

SAGE Fourth National Conference on LGBT Aging

It's About Time:
LGBT Aging in a Changing World

PRE-CONFERENCE INSTITUTES

SUNDAY, OCTOBER 12, 2008

New York Marriott at the Brooklyn Bridge
Brooklyn, New York

sageSM

Services and Advocacy
for Gay, Lesbian, Bisexual
& Transgender Elders

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SAGE's Fourth National Conference on LGBT Aging SPECIAL PRE-CONFERENCE INSTITUTES

Before venturing into the rich forest of SAGE's Fourth National Conference on Aging—**It's About Time: LGBT Aging in a Changing World**—we gather at the special Pre-conference Institutes to take a closer look at the specific branches of SAGE's vision for growth and development.

Each one of the concurrently running Pre-conference Institutes provides a forum for sharing information with peers and a variety of experts dedicated to improving the lives of older adults.

Whether you are a trainer, caregiver, or simply an interested participant, you won't want to miss these sessions.

As a participant, you'll be able to choose to attend one of the four following Institutes:

Institute 1: How to Build a SAGE Program

Institute 2: Planning Your Aging Future

Institute 3: LGBT Elder Housing

Institute 4: Best Practices for LGBT Cultural Competency Trainers

The Pre-conference Institutes support SAGE's goal of providing outstanding services and advocacy to lesbian, gay, bisexual, and transgender (LGBT) seniors; sharing knowledge that benefits older people; and acting as a powerful advocate for LGBT aging issues around the country.

SCHEDULE AT A GLANCE

Sunday, October 12

8 AM - 9 AM	Continental Breakfast
9 AM - 10:15 AM	Morning Plenary Sessions
10:30 AM - 11:45 AM	Morning Break-out Sessions
12 PM - 12:45 PM	Box Lunch
1 PM - 2:15 PM	Lunch Break-out Sessions
2:30 PM - 3:45 PM	Afternoon Break-out Sessions
3:45 PM - 4 PM	Coffee Break
4 PM - 5 PM	Wrap-up Plenary
5:30 PM - 7 PM	Conference Welcome Reception at the New York City Lesbian, Gay, Bisexual & Transgender Community Center*

*Easily accessible via subway. The hotel concierge will direct you to the subway station in Brooklyn. It's about two blocks away. Take the 2 or 3 train toward Manhattan and exit at the 14th Street subway stop. Exit the station at 14th Street and walk one block south to 13th Street. On your return trip, take the 2 or 3 train from 14th Street and 7th Avenue toward Brooklyn and exit at the Borough Hall station stop. *Transportation will be provided for those with physical disabilities.*

Institute 1**HOW TO DEVELOP A SAGE PROGRAM**

This discussion features SAGE professionals from around the country that are seeding, growing, and branching out into new communities. Representatives of SAGENet, the SAGE Affiliate Network, will provide an overview of how to create a SAGE program including needs assessments, board development, best practices, and lessons learned.

9 AM – 10:15 AM**MORNING PLENARY****SAGE Programs and What They Look Like****SALON I**

Moderator: Tom Weber, Director of Community Services, SAGE, New York

Panelists: Bill Serpe, Executive Director, SAGE Milwaukee; Serena Worthington, Executive Director, SAGE at the Center on Halsted, Chicago; John Nagel, Executive Director, SAGE/Queens (a program of Queens Community House), Queens, NY

10:30 AM – 11:45 AM**MORNING BREAK-OUT SESSIONS***(Please choose one of the following sessions.)***BREAK-OUT 1****Upstart SAGE: First Steps Toward Developing a SAGE Program****SALON I**

SAGE programs come together in many different ways. Some begin with a formal needs assessment, while others are initiated by a small group of dedicated individuals. Hear several stories of how SAGE programs were brought into being.

Moderator: Karen Taylor, Director of Advocacy, Training, SAGE

Panelists: Jim Lomax, SAGE, New York; Bryan James Whitley, Pide Center Western New York (Buffalo); Kerrie O'Neill, SAGE Long Island; Sherrill Wayland, SAGE Metro St. Louis

BREAK-OUT 2**Funding a SAGE Program****GOLDEN BOARDROOM**

Like other non-profit organizations, SAGE funding sources come in a variety of forms. Learn what makes fundraising for an LGBT organization different from other types of non-profits.

Panelists will address membership building, major donor fundraising, foundation and governmental grantwriting, innovative funding sources, and identifying your group's abilities to handle each of these funding streams.

Moderator: Serena Worthington, Executive Director, SAGE at the Center on Halsted, Chicago

Panelists: Kill Dill, Executive Director, SAGE Upstate, Syracuse, NY; Bill Serpe, Executive Director, SAGE Milwaukee; Alan Francisco-Tipgos, Deputy Director, SAGE, New York

12 PM – 12:45 PM**BOX LUNCH PICK-UP****1 PM – 2:15 PM****LUNCH BREAK-OUT SESSIONS***(Feel free to continue your lunch in the session.)***BREAK-OUT 1****Growing and Growing Well: Managing Expansion****SALON I**

Once a SAGE program begins, the suggestions for programs and services pour in! Hear what some SAGE programs have done to manage expectations and build on success, as well as the challenges of addressing important "populations

Pre-conference Institutes

within populations,” such as women’s programming.

Moderator: Bill Serpe, Executive Director, SAGE, Milwaukee

Panelists: Tom Weber, Director of Community Services, SAGE, New York; Serena Worthington, Executive Director, SAGE at the Center on Halsted, Chicago; Vanessa, Shelmandine, Program Director, CenterSAGE, Kingston, NY

BREAK-OUT 2

Board Development: How to Create a Healthy Board of Directors

GOLDEN BOARDROOM

Board members are active volunteers for all SAGE programs, but each board has different purposes. For some SAGES, board members run the office and the program; for others, they are leaders in the community and raise funds to support services. Learn from board members about the evolution of their experiences.

Moderator: Ginny Apuzzo, President, Hudson Valley, LGBTQ Center, Hudson Valley, NY

Panelists: Judith Turkel, Esq., Board of Directors Co-chair, SAGE, New York; Carl Galli, President, Board of Directors, SAGE South Florida, Dan Mullins, Board of Directors, SAGE Upstate New York (Syracuse)

2:30 PM – 3:45 PM

AFTERNOON BREAK-OUT SESSIONS

BREAK-OUT 1

Connecting with Community

SALON I

From LGBT organizations to aging services, SAGE programs build connections to expand their own membership base, and to raise the visibility of LGBT seniors in their communities. Learn about some good examples of those opportunities and come away with ideas about how to build your own connections. You’ll be surprised about where you can find support!

Moderator: John Nagel, Executive Director, SAGE/ Queens, Queens, NY

Panelists: Kerrie O’Neill, Program Director, SAGE Long Island; Bryan James Whitley, Director, Pride Center Western New York (Buffalo); Ty Martin, SAGE Harlem Program Manager, New York

BREAK-OUT 2

Social Programming: When You’re Ready to Quit, You’ve Only Just Begun

GOLDEN BOARDROOM

This presentation will highlight the development of events programming over the past four years at SAGE/Milwaukee, enumerating growth patterns, interest trends, and what worked and what didn’t work. Bill Serpe will show how he took his organization from five to six events a month and grew it to 15 to 20, adding weekly and monthly events to capture the largest possible audience. A roundtable discussion will follow, allowing participants opportunities to share events programming challenges and solutions.

Presenter: Bill Serpe, Executive Director, SAGE Milwaukee

3:45 PM – 4 PM

COFFEE BREAK

4 PM – 5 PM

AFTERNOON WRAP-UP

SAGE-ing Together

SALON I

A look at the first gathering of SAGE programs, held this summer in Milwaukee, and common themes for work that a national SAGE network could do together.

Presenter: Karen Taylor, Director of Advocacy and Training, SAGE, New York

Institute 2

PLANNING OUR AGING FUTURE

Planning Our Aging Future has been developed by the National Association on HIV Over 50 in collaboration with SAGE, AARP, and the National Senior Citizens Law Center. In this session you will learn about your rights and hear practical tips on preparing for the future after mid-life. Recommended for seniors and caregivers.

9 AM – 10:15 AM

MORNING PLENARY

What Does Our Aging Future Look Like?

SALON H

Panelists: Amber Hollibaugh, Senior Policy Strategist, National Gay and Lesbian Task Force, New York; Ty Martin, SAGE Harlem Program Manager, New York; Jim Campbell, Director, National Association on HIV Over 50

10:30 AM – 11:45 AM

MORNING BREAK-OUT SESSIONS

BREAK-OUT 1: Getting Your House in Order

SALON H

PART ONE Planning for Our Care

LGBT elders need guidance to understand and document their wishes for care when facing serious, life-limiting illness. This workshop will describe legal and psychosocial approaches for advance healthcare planning, with a focus on understanding planning documents and promoting communication among loved ones, friends, and healthcare providers; options for residential and long-term care; and hospice care and other palliative approaches to promote patient and family comfort when facing serious illness.

Panelists: Gary L. Stein, J.D., MSW, Associate Professor, Wurzweiler School of Social Work, Yeshiva University, New York, NY; Patricia Sherman, Ph.D., LCSW, Assistant

Professor, Kean University, Department of Social Work, Union, NJ

PART TWO Boomers, Finances, Estate Planning, Oh My!

Boomers are the generation that ushered in the Gay Rights Movement and brought us free love, hippies, and the Stonewall Riots; this session will look at the impact this cohort will have on money, finances, and the new gay retirement. Explore the demographics of the “gayby boomers,” finances, gay retirement planning, and passing assets to a family of choice while learning about the confusion created by conflicting local, state, and federal laws and what can be done about it.

Presenter: Joseph Kapp, Money Columnist for The Advocate, New York

BREAK-OUT 2 Economics and Benefits

GLEASON

Financial Realities: Unique Challenges Faced by LGBT Seniors.

Learn about the unique financial challenges related to entitlements, retirement, and other benefits for LGBT seniors.

Presenter: Bruce A. Thompson, MA, Social Services Worker, New Leaf Services for Our Community, Outreach to Elders; Fred Riccardi, Medicare Rights Center

12 PM – 12:45 PM

BOX LUNCH PICK-UP

1 PM – 2:15 PM

LUNCH BREAK-OUT SESSIONS

(Feel free to continue your lunch in the session.)

BREAK-OUT 1

Home Safety

SALON H

PART ONE

Fall Prevention

This presentation is an overview of the problem of falls among older adults, a discussion of risk factors, and a look at best practices for prevention.

Presenter: Laura DiGrande, DrPH, MPH, Research Director, Injury Epidemiology, NYC Department of Health and Mental Hygiene

PART TWO

Cluttering and Hoarding: Assessment and Care for Seniors in Their Living Spaces

Although, it is very common for seniors who have lived a full life to accumulate many belongings, this workshop will examine cluttering and hoarding and clarify the distinction between these issues. As we discuss screening techniques for determining the extent of the collection problem, we will highlight the importance of understanding the underlying emotional and cognitive reasons that drive the behaviors. We will also review minimal safety guidelines and the ethics of enforcing a clean-up of a situation that is deemed unsafe or a health hazard.

Presenter: Lisa J. Reeves, MD

PART THREE

Design Eye with Aging in Mind: Removing Barriers at Home and in Our Community

Most of us want to remain in our own homes as we age rather than moving into age-restricted housing, which can be even more isolating for LGBT seniors. This session will focus on simple, cost-effective design tips for making your home more adaptable to independent aging.

Presenter: Eric Cohen, AIA: Senior Associate Principal, Ethelind Coblin Architect, PC Faculty, New York School of Interior Design

BREAK-OUT 2

Your Rights at Home and in Long-term Care

GLEASON

PART ONE

Know Your Rights: Problems and Solutions for Consumers in Long-term Care

While federal and state laws provide many protections for individuals in assisted living and nursing facilities, many consumers and their families are not aware of their rights or how to protect them. This workshop will explain the laws that protect long-term care consumers, spotlight common problems, and provide practical advice on how residents, their families, and their advocates can obtain the best care possible.

Presenter: Gene Coffey, Staff Attorney, National Senior Citizens Law Center

PART TWO

The Basics of Fair Housing

Learn about housing discrimination laws and hear examples of strategies to address housing discrimination. This session will provide participants with an interactive forum for answering consumer questions about private and government-funded housing rules.

Presenters: John T. Zimmerman, Vice President, Miami Valley Fair Housing Center; Julie Nepveu, Senior Attorney, AARP Foundation Litigation

2:30 PM – 3:45 PM**AFTERNOON BREAK-OUT SESSIONS****BREAK-OUT 1**
Quality of Life**SALON H****PART ONE****Nutritional Healing**

While good nutrition drives most positive health outcomes, the information available to the general public, seniors in particular, is often confusing, conflicting, and not reinforced by primary care providers. Nutritional Healing integrates best practices from traditional nutrition science, complimentary medicine, and mind-body approaches.

Presenter: Jan Zimmerman, MS, RD Director AIDS Adult Day Health Centers, Village Care of New York

PART TWO**Jailbreak! Escaping Social Isolation**

More and more research indicates that increased socialization improves quality of life and life expectancy. This workshop will explore the problems of self-imposed solitary confinement and discuss ways LGBT elders can break free and find connection.

Presenter: Lee Chew, LCSW, SAGE

BREAK-OUT 2**Financial and**
Legal Decision Making**GLEASON****PART ONE:****End Stage Decisions**

This presentation will cover difficult end-of-life issues including how to ensure that plans relating to care, quality of life, and prolonging life are carried out.

Presenter: Dominick Varsalone, RN, Broadway House, Continuing Care Facility for People Living with AIDS

PART TWO:**Why Financial Planning Matters**

Join one of SAGE's "Experts" (SAGE Ask the Experts Page) for a discussion of the financial hurdles that LGBT singles and couples face. This presentation will cover interwoven finances; joint assets; rights to federal, state, and employer benefits; and protecting assets.

Presenter: William Bowden, Northwestern Mutual Financial Network

3:45 PM – 4 PM**COFFEE BREAK****4 PM – 5 PM****AFTERNOON WRAP-UP****It Takes a Community****SALON H**

A large percentage LGBT individuals age alone. In times of extreme illness or financial misfortune, they must rely on care from agencies or hospitals. This care is often augmented—sustained by a "community" of friends who make up a family of choice. This new family must be recognized by organizations to facilitate the care and comfort of the person in need. The panel will discuss the services needed, the legalities of interactions, and the practice and policy changes needed to facilitate optimum lifestyles.

Facilitator: Sandy Warshaw, LCSW

Presenters: Carmen Vasquez, Coordinator LGBT Health and Human Services Unit, State Department of Health; Joyce Pierson, Elder Law Project Consultant, National Center on Lesbian Rights

Institute 3

LGBT ELDER HOUSING

After our roots take hold, we need a home in order to grow and flourish. The Pre-conference Institute on LGBT residential housing and services, Successful Building Blocks of Intentional and Inclusive Communities, will bring together leaders in this burgeoning field. You'll hear about building and managing housing and communities that reflect the unique needs of LGBT seniors.

9 AM – 10:15 AM

MORNING PLENARY

Community Is Not the Goal, It's the Process

SALONG

No one denies that we need more housing for LGBT seniors, but is the end product just a new apartment or house? This panel will identify key issues for developing a business plan for a residential community. From concept to implementation, the panelists will discuss the development not only of the physical product, but of the community that will inhabit the residence.

Moderator: Michael Adams, Executive Director, SAGE

Panelists: Rev. Cindi Love, MCC; Marcy Adelman, openhouse; David Aronstein, Stonewall Communities

10:30 AM – 11:45 AM

MORNING BREAK-OUT SESSIONS

BREAK-OUT 1: The Location

SALONG

A discussion of physical settings, the laws affecting those settings, and what the community offers that residents will want and need.

Co-facilitators: David Aronstein, Stonewall Communities; David Latina, Barbary Lane

BREAK-OUT 2

The Public

ROEBLING

Find out who needs to be included in the process of creating a community and how to positively shape public perception. This discussion will also cover developing a community of support and advocacy and building service connections before opening the doors.

Co-facilitators: Marcy Adelman, openhouse; Arthur Webb, Village Care

12 PM – 12:45 PM

BOX LUNCH PICK-UP

1 PM – 2:15 PM

PANEL

(Feel free to continue your lunch in the session.)

Economic and Political Landscape of Building

SALONG

Hear from experts in three distinctly different communities about how they have negotiated the various challenges of the financial and political landscape. Learn how political shifts that range from marriage equality and non-discrimination laws to licensure and zoning all have a direct impact on the success of your project. Panelists will help you identify key issues for developing a business plan including: concept, community, money, services, and implementation.

Moderator: Mark Supper, GLEH

Panelists: David Latina, Barbary Lane; Arthur Webb, Village Care; Rev. Cindi Love, MCC

2:30 PM – 3:45 PM

AFTERNOON BREAK-OUT SESSIONS

BREAK-OUT 1

The People

SALONG

In this session, discuss the target market and who you want to serve versus who you may actually end up serving. This break-out will also cover LGBT-friendly versus straight-friendly and the uses and abuses of market research and why lenders demand it.

Co-facilitators: David Aronstein, Stonewall Communities; Arthur Webb, Village Care

BREAK-OUT 2

The Money

ROEBLING

Discuss project financing and best practices for building a business model to receive funding. This session will also cover public and private sources of funding and the role of public funding in dictating who can reside in your community.

Co-facilitators: Mark Supper, GLEH; Marcy Adelman, openhouse

3:45 PM – 4 PM

COFFEE BREAK

4 PM – 5 PM

AFTERNOON WRAP-UP

Building a Residential Family: Best Practices and Lessons Learned

SALONG

Take a look at best practices for and challenges of building a residential family. Panelists will discuss “what happens on the inside” of a structured community, the need to understand LGBT differences as well as similarities, how to identify advocates and address adversaries, and the process of creating a sense of home beyond just the physical structure. This presentation will also touch on developing a business plan including: concept, community, money, services, and implementation.

Moderator: Michael Adams, Executive Director, SAGE

Panelists: Mark Supper, GLEH; Arthur Webb, Village Care

Institute 4

BEST PRACTICES FOR LGBT CULTURAL COMPETENCY TRAINERS

SAGE's Pre-conference Institute on Cultural Competency Best Practices will add deeper color and shading to your training. Designed for professionals who conduct trainings and presentations, our goal is to advance our collective attitudes, skills, and knowledge. Share your insights, strengthen your skills, and ask the truly challenging questions. Recommended for trainers.

9 AM – 10:15 AM

Morning Welcome and Icebreaker

SALON F

This interactive exercise will offer an engaging way to start our day and help us define our expectations and desired outcomes for the work ahead.

Facilitator: Robert Stephens, City of New York Department for the Aging

10:30 AM – 11:45 AM

MORNING BREAK-OUT SESSIONS

BREAK-OUT 1

Targeting Your Training to Your Audience—As An Outside Trainer

SALON F

Training must address both the needs of the agency and the participants. Training content and style shifts depending on whether you are providing one-day training for social workers or a multi-session training for home care attendants. Analyze purpose, approach, audience, and more in this session. We will also discuss charging for training. Explore how to set prices and budget the cost of your training work.

Moderator: Catherine Thurston, Director of Clinical Services, SAGE

BREAK-OUT 2

When Worlds Collide

WHITMAN

You've set up the training, worked with the staff, and are finishing your presentation when there's a massive snowstorm, or the agency you're working with has changed its priorities, or your training partner broke her leg, or there's been a budget cut. This facilitated discussion will focus on the challenges of results-oriented training, working with partnerships, and outreach.

Presenter: Doreen Bermudez, Trainer, SAGE

12 PM – 12:45 PM

BOX LUNCH PICK-UP

1 PM – 2:15 PM

LUNCH BREAK-OUT SESSIONS

(Feel free to continue your lunch in the session.)

BREAK-OUT 1

Key Pieces that Work and Why

SALON F

Does a component of your trainings really speak to your audience? Do you have a great skills building exercise? Or a good resource such as the SAGE Connect database? Bring them to this session to share in a facilitated roundtable.

Moderator: Lisa Krinsky, LGBT Aging Project (Massachusetts)

BREAK-OUT 2 **Evaluating the Success of Training**

WHITMAN

Funders and agencies often require tangible and measurable training outcomes. Discuss how to measure success in ways that translate into real change.

Presenter: Imani Woody, Training Specialist, AARP Foundation

2:30 PM – 3:45 PM

AFTERNOON BREAK-OUT SESSIONS

BREAK-OUT 1 **Difficult Presentations and Strategies for Success**

SALON F

It's hard to deliver a presentation especially to an audience that is unresponsive or even resentful; at the best of times it can feel like you're just preaching to the choir. The barriers may not just be content, but other factors. Discuss how you overcome these challenges to do your work successfully.

Moderator: Don Kao, Executive Director, Project REACH

BREAK-OUT 2 **Targeting Your Training to Your Audience—Within Your Own Agency**

WHITMAN

Training must address both the needs of the agency and the participants. Training content and style shifts depending on whether you are providing one-day training for social workers or a multi-session training for home care attendants. Analyze purpose, approach, audience, and more in this session.

Moderator: Catherine Thurston, Director of Clinical Services, SAGE

3:45 PM – 4 PM

COFFEE BREAK

4 PM – 5 PM

AFTERNOON WRAP-UP

Building Strategic Alliances

SALON F

You've just spent the day with colleagues and allies. What did you bring to the table? And what are you taking away with you? Share your thoughts.

Facilitator: Imani Woody, Training Specialist, AARP Foundation



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