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**Fifth Anniversary Celebration
National Center for Transgender Equality
December 2, 2008 • The Woolly Mammoth Theater**

celebrate

On the cover and left: In 2008, NCTE celebrated its fifth anniversary with its most successful and well attended fundraising event in the organization's history

EXECUTIVE DIRECTOR'S MESSAGE

Dear Friends,

Five years. Can you believe it? When we launched NCTE in 2003, none of us really knew if we could make this work. We just knew that no one was speaking clearly enough for transgender people and that nothing would change if we didn't make it change.



When we began, lawmakers' offices wouldn't return our calls. The media didn't know and/or didn't care that we existed and reporters certainly didn't call us to comment on anything. In the world of LGBT organizing, the "T" tended to be silent as many of our allies didn't fully understand or inculcate transgender issues and activism.

But along the way, things began to change. One of the biggest indicators of that change came in June of 2008 when Congressman Rob Andrews who chairs the Heath, Education, Labor, and Pensions Subcommittee in the House of Representatives held the first ever Congressional Hearing on transgender issues: "An Examination of Discrimination Against Transgender Americans in the Workplace."

For NCTE's entire history we have been playing defense against a hostile administration. We have been working hard to stop both the intentional and the unintentional harm to transgender people through various federal policies. We've stood against the erosion of civil liberties, the loss of privacy, and the rising influence of intolerant religious extremists. And, now, five years later, we are still here and beginning to see the chance to advance our equality instead of just holding back the discrimination.

You can't do this job if you aren't hopeful, but this year we are particularly excited about the next year. Lawmakers are calling us, the media is calling us, transgender people and their family and friends are calling us. And, miraculously, the new administration-in-waiting has called us. With a new administration and a few key tools in place, we are curious to see what lies ahead for transgender equality. Thanks for being part of this journey with us.

WELCOME

WHO WE ARE

Board of Directors

Meredith Bacon, Chairperson, Omaha, NE
Marcus Waterbury, Treasurer, Minneapolis, MN
Steve Glassman, Philadelphia, PA
Donna Cartwright, Baltimore, MD
Amanda Simpson, Tucson, AZ
Dana Beyer, Chevy Chase, MD
Marisa Richmond, Nashville, TN
Mara Keisling (ex officio), Washington, DC

Staff Members

Mara Keisling, Executive Director
Stephanie White, Managing Director
Justin Tanis, Community Education & Outreach Program Manager



MISSION

The National Center for Transgender Equality is a national social justice organization devoted to ending discrimination and violence against transgender people through education and advocacy on national issues of importance to transgender people.

By empowering transgender people and our allies to educate and influence policymakers and others, NCTE facilitates a strong and clear voice for transgender equality in our nation's capital and around the country.

National Center for Transgender Equality

EQUALITY
it's not equality without the T

From NCTE's community awareness campaign in 2008

THE WORK WE HAVE DONE

ACCOMPLISHMENTS

ORGANIZING, EMPOWERING AND COLLABORATION

The success of NCTE in achieving our mission of “ending discrimination and violence against transgender people through education and advocacy” depends upon our ability to build the political power to succeed. This year we had several accomplishments in the realm of organizing and empowerment and collaboration:

- Hosted our first annual national policy conference, bringing together advocates and individuals from all over the country for a day of learning and skills building.
- Hosted our second annual religious summit with Center for Religious Studies in Religion and Ministry at Pacific School of Religion.
- Fostered the growth of UnitedENDA. Secured funding for a full time staff position to build the grassroots power of this now 400+ member organization.

GENERAL FEDERAL POLICY

The biggest advance in federal policy that NCTE saw for transgender people this year came in June when Congressman Rob Andrews who chairs the Heath, Education, Labor, and Pensions Subcommittee in the House of Representatives held the first ever Congressional Hearing on transgender issues: *"An Examination of Discrimination Against Transgender Americans in the Workplace."*

We were proud to work hard to help make that day happen. We helped to suggest potential witnesses for the committee, collect and provide information to the committee, help to prepare the witnesses and worked with many allied organizations to have their written testimony submitted.

"Special acknowledgment and thanks for this historic event must go to Mara Keisling, the Executive Director of the National Center for Transgender Equality. Mara has been front and center in every facet of planning and preparing for this groundbreaking hearing, from briefing congressional staff, to collecting stories of discrimination from transgender constituents in the home districts of every committee member, to preparing witnesses. If it were not for Mara's visionary leadership and tireless advocacy for the needs and interests of transgender people, this day would not be happening and the gains we've made would be far less notable. The entire LGBT community owes an incredible debt of gratitude to Mara for the dignity, brilliance, and grace with which she has led the charge to secure federal protections for transgender people."

-Kate Kendall, Executive Director of the National Center for Lesbian Rights

Less glamorous, but just as important, we also tackled two building blocks for future policy work that have been needed for quite some time: a comprehensive federal policy agenda and a national survey on the prevalence of anti-transgender discrimination. As the only professionally staffed organization focused on federal policies that affect transgender people, NCTE must tackle a wide range of issues. With a new administration taking over, this was the time to get a clear picture of all that we wanted to focus on. This past year NCTE worked in coalition with numerous LGBT organizations to conduct a comprehensive review of the federal government, looking at the entire range of policy areas that impact lesbian, gay, bisexual, and transgender peoples' lives.

Secondly, this year NCTE and the National Gay & Lesbian Task Force's Policy Institute designed and fielded the first academically rigorous national survey of the prevalence of discrimination against transgender people in the United States. One impediment to advancing transgender equality has been the lack of knowledge and data about the extent and types of discrimination that transgender people face. Government agencies understandably rely heavily on data when deciding on programs, funding and support. Therefore, this lack of data is a significant problem that echoes through many policy endeavors from advocating for federal forms that are transgender-inclusive to gaining federal funding for adequate HIV treatment to simply educating policymakers around decisions they make.

Now that we have completed thousands of interviews with transgender and gender nonconforming people, we can begin to analyze the results and release the findings. The results of this work will provide a foundation for several years of fact-based advocacy and can support advancements from health care funding to family support policies to job training programs.

PRIVACY & DOCUMENTATION

The first of its kind in the country, NCTE's Privacy & Documentation Program focuses solely on federal privacy and documentation issues that complicate the lives of virtually every transgender person. The research generated by this program has greatly increased NCTE's base of knowledge of the myriad regulations and policies that impact identity documents and are dependent upon them. NCTE has now become the preferred center for information on these issues and no other group or individual is working on this systematically.

This past year NCTE was able to research, influence and disseminate information on a dozen related topics:

- Transportation Safety Administration regulation changes
- Department of Homeland Security Secure Flight program
- Passport regulations
- Responding to the census
- The E-Verify system
- Regulations on Real ID implementation
- Family Medical Leave Act implications
- Provider Conscience regulations
- Selective Service guidelines
- Updating military records
- Department of Homeland Security Final Rules for the REAL ID Act: Review and Analysis
- Social Security Name and Gender Marker Change instructions
- Social Security Administration "No-Match Letter" Guide for Lawmakers
- Transgender people and the Selective Service

One of the greatest successes of the program is the agreement by the Social Security Administration to end the policy of generating “no-match” letters for gender only mismatches. While the SSA is still in the process of creating the systems and executing the plan to definitively end the practice (and NCTE continues to work with them to achieve that goal in the future), their commitment to do so will mean that people’s transgender status will no longer be exposed at work unless they make it so.

Lastly, NCTE’s success in 2007 with ending Indiana Bureau of Motor Vehicles’ policy of invalidating driver licenses due to gender mismatches with the SSA has provided the groundwork for that practice to end in other states. Last year Wisconsin has followed suit and stopped invalidating transgender peoples’ driver licenses.

NCTE distributed a number of publications on privacy and documentation issues, such as this one, in 2008

SOCIAL SECURITY GENDER NO-MATCH LETTERS AND TRANSGENDER EMPLOYEES

INFORMATION FOR EMPLOYEES

A Resource from the National Center for Transgender Equality

January 2008



Transgender workers sometimes have different gender markers in employer records than what the Social Security Administration (SSA) has in their database. When this occurs, those transgender employees can be the focus of no-match letters from SSA. This information sheet explains what no-match letters are and what to do if your employer receives a gender no-match letter about you.

WHAT ARE NO-MATCH LETTERS?

The SSA keeps information on everyone who has a social security number, including name, date of birth, and **gender**, among other data. Employers submit employee information to SSA, at hiring and at other times, which SSA verifies against the information in their database. This is done to ensure that workers are using valid Social Security numbers and that people receive the Social Security benefits to which they are entitled.

When employer-submitted information does not match the SSA database, notification is sent to the employer specifying which particular data does not match. While the notification may be either a paper letter or electronic notification, both types are commonly referred to as “no-match letters.” When employers have a gender marker listed in employee records which differs from the SSA database, a no-match letter indicating the gender mismatch may be sent to the employer, or sometimes directly to the employee.

WHAT TO DO IF YOU RECEIVE A NO-MATCH LETTER

There is no one single, right answer for what to do if you are the focus of a gender no-match letter. Your individual circumstances will guide you to choose what is best for you.

If your employer receives a gender no-match letter regarding you, SSA instructs them to first check to make sure they submitted correct data without typographical errors. If that does not fix the mismatch, the employer should notify you about the mismatch and the responsibility to resolve the issue becomes yours. You can address the mismatch in a few ways:



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HEALTHCARE ACCESS

In early 2008, NCTE convened a roundtable on creating a transgender federal health agenda with the National Coalition for LGBT Health. Twenty transgender and allied health advocates met to begin creating a formalized (though dynamic) health agenda and the collaborative structures to implement it.

Most policy experts predict that Congress and the next administration will try to undertake a wholesale reform of healthcare finance systems in America. This year NCTE created a strategic plan for building a health access program so that when policymakers address this issue, NCTE will be at the table. We have begun fact finding through conversations with insurance companies, corporations such as Target & WalMart, and advocates around the country.

COMMUNITY EDUCATION & OUTREACH

This year NCTE brought together several key functions under the capable leadership of Justin Tanis and created the Community Education & Outreach Program. In many ways, this program is the center of everything the organization does. By fostering strong relationships with NCTE members and the allied community and producing nearly all of the external communications, this program is responsible for the public face of the organization and for doing the education the American public needs about transgender people.

NCTE is in high demand from the media to provide education and context on many topics from celebrity transitions to federal workplace rules. The Community Education & Outreach Program Manager acts



A few of the participants at NCTE's largest Lobby Day to date in April 2008

as NCTE's communications manager handling the media in addition to other duties of leading workshops, organizing conferences and organizing the annual lobby day. This year, NCTE has once again been asked to provide hundreds of background and on-the-record media interviews appearing in major newspapers, television outlets, and countless electronic media venues. NCTE was quoted in the NY Times, People Magazine, Newsweek, Congressional Quarterly and dozens of LGBT media.

NCTE has a strong commitment to educating people across the country about ways in which they can take an active role in furthering equality. 2008 was no exception to this, providing information to encourage voter participation and interactions with lawmakers.

Finally, in addition to the publications relating to privacy and documentation issues, NCTE also produced and distributed the following manuals and guides:

- *Opening the Door to the Inclusion of Transgender People: The Nine Keys to Making LGBT Organizations Fully Transgender-Inclusive*
- *Hurricane Preparedness: Information for Transgender People*
- *Making Your Voice Heard: A Transgender Guide to Educating Congress*
- *Overcoming Voting Obstacles: A Guide for Transgender People*

WHAT IS NEXT

Early in 2009 we will take a more in-depth look at how the federal government intersects with transgender people and create a detailed, first ever transgender specific federal agenda. We'll work to expand our small staff team and secure funding to solidify our nascent policy programs.

We will continue our work to educate and empower transgender people, our families, friends and allies, about ways in which they can take concrete steps to move transgender equality forward. In addition, we will take steps to increase our communications launching new initiatives with new media, so that we can rapidly mobilize those most interested in current legislation. Coming initiatives include a guide for community members to lead transgender 101 trainings, new resources on travel policies, and ongoing efforts to involve and invigorate the community to take action on for vital legislative efforts.

Finally, we look forward to the opportunity to work with members of Congress in anticipation of passing urgently needed legislation to protect transgender people, including the Local Law Enforcement Hate Crimes Prevention Act and the Employment Non-Discrimination Act.



NCTE encouraged people to participate in the 2008 elections and provided resources to help counteract discrimination against transgender voters.

OUR FINANCIAL PICTURE

In 2008, NCTE saw strong growth in the areas of financial management and accountability, reflecting our development from a start-up organization to a vibrant, on-going institution. We have standardized our accounting practices to conform to the standards of the Movement Accountability Project (MAP), facilitating our work with foundations. In the coming year, we will undertake a formal audit of NCTE's financial records and practices.

NCTE serves a community facing very serious levels of under- and unemployment due to the discrimination that transgender people encounter in the workplace. Nonetheless, transgender people, our families, friends and allies continue to generously support our work. For many of these people, their gifts—whether large or small—truly represent a financial sacrifice on their part as well as their strong commitment to the movement.

NCTE's primary financial support continues to come from foundations. This has enabled us to serve a marginalized community for whom this would simply be impossible without these resources. Working with foundations has greatly contributed to the professionalism of our work and our ability to make a difference in addressing federal policy issues that impact transgender people's lives every day.

We celebrated our fifth anniversary in 2008 and marked the occasion with a fundraiser. This was our most financially successful event to date, raising over \$60,000 to support NCTE's programming. As with all of our events, we provided opportunities for major donors to make a significant contribution while offering free and low cost tickets to those who would not otherwise be able to attend. We had a volunteer committee who were deeply involved in the planning process.

We remain deeply grateful for those who believe in the work that NCTE is doing and are willing to invest their resources to the cause of transgender equality.

STATEMENT OF FINANCIAL POSITION

As of December 31, 2008

ASSETS

Current assets

Cash and cash equivalents	\$ 65,773
Grants receivable—current portion	75,000
Contributions and sponsorship receivable	20,862
Prepaid expenses and other	2,885

Total current assets \$ 164,520

Other assets

Grants receivable—non-current portion	\$ 75,000
Security deposit	3,360
Property and equipment, net	1,816

Total other assets \$ 80,176

TOTAL ASSETS \$ 244,696

LIABILITIES AND NET ASSETS

Current liabilities

Accounts payable and accrued expenses	\$ 1,285
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Total current liabilities \$ 1,285

Net assets

Unrestricted	\$ 86,461
Temporarily restricted	156,950

Total net assets \$ 243,411

TOTAL LIABILITIES AND NET ASSETS \$ 244,696

STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS

As of December 31, 2008

	Unrestricted	Temporarily restricted	2008
Support and revenue			
Contributions and grants	\$ 224,295	160,310	384,605
Events and sponsorships, net	38,579	—	38,579
Membership fees	12,140	—	12,140
Speaking fees	2,550	—	2,550
In-kind contributions	1,500	—	1,500
Net assets released from restrictions	63,084	(63,084)	—
Total support and revenue	342,148	97,226	439,374
Expenses			
<i>Program services</i>	\$		
Program expenses	208,799	—	208,799
Total program services	208,799	—	208,799
<i>Supporting services</i>			
General and administrative	50,042	—	50,042
Fundraising	55,066	—	55,066
Total supporting services	105,108	—	105,108
TOTAL EXPENSES	\$ 313,907		313,907
Change in net assets			
Change in net assets	\$ 28,241	97,226	125,467
Net assets, beginning of year	58,220	59,724	117,944
Net assets, end of year	86,461	156,950	243,411

STATEMENT OF FUNCTIONAL EXPENSES

As of December 31, 2008

Description		Program	Supporting Services		Total Supporting Services	Total Expenses 2008
		Services Program Expenses	General and Administrative	Fundraising		
Expenses						
Salaries and benefits	\$	135,261	35,927	37,177	73,104	208,365
Payroll taxes		9,379	2,491	2,578	5,069	14,448
Office rent		14,193	3,770	3,901	7,671	21,864
Travel and meals		15,683	228	783	1,011	16,694
Accounting and consultant fees		7,247	4,925	2,991	7,916	15,163
Printing and publications		8,247	65	489	554	8,801
Telephone		3,867	898	929	1,827	5,694
Temporary services		1,806	-	1,322	1,322	3,128
Interns		3,000	-	-	-	3,000
Bank fees		2,159	192	198	390	2,549
Postage and delivery		722	204	1,572	1,776	2,498
Support services		1,485	394	408	802	2,287
Supplies		1,548	62	302	364	1,912
Depreciation expense		1,257	334	346	680	1,937
Website		924	246	254	500	1,424
Insurance expenses		794	211	218	429	1,223
Dues and subscriptions		542	78	80	158	700
Meetings and trainings		685	17	18	35	720
Total expenses, excluding in-kind support	\$	208,799	50,042	53,566	103,608	312,407
In-kind contributions		-	-	1,500	1,500	1,500
TOTAL EXPENSES	\$	208,799	50,042	55,066	105,108	313,907

BUDGET FOR FISCAL YEAR 2009

Income

Members & Small Donors	\$	50,000
Major Donors		54,000
Event income		11,000
Foundation contributions		380,000
Speaking fees		5,000
TOTAL INCOME	\$	500,000

Expenses

Personnel

Salaries	\$	256,233
Payroll Taxes (9%)		23,061
Benefits (15%)		38,435
Personnel Total	\$	317,729

Professional Services

Tax & Audit	\$	5,000
Donor Perfect Tng		4,500
Board Consultant		30,000
Interns		3,200
IT Consultants		3,500
Payroll		2,200
Bookkeeper		10,000
Professional Services Total	\$	58,400

Communications

Website	\$	240
Constant Contact		660
Conference Calls		2,000
Communications Total	\$	2,900

Events and Travel

Staff Travel	\$	18,000
Lobby Day		8,000
Conference & Events		3,800
Events and Travel Total	\$	29,800

expenses continued

Printing and Mailing

Printing	\$	6,000
Postage		3,250
Photocopying		1,500
Printing and Mailing Total	\$	10,750

Base Office Operations

Rent (estimated)	\$	24,000
Phones & DSL		2,000
Mobile Phone		2,500
Insurance		2,000
Office Supplies		2,500
Equipment		13,143
Software		5,500
Bank Charges		400
Credit Card Fees		3,000
Office Operations Total	\$	55,043

Contingency Fund (1%)	\$	5,000
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TOTAL EXPENSES	\$	479,622
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Budget Surplus

Budget Surplus	\$	20,378
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