FIERCE 40 YEARS

2018 Annual Report
Contents

2 Message from the CEO

4 SAGE by the Numbers

6 SAGE Celebrates 40 Fierce Years

10 Our Supporters

13 SAGE Financials

As of 5/31/2019
In 2018, SAGE celebrated the 40 Fierce Years of progress that the organization has experienced since our 1978 founding. But as this annual report amply demonstrates, SAGE didn’t treat this landmark anniversary as a moment to rest on our laurels. Instead, the past year has been a time of vital breakthroughs in SAGE’s mission to build a world where all LGBT elders have the opportunities they deserve. In 2018, we demonstrated that we’re building a lasting movement with and on behalf of LGBT older people.

When we think about times of great change—like our country’s Civil Rights Movement—we often focus on headline-grabbing leaders. Over the years, SAGE has had its share of these bright stars, ranging from the dynamic executive director Ken Dawson in our early days to the wise elder icon Edie Windsor, who was one of our most treasured supporters until she passed away in 2017. Though people like Ken and Edie are essential to SAGE’s story, much of what makes a movement succeed are the people behind the scenes whose names we seldom hear and whose photos we rarely see. So, in 2018, we celebrated not only our icons, but also our everyday leaders who have been—and remain—critically important contributors to SAGE’s past, present, and future.

In the early days of SAGE, most of those unsung leaders came from our organization’s birthplace—
In 2018, we celebrated not only our icons, but also our everyday leaders who have been—and remain—critically important contributors to SAGE’s past, present, and future.

New York City. One of the ways that we marked their legacy in 2018 was by building the Big Apple’s first two LGBT-friendly affordable housing developments for older people, fulfilling one of SAGE’s decades-long goals. We will cut the ribbon on the first building in 2019 and the second in 2020.

Even as we spent 2018 driving toward these historic accomplishments, our communities and our elders stared down relentless hostility from the Trump administration. Since the 2016 elections, SAGE has been forced to develop strong grassroots-advocacy muscles to protect our elders from the unacceptable bigotry of this moment in our country’s history. In 2018, we mobilized our national supporters through our Care Can’t Wait campaign, which powerfully opposed discrimination and advocated for LGBT-inclusive eldercare. When Mary Walsh and Bev Nance were turned away by a St. Louis retirement community that decided the couple’s 40-year relationship didn’t qualify as a “biblical marriage,” SAGE drew the line. We partnered with the National Center for Lesbian Rights (NCLR) to defend the couple and remind all care providers of their responsibility to respect our community’s elders. We’ve also stood strong with transgender elders in the face of repeated assaults by the Trump administration. These were just a few of the key highlights in 2018 as SAGE marked 40 Fierce Years and geared up for our elders to be front-and-center for the 50th anniversary of the Stonewall uprising in 2019.

As always, thank you for everything you do to make this work possible. Together, we will build a movement that ensures that every LGBT elder—no matter where they live—enjoys the full respect, support, and opportunity they deserve as they age.

Michael Adams
CHIEF EXECUTIVE OFFICER
Advocacy

SAGE launched a national advocacy campaign called CARE CAN’T WAIT, targeting the Trump administration’s efforts to allow religious-based discrimination impacting more than bakeries and restaurants, and allowing people to be turned away from ambulances, hospitals and nursing homes, affecting the lives of all older LGBT people. The campaign mobilized people from across the country to stand up with LGBT elders and against religious-based discrimination.

SAGE in the Spotlight

566 mentions in the press, a 157% increase over 2017

Social-media posts were seen by nearly 9 million people, resulting in 187K+ interactions
### SAGE Centers

<table>
<thead>
<tr>
<th>Center</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAGE CENTER BRONX</td>
<td>Bronx</td>
</tr>
<tr>
<td>SAGE CENTER HARLEM</td>
<td>Harlem</td>
</tr>
<tr>
<td>EDELE WINDSOR SAGE CENTER</td>
<td></td>
</tr>
<tr>
<td>SAGE-GRID CENTER OF BROOKLYN</td>
<td></td>
</tr>
<tr>
<td>SAGE PRIDE CENTER OF STATEN ISLAND</td>
<td></td>
</tr>
</tbody>
</table>

#### Statistics

- **3,458** enrolled

### NUTRITION & MEALS

- **39,271** meals served
- **397** nutrition groups
- **1,963** meal attendees

### EXERCISE

- **1,078** events
- **935** attendees

### HEALTH AND WELLNESS

- **2,200** events
- **1,285** attendees

### ARTS/CULTURE/EDUCATION/TECH

- **5,523** events
- **1,411** attendees

### VOLUNTEERS

- **353** in house
- **1,038** corporate

### LGBT-Friendly Housing

Construction began on SAGE's two LGBT-friendly housing developments, Ingersoll Senior Residences in Brooklyn and Crotona Senior Residences in the Bronx.

In total, **5,024** LGBT elders are interested in SAGE's housing projects in New York City.

### Cultural Competency Training

**9,000** staffers trained at the Visiting Nurse Service of New York in caring for LGBT elders.

### Friendly Visitors & Respite Buddies

**6,000+** volunteer hours spent visiting homebound LGBT elders.

### HIV Support

In 2018, SAGEPositive served **almost 550** LGBT older people living with or at risk for HIV.

### SAGE by the Numbers

#### 1992
- SAGE national network of affiliates launches

#### 1993
- Older Lesbians Project launches

#### 1995
- SAGE opens its headquarters at 305 Seventh Avenue in NYC
SAGE Celebrates 40 Fierce Years

SAGE Launches Puerto Rico Affiliate

In 2018, SAGE expanded its reach in many crucial, rewarding ways. One of our most exciting new partnerships is our new SAGE affiliate hosted at Waves Ahead, a nonprofit in Puerto Rico dedicated to assisting marginalized and vulnerable people in the island nation. Set in the capital city of San Juan, SAGE Puerto Rico is the territory’s first center for LGBT older adults and will provide an array of educational, social, and medical services for LGBT community members over the age of 55. SAGE CEO Michael Adams joined the head of Waves Ahead and now SAGE Puerto Rico, Wilfred Labiosa, at the affiliate launch on October 24, 2018. In addition to offering life-changing services to LGBT elder Puerto Ricans, this newest SAGE affiliate will work to inform and influence the Puerto Rican landscape on behalf of LGBT older people through community-based local and state advocacy efforts. SAGE Puerto Rico will also provide leadership and education to organizations, service providers, the health care community, and retirement homes to help them serve their nation’s aging LGBT population.

LGBT Elders Will Soon Have a Place to Call Home

In 2018, SAGE and its partners made great strides in the construction of two LGBT-friendly elder housing developments in New York City. Ingersoll Senior Residences in Brooklyn and Crotona Senior Residences in the Bronx—which will each feature a state-of-the-art SAGE Center on the ground floor—represent a significant step in fulfilling the great need for affordable housing among the city’s LGBT elders. In November 2018, representatives from SAGE, BFC Partners, the New York City Housing Development Corporation, the New York City...
Housing Authority, and the Department of Housing Preservation and Development celebrated the “topping out” of the Ingersoll building. The ceremony, which has centuries-old roots, is held when a new building’s final beam is placed atop the structure. Ingersoll Senior Residences will be New York City and State’s first LGBT-friendly affordable elder housing and the largest such development in the nation. It is expected to open for residents in 2019, which is also the 50th anniversary year of the Stonewall uprising. Construction of the Crotona Senior Residences is still underway; the development expected to open in early 2020. The Crotona and Ingersoll Residences will directly inform SAGE’s National Housing Initiative, which serves to establish national best practices for LGBT-inclusive housing through SAGE’s technical assistance and advocacy at both the federal and local policy levels. The SAGE Centers at the Ingersoll and Crotona Senior Residences were made possible by the Calamus Foundation and the Harry and Jeanette Weinberg Foundation.

Shining a Global Spotlight on LGBT Elders at International Federation on Ageing Conference

SAGE led the charge in highlighting LGBT elders and LGBT aging issues at the 14th International Federation on Ageing (IFA) Global Conference. CEO Michael Adams was a speaker at the Toronto conference, which included representatives from more than 70 countries and called for nations, companies, groups, and individuals to safeguard the rights of all LGBT elders. SAGE’s contingent at the IFA meeting included Bolivian trans leader Sassa Almendro Zeballos, 69, as well as other LGBT elders from Latin America. Zeballos knew she was different from most other children very early on. “When I was a kid, I felt like I was a girl,” she says. Coming out was not possible for her for many years, but she now knows the power of her truth and that of her community, explaining, “I am convinced that we cannot be invisible, discriminated against, or excluded.” SAGE is committed to global partnerships to ensure lives of dignity and respect for people like Zeballos all across the globe.
Fighting Religious-Based LGBT Discrimination

In 2018, a series of actions by the Trump administration to expand so-called religious exemptions posed a grave threat to LGBT elders across the country. According to Dignity Denied, a policy report released by SAGE, the Movement Advancement Project (MAP), and Columbia Law School’s Law, Rights, and Religion Project, 85 percent of nonprofit continuing-care retirement communities are affiliated with a religious institution.

In response, SAGE launched Care Can’t Wait, a campaign to mobilize a national response to the dangerous expansion of religious exemption laws and policies that give individuals, businesses, and government contractors a license to discriminate. Care Can’t Wait—launched with the generous support of the Overbrook Foundation—called on LGBT older people, allies, and providers to sign a pledge to stand with LGBT elders in the face of religious-based discrimination, and galvanized more than 25,000 people from people across the country.

Later in 2018, SAGE’s Care Can’t Wait campaign focused its support on a St. Louis couple, Mary Walsh and Bev Nance, whose case of LGBT housing discrimination made national headlines. Legally married in Massachusetts in 2009 and together for over 40 years, Mary and Bev had put a deposit on an apartment in Friendship Village in Sunset Hills, Missouri. They’d chosen their final home together specifically because long-term healthcare was available at the property, so that they would never have to part as they grew older. After the Friendship Village board learned they were a couple, they were denied entrance into the community, citing theirs was not a “biblical marriage.” In response, SAGE swiftly partnered with the National Center for Lesbian Rights and redirected its Care Can’t Wait initiative to specifically support Mary and Bev, which galvanized over 3,000 supporters. SAGE continues to fight fiercely to protect the rights of LGBT elders like Mary and Bev, and to change the laws that make such dangerous discrimination possible.
Expanding Advocacy in Key States

In 2018, SAGE continued our work on the ground in key states—including Washington D.C., Illinois, New Jersey, New York and Florida, among many others—to further protections for LGBT elders, including those living with HIV. This work is funded in part by the Evelyn and Walter Haas Jr. Fund, the Wellspring Philanthropic Fund, and the MAC AIDS Fund. After many months of working closely with SAGE, District of Columbia Councilwoman Mary Cheh introduced the nation’s most far-reaching, comprehensive LGBT and HIV aging bill. In New Jersey, SAGE locked arms with Garden State Equality to advance legislation that would designate LGBT older people and older people living with HIV as greatest social needs populations under the Older Americans Act. SAGE additionally worked closely with New York Senator Brad Hoylman to reintroduce the Long Term Care LGBT Patient Bill of Rights and will work closely with the pro-LGBT majority in Albany to advance this comprehensive LGBT aging legislation.

Late in 2018, with the support of the Evelyn and Walter Hass Jr. Fund, SAGE formed a partnership with Equality Florida, Freedom for All Americans (FFAA), and other key organizations to bring LGBT elders face-to-face with their members of Congress. In these meetings, LGBT elders educate their representatives about the need for protections from discrimination and the importance of building support for LGBT-inclusive nondiscrimination protections.
Our Supporters

SAGE thanks its supporters who have made a significant investment—of money, time, or talent—in our work.

SAGE 2018 National Leadership Council

SAGE’s National Leadership Council is a dynamic network of ambassadors committed to raising the visibility of SAGE through fundraising, outreach, and advocacy. These leaders are critical to our success, standing with SAGE to provide resources to meet the needs of our elders and to advance the rights of our community. SAGE would like to thank our dedicated and passionate members for their leadership, service, and generosity.

Co-Chairs
Jennifer Hatch
William Weinberger
Kevin Williams

Members at Large
Harvey Abrams & Michael Sites
Ward Auerbach & Andy Baker
Gary Carnow & Barry Soroka
Lawrence Chanen & Jack Burkhalter
Carol Davidson & Jody Silver
Victoria Hill
John Kordel Juliano
Jay Lesiger & Tom Klebba
Thomas Luciano

Philanthropic Member Organization
The Calamus Foundation

Honorary Co-Chair
James C. Hormel

2012
SAGE opens the country’s first full-fledged, publicly funded senior center for LGBT elders in New York City

2013
SAGE joins American Society on Aging and other ally organizations in filing a key amicus brief providing LGBT elder perspective on marriage equality in Edie Windsor’s successful Supreme Court challenge to DOMA

SAGE releases ground-breaking report on improving health and wellness for LGBT older people of color
### Foundations

**$250,000+**
- Anonymous
- The Calamus Foundation
- The John A. Hartford Foundation
- The Harry and Jeanette Weinberg Foundation Inc.

**$100,000 – 249,999**
- Annenberg Foundation/Metabolic Studio
- New York Community Trust
- Rockefeller Philanthropy Advisors
- The Ted Snowdon Foundation
- H. van Ameringen Foundation
- Wells Fargo Housing Foundation

**$50,000 – 99,999**
- Alphawood Foundation
- MAC AIDS Fund
- MetLife Foundation
- John H. & Ethel G. Noble Charitable Trust
- The Small Change Foundation
- Evelyn and Walter Haas Jr. Fund

**$25,000 – 49,999**
- Broadway Cares/Equity Fights AIDS
- Callen-Lorde Community Health Center
- Jarvie Commonweal Service
- Overbrook Foundation
- Isaac H. Tuttle Fund

**$10,000 – 24,999**
- Louis and AnneAbrons Foundation Inc.
- The Ahmanson Foundation
- Altman Foundation
- Anonymous
- Design Industries Foundation
- Fighting AIDS: DIFFA
- FJC
- The David Geffen Foundation
- The Helene Foundation
- Keck School of Medicine of USC
- Schwab Charitable Fund
- The Vidda Foundation

**$5,000 – 9,999**
- The Stanley E. Hanson Foundation
- Lifetime Arts Inc.
- John L. McHugh Foundation
- Marvel Platoff Foundation
- Rutgers Presbyterian Church
- The Ludwig Family Foundation
- The Sambol Family Foundation
- Seymour/Tutelman Family Foundation
- Venable Foundation

### Government

- U.S. Department of Health and Human Services – Administration on Community Living
- New York City Department for the Aging
- New York City Department of Health and Mental Hygiene
- Manhattan Borough President Gale Brewer
- New York City Council Speaker Corey Johnson
- New York City Council Members:
  - Margaret Chin
  - Daniel Dromm
- Daniel Garodnick
- Vanessa Gibson
- Brad Lander
- Mark Levine
- Carlos Menchaca
- Annabel Palma
- Bill Perkins
- Keith Powers
- Rafael Salamanca
- Ritchie Torres
- James Vacca
- Jimmy Van Bramer

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SAGE receives funding from New York State Legislature to launch LGBT Elder Veterans Initiative

SAGE releases the first national market study on the experiences and perspectives of LGBT older adults

SAGE launches multi-year agency-wide diversity and equity initiative

SAGE wins major policy victories at the 2015 White House Conference on Aging
2015

With support from the NYC Council, SAGE inaugurates new SAGE Centers in the Bronx, Brooklyn (with GRIOT Circle) and Staten Island (with Pride Center of Staten Island)

SAGE launches SAGECare, a training and credential program for care providers committed to offering LGBT-inclusive services

SAGE announces New York City’s first LGBT-welcoming elder housing—Ingersoll Senior Residences—with 145 apartments and an on-site SAGE Center

The U.S. Supreme Court rules in Obergefell v. Hodges that same-sex marriage is legal in all 50 states

SAGE joins Diverse Elders Coalition to lead first-ever grassroots advocacy campaign for more LGBT-inclusive federal elder services

Citi Community Development awards SAGE $250,000 to expand the National LGBT Elder Housing Initiative

SAGE receives $1 million matching grant from the Calamus Foundation to support its National LGBT Elder Housing Initiative

2016

SAGE launches SAGECare, a training and credential program for care providers committed to offering LGBT-inclusive services

2017

3,500 people gather nationally for the first SAGE Table, launched with the support of AARP to build ties across LGBT generations

SAGE joins Diverse Elders Coalition to lead first-ever grassroots advocacy campaign—We Refuse To Be Invisible—and forces Trump Administration to abandon plans to erase LGB elders from evaluation of federal elders; SAGE follows up with a trans campaign

2018

SAGE Center Midtown is renamed The Edie Windsor SAGE Center

SAGE and partners successfully advocate for first-ever public hearing of Inter-American Commission on Human Rights on LGBT elders

Harry and Jeanette Weinberg Foundation awards SAGE $1.7 million for state-of-the-art SAGE Center to be featured at Ingersoll Senior Residences, the country’s largest affordable LGBT elder housing

Jim Obergefell joins the SAGE Board of Directors

SAGE partners with International Federation on Aging (IFA) to present first-ever LGBT program track at global conference
SAGE Financials

Condensed Statement of Financial Position

As of June 30, 2017 and June 30, 2018

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and Investments</td>
<td>$ 3,533,757</td>
<td>$ 5,076,490</td>
</tr>
<tr>
<td>Receivables and Pledges</td>
<td>$ 3,108,216</td>
<td>$ 4,170,634</td>
</tr>
<tr>
<td>Prepaid Expenses and Other Assets</td>
<td>$ 513,608</td>
<td>$ 530,061</td>
</tr>
<tr>
<td>Property &amp; Equipment, Net</td>
<td>$ 11,298,964</td>
<td>$ 10,871,224</td>
</tr>
<tr>
<td>TOTAL ASSETS</td>
<td>$ 18,454,545</td>
<td>$ 20,648,409</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIABILITIES</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Payables and Accrued Liabilities</td>
<td>$ 466,933</td>
<td>$ 611,844</td>
</tr>
<tr>
<td>Loan Payable</td>
<td>$ 7,379,207</td>
<td>$ 7,178,793</td>
</tr>
<tr>
<td>Other Liabilities</td>
<td>$ 200,243</td>
<td>$ 161,883</td>
</tr>
<tr>
<td>Deferred Revenues</td>
<td>$ 37,500</td>
<td>—</td>
</tr>
<tr>
<td>TOTAL LIABILITIES</td>
<td>$ 8,083,883</td>
<td>$ 7,952,520</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NET ASSETS</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>$ 9,429,258</td>
<td>$ 9,065,078</td>
</tr>
<tr>
<td>Temporarily Restricted</td>
<td>$ 941,404</td>
<td>$ 3,630,811</td>
</tr>
<tr>
<td>TOTAL NET ASSETS</td>
<td>$ 10,370,662</td>
<td>$12,695,889</td>
</tr>
</tbody>
</table>

TOTAL LIABILITIES AND NET ASSETS             $ 18,454,545 $20,648,409

Condensed Statement of Cash Flow

For the fiscal year ending June 30, 2018

<table>
<thead>
<tr>
<th>Net cash provided by (used in) operating activities</th>
<th>$ 1,816,114</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net cash provided by (used in) investing activities</td>
<td>$ 22,785</td>
</tr>
<tr>
<td>Net cash provided by (used in) financing activities</td>
<td>(215,707)</td>
</tr>
<tr>
<td>Net increase (decrease) in cash and cash equivalents</td>
<td>$ 1,623,192</td>
</tr>
<tr>
<td>Cash and cash equivalents at beginning of year</td>
<td>$ 3,390,701</td>
</tr>
<tr>
<td>Cash and cash equivalents at end of year</td>
<td>$ 5,013,893</td>
</tr>
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</table>
Condensed Statement of Activities

For the fiscal years ending June 30, 2017 and June 30, 2018

<table>
<thead>
<tr>
<th>SUPPORT AND REVENUE</th>
<th>2017</th>
<th>%</th>
<th>2018</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government Grants and Contracts</td>
<td>$ 3,916,049</td>
<td>41%</td>
<td>$ 4,046,161</td>
<td>29%</td>
</tr>
<tr>
<td>Contributions Individuals and Foundations*</td>
<td>$ 3,709,962</td>
<td>39%</td>
<td>$ 6,607,848</td>
<td>48%</td>
</tr>
<tr>
<td>Special Events (Net)</td>
<td>$ 803,565</td>
<td>9%</td>
<td>$ 956,535</td>
<td>7%</td>
</tr>
<tr>
<td>Bequests</td>
<td>$ 784,014</td>
<td>8%</td>
<td>$ 1,516,821</td>
<td>11%</td>
</tr>
<tr>
<td>Program Fees</td>
<td>$ 223,093</td>
<td>2%</td>
<td>$ 433,875</td>
<td>3%</td>
</tr>
<tr>
<td>Investment and Other Income</td>
<td>$ 11,047</td>
<td>0.1%</td>
<td>$ 176,553</td>
<td>1%</td>
</tr>
<tr>
<td>TOTAL SUPPORT AND REVENUE</td>
<td>$ 9,447,730</td>
<td>100%</td>
<td>$ 13,737,793</td>
<td>100%</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>EXPENSES</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Programs and Direct Services</td>
<td>$ 8,102,572</td>
<td>77%</td>
<td>$ 8,285,486</td>
<td>73%</td>
</tr>
<tr>
<td>Administration</td>
<td>$ 957,907</td>
<td>9%</td>
<td>$ 1,737,270</td>
<td>15%</td>
</tr>
<tr>
<td>Fundraising</td>
<td>$ 1,421,583</td>
<td>14%</td>
<td>$ 1,389,810</td>
<td>12%</td>
</tr>
<tr>
<td>TOTAL EXPENSES</td>
<td>$ 10,482,062</td>
<td>100%</td>
<td>$ 11,412,566</td>
<td>100%</td>
</tr>
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<table>
<thead>
<tr>
<th>CHANGE IN NET ASSETS</th>
<th></th>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td></td>
<td>($ 1,034,332)</td>
<td></td>
<td>$ 2,325,227</td>
<td></td>
</tr>
</tbody>
</table>

SUPPORT AND REVENUE FY2018

- Contributions—Individuals and Foundations* (48%)
- Government Grants and Contracts (29%)
- Special Events (Net) (7%)
- Program Fees (3%)
- Investment and Other Income (1%)

EXPENSES FY2018

- Programs and Direct Services (73%)
- Administration (15%)
- Fundraising (12%)

* Includes Donated Services and Memberships