

TGNC ORGANIZATIONAL HEALTH STATUS TOOL

The Transgender Strategy Center (TSC) is invested in the sustainability and success of transgender and gender nonconforming (TGNC) -led and -serving organizations. We believe that there are ways in which organizations can build and maintain a strong foundation in order to thrive while serving your community. This tool is an opportunity for leaders to reflect on where their organization has strengths and gaps.

Review each category of organizational health and rate where you think your organization sits. A brief description of what a healthy organization looks like under each area is provided.

*1-5 scale: 5 outstanding and 1 poor

Board Development

Category	Description	Rating
Bylaws	A healthy organization has strong bylaws that are regularly reviewed and revised. These bylaws are known by the board members and shape the processes and procedures that the group follows.	
Mission and Vision	Members of a strong board are dedicated to the mission and vision of the organization. They continuously review these vital statements as they work with the staff to make decisions and guide the organization.	
Roles and Responsibilities	All members of your staff and board should be innately aware of the core roles and responsibilities of the board. Generally, a board should supervise and support the Executive Director, navigate legal components of the organization, manage and approve finances, etc.	
Onboarding	A strong board should include individuals from diverse fields, backgrounds, and experiences across the TGNC community. These people should not be exclusively friends of staff leadership. There should be a clear and unbiased nomination process in place, as well as a process for onboarding new members and bringing them up to speed on the workings of the organization.	
Conflict of Interest and Confidentiality	These agreements should be reviewed and signed by all members of the board. Board members should not benefit financially from the organization and should recuse themselves from decisions in which they may have a conflict of interest. To the extent that the organization desires, a confidentiality agreement should be in place to protect the decision-making process for the organization.	

Administrative Infrastructure

Category	Description	Rating
Communication Systems	A healthy organization will have clear systems set up for both internal and external communications. Internally, this encompasses an email system, drive for saving shared documents such as Google Drive or SharePoint, trainings established to onboarding new employees to your internal communication systems, etc. Externally, this entails having social media platforms that the team can manage and has clear guidelines on the parameters and boundaries of external communications.	
Website	All organizations should have a standard website – outside of social media accounts – that outlines their mission, vision, core pillars of work, staff members, and general contact information. This site should be easy to navigate and represent your brand through its colors, pictures, logos.	
Data Systems	Tracking data is key to advocating for additional funding, reporting on your work, and demonstrating to the community the impact of your work. An organization should have a central location for storing both qualitative (stories and narratives) and quantitative (number of services provided, people served, and more) data.	
Employee Compensation and Tracking	Basic employee information should be stored in a safe and secure location. Organizations should also have an established process for payroll, management of benefits, and evaluation of employee performance.	
Staff Task Allocations	Organizations should have clarity – both through collective knowledge and in writing – on who is responsible for administrative tasks such as taking notes, overseeing payroll, reporting on grants, creating and balancing organizational budgets, managing staff and consultants, and beyond.	

HR

Category	Description	Rating
Personnel Policies	Organizations should have written policies that outline employee responsibilities and rights, requesting time off, payment, scheduling, submitting an HR complaint, EEO and anti-harassment policies, and more. These should adhere to the legal requirements of the state under which the organization is incorporated (or the fiscal sponsor under which they operate).	
Professional Development	Developed organizations have systems in place to support the growth and professional development of all employees. This is especially important for leaders and managers at the organization, who should have management experience or be provided with formal management training prior to leading and supporting staff members.	

Culture of Respect and Inclusion	While less formally established within the organization, a healthy team should function within a culture of respect and inclusion. All members of the organization should feel comfortable asking questions, sharing their opinions and experiences without retribution, and bringing their full selves to the workplace. This culture includes trauma-informed and person-first practices, policies, and relationships within the organization.	
Job Descriptions	Each employee should have a written job description that outlines their core responsibilities, experience required, supervision, and compensation range. These descriptions allow for there to be a clear role definition for all.	
Understanding of Trauma	TGNC leaders and organizations often hold significant and specific trauma. A strong organization has a deep understanding of these concerns, and has created internal adaptations to support both staff and volunteers through a trauma-informed lens. This may be reflected in time off policies, mental health support, liberatory management styles, and more.	

Community Engagement

Category	Description	Rating
Understanding of Audience	Alongside the organization's mission and vision, the team should have a clear understanding of the communities that are served by the organization's work. Within the TGNC community at large, organizations should have identified the specific demographics within their locale.	
Community Input	An organization should have key methods of receiving community input. Community members should be meaningfully involved in decisions about service provision, advocacy, allocation of funds, and program development. This information may be received through hiring staff with lived experience, community surveys, focus groups, open door policies, etc.	
Talking Points	Staff and volunteer members in a healthy organization can accurately describe the mission, vision, values, and services of the organization to stakeholders like community members, funders, and other service providers.	

Grantwriting & Fundraising

Category	Description	Rating
Grantwriting Roles	Where possible, an organization has a designated grant writer whose primary role is to fundraise and identify new grant opportunities within the philanthropic landscape. This individual – or individuals, where necessary – should be able to articulate the organization's mission, vision, values, and core services and adapt a grant proposal to the needs and interests of a particular funder.	

Fundraising Strategy	A strong organization has a dedicated fundraising strategy that integrates a diverse range of funding streams from individual donations to corporate support to government grants and more. An organization should have fundraising goals and methods determined to achieve those goals. A plan should address – at minimum – the upcoming year of fundraising needs.	
Alignment with Budget	Fundraising and grantwriting should not be done for the sole sake of bringing in money; these activities should be done strategically to align with the desired organizational budget. This may entail determining how much unrestricted funding is needed, projecting operating expenses for upcoming years, etc.	

Leadership Development

Category	Description	Rating
Personal Board of Directors	A personal Board of Directors is a group of people from outside of the organization that may help a leader to make decisions, serve as a sounding board for new thoughts and ideas, and challenge an individual to grow. This is intended to be a support network. Staff members – especially managers and higher-level leaders -- at a healthy organization should have this structure in place to support them both personally and professionally.	
Coaching and Training	Leaders at a healthy organization understand that they are in a continual state of growth and learning. This should be reflected in the workshops and professional development opportunities for staff members, Executive Coaching for leadership, ongoing evaluation and review for decision makers at the organization, and beyond.	
Organizational Succession Plan	Organizational leaders should shift over time, as a means of bringing in new ideas, perspectives, and experience to the organization. To proactively prepare for the departure of a leader, an organization should have a written succession plan that outlines the leadership pipeline within and outside of an organization. This plan should describe how staff will be trained and supported to take on leadership roles upon the departure of other leaders.	

Financial Management

Area	Description	Rating
Annual Budget	A healthy organization has an annual budget that is broken down by quarters (or, as needed, months) to outline the expected revenues and expenses of the programs and operating needs of the organization. This budget should reflect the values of your organization and serve as the roadmap for your work.	
Financial Documents	An organization should have a clear understanding of basic financial documents and concepts that are required to manage funds. This may include a budget (organizational and programmatic), financial statement, cashflow, payroll, and more.	

Financial Management	<p>Within a healthy organization, there is a clear delineation of roles related to financial management. For instance, a staff member may be responsible for drafting a budget, while the Executive Director is responsible for pitching the budget to the board and receiving approval to implement this budget. All staff members who engage in financial management should follow basic best practices for the management of nonprofit funds, such as ensuring public transparency on fund usage and aligning expenses with the mission and vision of the organization.</p>	
Reporting and Compliance	<p>Organizations should be prepared for financial oversight such as audits and board reviews. Additionally, a healthy organization should comply with both federal and local standards for reporting on their financial wellbeing. This may include completing paperwork such as Form 990 and reporting to funders how their grant allocations were spent.</p>	
Sustainability Planning	<p>As an organization grows, a portion of financial management should be dedicated to sustainability planning. This entails how funds will be maintained in following years, approaches for significant budget growth, shifting staff capacity and hiring needs, etc. An organization should be prepared for growth, as opposed to being overwhelmed by the influx of funds or support.</p>	

Programs: Development and Evaluation

Area	Description	Rating
Program Strategy	<p>A healthy organization has a set program strategy, outlining the intentions, goals, and objectives of the various programs that the organization implements (or hopes to implement). This strategy should include information on the program names, descriptions, impact, staffing needs, funding requirements, and long-term sustainability. When an organization establishes a new program, it should be aligned with this strategic plan and the organization's mission.</p>	
Community Input	<p>An organization should have key methods of receiving community input. Community members should be meaningfully involved in decisions about service provision, advocacy, allocation of funds, and program development. This information may be received through hiring staff with lived experience, community surveys, focus groups, open door policies, etc.</p>	
Goals and Objectives	<p>Programs should be rooted in clear goals and objectives that serve the community. These goals should be both realistic and sustainable, with an impact that aligns with the mission and vision of the organization.</p>	
Innovation	<p>Programs at a healthy organization are generally unique, providing services that are not duplicative of local services that are being offered by other agencies or programs.</p>	