

sage

Advocacy &  
Services for  
LGBT Elders

We refuse to be invisible



# Annual Report 2017







# CONTENTS

## SAGE BOARD OF DIRECTORS

### EXECUTIVE COMMITTEE

Elizabeth F. Schwartz  
*Co-Chair*

Dr. Kevin Williams  
*Co-Chair*

Dr. Charles R. Middleton  
*Treasurer*

Douglas E. Harris  
*Secretary*

William E. Weinberger  
*Development Committee Chair*

### MEMBERS AT LARGE

Michael J. Burke

David Canter-McMillan

Lisa Davis

Carlene "CJ" Jadusingh

Chris Kann

Bruce J. Lederman

Philip Lumpkin

Jim Obergefell

Barbara Peda

Laurie Peter

Cindy T. Rizzo

Linda E. Scott

Elliott R. Sernel

Frank Stark

Roy Wesley

Jason Young

*list as of 5/18/2018*

### SAGE

305 Seventh Avenue

15th Floor

New York, NY 10001

212.741.2247

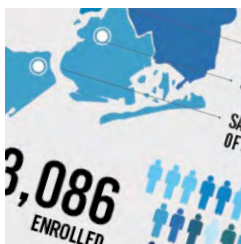
[sageusa.org](http://sageusa.org)

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



## 2

Message from the CEO



## 4

SAGE by the Numbers



## 6

A Year of Advocacy



## 10

Our Supporters



## 12

Financials



# MESSAGE FROM THE CEO

Dear Friends,

For SAGE and our work with and on behalf of LGBT elders, 2017 was a year of severe challenges, dogged determination, and innovative advances. LGBT rights in general, and LGBT elders more specifically, were under relentless attack from the earliest days of the Trump administration. Things began ominously in late January, when the administration deleted LGBT people and issues from federal websites the moment Donald Trump was sworn in. They turned even more perilous when the administration launched one of its first direct anti-LGBT attacks by trying to erase our community from a key government survey that determines how \$2 billion in federal elder services are distributed. Over the course of 2017, SAGE, LGBT elders, and our allies fought one attack after another.

One of the things that made me most proud over the last year is not only that we stood up and fought when we had to, *but that SAGE won*. Six months after announcing that it intended to erase LGBT elders—and in the face of more than 20,000 statements of protest mobilized by SAGE—the Trump administration was forced to reissue its federal elder survey and *to include LGBT older people*. We demonstrated early on that *we refuse to be invisible*, that we would stand with our elders, and that we knew how to win. SAGE continued that track record throughout 2017.



One of the key themes that emerged in 2017 was just how interconnected our fates are when hostile forces take over the federal government. For example, the administration's drive to authorize religious individuals and businesses to discriminate is focused primarily on destroying reproductive health and rights. Nonetheless, a religious license to discriminate also would have a terrible impact on LGBT elders in need of care, given that 85 percent of long-term care providers are faith-based organizations. (While some religious denominations are LGBT-accepting, many are not.) Similarly, relentless political assaults on immigrants hurt LGBT elder immigrants, threaten our allies in diverse elder communities, and force eldercare workers (many of whom are immigrants) to live in fear. While intersections like these had SAGE on high alert throughout 2017, they also provided tremendous opportunities for linking arms with coalition partners—opportunities that SAGE took advantage of throughout the year.

Through all of these battles, SAGE's job in 2017 has been to keep our eye on the prize and continue making progress however possible. And, boy, did we! Over the last year, we closed

---

"One of the things that made me most proud over the last year is not only that we stood up and fought when we had to, *but that SAGE won.*"

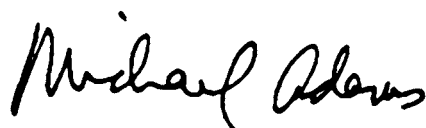
the deals on New York City's first two affordable LGBT-friendly senior housing developments, both of which will open their doors in 2019. For the inaugural SAGE Table, we convened more than 3,500 LGBT people of all ages and our allies through 230 events nationwide during which we discussed how to care for one another as we age. Through our SAGECare program, we trained thousands of eldercare providers across the country. SAGE's National Resource Center on LGBT Aging partnered with the federal Administration on Community Living to issue a smartly crafted toolkit that is changing the way state aging agencies in middle America think about how to serve LGBT elders.

Joining with AARP, SAGE released a new guide that has already helped thousands of us who are caring for our loved ones as they age. SAGE partnered with the Movement Advancement Project and Columbia Law School to launch "Dignity Denied," a critically important policy report that outlines how religious discrimination threatens LGBT elders and explains what must be done to stop it. In October, SAGE joined sister organizations from Bolivia, Costa Rica, and El Salvador in explaining to the Inter-American

Commission on Human Rights why LGBT elder rights across the Americas are human rights and what must be done to protect them. After these and so many other advances, we closed out 2017 by celebrating a SAGE icon with the dedication of the Edie Windsor SAGE Center.

In sum, while our country's broken politics cast dark shadows on 2017, SAGE refused to let the year be defined by those shadows. We refused to be turned back. We refused to be slowed down. *We refused to be invisible.* Instead, we made 2017 another year of progress for LGBT elders. With your support, we will continue to do so, year in and year out, until *all* LGBT elders are valued and respected, are given the support they've earned, and are able to age with boundless opportunities.

Sincerely,

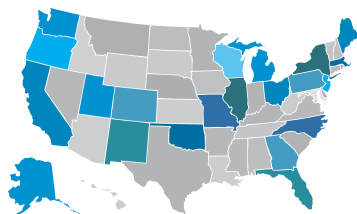


**Michael Adams**  
CHIEF EXECUTIVE OFFICER

# SAGE NATIONAL IN 2017

## NATIONAL NETWORK

**28** AFFILIATES  
in  
**20** states



**5,370** people  
served  
each month

**398** programs hosted  
each month

**29,760** hours of programming  
per year



## SAGE ADVOCACY

SAGE launched its first online organizing campaign in response to the Trump administration's proposed removal of LGBT elders from a key government survey that shapes federally-funded elder services.

**20,000+** people weighed in  
from all 50 states



**12** major media outlets  
picked up the story



**424,513** likes, loves, shares,  
comments and retweets  
accrued across our social media accounts,  
including Facebook, Twitter,  
and Instagram



**75** members of Congress from both  
sides of the aisle came together  
in favor of including LGBT elders



**In June, the Trump administration reversed course**, including lesbian, gay, and bisexual people in the survey, but not transgender elders. **SAGE immediately created a second campaign to promote trans inclusivity.**

**6,000** more people weighed  
in and SAGE forged  
partnerships and gathered support from



**30+** organizations including the ACLU,  
Log Cabin Republicans and National  
Association of Area Agencies on Aging

**IN OCTOBER, THE TRUMP ADMINISTRATION WAS FORCED TO RE-ISSUE THE SURVEY WITH LGBT ELDERSDROP DEAD.**

## CULTURAL COMPETENCE TRAINING

**10,000+**

professional caregivers from



**527** organizations  
across

**46** states trained in  
caring for LGBT elders

**113** organizations  
credentialed

**12,428** LGBT older  
people served

## TIES ACROSS GENERATIONS



**3,500+** attendees  
of all ages

**230+** SAGE  
Tables in

**40** states



## SAGE IN THE SPOTLIGHT

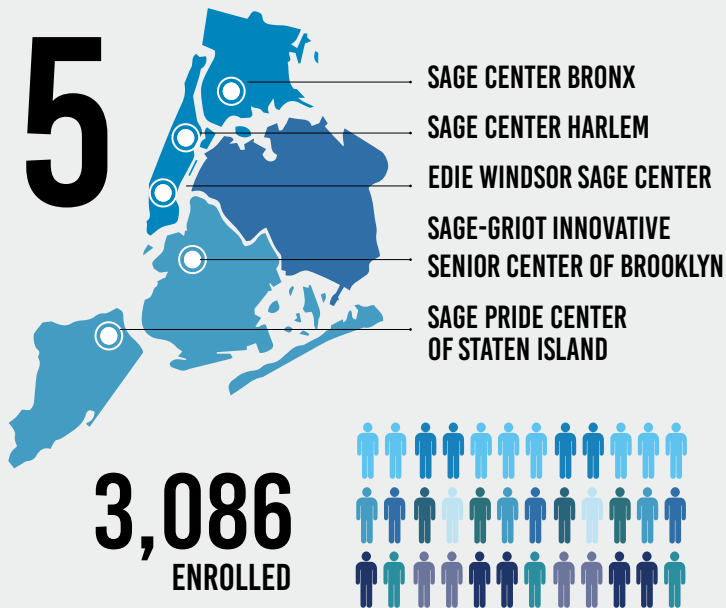
**220** mentions in  
the press, an **88%** increase  
over 2016

Social media posts from  
SAGE were seen by nearly  
**10 million** people, resulting  
in **21,673** interactions



# SAGE NEW YORK CITY IN 2017

## SAGE CENTERS



## SAGE HOUSING



SAGE breaks ground on Ingersoll Senior Residences to create

**145** UNITS of LGBT-welcoming affordable housing in Brooklyn



With Crotona Senior Residences in the Bronx, SAGE is building a total of

**227** UNITS

of LGBT-welcoming affordable housing in New York City

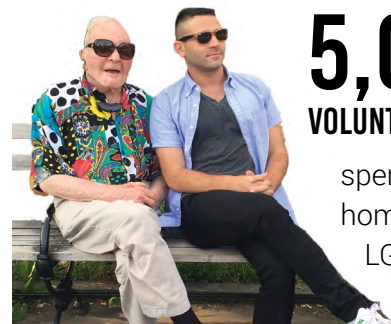
## CULTURAL COMPETENCE TRAINING

**5,000** STAFFERS TRAINED

at the Visiting Nurse Services of New York in caring for LGBT elders



## SAGE FRIENDLY VISITORS



**5,000+**  
VOLUNTEER HOURS

spent serving homebound LGBT elders



## HIV SUPPORT



**355** elders living with HIV received services—a



**58%**  
INCREASE  
over last year



SAGE Center Bronx



# A YEAR OF ADVOCACY

## Expanding LGBT-Friendly Housing throughout the Country

SAGE collaborated with Citi Community Development to lead the charge on expanding access to welcoming and affordable housing for LGBT elders. By engaging with the affordable-housing community, SAGE is working toward the day when LGBT older people are welcome in all senior housing developments across the United States. This year we are proud to have broken ground on NYC's first LGBT-friendly senior housing developments in Fort Greene in Brooklyn (developer: BFC Partners) and Crotona in the Bronx (developer: HELP USA). Each of these developments will offer an on-site state-of-the-art SAGE Center and daily meals, complemented by case management and other wrap-around services to ensure that residents can live independently



while reliably accessing the services and supports they need and deserve. These developments are part of SAGE's National LGBT Elder Housing Initiative, which was launched with lead support from the Calamus Foundation in 2016.



## Elders Fight Erasure by the Trump Administration

When the Trump administration proposed eliminating LGBT elders from a key aging survey, there was more than just demographic information at stake. Without this data, it would be impossible to measure how well LGBT older people are served by federally funded aging programs (such as Meals on Wheels) or to take action where LGBT elders aren't being served. SAGE fought back, and the administration agreed to re-incorporate lesbian, gay and bisexual elders, but not those who are trans. SAGE then continued the fight on behalf of trans elders and forced the Trump administration to re-issue a fully LGBT-inclusive survey last summer.

### BECAUSE ALL ELDERS DESERVE COMPASSIONATE CARE AS WE AGE

SAGECare, our LGBT cultural competency training program, educates and empowers care providers to understand and meet the needs of LGBT older people. In 2017, this program touched communities across the nation, ensuring that wherever we age, we will be treated with dignity and respect.





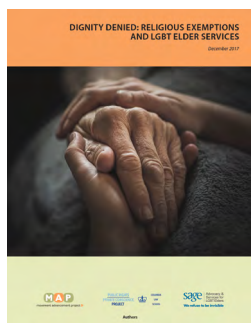
## Religious-Based Discrimination Could Affect Millions of LGBT Elders

Religious exemption laws and policies can have serious consequences for LGBT older people. In October, SAGE filed an amicus brief in the U.S. Supreme Court case *Masterpiece Cakeshop vs. Colorado Civil Rights Commission*, in which a baker invoked his personal religious beliefs in refusing to provide a wedding cake service to a gay couple. Joined by the American Society on Aging, SAGE explained to the Court how a religious right to discriminate would be devastating to LGBT elders. To shine a light on the particular dangers posed



to LGBT elders by threats of religious discrimination, SAGE teamed up with the Movement Advancement Project (MAP) and the Public Rights/Private Conscience Project (PRPCP) at Columbia Law School to launch the report *Dignity Denied*:

*Religious Exemptions and LGBT Elder Services*. The report's findings are profound: 85% of long-term care providers are faith-based organizations. Licensing these providers to discriminate on the basis of their religious belief would be devastating to LGBT elders, who are more likely than other older Americans to rely on long-term care since most do not have families to care for them as they age.



## SAGE EXPANDS LGBT AGING KNOWLEDGE WORLDWIDE

In most of the world, the challenges and needs of LGBT older people are ignored. Pioneering research in Bolivia, Australia, Costa Rica, and other countries demonstrates that LGBT elders are a highly vulnerable and marginalized population across the globe. In 2017, SAGE worked with organizations across the globe in order to share our knowledge, and increase collaborations among LGBT aging advocates. Last October, SAGE joined organizations from Bolivia, Costa Rica and El Salvador in testifying before the Inter-American Commission on Human Rights at its first-ever hearing on LGBT elders. In November, SAGE partnered with ILGA-LAC (International Lesbian, Gay, Bisexual, Trans and Intersex Association—Latin America and the Caribbean) to shine a spotlight on LGBT elder experiences and needs at the ILGA regional conference in Guatemala City. Look for this work to grow in 2018 as SAGE and our partners spotlight LGBT elders and their needs at the International Federation on Ageing's 14th Global Conference on Aging in Toronto this summer.



Photo by Centro de Investigación y Promoción para América Central de Derechos Humanos

# A YEAR OF ADVOCACY

## From Boomers to Gen Z, LGBT People of All Ages Show Up for SAGE Table

Friendships were forged and stories were shared at SAGE Table, a nationwide initiative we launched to combat social isolation among LGBT elders and build community for all by establishing stronger connections across generations of LGBT people. At dive bars, five-star restaurants, senior centers, city parks and all kinds of other venues, participants discussed the joys and challenges of aging—and how we can care for and about each other across generational lines. With more than 230 gatherings, this first-annual event was a tremendous success in breaking isolation and



building community: 91% of SAGE Table hosts report they would do it again. The next SAGE Table event is set for November 18th.

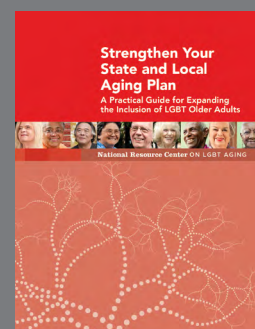
## Facing the HIV/AIDS Aging Crisis with SAGEPositive

As of 2015, more than 50 percent of people living with AIDS in America were older than 50—a figure that's set to increase to 70 percent by 2020. The disease disproportionately impacts LGBT people and people of color. As a result, SAGE is scaling our services to meet the needs of the aging population of people living with HIV. In 2017, SAGE served 58 percent more older adults living with HIV/AIDS than in 2016. SAGE's support for individuals living with HIV includes the nation's longest-running support group for older people with HIV (founded in 1989), educational offerings, self-care and sexuality workshops, and social and cultural events to help this community thrive. We're also providing prevention and PrEP education to help elders stay healthy.

## EDUCATING STATE AGING AGENCIES ON BEST PRACTICES FOR LGBT ELDERS

SAGE's National Resource Center on LGBT Aging partnered with the federal Administration on Community Living to create a toolkit that is changing the way state aging agencies across the country think about how to serve LGBT

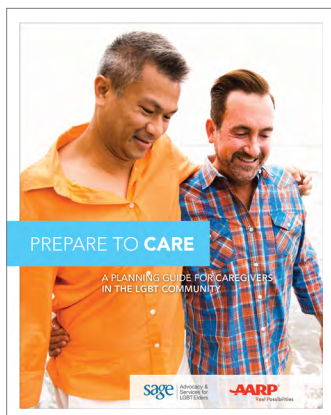
elders. The new best practice guide—*Strengthen Your State and Local Aging Plan: A Practical Guide for Expanding the Inclusion of LGBT Older Adults*—presents success stories from state and local agencies across the country who are working to include LGBT older adults in their plans and services. The guide was downloaded nearly 4,000 times during the first six months with an additional 600+ print copies distributed.





## Working with AARP to Make Sure LGBT Elders and Their Caregivers Get the Help They Need

Many Americans will care for a loved one at some point in their lives. LGBT people are even more likely to be caregivers. Yet many are unprepared to take on this role. In the LGBT community, caregiving looks different. Many LGBT people are cared for by chosen family members who are themselves aging, which can make caregiving even more overwhelming. To help improve the experiences of both LGBT older people and those who support them as they age, SAGE teamed up with AARP to produce a series of informative, easy-to-understand guides covering key subjects including creating a care plan and care team, balancing respect for your loved one's wishes with care for their safety, avoiding caregiver burnout, and much more. We created *Prepare to Care: A Planning Guide for Caregivers in the LGBT Community* to address these unique challenges and provide practical resources to caregivers.



### SPEED MENTORING

In a survey of SAGE Table participants, 83% indicated an interest in LGBT mentoring opportunities. In 2017, SAGE piloted speed mentoring events with the first in Los Angeles. Participants talked, listened, and shared ideas during three lively rounds of "speed mentoring."

## Dedicating SAGE Center Midtown in Honor of Trailblazer Edie Windsor



Sadly 2017 marked the passing of pioneer activist Edie Windsor, who paved the way for marriage equality through her landmark Supreme Court victory in *Windsor v. U.S.* For SAGE, Edie was family—she twice served on SAGE's board of directors and was involved from our organization's earliest days. In December, friends and supporters gathered at SAGE's national headquarters in New York City to pay tribute to Edie as we renamed SAGE Center Midtown—the first LGBT senior center in the country—the Edie Windsor SAGE Center.

# OUR SUPPORTERS

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

## SAGE NATIONAL LEADERSHIP COUNCIL

SAGE's National Leadership Council is a dynamic network of ambassadors committed to raising the visibility of SAGE through fundraising, outreach and advocacy. These leaders are critical to our success, standing with SAGE to provide resources to meet the needs of our elders 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.  
Jennifer Hatch

### Honorary Co-Chair

James C. Hormel

### Members at Large

Ward Auerbach and Andy Baker  
Gary Carnow  
Carol Davidson and Jody Silver  
Victoria Hill  
Jay Lesiger and Tom Klebba  
Thomas Luciano  
James G. Pepper  
John B. Roberts, Esq.  
Gerald Rupp, Esq.  
Thomas Sciacca, Esq.  
Ted Snowden and Duffy Violante  
Joy A. Tomchin  
Jim Tyrrel and Roger Thomson  
Richard C. Weber

The Calamus Foundation,  
Philanthropic Member Organization

## 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 Division of Veteran Affairs  
New York City Department for the Aging  
New York City Department of Health and  
Mental Hygiene

New York City Council Speaker Corey Johnson  
New York City Council Member Margaret Chin  
New York City Council Member Inez E. Dickens  
New York City Council Member Daniel Dromm  
New York City Council Member Daniel Garodnick  
New York City Council Member Vanessa Gibson  
New York City Council Member Brad Lander  
New York City Council Member Mark Levine  
New York City Council Member Carlos Menchaca  
New York City Council Member Rosie Mendez  
New York City Council Member Annabel Palma  
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





# OUR SUPPORTERS

## Foundations

---

### **\$250,000+**

The Calamus Foundation  
The Harry and Jeanette Weinberg Foundation, Inc.

---

### **\$100,000 – 249,999**

Evelyn and Walter Haas, Jr. Fund  
Tikkun Olam Foundation  
H. van Ameringen Foundation  
Wells Fargo Housing Foundation  
Wellspring Philanthropic Fund (Anonymous)

---

### **\$50,000 – 99,999**

Alphawood Foundation  
California Community Foundation  
MAC AIDS Fund  
MetLife Foundation

---

### **\$25,000 – 49,999**

Anonymous  
Broadway Cares/Equity Fights AIDS  
Florence V. Burden Foundation  
Tides Foundation

---

### **\$10,000 – 24,999**

Church of St. Luke in the Field  
Frank and Ruth E. Caruso Foundation  
Design Industries Foundation Fighting AIDS (DIFFA)  
The David Geffen Foundation

---

### **\$5,000 – 9,999**

Louis and Anne Abrons Foundation, Inc.  
The Ahmanson Foundation  
Allstate Insurance  
American Civil Liberties Union Foundation, Inc.  
Arcus Foundation  
Dekay Foundation  
Florida International University Foundation  
John A. Hartford Foundation  
Human & Civil Rights Organizations of America  
Just Us Justice  
LGBT Charities  
Lifetime Arts, Inc.  
The Ludwig Family Foundation



New York Community Trust  
John H. & Ethel G. Noble Charitable Trust  
The Small Change Foundation  
Ted Snowdon Foundation

Isaac H. Tuttle Fund  
The Vidda Foundation  
Walmart Foundation

The Helene Foundation  
James N. Jarvie Commonwealth Service  
Keck School of Medicine of USC  
QBE Foundation

Chauncey and Marion D. McCormick Family Foundation  
John L. McHugh Foundation  
Mertz Gilmore Foundation  
Miami Dade Gay & Lesbian Chamber of Commerce  
OUT Miami Foundation  
The Christopher Reynolds Foundation, Inc.  
Rutgers Presbyterian Church  
Venable Foundation

## Condensed Statement of Financial Position

As of June 30, 2017 and June 30, 2016

	2017	2016
<b>ASSETS</b>		
Cash and Investments	\$3,533,757	\$4,943,450
Receivables and Pledges	\$3,108,216	\$2,770,967
Prepaid Expenses and Other Assets	\$513,608	\$514,372
Property & Equipment, Net	\$11,298,964	\$3,955,450
<b>TOTAL ASSETS</b>	<b>\$18,454,545</b>	<b>\$12,184,239</b>
<b>LIABILITIES</b>		
Payables and Accrued Liabilities	\$ 466,933	\$ 359,352
Loan Payable	\$ 7,379,207	—
Other Liabilities	\$ 200,243	\$ 218,217
Deferred Revenues	\$ 37,500	\$ 201,676
<b>TOTAL LIABILITIES</b>	<b>\$ 8,083,883</b>	<b>\$ 779,245</b>
<b>NET ASSETS</b>		
Unrestricted	\$ 9,429,258	\$ 8,724,196
Temporarily Restricted	\$ 941,404	\$ 2,680,798
<b>TOTAL NET ASSETS</b>	<b>\$ 10,370,662</b>	<b>\$ 11,404,994</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$ 18,454,545</b>	<b>\$ 12,184,239</b>

## Condensed Statement of Cash Flows

For the year ending June 30, 2017

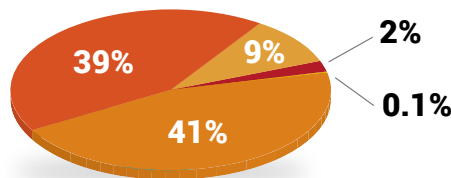
	2017
Net cash provided by (used in) operating activities	\$ (1,111,982)
Net cash provided by (used in) investing activities	\$ (7,502,138)
Net cash provided by (used in) financing activities	\$ 7,374,109
Net increase (decrease) in cash and cash equivalents	\$ (1,240,011)
Cash and cash equivalents at beginning of year	\$ 4,630,712
Cash and cash equivalents at end of year	\$ 3,390,701



## Condensed Statement of Activities

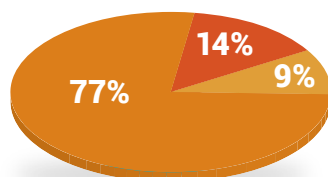
For the years ending June 30, 2017 and June 30, 2016

	2017	%	2016	%
<b>SUPPORT AND REVENUE</b>				
Government Grants and Contracts	\$ 3,916,049	41%	\$ 3,769,806	30%
Contributions Individuals and Foundations*	\$ 3,709,962	39%	\$ 5,001,949	40%
Special Events (Net)	\$ 803,565	9%	\$ 828,708	7%
Bequests	\$ 784,014	8%	\$ 2,670,256	21%
Program Fees	\$ 223,093	2%	\$ 200,259	2%
Investment and Other Income	\$ 11,047	0.1%	\$ 50,803	0.4%
<b>TOTAL SUPPORT AND REVENUE</b>	<b>\$ 9,447,730</b>	<b>100%</b>	<b>\$ 12,521,781</b>	<b>100%</b>
<b>EXPENSES</b>				
Programs and Direct Services	\$ 8,102,572	77%	\$ 6,896,602	75%
Administration	\$ 957,907	9%	\$ 1,150,528	13%
Fundraising	\$ 1,421,583	14%	\$ 1,102,521	12%
<b>TOTAL EXPENSES</b>	<b>\$ 10,482,062</b>	<b>100%</b>	<b>\$ 9,149,651</b>	<b>100%</b>
<b>CHANGE IN NET ASSETS</b>	<b>(\$ 1,034,332)</b>		<b>\$ 3,372,130</b>	



### SUPPORT AND REVENUE FY2017

- Government Grants and Contracts (41%)
- Contributions Individuals and Foundations\* (39%)
- Special Events (Net) (9%)
- Program Fees (2%)
- Investment and Other Income (0.1%)



### EXPENSES FY2017

- Programs and Direct Services (77%)
- Fundraising (14%)
- Administration (9%)

\* Includes Donated Services and Memberships

### FINANCIAL HIGHLIGHTS IN FY 2017

- SAGE had an operating surplus.
- The organization's unrestricted contributions and grants increased by \$830K.
- SAGE utilized foundation revenue recorded in FY16 in FY17.
- The organization's expenses increased by \$1.3M; \$1.1M of that was in program services.
- SAGE continued to build its board designated fund.



**sage**




Advocacy &  
Services for  
LGBT Elders

**We refuse to be invisible**

### **SAGE**

305 Seventh Avenue  
15<sup>th</sup> Floor  
New York, NY 10001  
212.741.2247  
[info@sageusa.org](mailto:info@sageusa.org)  
[sageusa.org](http://sageusa.org)  
[lgbtagingcenter.org](http://lgbtagingcenter.org)

### **CONNECT WITH SAGE**

 [facebook.com/sageusa](https://facebook.com/sageusa)  
 [twitter.com/sageusa](https://twitter.com/sageusa)  
 [instagram.com/sageusa](https://instagram.com/sageusa)

