

THE MAGAZINE OF SERVICES & ADVOCACY FOR GLBT ELDERS

sageSM

Matters

Winter 2015

**THE CASE FOR
AFFORDABLE
LGBT OLDER
ADULT HOUSING**

**WHITE HOUSE
CONFERENCE**

**NEW REPORT ON
SUCCESSFUL AGING**

**SUPPORTING
LGBT ELDERS**



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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MESSAGE FROM THE EXECUTIVE DIRECTOR

It's the beginning of a new year—and as this recent issue of *SAGEMatters* demonstrates, SAGE continues to launch initiatives that transform the lives of LGBT older people nationwide!

Of foremost importance is the launch of SAGE's National LGBT Elder Housing Initiative, a nationwide, multi-year initiative to ensure that millions of LGBT older people are able to access LGBT-friendly housing. A growing body of research—and SAGE's experience nationwide—decisively demonstrates how difficult it is for LGBT older people to find appropriate housing. For example, a national study last year documented that an astonishing 44% of LGBT older people applying for "senior housing" face discrimination just because of who they are. Moreover, LGBT older people lack legal protections that could address this discrimination. This housing crisis is exacerbated by the fact that many LGBT older people enter their later lives with smaller support systems and diminished financial security. In this issue, we discuss how SAGE and our national partners will correct this gross inequality—by building housing, training housing providers, changing policy, educating consumers and expanding services. The time for this coordinated national initiative is now.

SAGE's positive impact on the day-to-day lives of LGBT older people across the country has never been more apparent. One of our recent studies documented why SAGE's mission is so important. In October, SAGE released *Out and Visible: The Experiences and Attitudes of Lesbian, Gay, Bisexual and Transgender Older Adults, Ages 45-75*. This seminal research report details findings from a uniquely comprehensive, national study of LGBT older people, led by Harris Poll on behalf of SAGE. It found that LGBT older people face endemic levels of discrimination in housing and among health care providers, report increasingly smaller support networks, and are deeply distressed about when or whether they can retire (among other findings). SAGE's study significantly expands the knowledge on this subject—and serves as a call to action to health and aging providers, as well as leaders in the public and private sectors to create LGBT-friendly and responsive services, products and programs.

This fall we also saw the continued leadership of SAGE and SAGE affiliates. In October, SAGE leaders from 27 affiliates in 20 states and D.C. gathered to discuss the best ways to support LGBT older people in their diverse communities. In New York City—home to SAGE's national headquarters—SAGE is in the midst of a dramatic expansion of our programs to address the needs of all LGBT elders no matter where they live. We're working with partner organizations across New York—including GRIOT Circle, the country's leading organization dedicated specifically to the needs of LGBT elders of color. We're proud to profile GRIOT's critically important work and our partnership in this issue of *SAGEMatters*. We're also proud to have recently launched SAGEDay, a collaboration between SAGE and Hebrew Home at Riverdale that will offer intensive activities to frail and largely homebound LGBT elders who otherwise would be isolated at home or forced prematurely into institutional care. And we recently premiered SAGEVets, a path-breaking initiative that will help LGBT elder veterans access the essential benefits they deserve but have been denied for decades. Here at SAGE, we've packed a lot of important advances into the last few months, and a lot is packed into this latest issue of *SAGEMatters*. Together, we are truly changing the landscape for LGBT older people across the country!



Michael Adams, *Executive Director*



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THE CASE FOR AFFORDABLE LGBT OLDER ADULT HOUSING:

A National Crisis and Five Keys to a Solution.

Sofia Torres loves New York City. The 69-year-old Nuyorican lesbian was born in Puerto Rico but moved here as an infant and remembers it as the first place she was able to fully express herself as a young gay woman. It's the place where she forged some of her earliest and strongest friendships, broke gender barriers to build a career in construction, and served as a volunteer for New York City's Pride Parade.

Despite all this, when Sofia was offered a job in Las Vegas, Nevada in 2001, she decided to take a chance. She gave up a rent-controlled apartment in Astoria and relocated for the job, only to find herself laid off twelve years later. She missed New York's LGBT community, so she headed back to the City to start over. When she arrived, she was shocked at the cost of housing, and struggled to find work. Both health and financial issues took a heavy toll, and after months staying with friends she reluctantly moved into a shelter, where she has lived since May of 2014. While she's happy to have a home, she's experienced homophobia from shelter staff, and finds the lack of privacy and independence demoralizing.



She's considered moving to a city where housing is less expensive, but feels unsure that she'd be safe as an out lesbian in a more affordable community. Ultimately, Sofia worries that she may have to choose between safe, affordable housing, and an LGBT-friendly community—a challenge that, understandably, stirs deep emotions for her. "New York embraces everyone—this city is a comfort zone for gay people," she remarks. "With all the money in this



Sofia Torres with SAGE case worker Bill Mendez.

city, we should be able to give LGBT people a place that we can call our own where we don't have to feel threatened. We need our own space to lay our heads and be with our own people."

Sofia's story is an example of a larger crisis taking place in communities across the country—a challenge that's heightened for LGBT people as they age. According to a 2014 study conducted by the real estate company Trulia, rents increased faster than salaries in all of the 25 largest metro areas over the past year*. For older renters living on fixed incomes—particularly those who have mobility issues, or who need to stay close to their doctors and family members—these statistics can translate into frightening realities.

LGBT older adults face another set of challenges that exacerbate their struggle for safe, affordable housing. As studies have shown, lifelong discrimination in the workplace has led to economic insecurity for many LGBT older adults, who often also lack the social safety net provided by biological children. And LGBT older adults are much more likely to suffer from costly and often debilitating health issues like HIV, diabetes, and depression, making the cost of housing even more burdensome. Discrimination can create further barriers—SAGE's recent report

found that 25% of transgender older adults had faced discrimination in a housing search, and a recent test of housing searches conducted by the Equal Rights Commission found that LGBT people experienced differential treatment in 48% of test cases.

Fortunately, these challenges are beginning to receive national attention and related interventions. One prominent example is the new crop of affordable housing solutions for LGBT older adults that are beginning to appear. To name a few: the Triangle Square housing complex in Los Angeles, which encompasses more than 100 units for low income seniors; Chicago's Town Hall housing project, (a project of Center on Halsted, a SAGE affiliate) which offers 79 housing units;

and in Bay Shore, Long Island, a planned community of 50 affordable rental units.

In 2015, SAGE will join this forward-thinking cohort when it begins working with HELP USA to create the first New York City housing development for LGBT older adults (see below for more). This project is part of a multi-pronged national LGBT elder housing initiative that, in addition to sharing models for building housing developments, will also: train housing providers on the needs of LGBT older people; work to change public policy to create LGBT-inclusive supports; educate LGBT older adult consumers on how to navigate housing; and promote best practices in services and programs that support LGBT older people with their housing challenges.

With the help of SAGE social worker Bill Mendez, Sofia Torres has now secured a place on a waiting list for New York City's much sought-after affordable housing. But no one can say whether, or when, she'll find a place. Sofia sees that many of her peers also struggling, and remarks that she wants "all older LGBT people to know that the place where we put our key in the door is a safe haven." It's a goal that SAGE will be working toward in the months and years to come.

* *Despite Home Price Slowdown, Wages Can't Keep Up With Prices*, by Jed Kolko. Trulia Trends, July 10, 2014

LGBT ELDER HOUSING IN THE BRONX

With notoriously high rents and low vacancy rates, New York City's housing market is one of the most competitive in the country. With this in mind, SAGE has begun work on New York City's first affordable LGBT older adult housing project. Our priority focus for this first foray is the Bronx, New York City's poorest borough. SAGE is partnering with HELP USA (Housing Enterprise for the Less Privileged) on this project, a non-profit dedicated to providing housing and supportive services for the homeless and others in need. The project will advance an explicit goal outlined in New York City Mayor Bill de Blasio's new 10-year plan to create and preserve affordable housing for LGBT older adults throughout New York City.

THE IMPORTANCE OF LGBT ISSUES AT THE 2015 WHITE HOUSE CONFERENCE ON AGING

While we live in an historic time regarding LGBT rights, the aging network lags in meeting many of the basic needs of LGBT and HIV-positive older adults. The upcoming White House Conference on Aging, expected to take place in July 2015, presents a unique opportunity for the White House to shine a light on the barriers and the success stories that can compel successful aging for our community. The White House has announced four priority areas for the conference, all of which resonate with SAGE's focus on LGBT older people, as well as older adults with HIV.

RETIREMENT SECURITY

Many LGBT and HIV+ older adults face high rates of poverty and reduced retirement security. In particular, research shows high poverty rates among LGBT people as they age, which are the result of various factors, including higher rates of being uninsured and a lifetime of employment discrimination. LGBT older people also have thinner family and social support networks, compounded by a lack of access to marriage (in many states), increased likelihood of being single, lower likelihood of having children, and estrangement from families of origin.

HEALTHY AGING

LGBT older people face pronounced health disparities across areas related to physical



SAGE Executive Director Michael Adams, Matthew Heinz, HHS Director of Provider, LGBT Outreach, Vicki Gottlich, Director, Center for Policy and Evaluation, Administration for Community Living, at the Diverse Elders Coalition Congressional Briefing on the Affordable Care Act.

and mental health. Many delay care out of fear of discrimination from health providers, which means that illnesses go undetected until crisis hits. A lack of cultural competence regarding LGBT people, in particular transgender people and their health needs, create serious barriers for many LGBT older adults. While one in two people with HIV in this country are age 50 and older, research and experience shows that few aging and health professionals are equipped to address the unique needs of HIV+ older adults (see the next page for more on these issues).

LONG TERM SERVICES AND SUPPORTS

The 1993 Family and Medical Leave Act (FMLA) allows eligible employees to take

12 weeks of leave from their jobs without pay for family and medical reasons. With the *Windsor* decision in place (the Supreme Court case that cleared the way for the federal government to recognize same-sex marriages), the Department of Labor (DOL) announced in August 2013 that it would recognize same-sex marriages, but only those of couples who live in a state that recognizes their marriage. In June of this year, the DOL announced a proposed “place of celebration” rule, meaning regardless of where a couple lives or moves, the DOL would recognize that same-sex marriage for FMLA purposes. If and when the rule becomes final, it would ensure that

Continued on page 7

SAGE'S PROGRAMS TO IMPROVE HEALTH AND WELLNESS FOR LGBT OLDER ADULTS

On a recent Thursday morning, a dozen SAGE participants gathered for a seated fitness class in a sunny common room. The group stretched, bended and turned, energized by a soundtrack of 1980's pop classics and upbeat instructions from instructor Bonnie Fedge—all without leaving their chairs. It was an important opportunity for SAGE participants with limited mobility to build strength and flexibility, and a great example of SAGE's commitment to health and wellness.

SAGE's health programs around the country are diverse in content, audience, and location, but all address the health disparities experienced by LGBT older adults. A 2011 national study, *Caring and Aging With Pride*, found that high percentages of LGBT older people struggle with health conditions such as obesity, high blood pressure, cholesterol, cardiovascular disease, diabetes and more. This fall, SAGE's *Out & Visible* research report shed further light on the issue, finding that one in five LGBT older people and nearly half of transgender older people feel that their relationships with their healthcare providers would be adversely affected if their sexual orientations and/or gender identities became known.

There is no one "magic bullet" for the wide-ranging health issues faced by LGBT

older adults, so SAGE has developed a spectrum of programs and services to educate and empower participants around the country. For example, in New York SAGE has developed E-Linc (Elder LGBT Inter-professional Collaborative Care), a collaboration between SAGE and Columbia University's Schools of Nursing, Psychology, Occupational Therapy and Physical Therapy, to provide health and wellness services to SAGE participants. E-Linc will start programming in two Manhattan sites and then expand to other boroughs of the city, with the hopes of replicating across the country. Director of Care

“Our goal with this program is to give people information that will help them take care of themselves and access preventive health services, enabling them to live healthier, longer lives.”

—TOM WEBER, DIRECTOR OF CARE MANAGEMENT

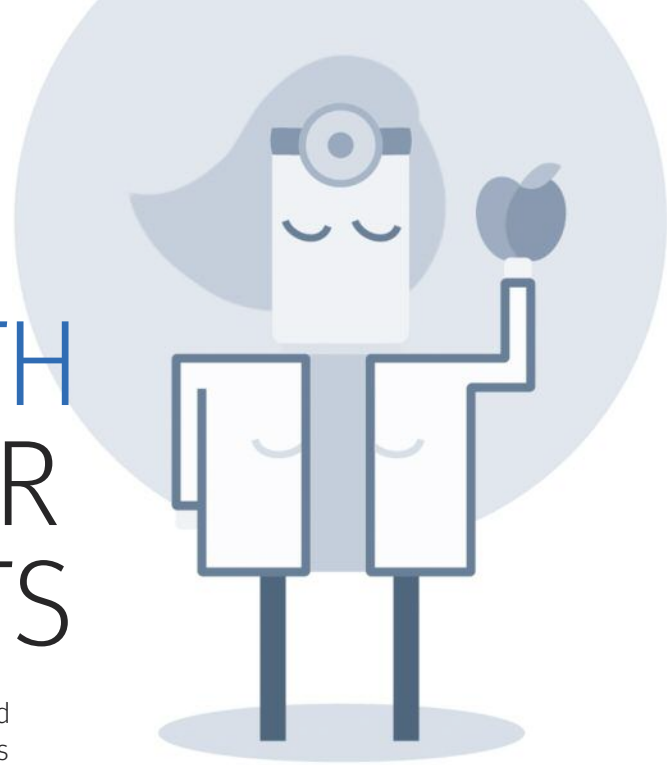
Management Tom Weber says “Our goal with this program is to give people information that will help them take care of themselves and access preventive health services, enabling them to live healthier, longer lives.”

Taking a social approach to healthcare education is another effective strategy.

SAGE's Lunch and Learn programs offer a healthy meal along with a lunch-hour presentation from a local healthcare provider, and plenty of time for questions. These events foster lively dialogues on topics including adult vaccinations, cardiovascular health, diabetes, and more. SAGE recently partnered with Pfizer to develop health education sheets that teach LGBT older people nationwide about adult vaccinations, diabetes, cardiovascular disease, Alzheimer's and dementia. The popularity of these

programs is spreading; participants can now find Lunch and Learn events at SAGE sites in New York, Colorado and Missouri.

SAGE's health programs also engage our community's caregivers. Founded in 2009, our SAGECAP (Caring and Preparing) program helps caregivers navigate their current and future needs.



SAGECAP addresses LGBT-specific issues in caregiving relationships, including the fact that LGBT older adults are 3-4 times less likely to have children, and are therefore frequently cared for by peers, who are also older, as well as challenges created by healthcare laws and policies that prioritize legal and biological family. Beginning in 2015, the SAGECAP program will be replicated at the Chase-Brexton Community Health Center in Baltimore, Maryland, providing counseling and support groups, educational seminars, assistance with benefits and entitlements, respite care and assistance for caregivers. Because Baltimore does not currently have services tailored to LGBT older people, the SAGE-Chase Brexton initiative will radically change the landscape for this underserved

community. Participants will have ample opportunity to provide feedback and input to ensure that the program is responsive to the community's specific needs.

SAGE is also playing a role in ensuring that LGBT older adults are able to enroll for healthcare coverage via the online healthcare marketplace. Through a partnership with Mercer Healthcare, SAGE is offering online tools to simplify enrollment, both for individual coverage and Medicare.

Being LGBT shouldn't be a risk factor for diminished health as we age. Through these comprehensive programs addressing both mental and physical health, SAGE is working with caregivers and participants alike to create healthier futures for LGBT older people.

WHITE HOUSE CONFERENCE ON AGING

Continued from page 5

LGBT individuals who take professional leave to care for a sick spouse will enjoy job security—and a little more peace of mind.



Ben de Guzman, National Managing Coordinator, Diverse Elders Coalition and Michael Adams.

SAGE HARLEM INVESTORS CIRCLE

We are honored to recognize the following individuals and institutions for their visionary support of our programs, services, and facilities in Harlem, and who are champions for the LGBT elders of color who we serve.

FOUNDING SPONSORS

Reginald Van Lee
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Kenneth A. Smaltz
George Walker

ELDER JUSTICE

Research shows that LGBT older people frequently encounter elder abuse from friends and family members, as well as staff and other residents in long-term care settings. Unfortunately, they are less likely to report this abuse out of fear of further discrimination or out of fear of being “outed.” As with all elder abuse, the abuse of LGBT older people can be mental, financial, physical or sexual, and it can take place in the home, in a hospital, in a long-term care facility or any other setting.

SAGE will work with our national partner organizations over the next few months to ensure that the White House uses this important platform to advance the rights of LGBT and HIV+ older adults.

NATIONAL PROGRAM UPDATE

In late 2013 and throughout 2014, SAGE engaged in a national outreach campaign with Senior Medicare Patrols (SMPs) across the country. These grant-funded groups empower and assist Medicare beneficiaries, their families, and caregivers to prevent, detect, and report health care fraud, errors, and abuse—issues that can result in higher out-of-pocket costs for beneficiaries. Through outreach, counseling, and education, SMPs served 1 million people across the country in 2013.

SAGE’s role in this work is to help SMP staff and volunteers understand the unique needs of LGBT people, including how to best outreach to LGBT older adults to teach them about fraud

prevention. SAGE teamed up with the SMP National Resource Library to facilitate four web seminars for SMP projects across the country to train them on understanding the needs of

LGBT seniors, and created a toolkit of materials for use when presenting to LGBT audiences. We also engaged with LGBT older adults online through a social media campaign to help draw attention to the issue of fraud prevention.

A wealth of information related to these issues is available online through the National Resource Center on LGBT Aging and SAGE, including these publications:

- **Transgender Older Adults and Medicare Fraud Prevention**
- **Lesbian, Gay, Bisexual Older Adults and Medicare Fraud Prevention**
- **Providing Services to Transgender Older Adults: Tips for SMP Staff and Volunteers**
- **Providing Services to LGB Older Adults: Tips for SMP Staff and Volunteers**
- **Recruiting LGBT People as Volunteers for Your SMP Program**

MEDICARE FRAUD PREVENTION TIP

Beware of offers for "free" medical tests in exchange for a peek at your Medicare card

LGBT older people may be at a higher risk for Medicare fraud. Learn how to protect yourself! smpresource.org | sageusa.org #MedicareFraud

MEDICARE FRAUD PREVENTION TIP

Keep a record of all doctor visits, tests & prescriptions

So you'll know if you're overbilled

LGBT older people may be at a higher risk for Medicare fraud. Learn how to protect yourself! smpresource.org | sageusa.org #MedicareFraud

MEDICARE FRAUD PREVENTION TIP

Never sign a blank form

Always read and keep copies of your signed Medicare documents

LGBT older people may be at a higher risk for Medicare fraud. Learn how to protect yourself! smpresource.org | sageusa.org #MedicareFraud

MEDICARE FRAUD PREVENTION TIP

Never give your card number over the phone

Medicare doesn't make sales calls

LGBT older people may be at a higher risk for Medicare fraud. Learn how to protect yourself! smpresource.org | sageusa.org #MedicareFraud

MEDICARE FRAUD PREVENTION TIP

Always review your Medicare Summary Notice for mistakes

Report mistakes when you find them

LGBT older people may be at a higher risk for Medicare fraud. Learn how to protect yourself! smpresource.org | sageusa.org #MedicareFraud

Q&A WITH NEW SAGE BOARD MEMBERS

SAGE recently welcomed two new members to its Board of Directors, Elizabeth Schwartz and Damian Pardo, both from Miami, FL. Director of Legacy Planning Jerry Chasen asked what motivates each of them—and why they've chosen to support SAGE.

What prompted you to join the SAGE Board of Directors?

ES: As an activist and attorney who has been providing estate planning services to LGBT individuals and couples for 18 years, I hear too often from my aging clients and friends about the homophobic treatment they receive in facilities, and concerns they have about their futures. I want to have a voice for those who might feel too vulnerable to express theirs.

One of those who helped me find my voice in the Movement was my former boss, still-mentor and great friend Jerry Chasen. As a [former] SAGE board member and now a staffer, his passion for the work of SAGE is infectious. Jerry was a major catalyst for me to turn my concerns for our community's older adults into SAGE board service. And I'm very excited about the potential that the Successful Aging initiative has for our community.

DP: My major motivation to join the SAGE Board of Directors was the overwhelming needs of LGBT elders, particularly those living in diverse communities and



belonging to minority populations such as many of those in Miami, FL. LGBT people entering the retirement phase (age 65-75) are often more likely to experience isolation and institutional homophobia in health care and long term care centers. This population and these issues are of a deep and personal concern.

Can you describe the importance of SAGE's mission to your life?

ES: Having just spent the better part of a year caring for my beloved father before he passed away, I'm more committed than ever to seeing that our elders receive the love and attention—enjoying the same dignity that my dad had and which they deserve—until their last breaths.

And if we play our cards right, we'll all enjoy a long justice-filled life, which ends peacefully and with the support of caring friends, family and community.

DP: I believe the more you give, the more you learn and grow. By helping foster a continuum of care for LGBT elders

through advocacy and services, I am helping to better the quality of life for the LGBT community at a time when people can be at their "wisest," most colorful, but also most vulnerable age. Being able to make a difference during the latter stage of life really adds to my experience of serving the LGBT community in a unique and powerful way.

What do you hope to accomplish as a board member?

ES: As we get closer to nationwide marriage equality, I'd like to bring more supporters to the table who, while not "SAGE age" themselves yet, recognize that much of the progress our community enjoys today was made possible thanks to our older adults. We need to be sure the systems are in place to take proper care of these heroes. I want to inspire more people to take up advocacy for elders as the Next Big Gay Issue.

I also want to be a part of bringing SAGE's training and support services to benefit more South Floridians.

DP: I hope to help raise funds to support the organization's mission, but also provide linkages that may help the organization grow and thrive. In particular, I hope to provide avenues to, and awareness and understanding of, the Hispanic/Latino community.



THANK YOU

TO OUR CORPORATE VOLUNTEER TEAMS!

SAGE's success is made possible by so many people. As we look back on 2014, we want to recognize and thank our remarkable corporate volunteers. These concerned and dedicated members of our community bring time, talent, and passion to their work. They are dedicated to SAGE's mission and eager to partner with us to ensure that LGBT older adults

across the United States age with dignity and respect.

Corporate volunteer contributions take many different forms: serving hot meals to SAGE members, hands-on logistic support at regional events, conducting workforce development workshops through our SAGEWorks program

and donating pro-bono services like marketing consultation.

Recently we asked some of our corporate volunteer partners "What does working with SAGE mean to you?" Here are a few of their replies, as well as a full list of our 2014 corporate volunteers. Each has helped to make this year extraordinary.

"At Grey, we believe in giving back to the communities where our people live and work. In New York, we are inspired by SAGE and its mission to improve the lives of LGBT older adults. From providing pro bono services to volunteering, we seek to leverage our unique professional talents and skills, our passion, our time and our resources to make an impact where it matters most to SAGE."

CHRIS ROSS, PARTNER,
GREY ADVERTISING

"At BlackRock, getting out and building a strong connection with the community and clients we serve is core to our culture. It's been extremely rewarding for all of us to get involved with SAGE on a personal and professional level."

JEFFREY KERN, VICE PRESIDENT/U.S.
RETIREMENT GROUP

"The families of today reflect more than ever the great diversity that defines America. As a leading provider of long term care insurance, we are dedicated to helping ALL families start the conversation now about the need to plan for care needs later in life. There is a natural fit between our mission and SAGE's."

JANET GALE, DIRECTOR, THOUGHT LEADERSHIP,
GENWORTH

"OPEN Finance is proud to work with SAGE in serving LGBT older adults, by lending our members' financial know-how and hands-on support to SAGE's clients. OPEN Finance looks forward to a continuing relationship with SAGE so that we can leverage SAGE's programs, training and education materials geared toward the LGBT community, and make community service programs available to our participating firms."

AUBREY SAUNDERS, OPEN FINANCE'S COMMUNITY SERVICES COMMITTEE MEMBER, VICE PRESIDENT, BANK OF NEW YORK MELLON

"JPMorgan Chase is proud to be supporting SAGE's tremendous work of providing essential services to LGBT elders and their allies nationwide. We look forward to continued collaboration in the coming year!"

PAT DAVID, GLOBAL HEAD OF DIVERSITY AND INCLUSION, JPMORGAN CHASE

"The vision of dbPride, Deutsche Bank's LGBT Employee Networking Group, is to lead, engage, and drive a more authentic and inclusive culture for all. This team strives to be an advocate for inclusion both within our walls as well as outside. This summer we had the opportunity to volunteer at a dinner service and engaged with SAGE's constituents directly. We were proud to support our community and put our values and beliefs into action. As co-Chair of this group, I look forward to our continued support of SAGE's growth as they expand throughout New York City."

FALON BECKER, VICE PRESIDENT OF TALENT ACQUISITION AND CO-CHAIR OF dbPRIDE

"SAGE has been a long-term partner to Credit Suisse's LGBT Open Network. This relationship grew out of our mutual dedication to improving the lives of lesbian, gay, bisexual and transgender people. We aim to enlighten and enliven the quality of life for the LGBT community in the United States, both now and in the future."

NICOLE DOUILLET AND DOUGLAS NIETERS,
CO-CHAIRS, CREDIT SUISSE LGBT OPEN NETWORK

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CAMPAIGN FOR THE HERBERT I. COHEN LIBRARY LENDING PROGRAM

SAGE is pleased to recognize following individuals who have paid tribute to the memory of Herbert I. Cohen — former board member, founding member of the SAGE National Leadership Council, and beloved friend—to name the SAGE Center library lending program in his honor.

\$5,000 AND UP

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Saul Zalkin

SUPPORTING LGBT ELDERS OF COLOR

Q&A with Katherine Acey

Executive Director, GRIOT Circle

As part of our citywide initiative to expand services and supports to LGBT older people, SAGE is partnering with organizations throughout the city with deep experiences, histories and roots across communities. Headquartered in Brooklyn, and serving people throughout New York City, GRIOT Circle is “an intergenerational, culturally diverse, community-based organization serving the needs of LGBT and questioning elders of color over the age of fifty.”

We recently spoke with GRIOT Circle Executive Director Katherine Acey to

understand its vital role as an LGBT elder of color organization—and what to know about its diverse population.

GRIOT Circle was founded in 1996. Regina Shaver was the founder and executive director of GRIOT Circle until her passing in February 2008. Tell me how the community remembers her?

The community admired Regina for her ability to take action and for her foresight in reaching out to others who shared the

desire for an organization dedicated to LGBTQ elders of color. She possessed great warmth and a special ability to coalesce people and encourage folks to take ownership of the change they wanted to create by forming GRIOT. Regina was a life force and a shining light for many activists—older and younger.

What were some of the issues facing LGBT elders of color in New York City in 1996? What has changed and what has remains the same? The major needs have not changed. Some of the big ones like economic security, affordable housing and culturally sensitive programs for LGBTQ elders still demand attention. Eighteen years ago there was no organization dedicated to elders of color



or a place where folks felt fully affirmed and seen. Members then and now refer to GRIOT as a “safe haven” or “community home.” Senior centers today have made progress and SAGE is a prime example of how to provide space, service, advocacy and leadership for LGBTQ elders. We all still have a long way to go in providing adequate culturally sensitive programs for LGBTQ elders of color that don’t treat the community as an add-on or afterthought.



Sandi Hines, Chancer Lloyd, Katherine Acey and Liz Boyd tableting at Bed-Stuy Pride.

Can you describe the role that GRIOT Circle plays for LGBT elders throughout the city? Everyday GRIOT Circle strives to provide a culturally relevant gathering place where members can receive assistance, participate and help shape programs that meet their needs, affirm their life experiences and acknowledge their strengths. One of GRIOT’s key roles is to facilitate community building so that fear and isolation are alleviated.

What are some of the characteristics and life experiences among the LGBT elders of color that GRIOT Circle engages? What should the aging field know about this diverse population? Our members are lively, engaged and diverse in many ways.

Left Photo: GRIOT Circle members participate with LGBTQ youth during Audre Lorde’s “Dare to Be Powerful” Training.

Right Photo: Eugene Edghill (center) celebrates Bed-Stuy Pride.

Photos: GRIOT Circle.

GRIOT Circle’s name is based on the West African word “griot” (pronounced gre-o, gre’o, gre’ot), which refers to a musician or storyteller who perpetuates the oral tradition and history of a village or family. We have adapted the word and extended its meaning into an acronym meaning Gay Reunion in Our Time.

Many are leaders; some are activists who continue to fight for equality and justice in many arenas. They’re family to each other and embrace those who enter the GRIOT for the first time. Folks at GRIOT offer much advice—it’s a lively group! One thing they emphasize is: “Don’t see elders of color simply as labels. As people of color (and queer people) we have been labeled and placed in boxes all our lives.” GRIOT members want to be seen as whole human beings who share both different and similar concerns, challenges and victories when it comes to aging.

What are you most excited to see develop in regards to this partnership?

We’re looking forward to having additional funding and help to reach a larger audience. It’s a timely opportunity to accelerate the expansion of some of the programs we have long wanted to do. We’ll benefit from areas of work SAGE has successfully implemented. Each organization brings different experience to the partnership that will inform our work.

Ten years from now, what do you hope will be different for LGBT elders of color in New York City? Over the next decade our hope is to be recognized as our own agents in all discussions, policies, and funding and not viewed simply as the “target” population. Too often “to empower” has meant to make us like the dominant group(s). For GRIOT, “empower” means for our members to have agency in creating the outcomes that support our dignity as whole human beings.

Look for further interviews with our organizational partners in future issues of SAGEMatters.



PAYING IT FORWARD: NEW OPTIONS FOR PLANNED GIVING TO SAGE



If you happened to be poking around SAGE's website in December, you may have noticed that the pages devoted to Planned Giving and the Taylor Society, SAGE's legacy group, have multiplied! These expanded pages offer some extremely useful tools and information to assist with your financial and estate planning.

For starters, everyone can benefit from SAGE's Personal Estate Planning Kit, found on the "Planned Giving, Taylor Society" landing page (accessed under "Ways to Give" from the SAGE home page, www.sageusa.org). The kit consists of two parts. One is a Lesson Book containing five essential lessons on creating an effective estate plan. The lessons provide lots of great information about planning, definitions, processes, and choices.

The other part of the Personal Estate Planning Kit is a Record Book, which helps organize all of the information necessary to put together an effective plan. This information includes your assets and the way those assets are titled, the people who are likely to figure

in your plan as beneficiaries, executors or trustees, and any special relationships you may have with particular organizations and institutions. You can print it out and enter information manually, or better yet, download the record book and complete it digitally. When created digitally, the record book automatically totals the assets.

If you're considering purchasing a CGA or Charitable Gift Annuity (see the side panel for more information on CGA's), there's another tool that helps calculate your benefits. All you have to do is input your age, the amount you'll use to fund the annuity, whether the annuity will be for one person or two, and whether you're going to use cash or appreciated assets to purchase the annuity. With this information, the program will

automatically determine your potential charitable deduction, the amount of yearly payments for life, and the estimated amount that SAGE will receive at your death.

People often think that planned gifts are very complicated. To dispel that myth, we've got a series of educational videos available at sageusa.mylegacygift.org that are both educational and entertaining. Here's a list :

- [Charitable Bequest / A Gift from your Will or Trust](#)
- [Beneficiary Designations / A quick and easy way to make a BIG Difference](#)
- [Charitable Gift Annuity / The Gift that Gives Back](#)
- [Retirement Plan Assets / A Smart Way to Give](#)
- [Life Insurance / An Ingenious Way to make a Heroic Gift](#)

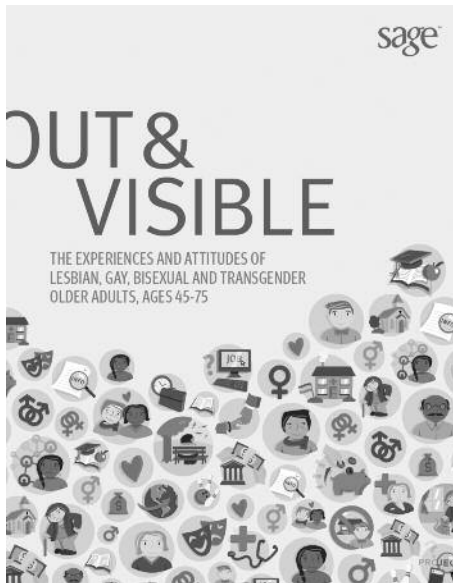
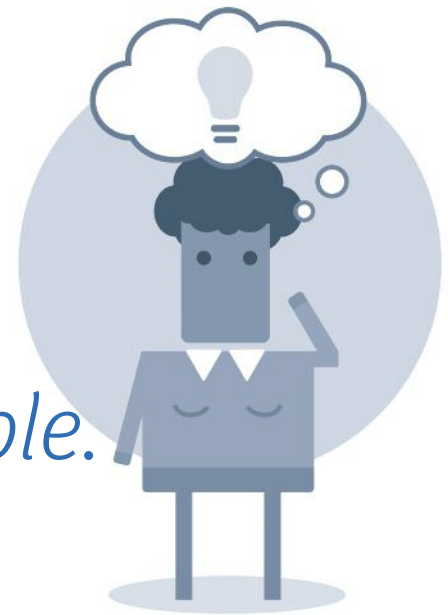
Throughout the site, you'll find free downloadable brochures that are easy to follow. We hope you find these useful and informative.

WHAT IS A CHARITABLE GIFT ANNUITY?

A charitable gift annuity is a binding agreement wherein a financial contribution to an organization (in this case, SAGE) is made in exchange for payments which are distributed on regularly for the rest of the lives of one or two beneficiaries. When these beneficiaries are deceased, the balance of the money originally contributed is paid to SAGE.

Do you have questions about planned giving? Contact Jerry Chasen, SAGE's Director of Legacy Planning, at jchasen@sageusa.org.

Successful Aging: Reflecting on Findings from SAGE's New Report, *Out & Visible*.



By focusing on five specific themes—*Reflection, Momentum, Wellness, Preparation, and Legacy*—SAGE supports the LGBT community in making choices that ensure successful aging, which we define as:

- **Charitable Bequest / A Gift from your Will or Trust**
- **Beneficiary Designations / A Simple Way to Make a BIG Difference**
- **Charitable Gift Annuity / The Gift that Gives Back**

This past September, SAGE released its groundbreaking report “*Out & Visible: The Experiences and Attitudes of LGBT Older People, Ages 45-75*.” The report details findings from a national study that SAGE commissioned to understand LGBT older people’s experiences with healthcare, finance and retirement, housing and more. This eye-opening study sheds light on many of the same issues addressed in our new Successful Aging Initiative, which encourages people to create rewarding and engaged lives for themselves as older adults—to ensure that they age successfully. Successful Aging provides lessons and resources to imagine a vibrant life at any age, one in which we also live and leave behind meaningful personal legacies.

For example, *Out and Visible* reports: “LGBT older people are far more concerned than non-LGBT older people about their financial security, and also that LGBT older people are more likely than their non-LGBT peers to live

alone and to have smaller support networks.” Successful Aging’s *Preparation* theme encourages the choices that lead to LGBT older adults securing adequate financial resources.

Similarly, the *Wellness and Momentum* themes stress the importance of

maintaining—even improving—physical and mental capacity, as well as engaging in rewarding relationships and activities. Proactive choices in these areas can begin to address the widespread concerns of LGBT older people regarding social isolation and having smaller support networks over time, two key findings in *Out & Visible*.

On a brighter note, *Out & Visible* reports that LGBT people are twice as likely as their heterosexual counterparts to see themselves as mentors. One of the great gifts of being an older adult is a more refined sense of what matters to us as individuals, something encouraged by Successful Aging’s theme of “*Reflection*.” Expressing those values through mentorship

speaks directly to Successful Aging’s theme of *Legacy*: “how we live and what we give.” By giving time and talent, LGBT older adults have the opportunity to contribute to the powerful legacy of human rights that their generation helped advance.



SAGE AT THE WHITE HOUSE. On September 26, in recognition of National Gay Men’s HIV/AIDS Awareness Day, the Office of National AIDS Policy hosted a conference at the White House entitled “HIV among Gay and Bisexual Men: FOCUS. ACTION. IMPACT.” Aaron Tax, SAGE’s Director of Federal Government Relations, was on hand to co-host a breakout session focused on HIV and aging with Dan Tietz, Chief Special Services Officer, Office of the Commissioner, New York City Human Resources Administration.

OUT AND VISIBLE. On October 6, 2014, SAGE released *Out and Visible: The Experiences and Attitudes of Lesbian, Gay, Bisexual and Transgender (LGBT) Older Adults, Ages, 45-75*. The report details findings from a uniquely comprehensive, nationally representative quantitative study on aging among older LGBT people. Highlights included statistics on financial, health and housing concerns, and growing older alone. View the report online at sageusa.org/outvisible.

OUT & EQUAL. Between November 3-6, SAGE staffers participated in Out & Equal, a conference devoted to educating and empowering organizations and corporations on workplace equality. A highlight of the conference was a panel on SAGE’s report, where we shared the findings of our study with other non-profit organizations and major financial and consumer companies.



Infographic detailing key findings from “Out & Visible”

SAGE IN CHICAGO. On November 6, SAGE ventured to the Windy City to salute our Chicago Investors Circle members. Keynote remarks were provided by Chicago board members Charles Middleton and Vicki Raymont, Marcus Boggs of Merrill Lynch, who generously underwrote the event, and Eric Vironet of SAGE West Suburban Senior Services, our newest SAGE affiliate.



From Left: Roderick Hawkins, Michael Adams and Marcus Boggs

Photo: Serena Worthington

SAGE VETS. SAGE celebrated Veteran’s Day with the launch of our SAGEVets program. This pilot program will offer case management services and connect older veterans to lawyers in an effort to fight dishonorable discharges due to “homosexuality” so these vets can receive rightful VA benefits and pensions. While the program will directly benefit LGBT elder veterans in New York, SAGE hopes the program will serve as a model which can be replicated on a national scale.

DEC CONGRESSIONAL BRIEFING. On November 25 the Diverse Elders Coalition (DEC), in partnership with the U.S. Department on Health and Human Services (HHS), hosted a briefing on the Affordable Care Act and diverse elders. SAGE was present as a DEC partner. Our Executive Director, Michael Adams, served as a moderator and provided information on health care challenges faced by diverse communities. For more information on the Affordable Care Act, visit sageusa.org/aca.

SAGE CENTER EXPANSION. On November 13, SAGE participants, staff and friends gathered to celebrate the opening of a new home for SAGE Harlem at the Oberia Dempsey Multi-Service Center! The new location offers three times the space for activities and programming, as well as daily meals. The expansion is part of a City Council-funded initiative to bring SAGE programs to LGBT older adults across New York.



SAGE’s Senior Director of Institutional Advancement, Kenneth Cox, talking about “Out & Visible” at the Out & Equal conference.

Photo: Elise Colomer Grimaldi

SAGEDAY. SAGEDay, a partnership with The Hebrew Home at Riverdale, is New York City’s first comprehensive LGBT-inclusive social adult day program. The program launched with an open house on November 14. SAGEDay is a supervised program for those who could not otherwise access SAGE services, offering health and wellness programs, cultural activities, meals, and more. Learn more at sageusa.org/sageday.



Photo: Kira Garcia

SAGEDay participants at the SAGE Center Midtown.

THANKSGIVING AT SAGE CENTER Continuing our annual tradition, the SAGE Center Midtown opened its doors on Thanksgiving for two lunches. Volunteers, SAGE staff and board members served SAGE constituents a hearty meal.



Photo: Sarah Savino

Thanksgiving Day

SAGE AWARDS. The 19th SAGE Awards & Gala, held on October 20 at Gotham Hall, was the most successful SAGE Awards & Gala to date. The evening proved to be a memorable night with many powerful speeches from our honorees, which included Nancy Mahon as a representative for MAC AIDS Fund, Councilmember Ritchie Torres, Frank Stark and Rosanne Leipzig, MD, PhD.



Photo: Dan Klein



Photos 2-5: Martha Gorfein

1. SAGE Board Members with Executive Director Michael Adams
2. SAGE Board Secretary Kevin Williams and New York City Councilmember Ritchie Torres
3. SAGE Board Co-Chair William E. Weinberger and Nancy Mahon from MAC AIDS Fund
4. Former Board Member Judith Turkel presents Frank Stark with his SAGE Award
5. Rabbi Kleinbaum presents a SAGE Award to Rosanne Leipzig, MD, PhD.



SAGENet affiliate members from across the country pose in front of the Bank of Oklahoma Center's welcome sign to SAGE

Representatives from our SAGENet program—which includes 27 affiliates across 20 states—gathered in late October at the Dennis R. Neill Equality Center in Tulsa, OK for an intense few days of seminars and brainstorming. Participants were excited to gather and share ideas and strategies for better supporting the country's growing number of LGBT older people. Ingrid Davis, board chair for SAGE Utah through the Utah Pride Center, enjoyed her first SAGENet conference after four years of working with SAGE: “It's good to be with folks like me who love the elder community.”

Alzheimer's and other forms of dementia are important topics to LGBT elders. Among lesbians, the disease is a top five health concern, and one in three older Americans will deal with dementia at some point in their lives. These sobering facts were presented to conference participants by Marshawn Brown, national director for diversity and inclusion for the Alzheimer's Association National Organization, and Diane Wood, director of programs for the Alzheimer's Association's Oklahoma Chapter.



Jamie Morton, Oklahomans for Equality Board Member and Marshawn Brown, Director of Diversity & Inclusion, Alzheimer's Association National Organization

A highlight of the meeting for many attendees was the keynote address by Dr. Perry N. Halkitis, a professor of applied psychology and global public health and medicine director for the Center for Health, Identity, Behavior and Prevention Studies at New York University. Halkitis is also the author of *The AIDS Generation: Stories of Survival and Resilience*, which tells the stories of young men who were given a death sentence in the prime of their lives when the AIDS epidemic was in full swing in the late 1980s. Halkitis remarked that in the early days of the epidemic, hundreds of HIV-positive men asked themselves, “If you're going to die within two years, what's the point of going to college?” The answer to this question has had a profound impact as life expectancies for those living with AIDS have improved.



Dr. Perry Halkitis and Serena Worthington of SAGE



John Hawk Co-Cké, leader of the Tulsa Two Spirit Society

Tulsa is home to many Native Americans, which provided local expertise to discuss the issues facing older LGBT Native Americans. John Hawk Co-Cké, leader of the Tulsa Two Spirit Society led a session on this important topic. “Time has a way of reviving the past,” Co-Cké said, noting that a revival of Two-Spirit societies is underway, with more than 13 groups currently active in the U.S.



Serena Worthington presents to SAGENet

Another important topic of discussion was “*Out and Visible: The Experiences and Attitudes of LGBT Older Adults, Ages 45-75.*” This new research report from SAGE describes the values, needs, wants and lifestyle preferences of older LGBT people. Robert Espinoza, the senior director for public policy and communications at SAGE and the report’s author, presented a few of the report’s findings. These include that more LGBT people than non-LGBT people are concerned about having enough money to live on as they age and that four in 10 LGBT people ages 60 to 75 say their health-care providers don’t know their sexual orientations. On the plus side, LGBT people are twice as likely—14 percent versus 7 percent—to see themselves as mentors, Espinoza reported. Participants praised the session, saying the information presented is essential for developing programs and interventions.

In a session titled “Forecasting the Future for LGBT Aging: Six Thought-Provoking Questions,” six SAGE affiliate leaders gave brief presentations on trends that LGBT aging advocates should anticipate and address, including: fostering leadership within organizations to support staff transitions, sexual health elder bullying, the terminology we use to describe aging, transgender inclusion and creating movement momentum post-marriage equality.

SAGENet

NORTHEAST REGION

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

SAGE Hudson County
hudsonpride.org

SAGE Hudson Valley
lgbtqcenter.org

SAGE Long Island
sageli.org

SAGE Maine
sagemaine.org

SAGE Philadelphia
waygay.org

SAGE Rhode Island
sageriinfo@gmail.com

SAGE Upstate
sageupstate.org

**SAGE Western
Pennsylvania**
persadcenter.org

MIDWEST REGION

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centeronhalsted.org

SAGE Cleveland
lgbtcleveland.org

SAGE Metro St. Louis
sagemetrostl.org

SAGE Milwaukee
mkelgbt.org

**SAGE West Suburban
Senior Services**
wsseniors.org

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SAGE Raleigh
lgbtcenterofraleigh.com

SAGE South Florida
sagewebsite.org

SAGE Tulsa
okeq.org

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of the Cape Fear Coast**
thefrankharrfoundation.com/
sage

WEST REGION

SAGE Albuquerque
pflagabq.org


SAGE of the Desert
thecenterps.org

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

SAGE Olympia
sageolympia.org

SAGE of the Rockies
glbtcolorado.org

SAGE Utah
utahpridecenter.org

 To learn more about SAGENet, including how to become a SAGE affiliate, visit us at sageusa.org/sagenet.



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

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