

sage

Advocacy &  
Services for  
LGBT Elders

We refuse to be invisible

# Annual Report 2016

[sageusa.org](http://sageusa.org)



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## SAGE BOARD OF DIRECTORS

### EXECUTIVE COMMITTEE

Elizabeth F. Schwartz  
*Co-Chair*

Kevin Williams  
*Co-Chair*

Dr. Charles Middleton  
*Treasurer*

Douglas E. Harris  
*Secretary*

William E. Weinberger  
*Development Committee Chair*

### MEMBERS AT LARGE

Michael J. Burke

David Canter-McMillan

Lisa Davis

Chris Kann

Philip Lumpkin

Damian Pardo

Barbara Peda

Laurie Peter

Cindy T. Rizzo

Linda E. Scott

Frank Stark

Roy Wesley

Jason Young

*list as of June 16, 2017*

### SAGE

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[lgbtagingcenter.org](http://lgbtagingcenter.org)



# Message from the CEO

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## Dear Friends,

Throughout 2016, SAGE demonstrated its rock-solid commitment to a world in which LGBT elders are valued and celebrated and have ample opportunities to live fulfilling and healthy lives as they age. Despite historic advances toward fairness for LGBT people and elders, there is so much more work that needs to be done. This is even more true with a new Administration in Washington, D.C. whose early actions have included numerous steps hostile to LGBT and ally communities.

As we enter this new era, the advocacy and services for which SAGE is known could not be more crucial. The emerging threats to LGBT people and elder Americans give SAGE's mission a

heightened sense of urgency and bolster our dedication to ensuring that LGBT elders have the financial security, health care, welcoming housing, and culturally competent services that they deserve.

This past year, SAGE announced ambitious efforts to advance the goals our new Strategic Plan. The markers for success that SAGE has set for itself are lofty. **By 2021, SAGE intends to make a meaningful difference in the lives of at least 500,000 LGBT older people and to catalyze at least 500 LGBT and age-friendly communities across the country.**

Toward that end, SAGE's successes by the close of 2016 are truly worth celebrating: Our National LGBT Elder Housing Initiative advanced throughout the country, in New York City we will soon break ground on the Big Apple's first two LGBT-friendly senior residential communities. Nationwide, we trained 15,000 aging providers to provide care more attuned to the needs of LGBT elders. And SAGE, along with our 28 affiliates, generated a groundswell of support for an effort toward the end of the Obama Administration to make federally funded elder service programs notably more LGBT-inclusive.

These examples just start to tell the story of how SAGE made a difference for LGBT elders in 2016. As we look ahead to new challenges



“ In the coming year, we will continue to stand with you.  
We will not be quiet when we see injustice.  
We refuse to be invisible.”

on the horizon, I take encouragement from a recent conversation I had with Mandy Carter, a pioneering activist for social, racial, and LGBT justice. Talking with a group of leading LGBT elder activists this spring, Mandy said: “It’s not as if we haven’t dealt before with things like what are happening now, because we have. One thing that has really saved me is this quote: ‘Don’t mourn; organize. If there’s a need, fill it.’ I find inspiration in my elders, but I’m also struck by today’s defiance that says, ‘No, we’re not going to have this, and we’re going to do something about it, darn it!’”

“This is my 50th year organizing, but it’s not just me. The Post World War II Baby Boomers were part of the ‘60s movement” Mandy continued. “But now we’re in our 70s, and we’re still hanging in! The demographics are striking: There are 79 million of us Baby Boomers and 80 million millennials from 18 to 25. If ever there were a time for all of us to come together, it would be now. But there’s also a shift in the demographics of color. By 2025, the majority of people will be of color. We’re in a moment—a major movement moment. So on a scale of one to 10 in optimism, I’m a 10.”

Mandy’s right. It’s a time to come together to build on the pioneering paths our elders have laid for us and to tap new allies both young



SAGE CEO Michael Adams with SAGE founding member Jerre Kalbas at NYC Pride.

and old. In the coming year, we will continue to stand with you. We will not be quiet when we see injustice. We refuse to be invisible.

Thank you for your continued support of SAGE.


Sincerely,

A handwritten signature in black ink that reads "Michael Adams".

**MICHAEL ADAMS**  
CHIEF EXECUTIVE OFFICER

# SAGE 2016: By the Numbers

## LGBT AGING REIMAGINED SAGE 2016-2021 Strategic Plan



CREATING TIES  
ACROSS  
GENERATIONS



TAKING CARE  
OF OUR OWN

LGBT  
AGING  
REIMAGINED

SAGE 2016-2021  
Strategic Plan



PROMOTING LGBT  
AND AGE-FRIENDLY  
COMMUNITIES

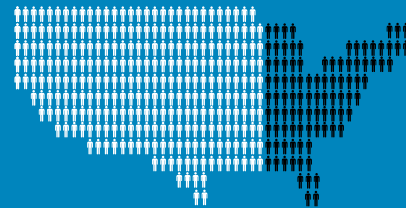


LIVING  
FULLY



**500,000** LGBT older people whose **LIVES WILL BE IMPROVED BY 2021** through SAGE's Strategic Plan

By the year 2030, there will be  
**7 MILLION LGBT PEOPLE**  
older than 65 in the US.



## SAGE Programs



**FRIENDLY VISITORS**

**3,200**

**VOLUNTEER HOURS**  
SPENT by SAGE Friendly Visitors,  
serving homebound LGBT adults



**SAGECARE**

**15,000**

**AGING PROVIDERS**  
**TRAINED** in the SAGECare  
program nationwide



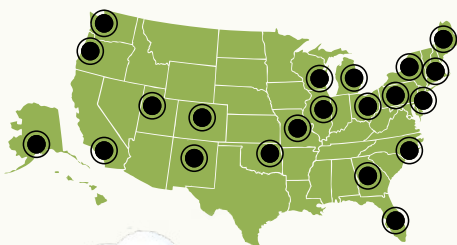
**CARING & PREPARING**

**242**

**CAREGIVERS SERVED**  
and supported in SAGE's  
Caring & Preparing program

## SAGENet Affiliates

There are **28 SAGE AFFILIATES** in **21 STATES**



**56,148**

**HOURS** of  
programming each year



**236**

**PROGRAMS**  
hosted each month



**1,800**

**PEOPLE**  
served monthly

## SAGE Centers



**5,000**

**PEOPLE HELPED**  
through SAGE Centers  
and Care Management



**30,000**

**MEALS SERVED**  
at SAGE Centers  
in NYC



## SAGE in the Media



**2,485**

**TWEETS** sent



**1,208**

**FACEBOOK** posts



**375%**

more **PRESS MENTIONS**



# A Year of Momentum for Our LGBT Elders

## NYC'S FIRST LGBT-WELCOMING ELDER HOUSING

In June, SAGE and its partners shared plans to break ground on affordable, LGBT elder housing, which will provide 227 units and services designed specifically for our LGBT elders.



Rendering of Ingersoll Senior Residences in Brooklyn.

## GOING GLOBAL

In June, SAGE CEO Michael Adams presented at the 13th International Federation on Ageing (IFA) in Australia. In 2018, the IFA will feature an LGBT aging track for the first time in Canada and served on the first panel on LGBT aging.



SAGE CEO Michael Adams with Australian activist Brian Day.

May  
2016

Jun  
2016

Aug  
2016

## TRAINING DAYS

In May, SAGE launched SAGECare, a training program for service providers who want to bring more competent and compassionate care to LGBT older adults. Now our LGBT elders and those who care for them can find LGBT-friendly care from 15,000 newly trained professionals in 38 states.

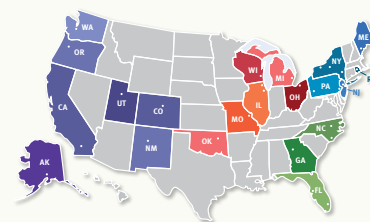


## LGBT ELDERS SPEAK UP

In August, SAGE sent nearly 3,000 comments to the Federal Administration for Community Living (ACL) on behalf of LGBT elders and their allies, and a letter from 100 LGBT and aging organizations. The campaign was part of a collective effort with the Diverse Elders Coalition to improve aging in diverse communities.

## THE LAST FRONTIER

In August, SAGE's affiliate network expanded to Anchorage, Alaska, bringing new bilingual programs, social experiences, and volunteer opportunities to our LGBT elder Alaskans. This new affiliate will also work toward educating local providers on how to competently serve LGBT older people.



“ These examples just start to tell the story of how SAGE made a difference for LGBT elders in 2016.”

—SAGE CEO Michael Adams



**TAKING A STAND**



sage **SAGE USA**  
11 Nov 2016

We will vigorously oppose any effort to roll back progress.  
#Elections2016 #LGBT

SAGE Board of Directors (top); Edie Windsor and SAGE CEO Michael Adams at the SAGE Awards in October (bottom).

**LGBT CHAMPIONS**

In October, SAGE celebrated its largest SAGE Awards and Gala ever, raising nearly 900K to support our work.

**Sep  
2016**

**Oct  
2016**

**Nov  
2016**

**Dec  
2016**



**NO PLACE LIKE HOME**

In September, SAGE made it easier for LGBT people and people living with HIV/AIDS to find the homes they deserve with the launch of a new education website called Welcome Home.



**WHERE CREDIT IS DUE**

In September, SAGE advocated with the Consumer Finance Protection Board (CFPB) moving the agency to prevent lenders from discriminating against LGBT people when they need credit.

Santa, Whoopi Goldberg, Olympic Gold Medalist Greg Louganis, and SAGE CEO Michael Adams.

**WHERE THE TOYS ARE**

In December, SAGE's annual Toys Party raised more than \$300,000 and donated more than 5,000 toys to children.





# Our Supporters

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**SAGE thanks our supporters who have made an investment of money, time, or talent in our work.**

## SAGE NATIONAL LEADERSHIP COUNCIL

The SAGE National Leadership Council is a dynamic network of individuals working alongside SAGE stakeholders, staff and board of directors to raise the visibility of SAGE's local and national programs through fundraising, outreach, and advocacy. These leaders are critical to our success, standing with SAGE to provide resources that meet the needs of our clients and advance the rights of our community. SAGE would like to thank our dedicated and passionate members for their leadership, service, and generosity.

### Co-Chairs

Larry Chanen, Esq. – New York City  
Jennifer Hatch – New York City

### Honorary Co-Chair

James C. Hormel San Francisco

### Members at Large

Ward Auerbach and Andy Baker – New York City  
Carol Davidson and Jody Silver – New York City  
Victoria Hill – Washington, D.C.  
Dr. Margaret Jacob and Dr. Lynn Hunt – Los Angeles  
Jay Lesiger and Tom Klebba – New York City  
Thomas Luciano – New York City  
James G. Pepper – Miami  
Steve A. Rabin – Los Angeles  
Christopher Rivers – New York City  
John B. Roberts, Esq. – New York City  
Gerald Rupp, Esq. – New York City  
Thomas Sciacca, Esq. – New York City  
Ted Snowden and Duffy Violante – New York City  
Joy A. Tomchin – New York City  
Jim Tyrrell and Roger Thomson – Miami  
Richard C. Weber – New York City/Miami

The Calamus Foundation, Philanthropic Member Organization –  
New York City

**These contributions are vital to our efforts in improving the lives of LGBT older adults across the country. For their cumulative financial support of every type between January 1, 2016, and December 31, 2016, SAGE extends gratitude to the following individuals and institutions.**

## **FOUNDATION SUPPORTERS**

### **\$500,000 or more**

The Calamus Foundation

### **\$250,000 – \$499,999**

Citi

The Ford Foundation

### **\$100,000 – \$249,999**

Anonymous

Arcus Foundation

Gill Foundation

Evelyn and Walter Haas, Jr. Fund

New York Community Trust

Rockefeller Philanthropic Advisors

The H. van Ameringen Foundation

The Harry and Jeanette Weinberg Foundation, Inc.

Wells Fargo Foundation

### **\$50,000 – \$99,999**

The David Bohnett Foundation

deKay Foundation

MAC AIDS Fund

MetLife Foundation

John H. & Ethel G. Noble

Charitable Trust

The Small Change Foundation

### **\$25,000 – \$49,999**

Macquarie Group Foundation

Isaac H. Tuttle Fund

The Vidda Foundation

### **\$10,000 – \$24,999**

Anonymous

Lily Auchincloss Foundation Inc.

Frank and Ruth E. Caruso Foundation

Design Industries Foundation Fighting AIDS (DIFFA)

Hebrew Home Foundation

The Helene Foundation

James N. Jarvie

Commonweal Service

Walmart Foundation

### **\$1,000 – \$9,999**

ADP Foundation

Fund in the Sun Foundation

JP Morgan Chase Foundation

Horizons Foundation

The Inner Circle

John A. Hartford Foundation

North Star Fund

## **GOVERNMENT**

U.S. Department of Health and Human Services – Administration on Community Living

New York State Department of Health, New York State Office for the Aging, New York State Office of General Services

New York City Department for the Aging, New York City Department of Health and Mental Hygiene

New York State Assembly Member Richard N. Gottfried

New York State Assembly Member Daniel O'Donnell

New York State Assembly Member Linda B. Rosenthal

New York City Council Speaker Melissa Mark-Viverito

New York City Council Member Margaret Chin

New York City Council Member Andrew Cohen

New York City Council Member Inez E. Dickens

New York City Council Member Daniel Garodnick

New York City Council Member Corey Johnson

New York City Council Member Ben Kallos

New York City Council Member Brad Lander

New York City Council Member Mark Levine

New York City Council Member Annabel Palma

New York City Council Member Helen Rosenthal

New York City Council Member Rafael Salamanca

New York City Council Member Ritchie Torres

New York City Council Member James Vacca

New York City Council Member Jimmy Van Bramer

Bronx Borough President Ruben Diaz, Jr.

# Financials

## CONDENSED STATEMENT OF FINANCIAL POSITION

*As of June 30, 2016 and June 30, 2015*

	2016	2015
<b>ASSETS</b>		
Cash and Investments	\$4,943,450	\$1,538,766
Receivables and Pledges	\$2,770,967	\$2,961,469
Prepaid Expenses and Other Assets	\$514,372	\$516,044
Property & Equipment, Net	\$3,955,450	\$4,159,878
<b>TOTAL ASSETS</b>	<b>\$12,184,239</b>	<b>\$9,176,157</b>
<b>LIABILITIES</b>		
Payables and Accrued Liabilities	\$359,352	\$676,845
Other Liabilities	\$218,217	\$281,562
Deferred Revenues	\$201,676	\$184,886
<b>TOTAL LIABILITIES</b>	<b>\$779,245</b>	<b>\$1,143,293</b>
<b>NET ASSETS</b>		
Unrestricted	\$8,724,196	\$5,918,836
Temporarily Restricted	\$2,680,798	\$2,114,028
<b>TOTAL NET ASSETS</b>	<b>\$11,404,994</b>	<b>\$8,032,864</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$12,184,239</b>	<b>\$9,176,157</b>

## CONDENSED STATEMENT OF CASH FLOWS

*For the year ending June 30, 2015*

	2016
Net cash provided by (used in) operating activities	\$3,457,621
Net cash provided by (used in) investing activities	\$69,765
Net cash provided by (used in) financing activities	\$(7,117)
<b>NET INCREASE (DECREASE) IN CASH AND CASH EQUIVALENTS</b>	<b>\$3,520,269</b>
Cash and cash equivalents at beginning of year	\$1,110,443
Cash and cash equivalents at end of year	\$4,630,712

## CONDENSED STATEMENT OF ACTIVITIES

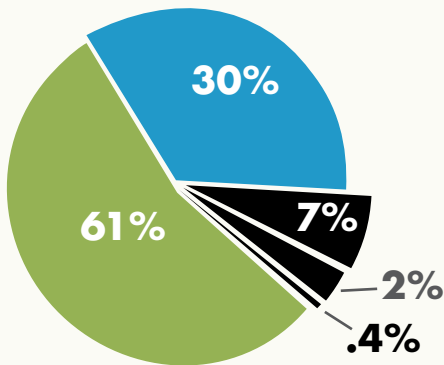
For the years ending June 30, 2016 and June 30, 2015

<b>SUPPORT AND REVENUE</b>	<b>2016</b>	<b>%</b>	<b>2015</b>	<b>%</b>
Government Grants and Contracts	\$3,769,806	30%	\$3,332,237	37%
Contributions Individuals and Foundations*	\$7,672,205	61%	\$4,830,144	53%
Special Events (Net)	\$828,708	7%	\$603,102	7%
Program Fees	\$200,259	2%	\$262,610	3%
Investment and Other Income	\$50,803	0.4%	\$20,149	0%
<b>TOTAL SUPPORT AND REVENUE</b>	<b>\$12,521,781</b>	<b>100%</b>	<b>\$9,048,242</b>	<b>100%</b>

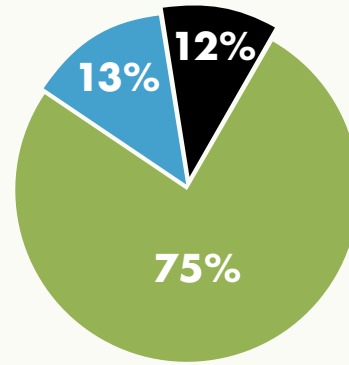
<b>EXPENSES</b>	<b>2016</b>	<b>%</b>	<b>2015</b>	<b>%</b>
Programs and Direct Services	\$6,896,602	75%	\$6,395,706	77%
Administration	\$1,150,528	13%	\$712,349	9%
Fundraising	\$1,102,521	12%	\$1,207,417	15%
<b>TOTAL EXPENSES</b>	<b>\$9,149,651</b>	<b>100%</b>	<b>\$8,315,472</b>	<b>100%</b>

**CHANGE IN NET ASSETS\*\*** **\$3,372,130** **\$732,770**

\* Includes Donated Services and Products, Corporate Giving (non-event related), Memberships and Bequests



**SUPPORT AND REVENUE FY2016**



**EXPENSES FY2016**

- Contributions Individuals and Foundations
- Programs and Direct Services
- Government Grants and Contracts\*
- Administration
- Special Events (Net)
- Fundraising
- Program Fees
- Investment and Other Income




\* Includes Donated Services, Memberships and Bequests

\*\* In both FY13 and FY14 SAGE received Capital revenue from City for the 15th floor renovations, \$2,148,880 and \$1,221,675 for FY13 and FY12 respectively.

## SAGE

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## CONNECT WITH SAGE

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