

THE MAGAZINE OF SERVICES & ADVOCACY FOR GLBT ELDERS

sageSM

Matters

SPRING 2012



**THE SAGE CENTER:
THE HISTORIC LAUNCH
OF THE NATION'S FIRST
LGBT SENIOR CENTER**

**SEE HIGHLIGHTS FROM
AN EXCITING WINTER SEASON**

**PROPERTY AND TAX-SAVVY ESTATE
PLANNING FOR LGBT OLDER PEOPLE**

**THE CALAMUS FOUNDATION
TELLS US WHY IT SUPPORTS SAGE**

SAGEMatters is the triannual magazine of Services & Advocacy for GLBT Elders (SAGE), the country's largest and oldest nonprofit agency dedicated to serving LGBT older people. Our mission is to take the lead in addressing issues related to lesbian, gay, bisexual and transgender (LGBT) aging. In partnership with its constituents and allies, SAGE works to achieve a high quality of life for LGBT older adults, supports and advocates for their rights, fosters a greater understanding of aging in all communities, and promotes positive images of LGBT life in later years.

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GRAPHIC DESIGN

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MESSAGE FROM THE EXECUTIVE DIRECTOR

This spring, SAGE celebrated an event that was many years in the making: the opening of The SAGE Center, an innovative senior center specifically for lesbian, gay, bisexual and transgender older people. It was a wonderful day! Hundreds of our constituents, friends and supporters came to the new Center to celebrate with us. The excitement in the room was palpable, as we all heard eloquent remarks from New York City Council Speaker Christine Quinn and Aging

Commissioner Lilliam Barrios-Paoli. Most importantly, I heard over and over again from LGBT elders who told me that The SAGE Center—a place that they can call their own—was a dream come true, and that they never thought they'd see this day. When SAGE constituents Phyllis Siegal and George Stewart spoke movingly to the crowd, it was clear that they were speaking on behalf of the thousands of New York City LGBT elders who are receiving SAGE's services every month. You can read more about the launch of The SAGE Center in this issue of *SAGEMatters*.

While The SAGE Center is located in New York City, its opening as the country's first comprehensive, publicly-funded LGBT senior center has nationwide implications. LGBT older people all across the country need a home like The SAGE Center. But that takes resources. That's why SAGE is advocating aggressively for funding for similar programs in communities throughout the United States through our work on the upcoming reauthorization of the federal Older Americans Act (OAA).

The Older Americans Act is the single most important funding vehicle for channeling more than \$2 billion of federal dollars to local aging programs. Yet currently, very little of this funding supports LGBT elder programs. This is because the needs of LGBT older people are not recognized anywhere in the OAA—an oversight that SAGE and our partner organizations aim to change. In this issue, you'll see how advocacy for an LGBT-inclusive Older Americans Act has been woven into several aspects of our work. You'll also meet Aaron Tax, SAGE's Director of Federal Government Relations, who is working diligently to ensure that the needs of LGBT older people are addressed in this critically important federal law.

SAGE has already made great strides toward this goal. First, we convinced leading national aging organizations to support making the OAA LGBT-inclusive. As a result of this key support, legislation has now been introduced in Congress to designate LGBT older people as one of the elder populations with greatest economic and social need under the Older Americans Act.

While there is a long road ahead to ensure that federal aging policy takes full account of the needs of LGBT older people, I am confident that, working together, we can make it happen. As you read about SAGE's many accomplishments over the past few months in this issue of *SAGEMatters*, I'm sure you will agree. As always, thank you for your support now and in the months ahead as we work to transform the aging experience for LGBT elders all across the country.



A handwritten signature in blue ink that reads "Michael Adams". The signature is written in a cursive, flowing style.

Michael Adams, *Executive Director*

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On the cover: *The ribbon cutting at The SAGE Center Grand Opening ceremony. Photo: Dave Sanders*

The SAGE Center: A New Space for LGBT Older Adults

SAGE Celebrates a Historic Moment with the Opening of a First-of-Its-Kind Center

On March 1, 2012, hundreds of LGBT older people, elected officials and allies packed into the 15th floor of a building in Manhattan’s Chelsea neighborhood to celebrate the grand opening of The SAGE Center, the nation’s first full-time innovative LGBT senior center. After opening remarks by Christine Quinn, New York City Council Speaker, and Lilliam Barrios-Paoli, New York City Department

for the Aging Commissioner, SAGE constituent Phyllis Siegal cut the ribbon amid the cheers and applause of her colleagues.

For SAGE, this moment was more than a party—it was the fulfillment of a long-held dream to establish a center designed to respond specifically to the needs of LGBT older people. SAGE constituent Ruby Juster, echoing the thoughts of many of



The ribbon cutting! (l-r) NYC Department for the Aging Commissioner Lilliam Barrios-Paoli; NYC Council Member Jimmy Van Bramer; SAGE Executive Director Michael Adams; SAGE constituent George Stewart; SAGE constituent Phyllis Siegal; SAGE Board Co-Chair Roz Richter; NYC Council Member Rosie Mendez; NYC Council Speaker Christine Quinn; NYC Council Member Danny Dromm.



her peers, said, “This is the most exciting thing I can think of, and I’m certainly glad I’m still around to be a part of it.”

How was SAGE able to make this dream into a reality? Here is a brief overview of the steps to opening this historic center.

A GROWING NEED

As with the United States population as a whole, the population of New York City residents age 60 and over is growing rapidly. By 2030, this age group is projected to increase to 1.8 million, outnumbering school-age children for the first time in the city’s history. This rapid growth points to a growing number of LGBT older adults who have unique needs that are not often met by traditional aging services.

Compared to their heterosexual peers, LGBT older adults are more prone to social isolation—they are twice as likely to live alone and be single, and often do not have close relatives or children to rely on for caregiving. In addition, LGBT older adults face a host of other challenges,

such as lack of culturally competent healthcare, heightened vulnerability to poverty, and unequal treatment under laws designed to protect older adults. This can lead to depression, delayed care-seeking, poor nutrition and premature mortality. However, despite a greater need for supportive social

“This is the most exciting thing I can think of, and I’m certainly glad I’m still around to be a part of it.”

— RUBY JUSTER, SAGE CONSTITUENT
SPEAKING ABOUT THE SAGE CENTER OPENING

services, LGBT elders often do not access such services out of fear of harassment or hostility.

A PUBLIC-PRIVATE PARTNERSHIP

SAGE had long recognized the needs of LGBT older adults, but also knew that cuts

to city budgets—a reality in New York City along with cities large and small across the country—often meant reduced funding for vital safety net programs, such as supports and services for older people. Faced with citywide budget cuts, the Council of Senior Centers and Services of New York City, Inc. (CSCS) approached the New York City Department for the Aging (DFTA) with the idea to develop, in partnership with community organizations, new ways to meet the needs of the city’s diverse population.

DFTA was interested in designing a program and social service model that would be constituent driven, and it looked to organizations such as SAGE that had already developed this model for expertise



The SAGE Center: Vital Stats

WHAT: A full-time center designed for LGBT older adults age 60 and over

WHERE: 305 Seventh Avenue, 15th Floor, New York City

HOURS: Mon - Fri, 1:00 - 8:00 pm

MEALS: Dinner is served Monday-Friday 5:00 to 6:30 pm. Suggested donation for people 60 and over is \$2; the cost is \$4 for people under age 60.

DAVID BOHNETT CYBERCENTER: Open Tuesdays and Thursdays from 10:00 am to 3:30 pm, and Fridays from 10:00 am to 5:00 pm.

PROGRAMS & SOCIAL SERVICES: The SAGE Center offers a range of programs and services to LGBT older adults in New York City. Visit sageusa.org for a calendar.

CONTACT: For more information on programs, menus and more, call The SAGE Center at **646-576-8669** or visit sageusa.org/thesagecenter.

1. NYC Council Speaker Christine Quinn speaks to the crowd packed into the Great Room at The SAGE Center.

2. NYC Department for the Aging Commissioner Lilliam Barrios-Paoli and Suleika Cabrera Drinane, President & CEO of Institute for the Puerto Rican/Hispanic Elderly, Inc. **3.** Longtime constituents attend The SAGE Center Grand Opening

4. NYC Council Speaker Christine Quinn **5.** SAGE Executive Director Michael Adams with Stacey Easterling, Atlantic Philanthropies

6. Igal Jellinek, Executive Director, Council of Senior Centers and Services of NYC, Inc.

and advice on new program design. Based on these consultations, DFTA worked with CSCS to create a model for senior centers to serve older New Yorkers more efficiently and effectively: the Innovative Senior Center (ISC).

HISTORY IN THE MAKING

Soon after announcing this new initiative, DFTA invited agencies to apply for a contract to operate an ISC, seeking applicants that could provide a comprehensive array of services related to arts and culture, fitness, food and nutrition, health and wellness and lifelong

education. Drawing on more than three decades of experience working with and for LGBT elders, SAGE proposed a center that would serve more than a single neighborhood: The SAGE Center would serve all LGBT elders citywide.

In October 2011, New York City Mayor Michael Bloomberg announced the recipients of the new ISC contracts—including SAGE as the provider of the ISC to the city's LGBT community. This made The SAGE Center not only the first LGBT senior center in the city, but also the first one in the country with municipal backing,

Thank You

SAGE would like to thank the following individuals and organizations, whose steadfast support made The SAGE Center possible:

New York City Mayor
Michael R. Bloomberg

New York City Council
Speaker Christine C. Quinn
and Members of the Council

Manhattan Borough President
Scott M. Stringer

The Calamus Foundation

The Harry and Jeannette
Weinberg Foundation

The Booth Ferris Foundation

FJC-A Foundation
of Philanthropic Funds

The David Bohnett Foundation

The SAGE Center is funded
in part by the New York City
Department for the Aging.

demonstrating that partnerships between city governments and public agencies are vital to meeting the needs of underserved communities.

With less than six months to the opening, SAGE quickly began renovations to the space that would become The SAGE Center. Thanks to support from the New York City Council and generous foundation and private donors, SAGE had already purchased a space that was perfect for the Center—a bright, open floor with expansive city views. Owning this space means that The SAGE Center is a permanent home for LGBT older people



Christine Quinn congratulates Phyllis Siegal after the ribbon is cut.



Phyllis Siegal, SAGE constituent



Roz Richter, Co-Chair of SAGE's Board of Directors and Greg Grinley, SAGE's Senior Strategist

in New York City, now and in the future.

In addition to establishing this anchor site in Manhattan, SAGE reached out to community organizations in each of New York City's boroughs. By working with organizations rooted in these areas, SAGE will be able to provide LGBT-affirming programs and welcoming spaces to LGBT older people throughout Manhattan, Brooklyn, the Bronx, Queens and Staten Island—building a true center without walls.

A CENTER LIKE NO OTHER

True to the ISC mandate, innovation and constituent-driven programming are woven into all aspects of The SAGE Center's offerings. The SAGE Center specifically supports LGBT older adults

through programs such as employment assistance, recognizing that many LGBT older people have experienced a lifetime of discrimination; caregiving programs for LGBT caregivers who might not have the biological family supports that are critical in tough life moments; legal and financial planning so that LGBT elders can age with financial security; HIV and aging programs that support a large demographic of older people aging with HIV; and much more. In addition, The SAGE Center offers a broad array of case management and supportive counseling and groups, provided by professional social workers.



Musicians from Concerts in Motion.



Former SAGE staff member Joyce Epstein and former SAGE Board Member Cyril Brosnan.



SAGE constituents at The SAGE Center grand opening.

Programs for LGBT Older Adults: Nationwide Inspiration

The SAGE Center is the country's first full-time LGBT senior center offering meals and a broad range of programs and services on a citywide scale. SAGE would like to acknowledge two other programs that have long supported LGBT older adults in their communities:

GOLDEN RAINBOW SENIOR CENTER OF PALM SPRINGS. The Golden Rainbow Senior Center of Palm Springs, California began offering programs and a welcoming space for LGBT older people in a one-room center in 2005. Today, this center is known as The LGBT Community Center of the Desert and has expanded its mission to include LGBT people of all ages; however, as a SAGENet affiliate, known as SAGE of the Desert, it continues to provide vital programs for LGBT older people.

NOBLE MCARTOR CENTER. Founded in 2004, the Noble McArtor Center is the first adult day program for LGBT older adults in the country. Adult day programs serve frail elders who need significant one-on-one assistance on a daily basis (by contrast, senior centers serve older people who are independent and need little or no special assistance).

Other unique features include:

- An early dinner to allow for constituents who work during the day and cannot attend the more typical lunch or breakfast offered at traditional senior centers;
- Drawing on the best practices in accessibility to ensure full participation for all LGBT older adults by building an audio loop into The SAGE Center to allow people who use hearing aids to participate fully in all programs, and including screen magnification software on computers in SAGE's David Bohnett CyberCenter; and
- Engaging constituents as teachers and educators, not just as participants, challenging the mindset that older people cannot be experts on their own lives, and cannot continue as leaders in our communities.

Taken together, these programs and features add up to a new model of service delivery to LGBT older adults that SAGE hopes will serve as inspiration to organizations across the country, ensuring that LGBT elders can age in good health, financially secure and with broad community support.

However, what may be the most important aspect of The SAGE Center is that LGBT older adults in New York City now have a dedicated center where they can be themselves with a community of their peers. "For years and years, we've heard from LGBT older people that they don't feel welcome in senior centers in their neighborhoods, that they can't find community there. These centers are a lonely place for them," said Michael Adams, SAGE Executive Director. "So finally we have a center of our own. Our constituents will come to The SAGE Center and know that they are home, that these programs are for them, that this organization is for them. Nothing could be more exciting than that."

SAGE Constituent Leader

George Stewart

George Stewart is a volunteer and participant at SAGE Harlem, and also spoke at the grand opening of The SAGE Center—where he came out for the first time to the broader public as an older gay man.

advocacy events, including the Empire State Pride Agenda’s annual Equality and Justice Day, as well as meeting with New York City elected officials to raise awareness about LGBT aging and the particular issues LGBT older adults face.



Less than three years ago, Harlem resident George Stewart had never even heard of SAGE, let alone LGBT aging. It wasn’t until SAGE opened its new space in Harlem that he learned about the organization and our work. “I was at a party and was introduced to Ty Martin, SAGE’s Harlem Community Liaison. He told me about the work he had been doing for years with SAGE and how he had begun to see a real transformation in the lives of the constituents that they serve. After meeting Ty and seeing his dedication and passion, I knew immediately I wanted to be involved too, and four months later, I was volunteering at SAGE Harlem.”

George began to involve himself in SAGE’s work by participating in local

“I was never especially interested in politics until I was introduced to SAGE and the passionate work they do on behalf of LGBT elders. But once I began, I just loved it. Advocating about the needs of LGBT elders and this overlooked population is so constructive, useful, and needed.” George was especially excited about meeting Council member Inez Dickens (Harlem) last year. “I had never met a politician before, but after meeting with Representative Dickens, I felt I had a much deeper understanding of the political process and what happens in Albany and DC.”

George has since become a staple here at SAGE, and regularly attends City Council meetings with SAGE Policy

Associate Alli Auldridge when he can. When asked if he feels like slowing down, he adamantly shakes his head, and suggests that he is just getting started: “I think it is tremendously important for LGBT older adults to advocate on their own behalf because it brings a face to a very real issue. While I have seen a lot of progressive changes in the last few years for LGBT people, homophobia still exists and affects the lives of so many LGBT people. I remember years ago during the AIDS epidemic when I was working in a hospital, and seeing nurses and doctors leaving trays of food on the floors of AIDS patients’ rooms because they were

Advocating about the needs of LGBT elders and this overlooked population is so constructive, useful, and needed.”

—GEORGE STEWART

afraid of contracting it. I thought to myself then, as I do now, that no one deserves to be treated like that.”

He continues, “I encourage LGBT older adults, and their friends and families to find ways to involve themselves in advocacy. They will be surprised by the sense of community, patriotism and responsibility that comes with being a part of a larger crowd and movement.”

When asked about his hopes for the future of LGBT older adults in New York City, George pauses before responding, “Housing. I understand that spaces are being created in Philadelphia, and California, and I certainly think we could use LGBT housing here in New York. I would live there, make friends with everybody, and hang out with them every night.”

SAGE's Nationwide Policy Team

Meet the newest members of SAGE's staff dedicated to ensuring that public policy is responsive to the needs of LGBT older adults around the country.



RYAN CARLINO

Community Advocacy Associate

Headquarters: New York

His role: I provide ongoing technical assistance to SAGENet, SAGE's national network of affiliates. We currently have 21 SAGENet affiliates in rural and urban areas throughout the country that work to reduce isolation, improve financial security and enhance the quality of life for LGBT older adults. I also provide regular capacity building support on areas such as fundraising, strategic communications, leadership development, conducting needs assessments and building constituent-led advocacy programs.

His past advocacy achievements:

The greatest accomplishment of last year was the 2011 SAGENet gathering in St. Louis, MO. The gathering convened 26 SAGENet leaders from around the country for two days of presentations, workshops about internalized ageism, coalition

building, and advocacy initiatives for SAGE's Spousal Impoverishment Initiative. The conference also allowed leaders to deepen their relationships with each other and with SAGE staff. I also helped implement a new monthly SAGENet Conference Call, which offers SAGENet leaders a forum to ask questions, solicit advice and best practices, share successes and challenges and update peers about programming.

Future advocacy projects: I am excited to see how SAGENet will grow. We have pending affiliates waiting in the wings and interested organizations contacting me on a weekly basis about joining SAGENet, so I believe 2012 is going to be a year of massive growth for SAGENet. I would be thrilled to see more affiliates in more rural areas so LGBT older adults in those areas can access SAGE programming and services and know that they are not alone.

AARON TAX

Director of Federal Government Relations

Headquarters: Washington, DC

His role: As part of SAGE's mission, I work to improve the lives of lesbian, gay, bisexual and transgender (LGBT) older adults by advocating for federal policy changes and fostering a greater understanding of LGBT aging needs to policy makers in Washington, DC.

His past policy achievements: In 2011, I helped SAGE lead a Congressional briefing on the current policy issues facing

LGBT older adults. The briefing was sponsored by the Congressional LGBT Equality Caucus, which is co-chaired by Congress members Tammy Baldwin (D-WI), Barney Frank (D-MA), Jared Polis (D-CO) and David Cicilline (D-RI). About 75 leaders attended the event, representing Congress and a range of national, DC-based aging and LGBT nonprofits. We were also honored to have Kathy Greenlee, Assistant Secretary for Aging, U.S. Department of Health and Human Services, in attendance.



Future policy projects for 2012:

In the next year, our main legislative priority is to pass an LGBT-inclusive reauthorization of the Older Americans Act. We are currently working with members of Congress to include our proposed amendments, the most important of which is to include LGBT older adults as a vulnerable population with the greatest social need.

Strengthening a National Board of Directors:

William E. Weinberger Brings a West Coast Perspective to SAGE

After years of serving the LGBT community in both his home of Los Angeles and nationally, Bill Weinberger turned his attention to aging issues and joined SAGE's Board of Directors. He tells us why.

How did you first hear about SAGE, and what made you want to join SAGE's Board?

I had heard of SAGE years ago and knew it was a group for LGBT older people, but was not very familiar with its work. I attended an event in New York City honoring Larry Chanan (co-chair of the SAGE National Leadership Council) and met several people from SAGE there, including [Board Co-Chair] David Canter. From there, I went on the website to learn more, and met Michael Adams when he was in Los Angeles.

What I learned from all this is how important SAGE's work is to the LGBT community. Having parents who were aging—my father has passed away, but my mother is doing reasonably well—and having friends who are dealing with the same issues to varying degrees, aging has recently come to the forefront of my mind. Seeing my parents age, and learning about what LGBT people deal with as they age, such as issues of social isolation, service delivery or HIV, made me want to apply the experience I have gained from serving on boards of other organizations to support SAGE's work.

In your opinion, what makes SAGE a vital organization in the LGBT community?

SAGE addresses critical issues that are not fully addressed by other organizations. In L.A., there are organizations that

provide wonderful and significant services to LGBT elders, such as the L.A. Gay and Lesbian Center and Gay and Lesbian Elder Housing. SAGE is a leader on these issues on a national scale, addressing aging more comprehensively than other national organizations or the LGBT community as a whole. I think it is vital that SAGE be part of the panoply of work needed to address LGBT aging.

You are one of the first board members on SAGE's Board from outside the New York area. As an L.A. resident, how do you feel SAGE's national work affects LGBT older adults in your area? And is there a unique perspective you bring to SAGE's work based on your own community?

I think SAGE's national advocacy work in Washington DC, both at the bureaucratic and administrative level and with Congress, supports work on elder issues in local communities by helping to ensure that funding through policies like the Older Americans Act, or protections built into programs like Medicaid (MediCal in California), apply to and address LGBT older people's needs. SAGE's website and its National Resource Center on LGBT Aging provide essential resources for organizations and people in the L.A. community. It's important to make these resources accessible for both professionals and family members who

work with elders, and LGBT elders themselves. With L.A.'s strong focus on youth-oriented culture, it's vital to bring aging issues more to the fore.

In terms of a unique perspective, I've been involved with several local organizations and community issues for years, and through that involvement have become acquainted with many of the players in this community. Michael is interested in working with local organizations, finding synergy between SAGE's work and their initiatives, instead of duplicating efforts. I hope that I can help SAGE build those relationships with local organizations and provide input on what will work in my community and what won't work.

Are you an activist in other areas, and if so, how does that work intersect with SAGE? I've been very involved in my synagogue, Congregation Kol Ami, for many years, serving as president of the board and chair of the religious school committee. One of the things a synagogue needs to do is to take care of its members. I know from experiences my friends have had how a religious community can care for people as they age. Through my work with Kol Ami, I've developed relationships with other congregations, which can help support SAGE's work in the community.

Continue on page 27

Over the past several months, SAGE led and participated in a number of activities in New York City and nationwide to advance our mission of improving the lives of LGBT older adults. Here, in words and photos, are the highlights. For more photos, visit flickr.com/sageusa.

SAGE RECOMMENDATIONS TO PROTECT LGBT ELDERLY

ACCEPTED BY NYSOFA. SAGE is proud to report that the New York State Office of the Aging (NYSOFA) incorporated our recommendations on ways to protect LGBT elders in their five-year plan for aging service provisions in the state. SAGE's recommendations included: prioritize health services and prevention programs to LGBT older adults; increase attention on elder abuse among LGBT older adults; design and implement programs that recognize unique family structures, such as families of choice; and collect and assess data on State Aging programs to ensure LGBT older adults are being served. The plan went into effect October 1, 2011 and will be active until September 30, 2015. SAGE will be working with NYSOFA to ensure that they hold to their current commitments to the LGBT community and strengthen their supports for LGBT New Yorkers in the next five-year plan. The plan can be viewed at: www.aging.ny.gov

EYAL FELDMAN SWIMS FOR SAGE. On September 18, Eyal Feldman, a SAGE Friendly Visitor, volunteer, and supporter, swam seven miles across Lake Mead and past the Hoover Dam, to raise money for SAGE. SAGE is proud and grateful to announce that,

thanks to Eyal's amazing efforts and your support, he exceeded his \$6,000 goal and brought in \$8,200 for SAGE! Thank you to Eyal, all of the swim sponsors, and Robby Browne, longtime SAGE advocate and host of New York's premier Toys Party, who pledged \$1,500 in matching support for Eyal's swim.



Joe Baker, President of the Medicare Rights Center

TOWN HALL ON SUPER COMMITTEE AND THE BUDGET DEFICIT

In September, SAGE hosted a town hall on the Congressional "Super Committee" and the federal budget crisis to discuss how decisions on the debt ceiling could affect LGBT older adults enrolled programs such as Medicare, Medicaid and Social Security. Joe Baker, President of the Medicare Rights Center, chaired the meeting and answered questions about what SAGE constituents can do to help prevent cuts to these programs. Attendees also had the opportunity to record personal stories about how their lives are affected by federal benefit programs, and SAGE social worker Ginny D'Antonio was on hand to detail SAGE's benefits counseling services and to set up one-on-one appointments with benefits counselors.



Eyal Feldman (left) with Michael Adams



SAGENet leaders at the annual gathering in St. Louis, MO, October 2011.

SAGENET GATHERING AND FIRST-EVER NATIONAL ADVOCACY INSTITUTE. In October, SAGE held its annual SAGENet Gathering, hosting 21 of its SAGE affiliates—plus a few promising potential affiliates—in St. Louis, MO. The gathering included trainings and sessions on how to build effective coalitions; a multigenerational conversation dealing with ageism; a section on bridging racial justice and LGBT issues (led by Rinku Sen, Executive Director of the Applied Research Center, the country’s premier think tank on race); a “policy café” on current policy issues such as the reauthorization of the Older Americans Act and HIV and Aging; and a half-day advocacy institute with the Williams Institute on Spousal Impoverishment Protections. In addition, SAGENet leaders were able to share their program ideas with each other throughout the two days, and most of them stayed in St. Louis for an additional day to attend the “Train the Trainers” session to master the National Resource Center on LGBT Aging’s curriculum. In total, 35 people attended, and evaluations of the gathering showed that the gathering was a resounding success.

SAGE CONSTITUENT PERRY BRASS SPEAKS AT CORRECTIONAL FACILITY. In celebration of LGBT History Month (October), SAGE constituent Perry Brass and writer for the blog “Queer New York,” was invited to speak on LGBT history at the Metropolitan Correctional Center (MCC). Brass fondly remembered co-editing *Come Out*, the first gay-liberation paper and a cutting-edge forum at the time. The program was moderated by MCC’s LGBT Program

Manager Paula St. John and LGBT Alternate Program Manager William J. Ryan, PhD. Perry’s visit was such a success that he was featured on dojpride.org, the official website for LGBT employees of the U.S. Department of Justice. Congratulations, Perry!



Perry Brass (left), with LGBT Program Managers Paula St. John and Bill Ryan.

TRANSGENDER AGING ADVOCACY INITIATIVE. In October, SAGE and the National Center for Transgender Equality (NCTE) convened the second meeting of its national advisory council for the Transgender Aging Advocacy Initiative. At the meeting, the council agreed to continue working together on five policy areas: improving federal data collection efforts to better study



Leaders at the Transgender Aging Advocacy Initiative in Washington, DC, October 2011.

transgender elders; requiring cultural competence training about transgender elders for long-term care facilities that receive federal funding; promoting safe and affirming practices for working with transgender elders;

National LGBT Aging Roundtable and the National Resource Center on LGBT Aging.

SAGE PRESENTS AT THE NATIONAL CONSUMER VOICE FOR QUALITY LONG-TERM CARE. In October, at the annual National Consumer Voice for Quality Long-Term Care Conference, SAGE Senior Director of Policy and Communications Robert Espinoza and National Senior Citizen’s Law Center Attorney Eric Carlson presented on LGBT older adults’ experiences in long-term care facilities. Held in Grand Rapids, Michigan, Robert and Eric hosted an informational session, attended by nearly 50 people, on the challenges faced by older LGBT adults in today’s long-term care facilities, current policies on LGBT older adults and Medicaid eligibility, and recommendations for what advocates, policy makers and providers can do to address long-term care issues.

SAGE HOSTS DISCUSSION ON THE AFFORDABLE CARE ACT.

In October, Dr. Jaime Torres, Regional Director of New York, New Jersey, Puerto Rico, and the U.S. Virgin Islands at the U.S. Department of Health & Human Services, came to SAGE to lead a discussion on the Affordable Care Act and how its policies may affect LGBT older adults. Dr. Torres gave SAGE constituents an overview of the Affordable Care Act and the new policies designed to improve their health, including increased prevention and wellness benefits, changes in prescription drug coverage, and reforms in Medicare, Medicaid and broader healthcare policies.



Harper Jean Tobin, Policy Counsel at the National Center for Transgender Equality, at the Transgender Aging Advocacy Initiative.

ensuring that the reauthorization of the Older Americans Act includes transgender elders in its definition of “greatest social need”; and ending the practice of allowing gender to be matched in its Social Security Number Verification System (SSNVS). SAGE will help lead these advocacy goals through its

SAGE CELEBRATES NATIONAL DAY OF HEALTH. On October 18, the National Day of Health, SAGE hosted two wellness events for constituents. At the LGBT Community Center, SAGE offered free flu shots to those interested. SAGE also held a Lunch and Learn program titled “Knowing Your Rights in the Health Care System,” where attendees reviewed tools to resolve conflicts in a hospital, doctor’s office, nursing home or other health care facility, as well as what their rights are as a patient or caregiver.

SAGE HOLDS TWO WOMEN’S DANCES ON OCTOBER 23 AND JANUARY 15. On October 23, SAGE held its popular Women’s Dance for LGBT women of all ages at Club LQ. Early attendees were treated to free salsa and hustle dance lessons by professional dancer Simone Assboeck, who is a dancer and choreographer for the cable TV series *Boardwalk Empire*. In January, DJ NancyB spun hits from both past and present, and the event also featured a prize raffle for attendees. Both dances were great successes! For more information, including dates for future dances, visit sageusa.org/womensdance

2011 GRANTMAKERS IN AGING DIVERSITY AWARD. In October, SAGE received the prestigious 2011 Grantmakers in Aging Diversity Award, which honors an individual or organization that embraces diversity as a fundamental element in all levels of its work in aging. SAGE was given the award for its work to identify and address the unique needs of LGBT older adults through direct service provision, coalition building and advocacy at the local, state and federal levels. The award was presented at the Grantmakers in Aging 2011 Annual Conference, with SAGE Executive Director Michael Adams accepting the award.

SAGE CELEBRATES NOVEMBER AS NATIONAL CAREGIVERS MONTH. SAGE kicked off the launch of its new National LGBT Caregiver Support Group with a nationwide online, email and phone advertising campaign that reached approximately 1 million viewers. A new service offered by SAGECAP (Caring and Preparing), this support group will be conducted by telephone, allowing LGBT caregivers—including those geographically isolated from supportive services and networks—from around the country to connect to a safe and nurturing space where they can build relationships, share resources, and gain much needed emotional support. In addition, SAGECAP Program Manager Scott French contributed a post, titled “Caregiving in the LGBT Community,”

to the Family Caregiver Association blog for their 30 Days of Caregiving campaign about the challenges LGBT caregivers face, and the resources available for LGBT caregivers and aging service providers on SAGE’s sister site, the National Resource Center on LGBT Aging. Visit sageusa.org/sagecap to learn more about the telephone support group for caregivers, as well as a telephone support group for LGBT older adults.

SAGE EXECUTIVE DIRECTOR MICHAEL ADAMS SPEAKS AT CONGRESSIONAL BRIEFING ON LGBT AGING. On November 9, SAGE Executive Director Michael Adams spoke at a Congressional briefing to discuss the current policy issues facing LGBT older adults. Sponsored by the Congressional LGBT Equality Caucus and Congress members Tammy Baldwin, Barney Frank, Jared Polis, and David Cicilline, the briefing was attended by nearly 75 representatives from Congress as well as national aging and LGBT organizations. The briefing also featured the release

SAGECAP Services & Advocacy for Gay, Lesbian, Bisexual & Transgender Elders
 {Caring and Preparing}

National LGBT Caregiver Support Group

If you're providing long-term care for a friend or loved one, you know that it can be rewarding, yet feel overwhelming. And, as a lesbian, gay, bisexual or transgender (LGBT) caregiver, you may be facing additional issues, such as a lack of supportive services in your area designed to meet your unique needs.

Services & Advocacy for GLBT Elders (SAGE) is launching a national telephone support group for LGBT caregivers—a safe and nurturing space to discuss challenges, vent frustrations and share advice and resources.

Join the National LGBT Caregiver Support Group! Whether you are caring for a parent, partner or friend, your well-being is essential.

For more information, contact SAGE at caregiving@sageusa.org or 202-741-2247 ext 294.

Topics discussed will be treated with the same confidentiality as in-person sessions. Free of charge.

SAGE is supported by the MetLife Foundation and MetLife Foundation.

SAGECAP Services & Advocacy for Gay, Lesbian, Bisexual & Transgender Elders
 {Caring and Preparing}

WE ARE EACH OTHER'S BEST CAREGIVERS



Michael Adams responds during Q&A at the Congressional LGBT Equality 'Equal Time' Briefing: Improving the Lives of LGBT Seniors in Washington, DC, November 9, 2011.

of *The Aging and Health Report: Disparities and Resilience among Lesbian, Gay, Bisexual, and Transgender Older Adults* by lead researcher Dr. Karen Fredriksen-Goldsen. This report details important findings from the first national study on LGBT aging and health funded by the National Institutes of Health and the National Institute on Aging, and was completed in collaboration with 11 organizations nationwide, including SAGE. The study reveals that gay, lesbian, and bisexual older adults have higher rates of disability than heterosexuals of similar age and face elevated risks of physical and mental distress, victimization, discrimination, and lack of access to supportive aging and health services. Other speakers at the briefing included Kathy Greenlee, Assistant Secretary for Aging, U.S. Department of Health and Human Services; and Jeff Krehely, Director of the LGBT Research and Communications Project, Center for American Progress.

SAGE SPONSORS POLICY JOURNAL ISSUE DEDICATED TO LGBT AGING. In November, SAGE and the National Academy on an Aging Society (the policy institute of the Gerontological Society of America) released the first-ever issue of the acclaimed *Public Policy & Aging Report* (PPAR) dedicated to

LGBT aging. This issue highlighted the gaps in policy and research on LGBT older adults and solutions to address the needs of LGBT elders, and covered a range of subjects, including the need for more research and public policies devoted to LGBT populations; the failure of existing broad-based aging policies to incorporate LGBT needs and interests; and the need for cultural competency training among services personnel. PPAR is distributed to thousands of thought leaders in the aging field, and explores policy issues generated by the aging of American society. To read the full report, visit sageusa.org

SAGE HARLEM BEGINS BUDDY TO BUDDY PROGRAM.

This fall, SAGE Harlem launched its innovative “Buddy to Buddy” program, which matches LGBT older adults in Harlem and the Bronx to promote community and help reduce social isolation. Built on the theme, “Take Care of Yourself, Take Care of Each Other,” buddies are encouraged to attend events together, visit each others’ homes, or accompany each other to doctor’s appointments or on errands. The program is free and buddies are typically matched based on interests. For more information, contact Bryan Pacheco, SAGE Harlem Outreach Coordinator, at [646-660-8956](tel:646-660-8956) or bpacheco@sageusa.org

SAGE HOLDS INTERFAITH MEMORIAL SERVICE. On Sunday, November 20, SAGE held a memorial service to honor and remember those clients, members and friends of SAGE who have passed over the last three years. Our community gathered together at the historic Church of Saint Luke in the Fields in Greenwich Village to support each other at the service, which combined Christian, Jewish, Eastern and other traditions. Also attending were our friends and family at Congregation Beit Simchat Torah (CBST) and the Metropolitan Community Church of New York (MCCNY), Unity Fellowship, Integral Yoga, and others.

SAGE THANKSGIVING PARTIES. To help celebrate Thanksgiving, SAGE hosted two holiday parties, one at the LGBT Community Center and one at SAGE Harlem. On November 17, SAGE hosted its annual Thanksgiving Dinner at the LGBT Center, serving up a traditional turkey dinner for 183 people—a record number of attendees. SAGE had 25 volunteers on hand to dish out the

food, including 15 from Credit Suisse. On November 18, SAGE Harlem hosted its second annual Thanksgiving Potluck, where constituents each brought their own dish and gathered to celebrate and eat. Thank you to Credit Suisse and to everyone for making this Thanksgiving a great one!

SAGE LEADS TWO LGBT AGING SESSIONS AT THE GERONTOLOGICAL SOCIETY OF AMERICA'S ANNUAL CONFERENCE.

In late November, SAGE held two sessions on LGBT aging at the 64th Annual GSA Conference in Boston. SAGE Director of Community Advocacy and Capacity Building Serena Worthington spoke on a symposium about “Improving Quality of Life for LGBT Older Adults: Policy and Service Implications,” alongside Lisa Krinsky, Director of the LGBT Aging Project in Boston, and Karen Fredriksen-Goldsen, lead researcher on *The Aging and Health Report: Disparities and Resilience among Lesbian, Gay, Bisexual, and Transgender Older*



Credit Suisse volunteers lending a hand at this year's Thanksgiving party.



(l to r) Serena Worthington, SAGE Director of Community Advocacy and Capacity Building; Mark Williams, University of Washington; Lisa Krinsky, LGBT Aging Project, Boston; Heidi Petry, University of Applied Sciences, Zürich; Charles Emlet, University of Washington; Karen I. Fredriksen-Goldsen, University of Washington, in Boston for the GSA conference.



SAGE constituents at this year's Thanksgiving party.

Adults. In addition, SAGECAP (Caring and Preparing) Manager Scott French presented in a symposium on “Lessons Learned from an LGBT Caregiver Support Program,” where 25 attendees learned about the challenges and successes of the country's most successful LGBT caregiving program.

SAGE COMMEMORATES WORLD AIDS DAY WITH A WALK AND VIGIL.

On World AIDS Day, December 1, SAGE participated in the Out of the Darkness Interfaith Gathering, an event organized by Gay Men's Health Crisis (GMHC) and sponsored by SAGE. This year marked the 30th year of the AIDS epidemic,

and participants showed their solidarity as they honored those who have been lost at the Candlelight Vigil at Trinity Lutheran Church and the reading of names at the World AIDS Day Gathering at the Advent Lutheran Church/Broadway United Church of Christ. In addition, SAGE Harlem hosted an advance screening of the film *Miss HIV*, a documentary about the rates of HIV/AIDS in Botswana and Uganda.

THE 26TH ANNUAL TOYS PARTY. On December 2, SAGE participated in the annual Toys Party, hosted by Robby Browne, David Tufts, and Chris Kann at the Chelsea Piers, Pier 60. Part of the proceeds benefited SAGE. In total, 2,500 people attended the party, bringing thousands of gifts for children and donating generously to SAGE. Thank you to everyone who attended and made this year's event such a wonderful success!

SAGE HOLIDAY PARTIES. This winter, SAGE threw a number of events to celebrate the holidays. First, on December 3, there was the "SAGE Royal Holiday Social," where constituents were treated to a party with a regal theme, sharing a meal with libations, dessert and dancing. Calvin Thompson from Concerts in Motion also performed and led a holiday sing along. On December 11, SAGE held its annual Women's Holiday Party at the LGBT Center, which featured a performance by lesbian/feminist singer Alix Dobkin and a gift exchange. SAGE Harlem hosted their "Winter Wonderful" Holiday Party on December 16, which featured live music, performances, dancing, and delicious food. This was SAGE Harlem's biggest event of the year and was a wonderful success! On December 18, SAGE hosted "An Operatic Holiday Party," where SAGE constituents met with members of "Monday at the Opera," a singing group that meets every Monday at the LGBT Center. In addition, members from Concerts in Motion performed at the party. SAGE Harlem hosted a holiday movie night on December 20, showing "This Christmas," for constituents. And finally, on December 27, SAGE hosted a holiday gift swap for the Uptown Neighbors Group as well as a festive sing-along, with food and refreshments! It was a great holiday season!

SAGE SPEAKS AT HUD LGBT ELDER HOUSING SUMMIT.

In December, the U.S. Department of Housing and Urban Development (HUD), in partnership with the Administration on Aging and the National Center for Lesbian Rights, held an LGBT Elder Housing Summit to discuss LGBT older adults' housing needs and existing efforts to fund and support current LGBT-affirming housing. At the daylong meeting, SAGE Executive Director Michael Adams and Mara Keisling, Executive Director of the National Center for Transgender Equality, gave an

overview of LGBT housing and the current need for affordable options for this vulnerable population; Hilary Meyer, Director of the National Resource Center on LGBT Aging, served on a panel on LGBT discrimination and legal barriers to accessing long-term care and housing; and SAGE Senior Director of Programs Catherine Thurston spoke about LGBT older adults aging in place through supportive community models such as Naturally Occurring Retirement Communities (NORCs) and SAGE's successful NORC in Harlem. National leaders and aging professionals from a variety of organizations attended, including the Administration on Aging; the U.S. Department of Health and Human Services, Gay and Lesbian Elder Housing, the National Center for Transgender Equality, AARP, and the Beasley School of Law. To view a webcast of this Summit, visit www.huduser.org



Michael Johnson and Michael Roberts, SAGE constituents featured on CNN's new video blog "Rareviews."

SAGE CONSTITUENTS FEATURED ON CNN AND THE TOP PHOTOS OF 2011.

In 2011, as New York State passed same-sex marriage and LGBT aging issues continue to gain recognition, SAGE constituents were prominently featured in many mainstream media outlets. First, a powerful image of Connie Kopelov and Phyllis Siegal, who were the first couple to be married in New York City, was chosen as one of the most powerful images of 2011 by BuzzFeed.com and CNN. In addition, SAGE constituents Michael Johnson and Michael Roberts, who also married this summer, as well as Sandy Warshaw, were featured on CNN's new video blog "Rareviews" to discuss what it has meant to them to grow "old and gay," and the monumental gains they have seen in LGBT rights across the country. To see their stories, visit www.inamerica.blogs.cnn.com

SAGE CELEBRATES NEW YEAR WITH CONSTITUENTS AND VOLUNTEERS FROM TD BANK. On January 12, SAGE rang in the New Year with constituents at the LGBT Center, featuring twelve volunteers from TD Bank who served food and drink to over 100 constituents. In addition, TD Bank Foundation presented SAGE with a check for \$10,000 to support The SAGE Center's nutrition program, which will allow The SAGE Center to give hundreds of LGBT older adults healthy, warm meals. SAGE Executive Director Michael Adams and Senior Director of Development Kenneth Cox were on hand to accept the check. **Thank you, TD Bank!**



Michael Adams accepts a check from the TD Foundation to help fund The SAGE Center's nutrition program.

SAGE AND THE UNITED HOSPITAL FUND PUBLISH LGBT CAREGIVING GUIDE. In December, SAGE partnered with the United Hospital Fund to create a guide to help members of the LGBT community better navigate the health care system. The first publication of its kind released by United Hospital Fund, *A Guide to LGBT Caregiving* addresses a range of concerns from advance directives and other legal documents, to considerations regarding self-identification, to the realities of discharge planning and home care. Available in English, Spanish, Chinese and Russian, the guide is the latest addition to the Next Step in Care website, which was created by United Hospital Fund to improve the working relationship between family caregivers and health care providers, and to make patients' transitions between care settings smoother and safer. To read the guide, visit sageusa.org or lgbtagingcenter.org



Harold Seely in Cherry Grove, 2011

SAGE REMEMBERS HAROLD SEELY. In December, longtime SAGE friend and constituent Harold Seely passed away. Harold had been active with SAGE from its very beginnings in New York City in the 1970s, and was instrumental in helping SAGE create an archive of its history, donating photos from his own collection to bolster the project. This last July, Harold was honored at SAGE's annual Cherry Grove event for his commitment to SAGE and the local LGBT community. Jerre Kalbas, a SAGE constituent from day one, said, "He was a wonderful, wonderful guy. I met Harold because of the SAGE socials, and Harold would do all of the decorating. He was just a great guy, and I'm going to miss him a lot. I spent a weekend with him at his home on Fire Island and he was just a generous host. He was a true asset to SAGE. I'm just going to miss him, very much." SAGE constituent Larry Lala added, "A man who was creative, a partner and a pleasure to work with. Harold's work ethic was focused and reliable. There was never a doubt that the decorations for our socials were complete to the last detail and on time. All of Harold's visions were a talent to be truly admired and he will be truly missed."

SAGE HIGHLIGHTS LGBT AGING ISSUES AT CREATING CHANGE. At the end of January, a number of SAGE staff presented at the National Gay and Lesbian Task Force's 24th Annual Creating Change conference in Baltimore, MD, bringing LGBT aging issues into the spotlight. On Thursday, January 26, SAGE hosted a Pre-Conference Institute on LGBT Aging Advocacy, where representatives from SAGE affiliates, SAGE's National Resource Center on LGBT Aging, the Williams Institute, and the National LGBT Aging Roundtable discussed current policy opportunities, including the reauthorization of the Older Americans Act and SAGE's Spousal Impoverishment Protections Initiative, as well as program models and innovations in LGBT aging. Over the next two days, SAGE Director of Federal Relations Aaron Tax presented on a panel on HIV and aging; Hilary Meyer, Director

of the National Resource Center on LGBT Aging, led a four-hour LGBT aging cultural competency training; and SAGE Director of Community Advocacy and Capacity Building Serena Worthington and Policy Associate Alli Auldridge led a session on transgender older adults and policy needs. Finally, SAGE and the Task Force, with special sponsorship from AARP, debuted the first-ever Creating Change dance for people 50 and up and their allies, where attendees danced the night away!

ASSISTANT SECRETARY FOR AGING KATHY GREENLEE RECEIVES SAGE'S EXCELLENCE IN AGING AWARD. In addition to the other exciting events at the 2012 Creating Change conference, SAGE Executive Director Michael Adams presented Kathy Greenlee,



Assistant Secretary for Aging Kathy Greenlee.

Assistant Secretary for Aging, with the annual SAGE Advocacy Award for Excellence in Leadership on Aging Issues. Assistant Secretary Greenlee has been committed to improving the quality of services and support offered to all older Americans, including lesbian, gay, bisexual and transgender (LGBT) older adults, since being appointed in 2009, and was instrumental in the creation of the nation's first National Resource Center on LGBT Aging in 2010. Said Adams, "Greenlee's inclusive approach, which embraces LGBT older people as an important part of the nation's aging mosaic, cannot be taken for granted—in fact it is the essence of leadership. Her insistence on including LGBT older people in the U.S. Administration on Aging's vision for supporting those elders in greatest economic and social need is making a tremendous difference for the LGBT community all across the country. SAGE and our constituents are profoundly grateful."

SAGE LAUNCHES SPOUSAL IMPOVERISHMENT PROTECTIONS INITIATIVE.

In February 2012, SAGE launched its Spousal Impoverishment Protections Initiative, working with partners and advocates across the country to ensure that all 50 states extend spousal impoverishment protections to same-sex couples—ensuring that these couples do not need to give up their homes and assets to qualify one partner for essential long-term care under Medicaid. The Spousal Impoverishment Protections Initiative provides policy guidance to state advocates, connects them to share best practices and ideas, and offers them a range of online activist tools. Learn more about SAGE's Spousal Impoverishment Initiative or download the guide, *A State Advocacy Guide for Understanding Spousal Impoverishment Protections, Medicaid and Same-Sex Couples*, at sageusa.org/spousalimpoverishment

NATIONAL RESOURCE CENTER ON LGBT AGING RELEASES GUIDE TO CREATING INCLUSIVE SERVICES.

In March 2012, SAGE's National Resource Center on LGBT Aging released its first comprehensive guide for aging service professionals and agencies, offering a range of tools and tips on creating affirming services for LGBT older adults. Titled *Inclusive Services for LGBT Older Adults: A Practical Guide to Creating Welcoming Agencies*, this guide was created to help agencies provide supportive care to LGBT older adults and increase awareness of the unique barriers that LGBT elders face. To help in creating this guide, SAGE surveyed service providers and professionals across the country, all of whom have taken various steps to help make their agencies safe and inclusive for LGBT older adults. Visit lgbtagingcenter.org to download the guide or request print copies.



SAGE CELEBRATES THE 16TH ANNUAL SAGE AWARDS.

On October 25, SAGE held its 16th Annual SAGE Awards & Gala, honoring three extraordinary individuals. Larry Chanen received the SAGE Community Service Award, Joy Tomchin received the Ken Dawson Advocacy Award and Paula Ettelbrick's family accepted a posthumous Joyce Warshow Lifetime Achievement Award on her behalf. In honor of her lifetime commitment to advocacy and justice for all LGBT people, SAGE announced that the SAGE Community Service Award will now be known as the Paula L. Ettelbrick Community Service Award. Hosted by Florence Henderson, this year's Gala was attended by more than 600 people and was the most successful fundraiser in SAGE's history, raising over \$550,000 thanks to the generosity of our friends and supporters. A special thank you goes to the Gill Foundation and Henry van Ameringen Foundation, who matched gifts received during the gala for the National Resource Center on LGBT Aging. These donations will help SAGE continue to meet the growing needs of LGBT older adults both in New York City and nationwide.

Our heartfelt appreciation to everyone who attended or supported the 16th Annual SAGE Awards & Gala. We hope to see you again this year!



1. Host Florence Henderson (left) and musical guest Maureen McGovern at the 16th Annual SAGE Awards
2. Musical Interlude with Jeff Harris.
3. Just a few of our many generous guests.
4. Florence Henderson helps SAGE Executive Director Michael Adams celebrate his 50th birthday.
5. Florence Henderson hosts the 16th Annual SAGE Awards.





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6. David Canter, Co-Chair of SAGE's Board of Directors, honors the SAGE staff at the 2011 SAGE Awards.

7. Guests at the 16th Annual SAGE Awards and Gala.

8. New York City Council Speaker and longtime SAGE supporter Christine Quinn at the 16th Annual SAGE Awards.

9. SAGE Award Recipient Larry Chanen

10. Musical guest Maureen McGovern at the 16th Annual SAGE Awards and Gala.



Q&A

with Louis Bradbury

SAGE National Leadership Council

Louis Bradbury, Esq., is the Chair of the Board of Directors of The Calamus Foundation and Co-Chair of the Board of Directors of the Empire State Pride Agenda. The Calamus Foundation awards grants to nonprofit organizations for programs and activities in the areas of care and support services to individuals with HIV, and services to the LGBT community that promote and support its formation, growth, identity, general well-being and social and legal rights. The Calamus Foundation is also the first organization to become a member of the SAGE National Leadership Council.

The Calamus Foundation is one of SAGE's biggest supporters, extending over \$1.5 million in matching grants to SAGE since 2008. How did The Calamus Foundation first become connected to SAGE, and how do the two organizations complement each other?

The Calamus Foundation first became involved with SAGE through Shelley Kaplan, the former Board Chair of The Calamus Foundation, who had long been interested in and committed to SAGE's work to support LGBT older adults. In the LGBT community, elders are often a forgotten group. This reflects society in general, but I think it's more acute in the LGBT community. From the point of view of The Calamus Foundation, we felt that older gay men, especially this current generation, needed extra support. Many have lived their lives in the closet, or have not had children or families, and have lived through the AIDS crisis and the loss of their friends and support systems. Since the mission of The Calamus Foundation is to support the

LGBT community, we want to step up anytime we can support work that has a positive impact on our community.

Support from The Calamus Foundation has been especially crucial to SAGE's purchase and renovation of the space for The SAGE Center. What is The Calamus Foundation's vision for The SAGE Center? Why did you invest so generously?

This goes back to the \$1 million challenge grant we gave SAGE in 2008. When Michael Adams first approached The Calamus Foundation about supporting SAGE, he asked for \$30,000 for SAGE's 30th anniversary. I said, "You know, that's a lot of money, but it's not really going to help you much with your vision for SAGE's work." Jeff Soref, another Calamus board member, and I put our heads together and discussed SAGE's goals for the LGBT older adult community and how we could help. We decided on a challenge grant where SAGE would have three years to raise \$1

million that would be matched by The Calamus Foundation. This was very successful—Michael and his staff raised the entire amount within the first year. It shows that SAGE was able to accomplish what they set out to do. So, when SAGE approached us with the idea for The SAGE Center, it made a lot of sense to us. We gave a capital grant to SAGE to help purchase the space for the center, so that you wouldn't be saddled with a mortgage and could devote more resources to programs.

As a Philanthropic Member Organization of the SAGE National Leadership Council, why does The Calamus Foundation believe SAGE's national initiatives are an important part of SAGE's body of work?

We believe it's important that what SAGE does in New York City is replicated throughout the country, and one of the ways to do that is through federal advocacy work. This was part of Michael's vision for the first challenge grant. We're not reinventing the wheel here; these are tried and true programs that LGBT older adults in other cities can benefit from. Federal legislation is one way to ensure that this happens.

Generally, what vision does The Calamus Foundation hope to realize through its philanthropy?

The Calamus Foundation looks at areas of the LGBT community that are underserved, ignored or need more attention, such as homeless youth or elders. We also support a lot of other organizations that make a difference in LGBT communities, and give large grants to organizations, such as SAGE, who we think have the capacity and need support to take their work to the next level.

We also think it's important to not only support social services initiatives, but also highlight the LGBT community's contributions to our society. For example, we were the lead sponsor, and the largest sponsor, for the 2011 Hide/Seek exhibit at the Smithsonian in Washington, DC. This was the first time a government institution focused on the work and contributions of the LGBT artistic community. We thought that this exhibit was an important moment, highlighting what the LGBT community has done artistically. In all of our work, we try to support initiatives that have a positive impact on the community.

Why would you advise others to contribute to SAGE in light of The Calamus Foundation's incredibly generous matching grants?

When people look at the list of accomplishments that SAGE has achieved in the last few years, in New York City with The SAGE Center and on the national stage, we know that we can tell people that SAGE has a vision and the capacity to achieve it—they just need the funds to make it a reality.

At The Calamus Foundation, we don't like to tell organizations what they should be doing. We like them to tell us they want to do and then we try to help them do it. The Calamus Foundation's support shows how much we believe in what SAGE is doing.

About 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. Members help address issues concerning the older LGBT community through fundraising, outreach and advocacy. They are critical to our success by 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.

James C. Hormel Honorary Co-Chair

James M. Johnson Honorary Co-Chair

Larry Chanen Co-Chair

Joy A. Tomchin Co-Chair

Members

Herbert I. Cohen

Carol Davidson & Jody Silver

Jay Lesiger & Tom Klebba

Jon C. Nathanson

James Pepper

Steve Rabin

John Roberts

Gerald Rupp


Dorothy Sander

Ted Snowdon & Duffy Violante

George Zuber

The Calamus Foundation,

Philanthropic Member Organization

 To learn more about SAGE National Leadership Council, please contact C. Nathan Harris at nharris@sageusa.org or 212-741-2247.

Splitting Property Ownership Interests:

A Tax-Savvy Way to Leave a Legacy and Reduce Taxes

BY THOMAS SCIACCA, ESQ.

It's the sitcom cliché: two people (be they roommates or spouses) have a major argument, and suddenly they have a line drawn down the center of their home dividing the space between them. After the ensuing screaming matches, discomfort for the person whose space does not include the bathroom, and the inevitable reconciliation, the people reunite their interests and learn to co-exist.

Sometimes, a donor can take advantage of favorable tax and estate planning techniques by splitting his or her ownership interest in a home. Here's an example of how it could work:

Linda and Fran have been partnered for 35 years. Linda is 74 and Fran is 66. Linda owns a two-family house in Brooklyn that she purchased in 1988 for \$200,000. The current net worth of the property is

\$3.5 million, due largely to the subsequent gentrification of the neighborhood. In addition to the house, Linda has significant other assets totaling \$4 million. For various tax reasons, Linda never added Fran to the Deed as an owner of the property.

Linda wants Fran to be the beneficiary of her Estate. However, if Fran inherits everything, Linda's Estate will potentially owe hundreds of thousands of dollars in estate taxes. While marriage will likely eliminate any New York State estate taxes, Federal law will not recognize their marriage, and the Executor of Linda's Estate will write that large check to the United States Treasury.

To alleviate this, Linda's Will contains a provision leaving Fran a life estate in the property. Linda names SAGE as the remainder beneficiary of the property. Linda dies at age 92, survived by Fran, who is now 84.

Fran now has a life estate in the property—she has the absolute right to

ownership for the rest of her lifetime. Fran must pay all the carrying expenses of the property for the remainder of her lifetime, and is entitled to any correlating tax deductions to which she would otherwise be entitled. She can live there rent-free, or, she can rent the property and keep all of the rent for herself. She can also live on one floor and rent the other, again keeping the rent for herself. As the remainder beneficiary, SAGE has no right of possession until Fran's eventual death.

The IRS mortality tables determine the value of Fran's life estate in the property based on her age. In this example, Fran's life estate is valued at roughly 15 percent (\$525,000), and the balance of the property's value (\$2,975,000) would be allocated to SAGE. As a 501(c)(3) charitable organization, SAGE's interest would pass free of estate taxes. This

would allow Linda to use her exemption to transfer her additional wealth to Fran without generating further Federal estate taxes (assuming current exemption amounts remain static).

Advantages of this plan:

- First (and most importantly), by reducing or eliminating the estate taxes, Linda will not need to sell the property to pay estate taxes. Linda will be able to remain in her home for the remainder of her lifetime if she so chooses.
- Second, Linda has a considerable amount of capital gain in the property. If she attempted to transfer an ownership interest to Fran during her lifetime, she would have faced either income taxes (sale) or gift taxes (gift).
- Third, upon Fran's eventual death, the property passes outright to SAGE. The transfer is not subject to a probate proceeding, potentially allowing Linda's or Fran's family to obstruct the plan.
- Fourth, Fran may elect to forfeit her life estate at any time if she no longer wishes to reside in the property. This will alleviate her obligation to pay the carrying costs, and accelerate full property ownership to SAGE.
- Finally, Linda may take advantage of an additional income tax deduction if she transfers the property in this manner during her lifetime, rather than splitting the interests in her Will.

Whenever considering tax-savvy planning, it is essential that a donor covers all of his or her bases. Some things to consider:

- First, it is essential that the donor clearly spell out the responsibilities of each of the two owners: the life tenant and the remainder owner. Traditionally,

the life tenant pays all of the carrying costs for the remainder of his or her lifetime (property taxes, common charges, utilities, homeowners' insurance, etc.) and the parties split the costs of major capital improvements (such as replacing a roof or re-doing a kitchen). It is essential that the document creating the bequest clearly identifies the financial obligations of each party, and that all parties agree to the undertaking beforehand.

- Second, this type of planning works best when dealing with the type of property one can convey with a Deed (such as real property or a condominium). Creating a plan with a cooperative apartment will require board approval and, often, extensive and expensive legal and transfer fees. Co-op boards will often require that the donor escrow several months of maintenance to secure board approval.
- Third, it is essential that the life tenant have an "out" in case he or she no longer wishes to reside in the property. In such a situation, the life tenant should be able to relinquish the life estate and full ownership of the property will immediately vest in the remainder owner.
- Fourth, as discussed above, the non-charitable interest will trigger estate and/or gift tax inclusion for the donor. The overall tax consequences may differ between the state and Federal taxes due to the current discrepancy in marriage equality created by the Federal Defense of Marriage Act (DOMA).

Because of the importance of these issues, I advise donors to retain competent legal counsel of their choosing to ensure no adverse consequences.

This is just one of several examples of how a donor can leave a legacy that

both cares for his or her loved ones while providing for favored charitable causes.



Tom Sciacca is a Trusts & Estates attorney and litigator based in Manhattan. He has also volunteered at the SAGE legal clinic since 2004, currently serves on the Planned Giving subcommittee at SAGE, and is an Investors Circle donor and Taylor Society member. Information current as of March 5, 2012. The contents of this article are for informational purposes only and are not intended to create an attorney-client relationship between the author and the reader. The information contained herein is not a substitute for the individual advice of the reader's own financial, tax, and legal advisors. The contents of this article are not intended to be used, and cannot be used, to evade tax penalties.

Interested in discussing your planned giving with SAGE? Contact C. Nathan Harris at taylorssociety@sageusa.org or 212-741-2247.

SAGENet

Directors from two of our newest affiliates tell us why they decided to join SAGENet and what the future holds for their work in their communities.

SAGE WESTERN PENNSYLVANIA AT THE PERSAD CENTER

Betty Hill, *Executive Director*
www.persadcenter.org

The Persad Center has been in existence for 40 years serving the LGBT communities in Pittsburgh, PA and greater Western Pennsylvania. In 2011, we decided to start a SAGE program to respond to the needs of an increasing number of older LGBT constituents in our region. We wanted to learn and benefit from the experience and network of other SAGE affiliates so that we would be providing our region with the most updated and successful programs and strategies to support LGBT elders.

While we are new to the SAGE family, it already does feel like a family. All of the people associated with SAGE and its 21 affiliates have all been friendly, smart, committed to the work and overall great to work with. It's very inspiring. The energy sparks creativity and that's where solutions to problems are born.

Since we've begun as SAGE Western Pennsylvania, we have been busy raising awareness about the needs of LGBT older adults and getting our local communities to recognize that LGBT seniors are an overlooked part of the LGBT community whose needs often go unmet. Our training programs aim to bring greater awareness to the existence of LGBT elders and the needs and disparities that exist between heterosexual older adults

and those who are LGBT. Recently, we received a grant from our local United Way to help us to build relationships with local mainstream senior service providers to establish a strategic plan to implement culturally competent LGBT senior services in the region.

SAGE CENTRAL VIRGINIA RICHMOND, VA

Cindy Bray, *Program Director*
www.gayrichmond.com

A little over a year ago, SAGE Central Virginia was just a thought or an idea. In 2010, Jay Squires, President of the Gay Community Center of Richmond (GCCR), came back from Creating Change with a packet of information about SAGE and a desire to create a SAGE affiliate in Richmond, VA. Concurrently, Shannon Marling, a master's student in the Gerontology Program at Virginia Commonwealth University, came to us with a proposal to start a SAGE program. Wow! Synchronicity!

We held an inaugural SAGE Gala to celebrate our official status as SAGE Central Virginia. The gala was free and public, and had several goals: to introduce the community to SAGE; involve our local community; raise money for the programs and services we would be offering; and most of all, be as accessible to everyone as SAGE itself would be. A large pool of businesses, organizations, politicians and individuals were brought together as sponsors of the gala through the efforts

and outreach of our steering committee, and over 200 people attended to support us. Our speakers included Virginia Representative Jennifer McClellan; Dr. Thelma Watson, Executive Director of our local Area Agency on Aging; Patrick Johnson, the diversity chair for AARP of Virginia; Kathy Carmody, the GCCR Board Chair; Jay Squires, GCCR President; and committee co-chairs Shannon Marling and myself. Entertainment was provided by local musician Roddy Barnes and the local women's chorus. What an evening!

Since our humble beginnings, we have spearheaded a number of programs and activities, ranging from meeting at a local restaurant for brunch or dinner, wine and cheese receptions, and a monthly "SAGE Night at the Movies." We have also started a monthly speaker series for our constituents to find out more about topics such as legal and financial issues, dementia and Alzheimer's, Social Security and grief and loss.

Our future projects include partnering with the Virginia Commonwealth University for cultural competency training, and we have two trainers certified to teach Stanford University's Chronic Disease Self-Management Course curriculum! Finally, we work tirelessly to strengthen our partnerships with local aging services agencies. If you want to keep up with us as we grow, sign up for our newsletter by emailing Cindy.Bray@LGBTRichmond.net or follow SAGE Central Virginia on Facebook!

SAGENet Members

NORTHEAST REGION

SAGE Long Island
sageli.org

SAGE Hudson Valley
lgbtqcenter.org

SAGE Hudson County
hudsonpride.org

SAGE Philadelphia
waygay.org

**SAGE of the
Genesee Valley**
gayalliance.org

SAGE Upstate
sageupstate.org

**SAGE Western
Pennsylvania**
persadcenter.org

**SAGE Western
Massachusetts**
sagemw.org

MIDWEST REGION

SAGE Center on Halsted
centeronhalsted.org

SAGE Metro St. Louis
sagemetrostl.org

SAGE Milwaukee
sagemilwaukee.org

SOUTH REGION

SAGE CenLa
sagecenla.org

SAGE of South Florida
sagewebsite.org

SAGE Atlanta
sageatl.org

SAGE Metro DC
thedccenter.org

SAGE Central Virginia
gayrichmond.com

WEST REGION


SAGE Olympia
sageolympia.org

SAGE of the Desert
thecenterps.org

SAGE of the Rockies
gltcolorado.org

SAGE Utah
utahpridecenter.org

SAGE Metro Portland
friendlyhouseinc.org/
programs/gay-and-grey/

 SAGENet affiliates provide programs and services to LGBT older adults in various parts of the country. To learn more about SAGENet, including how to become a SAGE affiliate, email us at sworthington@sageusa.org

BUILDING A NATIONAL BOARD OF DIRECTORS

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I've been involved in politics as well, which can help SAGE. I've been president of the Lesbian and Gay Lawyers Association of Los Angeles and a cooperating attorney with Lambda Legal and the ACLU of Southern California—lawyers can be helpful! And I'm a parent. I've been an activist in my son's life, probably more than he wishes, but this gives me a perspective and ties to the community that broadens the reach of SAGE.

Any other thoughts for SAGEMatters readers? I'm really honored to be on the board. In the short time I've served, I've been impressed with the dedication and talent of my fellow board members and the staff and what they bring to these issues.

Bill Weinberger is a shareholder at the Los Angeles law firm Parker, Milliken, Clark, O'Hara & Samuelian, specializing in complex business and real estate litigation, and employment law. Weinberger has long been involved in LGBT community work; his many roles include co-founding the National LGBT Bar Association, and serving on the boards of the L.A. Gay and Lesbian Center and Gay and Lesbian Alliance Against Defamation (GLAAD), for which he was also treasurer.

NEW SAGE BOARD AND STAFF MEMBERS

The staff and board members who have joined our growing team at SAGE over the last few months.

NEW BOARD MEMBERS

DR. MAGDA HOULBERG

DR. CHARLES R. MIDDLETON

ROY INMAN

*Administrative Assistant
The SAGE Center*

NEW STAFF MEMBERS

CYNTHIA DIAO

Harlem Outreach Worker

AL ROSENBERG

*Food Service Coordinator
The SAGE Center*

PATRICIA FRASER

Harlem Program Assistant

SARAH SAVINO

*Manager
The SAGE Center*

JACOB FRIED

Database Manager

JODY WEST

Chief of Staff

REBECCA HEISLER

*Program Coordinator
The SAGE Center*

SAGE Programs & Services

SAGE offers dozens of activities, groups and programs that encourage LGBT older adults to stay connected with each other and the community. With offices across New York City, we provide an array of English and Spanish-speaking programs, including:

SUPPORT GROUPS

Bereavement
Coming Out Later in Life
Multiple Sclerosis
Men's Coming Out
Gay Widowers

SAGE POSITIVE

Case Management
SAGE HIV Group
HIV Prevention/Education
Harlem Men's HIV Group

COMMUNITY SERVICES

Arts and Culture Programs
Booklovers Discussion
Discount Theatre Tickets
Morning at the Opera
Tuesday Discussion Group
Conscious Creative Aging
Life Issues Beyond Retirement
Men's 40+ Discussion Group
Men's 50+ Discussion Group
SAGE Singers
75+ Senior Elders Group
Walk-in Cyber Center
Women's 55+ Discussion Group
Volunteer Orientation

CAREGIVERS

Respite Support Group
Financial Help
Friendly Visiting
Home Care
Lend-A-Hand

SAGECAP – CARING AND PREPARING INITIATIVE

SOCIAL & WELLNESS

Baby Boomer Programs
Bridge
Brunch
Bus Trips
Memorial Service
Daily Drop-In
Dating and Relationship Programs
SAGErcise
Gay Pride Celebrations
History & Heritage Programs
Holiday Parties
Intergenerational Programs
Health Fair for LGBT Older Adults
Uptown Neighbors Group
SAGE Socials
Walks/Outings
Women's Dances
Women's Programs

INFORMATION PROGRAMS

Benefits Counseling
Drop-in Community Meetings
Health Information Clinic
Health & Wellness Programs
Legal Clinic
Money & Finance Programs
Outreach and Tabling

LIFELONG LEARNING

Computer Classes
Creative Writing Classes
Foreign Language Classes
Art, Film & Theatre Classes

SAGEWORKS

Orientations
Monthly Seminars
Computer Classes
Coaching Sessions
Resume Assistance

HARLEM

Bilingual Benefits Counseling
Bilingual Legal Clinic
Buddy-2-Buddy
Computer Classes
Women's Groups
Cultural & Social Programs
Men's Groups
Men's HIV Support Group
Latino Men's Support Group
HEAT (Harlem Elders Aging Together) Meetings
Women's Bilingual Discussion Group
Nurse Practitioner

SAGE OFFICES

THE SAGE CENTER

305 Seventh Avenue
15th Floor
New York, NY 10001
646-576-8669

SAGE COMMUNITY SERVICES

208 West 13th Street
Room 207
New York, NY 10011
212-741-2217

WALK-IN HOURS

Monday-Friday, 2 pm -5 pm

SAGE HARLEM CENTER


2090 Adam Clayton Powell, Jr. Boulevard
Suite 201, 2nd Floor
New York, NY 10027
646-660-8953

WALK-IN HOURS

Fridays, 2 pm -8 pm

SAGE SOCIAL SERVICES

305 Seventh Avenue
6th Floor
New York, NY 10001
212-741-2247

 For a full listing of SAGE activities, including a calendar of events, please visit us at sageusa.org.



305 Seventh Avenue, 15th Floor, New York, NY 10001 ■ 212-741-2247

sageusa.org ■ facebook.com/sageusa

twitter.com/sageusa ■ youtube.com/sageusa

NATIONAL OFFICES:

NEW YORK

CHICAGO

WASHINGTON DC

HARLEM