacity building and programming potential.

Change will understandably not come easily, but the plan helps to direct change toward an agreed upon vision. The rapidly changing sociopolitical environment over the last year or two suggests there is less of a need for the kind of organization TransGender Michigan had become. Instead of direct services to trans people, the strategic plan communicates to other entities TransGender Michigan's readiness to help better established agencies—healthcare assistance, workforce development, legal services—to competently provide direct services to trans clients. If TransGender Michigan does not promptly position itself to fill that need, then the possibility increases that someone else will.

Conclusion

TransGender Michigan is one of many nonprofit entities that began with a narrow focus, as one of the few statewide agencies focused exclusively upon the needs of the trans population. As other entities become increasingly open and capable to address these needs, during the evolving social environment of less transphobia, the need for an organization like TransGender Michigan becomes open to question. The continuing high prevalence of discrimination against trans people, as indicated by local and national surveys, suggests there is still a role for TransGender Michigan to perform. As the nonprofit sector moves toward more collaborative partnerships, TransGender Michigan can offer value from its years of accumulated trans competencies and

social capital. With a strategic plan in place, the entity of TransGender Michigan steps away from the arbitrariness of the co-founders' personalities and toward something the nonprofit sector can take more seriously as a going concern.

If TransGender Michigan continued to provide only the services of its co-founders, such as the help line run by Rachel, it risks dissolving when the co-founders eventually retire. By engaging in the strategic planning process, the co-founders express their aspiration to see their creation continue on without them and to mature into an entity transcending their exclusive ownership. Rachel admits this can be challenging, to let go of control and trust others to shape the strategic direction of what they have invested much of their life energies. She likens the process to seeing her "baby" grow up. The strategic plan suggests program evaluation to determine if there remains a need for the programming like the help line. The plan helps her brace for needed change, to adjust to changing needs, while retaining familiar elements to which she has grown fond. The plan also brings Rachel and Susan back to their original vision for the organization as a clearinghouse for the needed services of other entities.

By working with an increasing number of agencies, to help improve their trans competencies, TransGender Michigan could have firsthand knowledge about which agencies are most responsive to trans needs. This could be immensely valuable when fielding calls to the help line for trans friendly services; TransGender Michigan will know who best to refer if they themselves trained that agency's staff. In keeping with the heuristic approach to this strategic planning process, this effort is already begun in TransGender Michigan's growing speakers bureau which "offers basic or customized panel presentations for classes, community groups, and businesses to learn about trans identity and issues related to the trans community" (Crocker, 2013).

If this strategic planning effort inspires TransGender Michigan toward a proactive mindset, and it never completes all the stated objectives, this would still be a success. An important dynamic of strategic planning that I have learned about strategic planning is that it is not about what happens on paper but what happens in the minds of those giving the organization direction. This is important to consider because strategic planning often ends as an academic exercise, never to be pursued again. An organization's first attempt to strategic planning could be its last if the first effort proves unsatisfactory. Fortunately, TransGender Michigan is already thinking strategically.

Appendices

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Executive Summary

In 1997, Susan and I started TransGender Michigan with the idea it would serve as a clearinghouse for trans related services. We soon found there will little to actually “clear.” We found ourselves trying to fill in some of those gaps, and found the work to be overwhelming, but also rewarding.

Since the fifteen years we started we are encouraged to see more and more of us trans people coming out and stepping up to do the work. We have been approached by some of you asking what you can do to help. That is a good question indeed.

We put our heads together and worked with a former board member to develop this strategic plan, in part to answer that question. In the process we learned strategic planning is something of a work in progress. It is not a business plan, not an operational plan. It is a way to express agreement about which direction we aim to go.

We aim to share more and more of the work and celebrate those already doing the work. We aim to think strategically with you. Together, we trust we can build a greater future for all of us than what we could accomplish alone. How will we do that? This strategic plan is the first of many steps we hope to lead us there. Will you join us?

Love & Hugs,

Rachel Crandall

Executive Director

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Strategic Planning

This plan is less about what we are going to *do* together and more about how we are going to *think* together. It is “dynamic” because the fine details are expected to change as the working environment changes. This is a plan on how to put ourselves in proper position so we can take advantage of opportunities when they hit us. Yes, we hit back!

This written strategic plan announces how TransGender Michigan will embark on this fresh perspective, how it will prepare itself to keep up with an ever changing and often hostile environment. *This is strategic thinking*, and without this shift in thinking there is not much point in pursuing “strategic planning.”

The planning process

This process has unfolded from the enthusiasm sparked at the 2011 International Day of Transgender Visibility and the Transgender Day of Remembrance. At the 2011 Day of Empowerment, led by Transgender Detroit, a town hall meeting was held identify some of the issues facing the community and some ideas to fix them.

Many good ideas are being expressed and explored, but typically with insufficient support to help guarantee success. Central to this plan is building up our capacities to help one another to successfully redress our many issues.

Consider this a working draft, not quite in stone. It is expected to evolve as new information becomes available. It starts with some assumptions ripe for challenge.

Guiding assumptions

TransGender Michigan was started at a time when few trans people could risk being publically out and serving openly. As the risks to being out decline there are more trans people willing to step up and get involved in the work of improving all of our lives. In the meantime, our pioneers became saddled with a cultural norm of doing most of the work.

When you create something special that others come to depend upon, it is not always easy to let go and trust others to take charge of it. What if others mess it up? Could clients get hurt? What else is at risk if we allow change?

But change we must, or risk being swept aside by the tides of change. We can either let change happen to us, or prepare ourselves to meet change and direct it proactively. And we can do that by identifying our strategic priorities.

Strategic priorities

First, we lay out a strategic core: a revised mission statement, a new guiding vision, our operating values, assessment of our operating environment, and then assess some of dire the needs we face. Then we set some smart goals we can reasonably meet by working together. Ready?

Strategic Core

Mission

Transgender Michigan's primary mission is to provide advocacy, support and education while serving to create coalitions in the state of Michigan to unify and empower trans and gender nonconforming communities.

Vision

We will be the catalyst and clearinghouse for all things trans and gender nonconforming in the state of Michigan.

Values

Collaboration	We believe we work best when we work together. In fact, we think our greatest resource is our collective human capacities. Yes, we became accustomed to just a few of us bearing the brunt of the workload. We even got used to the idea of being in control. Then we got tired of working alone, and simply got tired. Oy! We recognize we are on a learning curve for how to transition from our familiar patterns to building sustainable partnerships of effective teamwork. Old patterns are not easily changed. But the cost is too great if we do not change, so change we must, and we are already changing some of the ways we do business. We see cooperation as key to sustainable change. And an important step toward supporting all the work required for easing our many needs.
Grassroots	We believe our best work arises from the wisdom of the crowd. We think meaningful change is best led by those who will be most impacted by such change. We realize we have become accustomed to top-down ways of doing business, but we seek to stretch our boundaries to include such things as crowdsourcing and other forms of participatory democracy. We trust we will find ways to integrate all the local efforts into our broader vision to be a catalyst and a clearinghouse for the hard work done by others. We cannot do the work alone nor seek to work that hard. We need you as much if not more than you need us.

Gender diversity	<p>We believe the differences in the way we each experience gender adds to our shared strength.</p> <p>We appreciate how our varied experience of gender is still emerging, resulting in many contested terms and new theories to explore. We affirm anyone who experiences their gender innately, as something essential to their very being, while also affirming anyone who experiences their gender relatively, as something socially constructed. We affirm everyone's right to define themselves, and everyone's freedom of expression to respond to these definitions, in a form that is sensitive to one another's needs. We believe we are stronger when every voice and view is integrated into our whole perspective.</p>
Cultural Competence	<p>We believe in being responsive to our cultural diversity.</p> <p>We recognize it is not enough to increase visibility of people from different ethnicities but we must ensure we hear their voice, and then respond appropriately. We believe we are all better when we integrate a variety of perspectives in our decisions. We recognize there are many people in our communities with cultural differences to whom we need to be more attentive, including those of all ages, those diagnosed with mental illness, those with disabilities, those across the socioeconomic spectrum, those suffering substance abuse and/or domestic violence, those who have been impacted by the judicial system, those adversely impacted by the War on Terror, and many more. We also appreciate these cultural categories often intersect in ways that complicate our issues. We honor those spaces where lack of cultural competence can be respectfully alerted and proficiently addressed. We affirm the need to freely acknowledge when we ourselves are not being adequately competent in our treatment of others, without retribution but encouragement to try and try again to learn from one another. Lastly, we acknowledge the importance for each person of a different cultural background to speak for themselves, without assuming they can speak for others similarly identified any more than others can speak for them. We do indeed value our cultural differences.</p>

Obviously, there are many more values we express. We highlight these since they speak directly to our current circumstances, and we trust they will lead us in a direction we all seek to go.

Environmental Scan

While this assessment is not exhaustive it provides a solid starting point for moving forward. We are bound to discover more of our collective assets while encountering some more liabilities. Here we have an honest look at some opportunities to embrace, which we can leverage when we address the many challenges threatening our ability to serve our constituents.

Currently looking <i>inward</i> at TransGender Michigan	
Strengths	Weaknesses
501(c)3 status Long term visibility Ties to community Led by broadly respected leader in trans community Education and experience of current board Only trans-specific helpline Paid AmeriCorp volunteer on staff	Founders on board also serving as staff Few board members Culture of a few doing most of the work Anemic capacity; insufficient resources to effectively serve as a statewide agency Inability to respond to every request for service, hurting reputation
Currently looking <i>outward</i> from TransGender Michigan	
Opportunities	Challenges (threats)
Former board member returning with MPA with emphasis in nonprofit management, providing much of the guidance for this strategic planning More capable people who are out and willing to step up and do more Improving public acceptance for trans people creating partnership opportunities	Lack of funding Continuing recession Arcus pulling out of Michigan Developing cultural competencies across many intersecting subgroups Hostile political environment in Lansing

Needs Assessment

2011 Day of Empowerment town hall meeting

At an annual event at Affirmations coordinated by Transgender Detroit, community members were encouraged to express in their own words what they see as the pressing issues facing the local trans community. In the first half they brainstormed issues confronting their lives. Then they segued to some suggested solutions. Their responses are summarized here:

ISSUES

- 1** Forums for bridging our distances
- 2** Encompassing community name
- 3** Engaging general public
- 4** Public interaction
- 5** Community outreach services
- 6** Public accommodations
- 7** Educate public officials
- 8** Outreach & education
- 9** Structure for community
- 10** Health & legal services
- 11** Visibility & humanization of trans experience
- 12** Communication, social networking in community
- 13** Mentors for youth

SOLUTIONS

- 14** Panelist list & place
- 15** Reps for trans in MI
- 16** Training for panelists
- 17** Professional training of educators
- 18** Training on trans issues
- 19** Youth involvement
- 20** Credentialled reps
- 21** Resource lists updated
- 22** List of trans welcoming places
- 23** Open house for training professionals on trans issues
- 24** Combine trans support orgs
- 25** Someone to ensure online info is updated
- 26** Job development
- 27** Trans org board inclusivity
- 28** 24-hour helpline
- 29** Funding search
- 30** Promote via ads
- 31** Address homeless & jobless trans
- 32** Tapping into available resources
- 33** Board development
- 34** Committees for various goals
- 35** Ensure trans majority on org board
- 36** Human capacity & succession planning

While it would be impractical to try to address all of these concerns and experiment with all of these solutions at once, these do provide a context for which needs are considered more important, and which services would be of most value. However, the attendants to this event did not properly represent the diversity in trans and allied communities, so these were taken merely as a starting point. To get input from those who could not attend, an online survey was created to capture a broader perspective of the community's needs and their perception of orgs trying to meet those needs.

Online survey

Survey respondents were given a list of common needs expressed by people in the trans communities, and then asked to rate what they viewed as the top five to be addressed by TransGender Michigan and other trans support orgs, in order to improve the lives and help the community . The first cohort of 59 respondents expressed their priorities as thus:

Answer Options; Priority:	1st	2nd	3rd	4th	5th	Mean	Count
Inclusive/nondiscrimination laws (for housing, workplace, and public accommodations)	23	8	4	5	8	9.6	48
Changing gender marker on official documents	12	11	6	7	4	8.0	40
Health insurance inclusion for trans procedures	14	10	8	4	3	7.8	39
Healthcare assistance	12	8	6	7	4	7.4	37
Anti-bullying	6	6	10	7	8	7.4	37
Workplace education	5	15	3	5	9	7.4	37
Doctor/therapist registry	7	3	8	7	7	6.4	32
Mental healthcare	8	5	8	7	3	6.2	31
Job assistance/training	5	3	10	6	7	6.2	31
Marriage equality	6	3	2	8	9	5.6	28
Other	1	0	0	0	2	0.2	3
<i>answered question</i>							52
<i>skipped question</i>							7

The online survey also elicited respondents' perception of TransGender Michigan. Responses range from 1=strongly disagree to 5=strongly agree.

Answer Options	1	2	3	4	5	N/A	Mean	Response Count
TGMI is inclusive of all people regardless of their gender identity.	1	1	6	9	26	1	4.35	44
TGMI is inclusive of all people regardless of race or ethnicity.	1	1	5	11	24	3	4.33	45
TGMI is inclusive of all people regardless of their age.	2	1	6	13	22	1	4.18	45
TGMI is the leading organization for trans/gender nonconforming people in Michigan.	1	3	10	15	15	1	3.91	45
TGMI is visible within the LGBTQA community.	0	6	12	12	15	0	3.80	45
TGMI activities are informative.	1	4	12	10	10	5	3.65	42
TGMI activities are well planned.	1	7	14	8	8	6	3.39	44
TGMI has the resources to address issues endured by trans/gender nonconforming people in MI.	1	9	12	15	6	1	3.37	44
<i>answered question</i>							45	
<i>skipped question</i>							14	

Focus groups

The survey was left open and reached nearly 200 respondents, but trans people of color—as well as other subgroups—remained underrepresented. This led to efforts to go directly to trans people of color, where they are at, to learn what exactly they need for their unique set of needs.

Efforts are currently underway to form focus groups for trans people of various ethnicities in Michigan. Initial focus is on trans people in Detroit. Trans people of color in urban settings are disproportionately represented in the annual Day of Remembrance each November. What is learned there may then be applied to discovering the needs and proper responses to trans people of color and other cultural minorities throughout Michigan and perhaps beyond.

Trans Empowerment Network

A broader format for assessing needs and any responsiveness to them is now underway. The Trans Empowerment Network (TEN) is an emerging communication channel for bridging the gaps between the many efforts throughout the state to attend to trans specific needs.

TEN is expected to provide a heuristic approach to need discovery. By starting a discussion about what is being done, perhaps more will come to light about all the isolated efforts currently stuck in silos.

This is not a group but merely a communication conduit to explore working closer together. This network includes meeting space, including a monthly meeting starting soon at Affirmations and visits to other trans groups across the state. Utilization of inexpensive communications technologies is another aspect. Working together will inevitably reveal more needs, ideas, and values. Its centerpiece is listening and encouragement.

Needs internal and external

In order to tackle the many needs confronting trans people in Michigan we need to build up our internal capacities to effectively respond to them. We recognize that in order to build up such capacities we will need to first demonstrate our stewardship with a few reachable goals. Then we can celebrate our early victories and build upon that energy to address whatever is the next priority item. This is essentially a capacity building plan, but we recognize most of the capacity will be the grassroots capabilities of others.

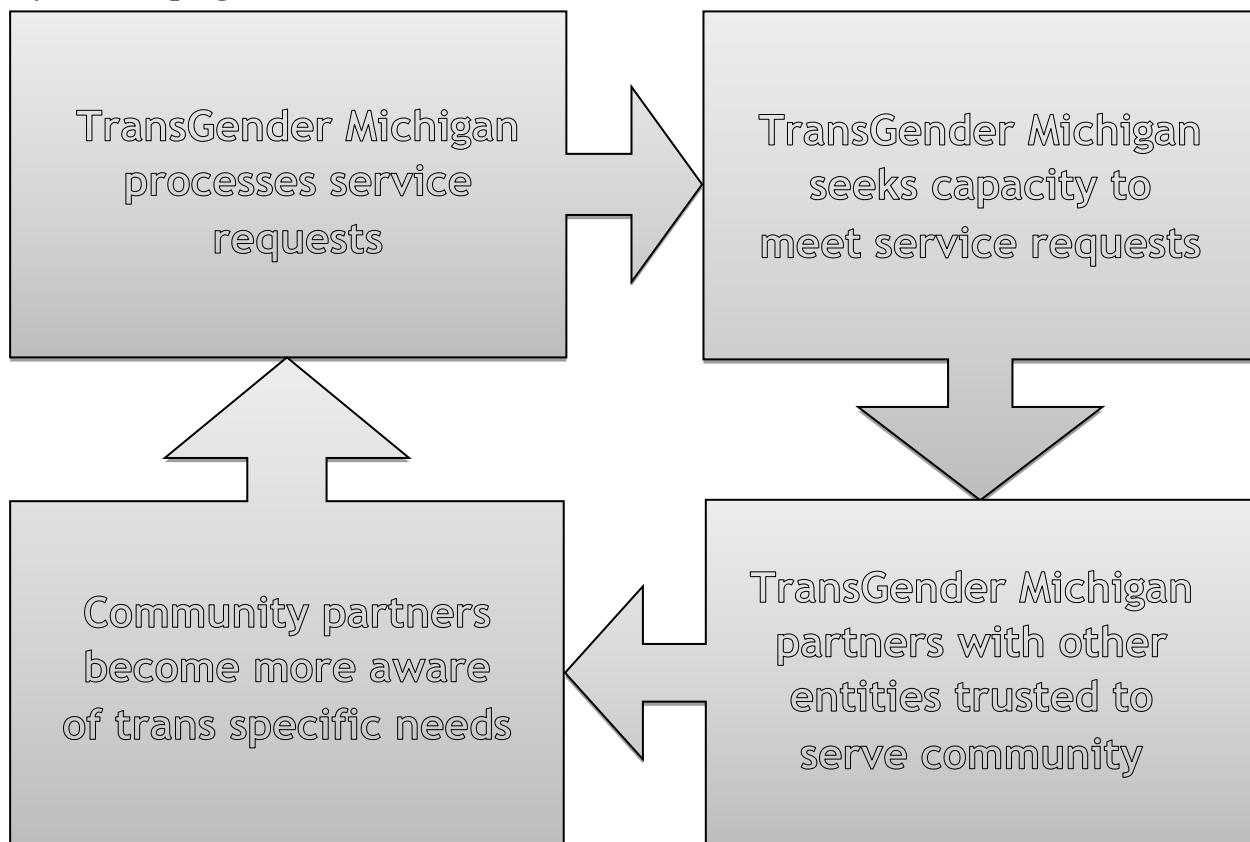
Growth needs

This plan envisions a long term aim of building up board and staff, just enough to fit the need, and allow founders to transition toward retirement, or at least separating them from dual role of staff and board.

TransGender Michigan finds itself at that critical stage in its young life when the environment compels it to either grow or shrink back. It currently is still in its early phase of being led by its founders. Board members tend to be handpicked supporters of the founders' agenda. In fact, the board is more of a pool of available volunteers than a group tasked with the responsibility of the agency's direction. Like many human service agencies of its size, the board is more of a working board than a governing board. This is a natural phase in the life cycle of young nonprofits.

Getting back to its original vision, this plan seeks to build its capacities for the benefit of the whole community. To that end, the goals emphasize building partnerships, so we can better help one another address the many trans-specific needs we endure.

Cycle of helping each other



Goals and Objectives

1. Develop current programs to address communities' needs

- 1.1. Clarify how current programming meets current communities' needs
- 1.2. Identify communities' needs not being properly addressed
- 1.3. Identify means, including coalition building, to address these needs
- 1.4. Identify programming costs for building a budget
- 1.5. Identify funding sources to support programs
- 1.6. Develop capacity for program evaluation

2. Build capacity by developing volunteers

- 2.1. Define need for volunteers based on communities' needs
- 2.2. Draft volunteer position descriptions
- 2.3. Solicit volunteers to match open volunteer positions
- 2.4. Hire volunteers
- 2.5. Orient and train volunteers
- 2.6. Thank volunteers

3. Build capacity by developing the staff

- 3.1. Define need for staff based on communities' needs
- 3.2. Identify funding sources for staff development
- 3.3. Draft staff position descriptions
- 3.4. Solicit prospects to match open staff positions
- 3.5. Hire most qualified candidates
- 3.6. Orient and train new staff members
- 3.7. Thank staff members

4. Build capacity by developing the board

- 4.1. Define program needs based on communities' needs
- 4.2. Identify board prospects who can bring needed capacities
- 4.3. Define incentives for prospect to serve on volunteer board
- 4.4. Draft board volunteer position descriptions
- 4.5. Solicit board volunteers to match open board positions
- 4.6. Invite volunteer board members
- 4.7. Orient and train new board volunteers
- 4.8. Thank board volunteers

Transgender Economic Empowerment Survey

IMPORTANT: DO NOT WRITE YOUR NAME ANYWHERE ON THIS PAPER.

Please take a few minutes to answer these eight questions about your employment or income situation. The answers will help identify the level of need for economic development within the trans community.

Your confidentiality is important, so please do NOT write you name anywhere on this survey form. No one who agrees to fill out this survey form will be identified at any time.

While your cooperation is appreciated, it is not required. You are free not to take this survey, without any repercussions. If you agree to take this survey you are free to skip any item you do not feel comfortable answering. If an item does not adequately apply to your situation then please mark its last option in *italicized* text. Thank you.

Thank you for taking the time for this survey. Results are to be reported at the Facebook page for the Michigan Trans Empowerment Taskforce (MTET). If you currently are not linked to this page and would like to be—whether you took this survey or not—please feel free to ask one of the facilitators. Thank you for your cooperation and your input.



Transgender Economic Empowerment Survey

1. I am currently:
 - fully employed
 - unemployed
 - under-employed
 - self-employed
 - none of the above adequately applies to my situation*

If wage & hours low enough to qualify
for government food assistance

2. I currently work in the (check any that apply):
 - for-profit private sector
 - public government sector
 - nonprofit sector
 - currently not working*
3. At my work environment my trans status is:
 - not disclosed
 - disclosed to a select few
 - open for all to know
 - none of the above adequately applies to my situation*
4. If others could locate trans friendly employers, I would seek their help to find me a job.
 - I strongly agree
 - I agree
 - I am unsure
 - I disagree
 - I strongly disagree
5. If I could receive help getting started that is trans friendly, I would start my own business.
 - I strongly agree
 - I agree
 - I am unsure
 - I disagree
 - I strongly disagree
6. I self-identify as: white non-white *neither adequately applies*
7. I self-identify as: trans gender nonconforming
 check each transsexual ally to trans community
 that applies *none of the above adequately applies to my situation*
8. My age is: under 20 30-39 50-64
 20-29 40-49 65 or over

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