

**2008**

**Immigration Equality  
Standard Annual Report**

*Please see attached SAR Quick User's Guide and separate 2008 LGBT Movement Financial and Operating Overview*

**IMPORTANT NOTE TO THE READER**

Standard Annual Reports help donors understand LGBT organizations' effectiveness and efficiency; give organizations comparative information to fine tune their own performance; and track movement finances to inform actions to improve the movement's financial capacity and health. The organizations supply all data, mostly from audited financials.

Please DO use these reports for a quick glimpse of each organization's goals, priorities, staying power and financial needs. Please DO NOT use these reports as a sole basis for funding decisions.

**Snapshot**

<i>Founded</i>	<i>Geographic Scope</i>
1994	National
<i>Fiscal Year</i>	<i>Type</i>
Jan - Dec	Issue
<i>2008 Budget</i>	<i>Total Paid Staff</i>
\$950,860	9
<i>Tax Status*</i>	
501(c)(3)	100%

\* Percent of latest FY revenue.

**Mission**

To end discrimination in U.S. immigration law, to reduce the negative impact of that law on the lives of LGBT and HIV-positive people, and to help obtain asylum for those persecuted in their home country based on their sexual orientation, transgender identity, or HIV-status. Through education, outreach, advocacy, and the maintenance of a nationwide network of resources, we provide information and support to advocates, attorneys, politicians and those who are threatened by persecution or the discriminatory impact of the law.

**Key Planned Accomplishments**

Five-year Key Planned Accomplishments for FY2008-2012

1. Mobilize LGBT, immigrant rights, and progressive allies to move the Uniting American Families Act into position to pass in the 113th Congress (2013-2014). With the help of those allies, build a national network of 300+ gay and lesbian couples facing immigration discrimination who are trained and prepared to make their voices heard in Congress.
2. Expand access to asylum based on sexual orientation and gender identity by taking more appellate cases that will lead to precedent-setting decisions; training the country's 1,000 immigration judges and the asylum officers at the 8 national asylum offices in the rights of LGBT and HIV-positive asylum-seekers; and producing and disseminating detailed resources for attorneys.
3. End the HIV immigration ban, which bars foreign nationals living with HIV/AIDS from visiting the U.S. or ever becoming citizens. Partner with AIDS and public health groups to research and quantify the public health and economic impacts of the ban and devise a strategy leading to Congressional repeal of the ban.
4. Build a robust Corporate Roundtable of 20-30 corporations engaged in LGBT immigration as a diversity issue and a brain drain problem, and prepare to support legislative change. Work with LGBT allies to reward corporations who take action against immigration discrimination.
5. Leverage Immigration Equality's expertise to build the field of global gay migration - the unstable rights and recognition that LGBT people face when they cross national borders - and pioneer new legal strategies for LGBT asylum seekers. Analyze and disseminate policy memos and publish magazine, blog, and law review articles to engage the LGBT and human rights movements in global gay migration issues, like international protections for LGBT refugees and recognition of same-sex partnerships and parenting rights across borders.

One-year Key Planned Accomplishments for FY2008

1. From new D.C. office, build a permanent, tangible presence on the Hill by participating daily in LGBT, HIV, and immigration coalition work and expanding opportunities for coalition building within the wider progressive policy community. With better access to policy makers and immigration officials, Immigration Equality's experienced new Policy Director will expand Congressional support for the Uniting American Families Act and build coalitions within the mainstream immigrant rights movement and among progressive allies.
2. Galvanize and empower activists by training 30 new families in target legislative districts for Immigration Equality's Spokesouples Bureau and placing 1-2 local media stories on each couple. Leverage increased national coverage to alert more clients to their rights and the public to the particular injustices LGBT and HIV+ immigrants face through feature stories in 5-10 national news sources.

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3. Capitalize on recently expanded legal capacity and growing reputation to take on more and tougher cases while maintaining an unflinching commitment to free, high-quality direct legal service. Increase national intake and asylum representation by 20% and expand the depth and distribution of training resources for clients, attorneys, and other professionals. Release the Transgender Immigration Manual, a 1st-of-its-kind guide for attorneys co-authored with Transgender Law Center and published by the American Immigration Lawyers Association.
4. Increase the competence of those engaged in LGBT immigration and asylum work by surveying the country's 30 largest immigration service providers regarding their experience and competence in serving LGBT and HIV-positive clients, then using the results to: a) identify opportunities for collaboration; and, b) design training modules and web-based resources to expand LGBT and HIV-positive immigrants' access to quality legal services.
5. Increase corporate awareness of LGBT immigration discrimination and LGBT "brain drain" by adding 5 Fortune 500 companies to Immigration Equality's Corporate Roundtable – companies whose LGBT employee resource groups, HR and diversity professionals, and senior executives are committed to ending the brain drain caused by LGBT immigration discrimination.

Key Accomplishments in FY2007

- Brought 12 families from target legislative districts to DC to meet with key decision makers for National Lobby Week; generated 14,000+ letters and phone calls to Congress demanding passage of the UAFA. Immigration Equality also hired an experienced and talented new Policy Director to open our 1st office in DC in August 2008.
- Identified, recruited, and trained 50+ families to participate in our Spokescouples Bureau. Resulting stories about Immigration Equality's work were featured in *Washington Post*, *Los Angeles Times*, *Orange County Register*, *Sacramento Bee*, *Houston Chronicle*, *Miami Herald*, *Seattle Times*, *Boston Globe*, *New York Magazine*, National Public Radio, and *Bill O'Reilly Show*.
- Expanded Asylum Pro Bono program to include 30+ national law firms representing 120 LGBT and HIV-positive clients; did not lose a single case in 2007. This program provides disadvantaged clients with resources and skills of large law firms, and trains attorneys to successfully represent sexual orientation, gender identity, and HIV-based asylum claims. National intake hotline answered 1,500+ individual inquiries from 46 U.S. states and 115 countries.
- Coordinated 100+ NGO's to support repeal of the HIV ban prohibiting people living with HIV/AIDS from entering the U.S. – even as visitors – or becoming U.S. citizens. Spring of 2008 saw the most promising opportunity to lift the ban in 15 years and, at the request of Senator John Kerry, Immigration Equality led the broad coalition of over 100 organizations to lift the HIV ban.
- Increased legal capacity by hiring additional staff attorney and 1st-ever paralegal, laying the groundwork for implementation of national immigration providers survey. The only fully staffed direct legal service provider for LGBT and HIV-positive immigrants and asylum seekers, Immigration Equality expanded its appellate and amicus work, authoring 6 original briefs and signing on to several others. Helped lead coalition demanding justice with dignity for an HIV-positive transgender woman killed in immigration detention.

The above essentially fulfills Immigration Equality's 2007 goals stated in the 2007 SAR.

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**Indicators of Financial Health & Efficiency**

For the fiscal year ending December 31

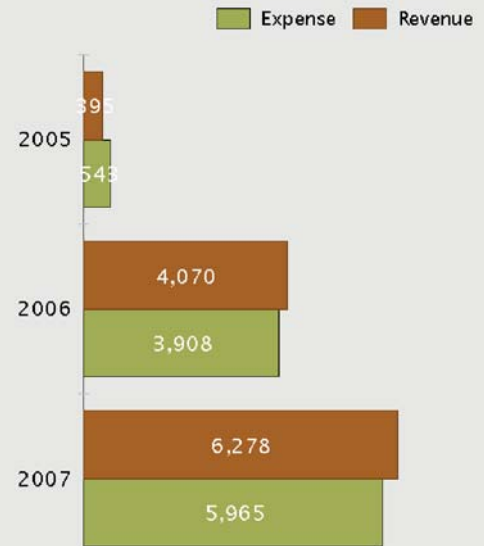
Ratios of Financial Health

	2005	2006	2007
Liquidity ratio	7.3	10.6	14.4
Days of working capital	108	181	303
Working capital (\$000)	\$117	\$240	\$494
Average daily cash expense (\$000)	\$1.1	\$1.3	\$1.6
Fundraising expense (cash only) to raise \$1	\$0.20	\$0.12	\$0.11
Total revenue raised through development efforts (\$000)	\$251	\$622	\$913

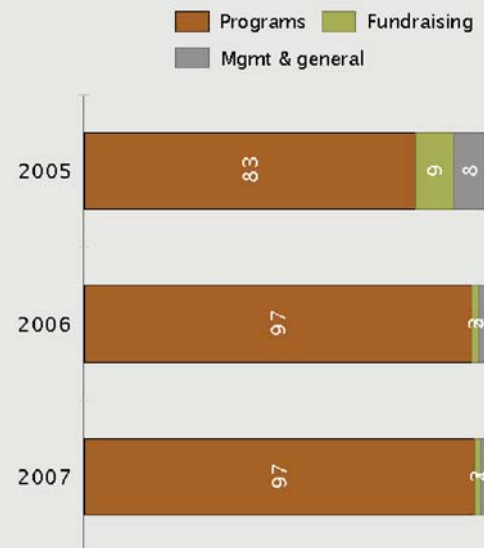
Indicators of Contributor Base

Number of individual donors who gave > \$35	309	317	485
Number of individual donors who gave > \$1,000	21	28	56
Donor turnover (gave > \$35 in prior FY & not this FY)	72%	36%	61%
Number of individuals attending fundraising events (paid > \$100 per person)	210	408	242
Percent of total revenue from top 10 contributors	67%	9%	9%
Number of unique contactable names currently in fundraising and e-action databases		<u>Current</u> 11,000	

**Revenue -vs- Expense (\$000)**



**Expense Percentage**



**Statement of Cash Flows**

	<u>Audited 2005</u>	<u>Audited 2006</u>	<u>Audited 2007</u>
Cash and cash equivalent balance at beginning of year	\$144,790	\$80,805	\$160,340
Net cash provided (used) by operating activities	-63,985	99,581	163,341
Net cash provided (used) by investing activities	0	-20,046	-600
Net cash provided (used) by financing activities	0	0	0
Net increase (decrease) in cash	<u>-\$63,985</u>	<u>\$79,535</u>	<u>\$162,741</u>
<b>Cash and Cash Equivalent Balances at End of Year</b>	<u>\$80,805</u>	<u>\$160,340</u>	<u>\$323,081</u>

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**Statement of Financial Position**

	<i>Audited</i> 2005	<i>Audited</i> 2006	<i>Audited</i> 2007
<i>Assets</i>			
Cash and cash equivalents	\$80,805	\$160,340	\$323,081
Investments	0	0	731
Other current assets	46,888	95,000	193,063
Net fixed assets	18,288	60,861	45,612
Other long-term assets	15,221	10,825	86,320
<b>Total Assets</b>	<b>\$161,202</b>	<b>\$327,026</b>	<b>\$648,807</b>
<i>Liabilities</i>			
Current liabilities	\$11,099	\$15,184	\$22,564
Long-term debt	0	0	0
Other long-term liabilities	0	0	1,100
<b>Total Liabilities</b>	<b>\$11,099</b>	<b>\$15,184</b>	<b>\$23,664</b>
<i>Net Assets</i>			
Unrestricted	99,805	201,842	405,143
Temporarily restricted	50,298	110,000	220,000
Permanently restricted	0	0	0
<b>Total Liabilities and Net Assets</b>	<b>\$161,202</b>	<b>\$327,026</b>	<b>\$648,807</b>

**Statement of Activities**

	<i>Audited</i> 2005		<i>Audited</i> 2006		<i>Audited</i> 2007	
<i>Support &amp; Revenue</i>						
Individual contributions	\$84,371	21%	\$164,404	4%	\$316,350	5%
Bequests	0	0%	0	0%	0	0%
Dues	0	0%	0	0%	0	0%
In-kind contributions	143,210	36%	3,456,213	85%	5,353,144	85%
Foundation contributions	127,500	32%	376,000	9%	545,000	9%
Corporate contributions/Non-event sponsorships	0	0%	0	0%	0	0%
Government funding	0	0%	0	0%	0	0%
Program income	0	0%	0	0%	0	0%
Fundraising event income	51,593	13%	99,269	2%	69,446	1%
Less costs of direct benefit to donors	-12,963	-3%	-18,098	-0%	-18,251	-0%
Net fundraising event income	\$38,630		\$81,171		\$51,195	
Merchandise sales (net of cost of goods sold)	0	0%	0	0%	0	0%
Investment income	0	0%	0	0%	0	0%
Other revenue	1,474	0%	-8,052	-0%	12,430	0%
<b>Total Revenue</b>	<b>\$395,185</b>		<b>\$4,069,736</b>		<b>\$6,278,119</b>	
<i>Expenses</i>						
Program services	301,913	56%	351,450	9%	437,682	7%
Fundraising	49,583	9%	72,480	2%	96,819	2%
Management and general	42,833	8%	59,141	2%	61,324	1%
Total cash expenses	\$394,329		\$483,071		\$595,825	
Non-cash expenses						
In-kind	141,960	26%	3,413,438	87%	5,353,144	90%
Depreciation	6,551	1%	11,488	0%	15,849	0%
Total non-cash expenses	\$148,511		\$3,424,926		\$5,368,993	
<b>Total Expenses</b>	<b>\$542,840</b>		<b>\$3,907,997</b>		<b>\$5,964,818</b>	
Capital campaign net revenue	0		0		0	
<b>Change in Net Assets</b>	<b>-\$147,655</b>		<b>\$161,739</b>		<b>\$313,301</b>	

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Board Members					Locations & Contact
<i>Total</i>	<i>Transgender</i>	<i>Women</i>	<i>Fundraising Requirements</i>		Immigration Equality 40 Exchange Place, 17th Floor New York, NY 10005 212-714-2904 www.immigrationequality.org  <u>Additional Locations</u>  Washington, DC  <u>Legal Names</u>  Immigration Equality - 501(c)(3)  <u>Contact</u>  Rachel B. Tiven Executive Director rtiven@immigrationequality.org
14	0%	29%	Personally significant gift		
<i>African American</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic</i>	<i>Native American</i>	
0%	7%	79%	14%	0%	
<b>Senior Management Profile</b>					
			<i>Lowest</i>	<i>Average</i>	<i>Highest</i>
Tenure with the organization			2.7	4.4	5.5
Compensation			\$52,000	\$76,333	\$90,000
Paid Staff					
<i>Total</i>	<i>Full-Time</i>	<i>Part-Time</i>	<i>Transgender</i>	<i>Women</i>	
9	9	0	0%	33%	
<i>African American</i>	<i>Asian/Pacific Islander</i>	<i>Caucasian</i>	<i>Hispanic</i>	<i>Native American</i>	
0%	11%	78%	11%	0%	
<p><i>Note: Board and staff data as of 5/31/08. Percentages by race may not add to 100% because some people may have preferred not to respond or selected more than one category.</i></p>					

**Organization's Notes and Advisories**

- Donated Legal Services** - More than 30 national law firms donate their time and costs to represent Immigration Equality's LGBT and HIV-positive asylum-seekers. In FY2007, that pro bono work was valued at more than \$5.3 million. These donated legal services helped Immigration Equality represent 120 people fleeing persecution on account of their sexual orientation, gender identity, and HIV status.
- Diversity** - Immigration Equality is striving to further diversify its staff and board by race, ethnicity, HIV status, and gender identity. In addition, immigrant status is an extremely high diversity priority for the organization: currently, 5 board members and 2 staff people are immigrants.
- History** - Immigration Equality was founded in 1994 to help LGBT and HIV-positive refugees take advantage of new law recognizing sexual orientation-based asylum claims, and to fight for immigration rights for same-sex couples and those living with HIV/AIDS. The organization has grown from an all-volunteer task force to a national organization with offices in New York City and Washington, D.C.
- HIV Ban** - As this profile went to press, Congress repealed the HIV immigration and travel ban. Immigration Equality is now mobilizing its coalition of public health and AIDS groups to ensure the Department of Health and Human Services implements the repeal. Over the next several years, Immigration Equality's legal team will continue to publicize the changes and counsel immigrants with HIV and their families on the impact of the new law.