Annual Report 2016
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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

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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
Message from the CEO

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 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,

MICHAEL ADAMS
CHIEF EXECUTIVE OFFICER

SAGE CEO Michael Adams with SAGE founding member Jerre Kalbas at NYC Pride.
SAGE 2016: By the Numbers

LGBT AGING REIMAGINED
SAGE 2016-2021 Strategic Plan

TAKING CARE OF OUR OWN

LIVING FULLY

CREATING TIES ACROSS GENERATIONS

PROMOTING LGBT AND AGE-FRIENDLY COMMUNITIES

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

SAGE USA.ORG
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.

**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.

**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

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.

SAGE USA
11 Nov 2016
We will vigorously oppose any effort to roll back progress.
#Elections2016 #LGBT

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.

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

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

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

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 Klebb – 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 Snowdon 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 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.
## CONDENSED STATEMENT OF FINANCIAL POSITION

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

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

## CONDENSED STATEMENT OF CASH FLOWS

*For the year ending June 30, 2015*

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net cash provided by (used in) operating activities</td>
<td>$3,457,621</td>
</tr>
<tr>
<td>Net cash provided by (used in) investing activities</td>
<td>$69,765</td>
</tr>
<tr>
<td>Net cash provided by (used in) financing activities</td>
<td>$(7,117)</td>
</tr>
<tr>
<td><strong>NET INCREASE (DECREASE) IN CASH AND CASH EQUIVALENTS</strong></td>
<td>$3,520,269</td>
</tr>
<tr>
<td>Cash and cash equivalents at beginning of year</td>
<td>$1,110,443</td>
</tr>
<tr>
<td>Cash and cash equivalents at end of year</td>
<td>$4,630,712</td>
</tr>
</tbody>
</table>
## CONDENSED STATEMENT OF ACTIVITIES

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

### SUPPORT AND REVENUE

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

### EXPENSES

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

### CHANGE IN NET ASSETS**

- **$3,372,130** (2016)
- **$732,770** (2015)

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

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*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.*