

Sage Upstate Long Range Action Plan

January 21, 2009

Table of Contents

Introduction	3
Sage Long Range Planning Overview	5
• Executive Director Priorities in 2009	7
• Success Factors	8
Committee Overviews	
• Community Building.....	10
• Public Relations/Community Relations.....	13
• Buddy Network.....	17
• Expanding Physical Space	20
• Fundraising.....	22
• Membership.....	23

•

Introduction

The creation of Sage Upstate's 2009 Long Range Action Plan has taken nearly twelve months and has been a collaborative effort from the start. As chair of the Long Range Planning Committee, my job, as I said many times, was simply to keep the train on the tracks. That said, much of the work has been done by and credit is due to the many past and present Board members, staff, and members of Sage Upstate. It is their ideas and efforts that are reflected in this Action Plan. I especially wish to acknowledge past Board Chair Willard Doswell whose vision it was for Sage to have a long term vision. As I joke with him, "it's all your fault!" I also wish to acknowledge LRP committee members Marilyn Pinsky and Kim Dill who endured my endless whining about our need to be strategic, as well as to the current Board members who have volunteered to chair and provide strategic leadership to the several forward-looking ad hoc committees created during this process. Finally, I wish to acknowledge fellow LRP committee member and current Board Chair Barb Genton. It is under Barb's thoughtful watch that this process has borne fruit and we are all grateful for her good humor, steady leadership, and dedication to the mission of our organization.

The vision we have created for Sage Upstate is an ambitious one indeed. It is not an exaggeration to say that for many of the strategic priorities we lay out here, Sage Upstate does not currently have the financial resources nor necessarily the skill and expertise to carry out this agenda. So as it should be, it all comes back to the community we serve. We need you. We need your ongoing and continued generosity to help underwrite the expenses we envision here. We also need your skills. The committees

we've created are open. So join one in 2009. Bring your ideas and energy, roll up your sleeves, and impress us with your expertise and enthusiasm. Sage Upstate exists solely to help satisfy the needs of our community. Your generous support of time and money allows us to continue this work.

The future of Sage Upstate lies within these pages. May we stay true to our mission.

Ralph Valente
Chair, Long Range Planning Committee
Vice-Chair, Board of Directors
Sage Upstate

Long Range Planning Overview

Staring at a blank piece of paper is a daunting task. Further daunting is the task of trying to imagine what Sage Upstate should look like at the end of 2013! But that's what Sage's Long Range Planning (LRP) Committee faced on February 20th, 2008, the day of our first meeting. The committee was the brain child of immediate past Board Chair Willard Doswell. In 2006, Sage celebrated its 10th anniversary. Amidst the fanfare and congratulatory celebration was the idea that the organization was at a crossroads. Willard sensed, and others agreed, that the organization needed a strategic plan, a playbook if you will, to help guide it through its second decade.

Community-based not-for-profit organizations are fragile. The grassroots involvement of the membership takes the organizations only so far and then becomes, inevitably, bureaucratic. In and of itself, "professionalizing" is not a bad thing, however organizations can lose their way when this happens; often losing touch with the very community they were created to serve. The point of creating this LRP Committee and to charge it with developing an Action Plan was to make sure that the mission of Sage Upstate remains squarely in focus and that its activities and programming remains vital and relevant to those that we serve.

For the balance of the late winter and early spring, the LRP committee (consisting of current Board members Barb Genton, Marilyn Pinsky, and Ralph Valente, and Sage Upstate Executive Director Kim Dill) solicited and processed ideas and comments from a variety of sources, including the existing Board and current members, donors, past Board members, and anyone else who had an idea or opinion about the strategic direction our

organization should take. At the time, our short term goal was to sort through that which was strategic versus tactical, and to figure out a way of getting there that made some sense.

Over the next several months and many hours of productive deliberation, we arrived at a list of potential planning areas. We knew we couldn't do them all, and we knew that some of them were areas long needing careful reexamination. And others, in less specific ways, were already or on the verge of happening and simply needed focus. But we felt them all to be worthy of discussion.

On April 19, 2008, the entire Board gathered for a day-long offsite meeting to establish priorities for Sage's Long Range Action Plan. Because of our limited staff and modest financial resources, our job that day was to establish priorities. We also needed task-specific leadership. Individual Board members would need to take charge of newly created committees, and their time was already being taxed. And simply put, some of the issues we identified were flat out more important than others. We had to focus our energies and commitments. To that end, through lively and energetic conversation, frequent hand-wringing, and moments of soul-searching, we deliberated the relative merits of fourteen project areas ranging from setting up an LGBTQ transportation network to establishing LGBTQ senior housing to creating a Sage Upstate Oral History Project.

But when deliberation was complete, and after more work by the Board over the balance of 2008, we decided to create six new ad hoc committees to address areas vital for the continued evolution of our organization, and we recruited current Board members to serve as chairs of each of these new committees.

The six new committees and their current chairs are listed below and more detailed explanations of the work of each committee can be found later in this report.

- Community Building, Arlene Ahl – Chair
- Public Relations/Community Relations, Ralph Valente – Chair
- Buddy Network, Mike LaMontagne – Chair
- Expanding Physical Space, Adrea Jaehnig – Chair
- Fundraising, Wendy Harris – Chair
- Membership, Ralph Valente – Chair

Executive Director Priorities in 2009

We also decided that three other projects would be made priorities for the Executive Director's office in 2009. Those projects include:

1) the expansion of Sage's professional staff through the hiring of a new half-time office manager. The search process to fill that position is nearly complete and we hope to announce the name of our new employee shortly;

2) a second priority is the continuation of a community education program targeting health care workers and health care facilities, police and other law enforcement officials, and lawmakers. We are pleased to report that this program kicked off in swell fashion in 2008 and that its work is ongoing.;

3) finally, it was decided that a thorough program reassessment was in order and the Executive Director was asked to draft a policy statement on program development, elimination, and facilitator compensation--the stated goal being to strike a proper balance

between programs that are social vs. support-oriented vs. educational, and to create a mechanism for determining the ROI (return on investment) of all programming activities. Look for this report later in 2009.

Success Factors

The long range activities covering the five year period 2009-2013 imagined by this report are a moving target. Some of these projects may not come into reality until the fifth year or some, because of the lack of resources, changing priorities, or the shifting sand, may never come to fruition. The process is not static but, in fact, evolving. With this said, we believe there to be several factors critical to determining whether our vision succeeds or fails:

1. ***the continued presence of an engaged, activist Board.*** Given the relatively small size of Sage's paid staff, it is simply not possible for us to evolve and take on new projects and responsibilities without there being talented, committed individuals willing both to serve on the Board and to assume leadership positions on many projects. Mind you, no Board member receives any compensation for their work. But what they get in return is a sense of service and the opportunity to return to our community their heart-felt effort and desire for change. But the Sage Upstate Board has mandatory term limits and must constantly refresh itself. If you have never served on the Board, or even if you have before, please consider joining our "management team."

Your skills and insight will go a long way in helping us serve our community in the best way we can.

2. ***local money***. We have bills to pay and the funding we receive from public sources has been drastically cut because of the broader economic situation. Currently, the bulk of our funding comes from sources outside the community. We need to reverse this trend and to do this we need the continued and ongoing generosity of our members, friends, corporations, and foundations in central New York. If you are currently a donor, please give more. If you are not a donor, please consider providing us with financial support.
3. ***member involvement***. There are a number of volunteers who assist Sage in a variety of ways, sacrificing their time and energy for the greater good. Participating on one of the six newly created ad hoc committees has only one qualification: your willingness to roll up your sleeves. So let us know what committee(s) you wish to serve on and volunteer today. Your effort will help to make a huge difference.

Committee Overviews

Community Building Committee

Arlene Ahl, Committee Chair

Key Issues

In order to meet the needs of all SAGE Upstate members and to become the truly diverse and inclusive community service agency that we aspire to be, we have identified a need for SAGE to develop multiple strategies that will help all of us build interpersonal relationships within SAGE that foster understanding across boundaries of race, sexual orientation, gender, gender identity/expression, class, religion, educational levels, and ability. While we seek to provide safe space and comfort for people in relation to their sexual orientation and gender identity/gender expression, we also recognize that our community is diverse and that we all have other social identities that have informed our experiences. That being said, we need to create safe space for people of all backgrounds and create opportunities for learning about our similarities and differences. While this work will strengthen SAGE, it will require a sincere commitment for honest dialogue, civility, reflection, action, and social justice.

Strategy/Tactics

In order to make Sage as welcoming and inclusive as possible, the Board will work to become as aware and sensitive to the needs of multiple communities as possible – work has already begun in several ways:

- First, the Board plans to participate in a series of race dialogues in the spring of '09.
- The Uzuri group held an open house at which several Board members participated, which led to an increased understanding of the issues faced by LGBT people of color.
- Steve Simon, Director of Syracuse University's Office of Disability Services, and former Sage Board Member, gave a presentation on the need for Disability Awareness to the Board. He included information on the Americans with Disability Act (ADA) and supported us in making the commitment to full accessibility at all gatherings and in all communications.

The board should work with the PR committee to review all current media materials and the web site to ensure that the images are inclusive and welcoming. The newsletter should include a statement about accessibility and a review of the availability of such items as ramps, the elevator in the church and the availability of non-print media for the newsletter. The Mission statement should be reviewed to ensure that it addresses disability access and inclusion.

Going forward, the Committee will work to connect with professionals in the community who are working with underserved populations. The Committee will work closely with Kim Dill in the area of educating these professionals who may be serving people of color, the poor, individuals living in assisted living or nursing homes, the disabled or those living in rural communities. We will encourage professionals to include Sage as a resource for their consumers, alerting them to our goal of full inclusion.

Budgetary Implications

Will include some of Kim Dill's time as a community educator; possible cost for revising web and print materials; payment to sign language interpreters at all events, Cost of CDs for alternatives to print media, time needed to record material on CDs.

Timeframe

- Jan 09 – Committee will meet to discuss, identifying the initial target communities for bridge building
- Feb 09 – Committee will meet with member's of PR Committee to plan revision of print and web materials
- Mar 09 – Committee will formulate statement of commitment to accessibility to be printed in the newsletter.
- Apr 09 – Planning to begin on race dialogue program for the Board
- May 09 – Committee will meet with Kim Dill to identify community agencies involved with underserved consumers. Work on planning of race dialogues will continue.

Public Relations/Community Relations Committee

Ralph Valente, Committee Chair

Key Issues

Outreach to the broader community in Central New York, beyond the traditional constituents that we serve, is necessary and important. As Sage Upstate looks to expand its programming, increase its membership, and enhance its fundraising, a strategic and ongoing P.R. and community outreach effort is crucial to the success of these goals.

Seen in this way, the P.R. efforts and community relations activities we contemplate do not serve an end unto themselves. Rather, the several-fold objectives of these activities seek to accomplish the following:

1. increase awareness about and knowledge of the existence of Sage Upstate to the broader community in Central New York regarding its mission and the types of programs and services it provides. This will assist us in gaining support from allied groups within the broader community as well as with our advocacy work on behalf of the aging LGBTQ population.
2. broader awareness of Sage Upstate is likely to have a positive impact on fundraising. Many individuals in CNY outside the LGBTQ community would be eager to support our efforts financially, **if only they knew we existed!** This holds true also for local companies with giving programs. Broader awareness of our existence and the important activities we are involved in will greatly assist fundraising efforts.

3. despite our best efforts, many aging LGBTQ persons in CNY who may greatly benefit from the programs and services offered by Sage Upstate are unaware of our existence. A consistent and broader exposure may have a positive impact on our membership numbers.

Strategy/Tactics

- Develop relationships with local media (print, TV, radio) in Syracuse, but also in smaller, satellite communities such as Cortland, Auburn, Utica/ Rome, Oswego, and Watertown
- Increase presence/awareness of SAGE in the larger community through participation of Sage staff in local activities/ organizations that deal broadly with issues of aging
- Increase the frequency of political advocacy regarding the needs of the aging in the LGBTQ community (legislative/policy)
- Regularize PR activities/functions
 1. Media Kit
 2. press releases
 3. press conferences (especially around the announcement of large gifts/grants, roll-out of new programs)
 4. regular briefing meetings by the Director with key media representatives (educate media about our issues; establish Sage as

THE expert on aging and LGBTQ issues in CNY—become the go-to organization)

Budgetary Implications

Sage Upstate will incur additional expenses by engaging in these activities. A new line item will need to be added to our budget and monies found to pay for these activities.

These expenses might include, but may not be limited to:

- travel costs (to/from meetings, but mostly local travel)
- printing and office supplies (mostly for the development and stocking of media kits)
- postage (physical mailing of press kits and press releases)
- hospitality (meetings with media representatives)
- Internet (modifying and maintaining existing website so that all press releases are posted there as well as the development of an electronic media kit that can be accessed via our website)
- events (hosting press conferences and other P.R.-related activities)
- staff time (who will do this work)

Timeframe

The PR committee will have its first meeting in January, 2009. By the end of the first quarter of 2009, the goal is to accomplish the following:

- identify all relevant media outlets in CNY
- identify specific contacts by name, email address, and phone number

- draft acceptable boiler plate language
- design the media kit and begin deliberation over its contents
- identify opportunities for Sage involvement in broader community activities
- sketch out a press conference plan
- a media plan for CY 2009 should be submitted to the Board for their approval along with a specific budget and a staffing strategy for performing the activities

Buddy Network Committee

Mike LaMontagne, Committee Chair

Key Issues

Seniors in the LGBTQ community have less support than seniors in the mainstream. Aging LGBTQ people are more likely to be separated from biological family, less likely to have children to rely on, and more likely to live alone. Despite these facts, seniors in our community are less likely to reach out to mainstream sources of support for fear of being discriminated against.

Many Sage Upstate programs work to bring aging LGBTQ people together so they can form friendships and support networks. For some, this works. Others may need more help connecting. Some who are isolated and/or homebound may need a visitor. Some who live alone are very active and would not want a visitor, but might need a check-in to see if they are alright. Some may need short-term help – they may need a visit while they are in the hospital, or to have errands run when they are recuperating from surgery. Finally, others would benefit from cards and email connections from Sage friends that say, “get well,” “congratulations,” “happy birthday/anniversary,” or “we offer our sympathy.”

The Buddy Network will create a structure that connects people for these purposes. It goes beyond providing a space where people can come together and build their own support networks – it actually creates a support network that Sage participants can

contribute to and/or rely on. In doing so, it counters the number one enemy to LGBT people as they age – isolation.

Strategy/Tactics

Establish a “Buddy Network” to do the following:

1. Set up buddy list that receives emails and/or phone calls and mailings about events in the lives of others, including hospital stays, birthdays, deaths of loved ones, anniversaries, etc. Buddies could send a card or email to let these folks know they are not alone.
2. Set up a list of “buddy helpers” that would agree to be called upon by people in need of short-term help such as hospital visits, errands, rides. The list of buddy helpers would be given to people in need of help – arrangements would be made between the two parties.
3. Set up a system of “check-in buddies.” Participants would pair up with a buddy and do daily phone check-ins. This is for folks who live alone and worry that if something happened to them, no one would know. In the event that one person or the other was not at home, emergency contacts would be called, and possibly 911 would be contacted.
4. Set up a “buddy visitor” program, much like the previous friendly visitor program. Visitors would be screened and trained, friends at home would be screened, visitors and friends would be paired and visits would happen at regular intervals. This would be social calls only – no errands, no medical help, no lifting, etc. Sage would also

monitor the visits by soliciting progress notes from visitors.

Budgetary Implications

Program Coordinator Carrie Elliott would coordinate the program, working with a volunteer committee. Executive Director Kim Dill would have an oversight role. So, a portion of each salary would be a part of this program. We would need paper, notebooks, folders, nametags, postage, envelopes, etc for trainings and quarterly volunteer meetings. These costs could come out of our supply budget – we may have to increase the totals in this category. Perhaps some grant funds could be redistributed. We also may want to have an annual fundraising event to raise money specifically for this program.

Timeframe

February '09: First draft of Buddy Network manual complete

March '09: Committee to go over the manual and implementation plan.

April '09: ready to start recruiting volunteers

April '09 newsletter: article on program calling for volunteers, explaining components of program

May '09: Buddy list established, recruitment of buddy helpers, buddy check-in, buddy volunteers in place, first buddy visitor trainings held

June '09: buddy visitors trained, visiting

Expanding Physical Space Committee Overview

Adrea Jaehnig, Committee Chair

Key Issues

While the present rented location of SAGE Upstate at the First English Lutheran on the corner of James & Townsend has been good, the space minimally meets the organization's current needs especially in regards to multiple early evening activities on the same night. The current location is not anticipated to meet the future needs of this growing organization.

The community interaction with other organizations and programs located at the First English Lutheran Church has been positive, but they also have raised concerns about privacy and confidentiality. In addition, there is a strong desire to have an LGBTQ specific space in the Central New York community. An LGBTQ specific space could also result in the opportunity to rent programmatic or sublet office space to other LGBTQ organizations in the community. The primary concern of this committee, however, is to locate space first and foremost to meet the needs of SAGE Upstate with the possible use of the space by other LGBTQ organizations.

The issues involved in expanding physical space are numerous and complex requiring the best thinking of our own members, as well as, asking for support and guidance from officials from the City of Syracuse, Onondaga County, and Syracuse University.

At this point, the only viable option forward is to find a new space to rent as buying is not financially possible. The Long Range Planning Committee on Physical Space charge is to identify an affordable and accessible site that is on a bus line, has ample parking, and is in a safe location that balances privacy concerns and centrally located public space.

Timeframe

- September '08: Identify, invite and confirm committee members.
- June '09: Committee members are presented with charge and debriefed on previous space location efforts and findings.
- September '09: Identify ideal and required programmatic, meeting, and office space needs of Sage Upstate. Request the monthly budget allocation for rental of space from the Treasurer and Executive Director.
- November '09: Map out desired space needs with consideration of multipurpose space use.
- January '10: Identify contacts with the City of Syracuse, Onondaga County, and Syracuse University to present our space needs to and to request support and advice in locating potentially usable space.
- June '10: Provide a preliminary report to the Board of Directors of Sage Upstate.

Budgetary Implications

In the short-term, while investigating options, there will be little if any budgetary implications for this project. However, expenses related to obtaining, rehabilitating, and maintaining future new space is unknown. There are no resources within the existing Sage budget for this project other than repurposing monies currently paid for rent and utilities at the existing space. It is likely that a capital campaign will be needed to help underwrite this effort, but that is a consideration for 2010 and beyond.

Fundraising Committee Overview

Wendy Harris, Committee Chair

Key Issues

The Fundraising Committee is responsible for the two primary fundraising initiatives, the year-end fundraising appeal and the summer membership campaign, but also the larger strategic plan for maximizing fundraising receipts. Ideally, membership will shift to a year long effort where we encourage folks to become members at all or most of our events and then we send members renewal letters 11 months after they sign on. Since we have such a bulk of people who are oriented to the summer renewal, we will continue to have this be the focal point of this overall effort with a large renewal/new member at that time.

Strategy/Tactics

The year end appeal will be guided by the Fundraising Committee. We will meet at least every three weeks through out the Fall starting in September to draft the letter and set the schedule of mailing and follow-up. We will also set the next Donor Circle agenda, meeting date, and details. Overall, the question is still unanswered if membership is advantageous to solicit and track, and if our individual supporters are confused by the two different appeals in the year. This is the domain of the Membership Committee and is a topic we will work closely with them as we move forward.

Membership Committee Overview

Ralph Valente, Committee Chair

Key Issues

The official membership list of Sage Upstate is relative small compared to the number of people who attend and/or participate in Sage activities and programming. This situation is potentially harmful for our organization in a number of ways:

- The public and private agencies that provide Sage with funding look carefully at this discrepancy and we are forced to then explain the discrepancy.
- Membership dues are a key source of funding and so there are many who “consume” our services but then pay very little or anything in return.
- As an organization, we have failed at explaining why being a member is important, nor have we created the sense among those that we serve that there is “value” to being a member.

Strategy/Tactics

Beginning in 1Q09, this committee begin its deliberations and discussions to determine how to quickly and permanently increase membership numbers:

- Speak informally with major donors and create a survey to measure attitudes among existing members and others who “consume” Sage services about the relative merits of Sage membership.
- After this brainstorm about ways of creating value attached to membership, i.e., members receive the newsletter via mail, non-members pay more at certain events/members get in free, tying a Sage membership in to free or discounted services at businesses or other agencies in the area.
- Have facilitators at every Sage event talk about the importance of membership and have forms on hand.
- Improve our messaging so that membership is clearly distinct from other fundraising efforts or even include membership (or automatic renewals) with donations over a certain amount.
- Work closely with the Fundraising Committee so that efforts are closely coordinated.

Budgetary Implications

Rather than be a cost center, rethinking and rationalizing the membership roles will generate additional monies through larger dues payments and will have a positive impact on broader fundraising efforts.