

A Report on 2008 Services: Financial Report

2008 Income/Revenues

Grants	\$141,516
Memberships/Donations	\$ 41,355
Events	\$ 4,185
Other Income	\$ 980

Total Income/Revenues: \$188,036

2008 Expenditures

Programs	\$133,781
Administration	\$ 19,534
Fundraising	\$ 21,350

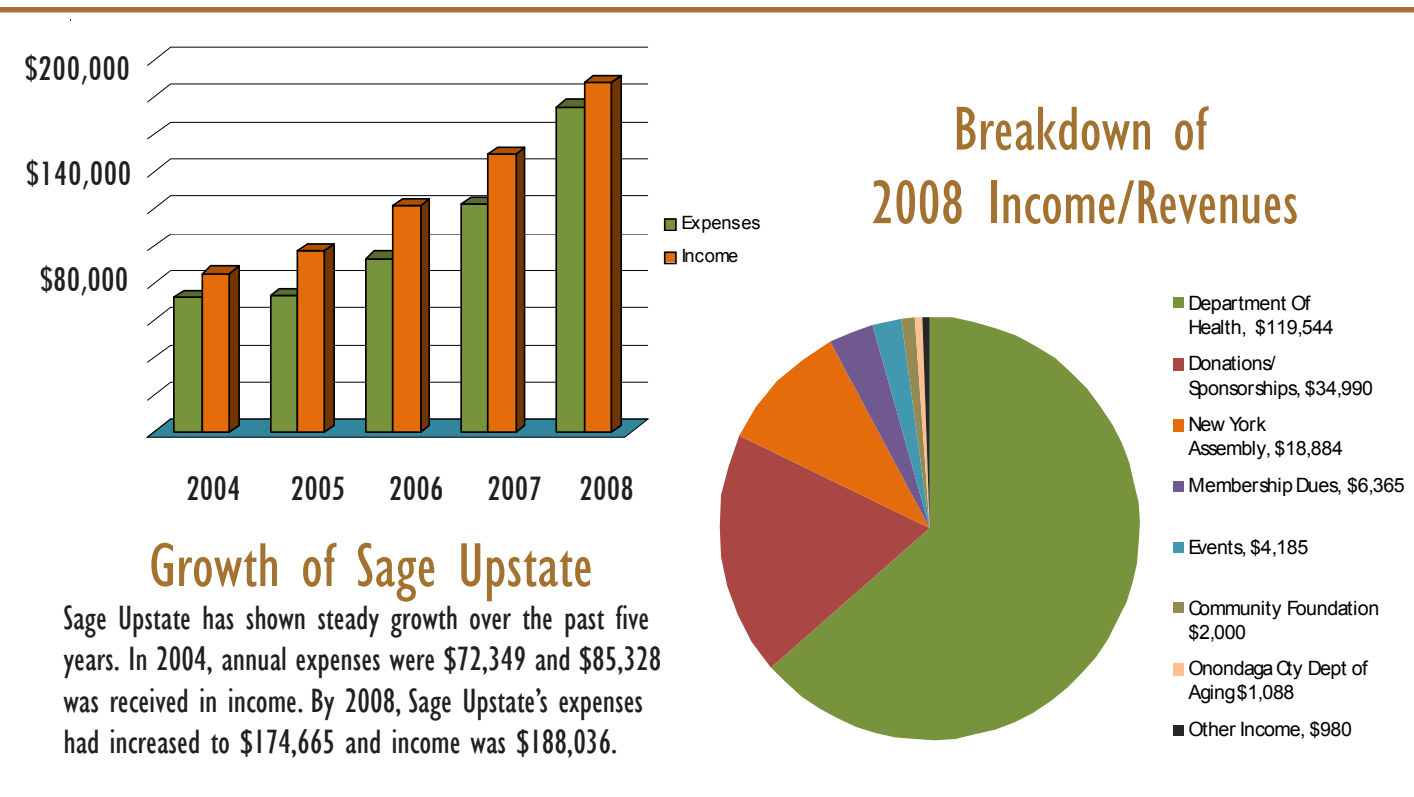
Total Expenditures: \$174,665

Change in Net Assets: \$ 13,371

In 2008, Sage Upstate received more support from members and donors than ever before. A record \$34,990 came from contributions -- \$10,166 from donors, \$1,200 from business sponsors, \$5,319 from center activities and group trips, and \$18,305 from the endowment of an anonymous donor. \$6,365 -- also a record amount, came from memberships. Fundraising events brought in \$4,185; these included the Beach Party Dance, the Spring Dance, and the Halloween Dance, as well as three socials at the Mystic Lounge.

As a member of the New York State LGBT Health and Human Services Network (coordinated by the Empire State Pride Agenda), Sage Upstate advocated for and received continuing state funding with \$119,544 from the Executive Budget and \$18,884 from the Assembly. The Executive Budget funding, coming through the Department of Health, is the first year of a 5-year contract for funding at this level. These grants provide support for a variety of costs, including programs, salaries, and rent/utilities. As the New York State Budget continues to experience shortfalls, cuts were made to Sage Upstate's funding in 2008 and more cuts are expected in 2009.

Sage also received funding from the Community Foundation (\$2,000) to purchase a computer and office equipment, and a "Fit For The Next 50" grant (\$1,088) from the Onondaga County Department of Aging and Youth to fund a speaker series on "Improving Longevity".



Sage Upstate 2008 Annual Report

Serving Central New York Lesbian, Gay, Bisexual, and Transgender People as They Age

Board of Directors

Barbara Genton, Board Chair:
Retired Teacher

Ralph Valente, Vice-Chair:
SVP, Sales & Marketing

Bruce Carter, Treasurer:
Associate Professor/Associate Dean

Adrea Jaehnig, Recording Clerk:
*Director, Syracuse University
LGBT Resource Center*

Arlene Ahl:
Social Worker

Wendy Harris:
Artist & Energy Savings Consultant

Alyn Hoxie:
*Community Renewal Specialist,
NYS Dept of Housing*

Mike LaMontagne:
Special Education Teacher

Dan Mullins:
Business Owner

Marilyn Pinsky:
New York State President, AARP

Roslyn Rasberry:
Vital Change, Consultant

Staff

Kim Dill: Executive Director

Carrie Elliott: Program Coordinator

Barbara Johnson: Office Manager

Tony Fonehouse: Office Assistant

Aging LGBT People:

- ▶ Are more likely to live alone, less likely to have children to rely on
- ▶ Faced discrimination of earlier eras
- ▶ Are now less likely to reach out for health & wellness services/resources

Sage Upstate:

- ▶ Helps aging LGBT people build support networks
- ▶ Educates providers on LGBT issues
- ▶ Provides health & wellness programs and information

From the Board Chair:

As you read the 2008 annual report, you will see the tremendous progress Sage Upstate continues to make serving our community and fulfilling its purpose. For another year we have demonstrated growth in our membership, programing, outreach services, advocacy efforts and financial support. Also we are building more connections with providers of senior services across our seven counties.

Special accolades go out to our Executive Director, Kim Dill, Program Coordinator, Carrie Elliott, Office Assistant, Tony Fonehouse, and all the program leaders who are always striving to provide the best.

I would also like to thank the Board of Directors for their time, talent, and expertise. These individuals have contributed many hours in committees, at events, and helping advance our mission.

Finally, it is the volunteers, members, friends, and donors that create the "heart" of Sage. During the past four years, it has been my honor to serve with you on committees, potlucks, dances, bus trips, and the board room. You have provided a second "coming out" opportunity and hopefully you, like me, have built newer friendship networks that will

From the Executive Director:

2008 has been a great year. Why? Because of the founders and those who came after them to build a strong foundation for Sage Upstate. Because of a dedicated, caring, and definitely a working board who has kept an eye on the big picture. Because of the fantastic staff I work with every day who put in the extra time and energy to make sure things get done. Because of the people who make donations -- investments in what we are doing for aging LGBT people in CNY. Because of our members, who truly "belong" at Sage. Because of the people who come to potlucks, center groups, presentations -- you make up one big happy Sage family. Why has Sage Upstate had such a successful year? The answer is simple: because of you. -Kim Dill



carry all of us into our future.
-Barb Genton (pictured)

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www.sageupstate.org In Central New York: 315-478-1923 Toll Free Outside CNY: 866-717-2640

A Report on 2008 Services: Programs



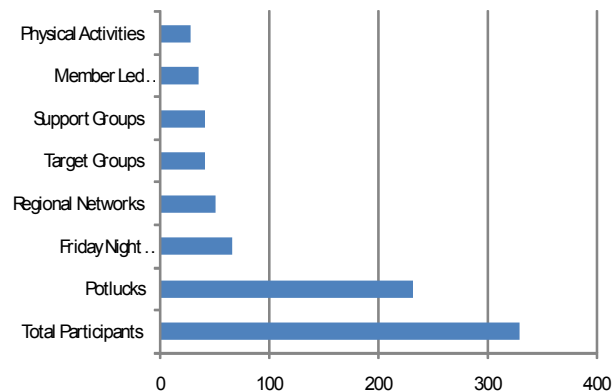
Second Sunday Potlucks

Sage Upstate Second Sunday Potlucks continue to be the most popular activity offered by Sage Upstate. In 2008, potluck attendance averaged 60 per month. A total of 231 people attended a potluck at some point over the year. Our Annual Picnic -- held on the Second Sunday in August -- drew 100 participants, and in November, we welcomed 200 for a turkey dinner.

Of those potluck participants for whom we have demographic data, women and men attended in equal numbers. Some 90% of these participants were 50 and older -- half younger than 60 and half 60 or older.

Other programs informed and entertained. Local experts made presentations on financial planning, relationship violence, Long Term Care options, and the history of pride parades. We were treated to a performance by Resident Artists from Syracuse Opera, local singer-songwriters, and our own acting troupe made up of Sage members. We heard from a psychic, shared a Thanksgiving feast, and celebrated the holidays with a dance. All that and the food was great!

2008 Participation in Sage Upstate Programs

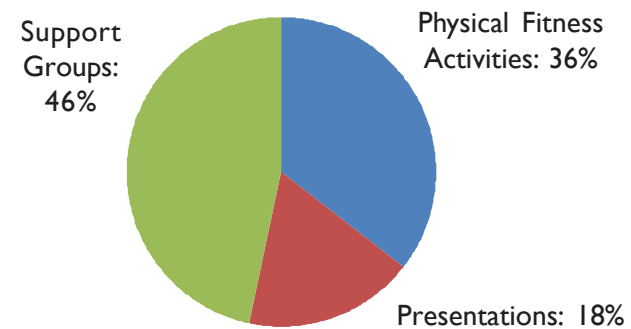


Raw numbers are reflected in this chart; a total of 329 people took part in Sage Upstate programs in 2008.

Health and Wellness Programs

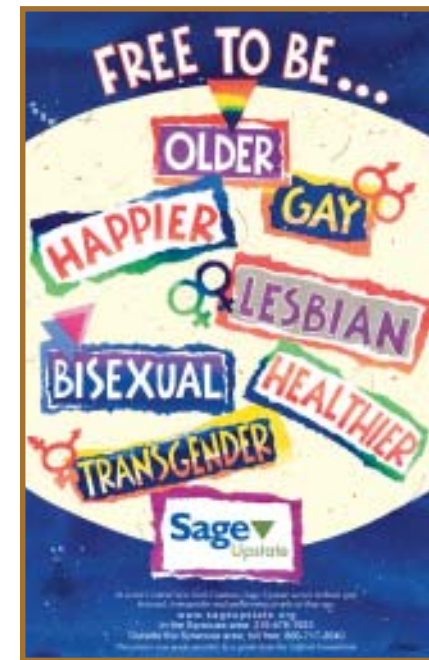
Sage Upstate offered a number of programs focused on health and wellness; 90 participants took part in these activities. Three support groups served an average of 15 people twice monthly, two facilitated by professional counselors (HERS Group For Women -- Susan White, MA; Men's Empowerment -- David Bullard, LMSW) and a third peer support group (Coming Out Later in Life). Another peer support group -- the Monday Night Men's Group, met weekly with 8 participants. Fitness activities included a weekly yoga class, dance classes, tennis lessons, and an outdoor activities group. Health and wellness presentations included sessions on financial planning and a six-class series on "Improving Longevity," which was funded by the Onondaga County Department of Aging and Youth's *Fit For the Next 50* program.

Participation in Health & Wellness Programs



Outreach to diverse groups (on facing page) has included the Uzuri group for aging LGBT People of Color, transgender issues materials, and the 60+ Circle of Friends group.

Education



LGBT seniors all over New York, covers unique challenges of LGBT seniors, legal and health information, and tips for making agencies more open and affirming. To launch the campaign, a new poster was designed by local artist Amy Bartell, which will be distributed during the campaign to providers.

Sage Upstate made presentations to various groups in 2008, including the Lewis County Long Term Care Ombudsman Volunteer Program, the Aging Concerns Unite Us Conference, the SAGE National Conference, Huntington Family Center's Senior Program, Cortland PFLAG, and a "Rock the Vote" panel at Syracuse University. In addition, Sage Upstate and the Senior Issues Committee of the New York State LGBT Health and Human Services Network teamed up with the New York State Office for Aging for their "New Faces of Aging" workshops in six New York Cities. These NYSOFA events covered different aging populations, among them LGBT seniors.

Sage Upstate board and staff also worked to educate legislators, holding meetings with Senator David Valesky, Assembly Members William Magnarelli and Joan Christensen, and County Executive Joanie Mahoney on issues facing LGBT seniors in Central New York.

Long Range Plan

In April of 2008, the Sage Upstate Board met for a day long session to create a long range plan. The point was to make sure that as Sage Upstate grows, its mission remains in focus and its programming remains vital and relevant. The session resulted in the creation of six new ad hoc committees chaired by Board Members to address areas vital for the continued evolution of our organization. Other long range plan goals were given to the Executive Director; these projects include. The plan is detailed in the box below:

Components of the Sage Upstate Long Range Plan

Community Building: Arlene Ahl, Chair

- ▶ Dialogue circles on race, Uzuri Open House, increase awareness and address disability issues, identify underserved consumers.

Public Relations/Community Relations: Ralph Valente, Chair

- ▶ Develop relationships with media, increase awareness about Sage in larger community, increase advocacy, formalize PR activities

Buddy Network: Mike LaMontagne, Carrie Elliott, Chairs

- ▶ Build a network of Sage members to: provide info updates, help with short term needs, offer phone check-ins, visit isolated seniors.

Expanding Physical Space: Adrea Jaehnig, Chair

- ▶ Explore options for expanding program, office, and meeting space for Sage Upstate

Fundraising: Wendy Harris, Chair

- ▶ Year-end fundraising appeal, increase donors and members, build local sources of support, introduce planned giving

Membership: Ralph Valente, Chair

- ▶ Creation of member benefits, recruitment of new members from diverse groups, increase current member numbers

Other Priorities: Kim Dill, Executive Director

- Expansion of staff, Community Education Project, Program Assessment and Development

A Report on 2008 Services: Outreach

Outreach and Advocacy

As a member of the New York State LGBT Health and Human Services Network (a coalition of more than 50 organizations providing services to LGBT people across the state), Sage Upstate met with legislators and state agency leaders to educate about LGBT senior needs and to secure funding. Sage was able to increase its funding from both the NYS Department of Health and the NYS Assembly, and was able to increase awareness about legislation that affect aging LGBT people.

Executive Director Kim Dill co-chairs the Network Senior Issues Committee, which in 2008 held the first statewide LGBT Senior Issues Summit. The event brought more than 80 seniors from around the state to the Capital, where New York State Office for Aging Director Michael Burgess listened to their feedback and concerns.

Twenty-five Sagers traveled to Albany to participate in Equality and Justice Day, a statewide



advocacy day coordinated by the Empire State Pride Agenda which drew more than 1,000 people. Sage Upstate participated in the local Rainbow Alli-

ance of Central New York, holding an educational forum on the Gender Expression Non-Discrimination Act, and working with community leaders to support other community organizations and to responded to the murder of a local transgender woman with a campaign to educate law enforcers, the media, and the community about anti-LGBT bias crimes.

Pictured: Equality and Justice Day

Sage Upstate News



The Sage Upstate News started color printing in 2008, with plenty of photos of Sage activities and a large calendar surrounded by business sponsor listings in each issue. The newsletter

reached more people also. It was delivered to more than 50 drop-off sites and was mailed to nearly 900 addresses each month. We also began recording an audio version of the newsletter for people with vision limitations. The Sage Upstate News provided information on Sage programs, community events, recovery resources, free health seminars, and other health issues. The newsletter's Health and Wellness Page covered a variety of topics, including brain health, sleep apnea, and arthritis.

What Sage Upstate Means To Me ...

Sage has made me more aware of the issues that concern LGBT people and I have decided to put that knowledge to use as part of my agenda and to help further the cause of LGBT rights. Sage has brought so much to me, I have met so many nice people. Coming in contact with different people -- gays, lesbians, transgender people -- has made me think beyond my own situation, to think about the issues that others face too. Now I have nothing holding me back -- I am not in the closet any more and I don't have a partner -- I'm never going to quit fighting for our rights. Sage will help me do that. -Becky Warner



Sage Upstate Mission Statement

Sage Upstate is a not-for-profit organization that promotes the health and well being of lesbian, gay, bisexual, transgender and questioning people in Central New York as they age.

Reaching Diverse Groups

As part of Sage Upstate's Long Range Plan, in 2008 a focus was placed on reaching diverse groups within the LGBT aging population. Specific outreach efforts have been put in place to help Sage reach ALL aging LGBT people in CNY. This work includes outreach to people in rural areas with our regional networks (see page 4 of this report), People of Color, people age 60 and older, and Transgender people. A total of 70 were served through our regional networks, and 40 were reached through the other three efforts, described below.

Uzuri

Uzuri -- a Sage Upstate group for aging LGBT people of color -- meets monthly on the second Friday with an average of 10 participants. The group serves as both a social and support group that features a program theme each month. In 2008, Uzuri programs included a spirituality discussion, an inter-generational "cross-talk", an Open House in June attended by more than 35, and a service project in December, which donated food baskets to The Living Room and AIDS Community Resources. Members have done storytelling, crafts and drumming at community events. In addition, 4 members of Uzuri attended the statewide LGBT People of Color Heath Summit in Albany.

60 + Circle of Friends

In 2008, the 60+ Circle of Friends group was established for people age 60 and older. Though Sage Upstate has no age limit for membership and participation, all of our programs are designed to address the needs of older LGBT people. The 60+ group offers a way for folks in this age range to meet, socialize, and build support networks. The group includes a once per month meet-up for lunch, and has featured outings and other programs. Last summer, some 60+ members visited a Buffalo Farm (see picture at left).

Transgender Issue Outreach

Sage Upstate Transgender issue outreach in 2008 included presentations on various issues, peer support discussions, education on the Gender Non-Discrimination Act (GENDA), and the creation of a brochure on trans issues.

Building Support Networks

In addition to diversity outreach and health and wellness efforts, Sage Upstate also held programs that were social in nature. Social programs offered in a safe and supportive environment allow LGBT seniors to



come together and build support networks, counteracting the isolation that many feel. An average of 117 instances of participation per month in these activities were logged in 2008. Social groups at Sage Upstate include Men's Night Out, Women's Coffeehouse, 60+ Circle of Friends, Uzuri, the Knitting Circle, and



member-led classes. More than 40 took a bus trip to Toronto in 2008 for the annual Pride Parade in June, and 20 carried signs for Sage Upstate in the CNY Pride Parade. Three dances -- a Beach Party, a Spring Dance, and a Halloween dance -- were held, averaging an attendance of 100 per event. In addition, three "tea dances" were held at the Mystic Lounge for Sage participants. Pictured from top: Beach Party Dance, Bus Trip to Toronto Pride, Sage in CNY Pride Parade, Halloween Dance.

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A Report on 2008 Services: Regional Networks

Regional Networks



Since it started in 1997, Sage Upstate has welcomed participants from seven counties: Cayuga, Cortland, Jefferson, Madison, Oneida, Onondaga and Oswego. Until 2006, most programs were held in Syracuse. But, for the last few years we have been building networks in counties outside of Onondaga County. These networks help Sage participants find friends and support networks close to home. Networks Jefferson, Oswego, Cortland and Oneida met regularly for potlucks and other activities in 2008. An average of 29 people per month attended these gatherings.

In June, the Sage Jefferson County Alliance held a Health Fair at the Unitarian Church in Watertown

where the group meets. The event was well attended and gained press coverage -- news about the network group and about Sage Upstate appeared in the local paper.

Sage Upstate staffed a table at Utica Pride and distributed information on the group there. In early 2009, Oswego County meetings found a new home at the Fallbrook Recreation Center, and plans are being made to partner with the Cortland County LGBT Resource Center to offer Sage Cortland group meetings.

In the fall of 2008, Sage Upstate gathered the leaders of the four regional networks for information and strategy sharing. New program ideas and the creation of a regional survey resulted. Responses to the survey came in from all counties on the best places and times to meet, and what types of programs were needed. Data from the survey will be used to build existing networks and create new ones -- a new network was established in Cayuga County in 2009.

What Sage Upstate Means To Me ...



I was at a low point in my life -- in a recovery program and coming out of a 15 year or more relationship. I knew that I needed to make changes in my life so I decided to change people and to reinvent myself. I'm a women of 59 years, African American, and I longed to be with people of color with the same sexual orientation. When I first went to Uzuri I was shy, but the other folks came in and when we started talking I felt at home. I/we can speak what's truly on our minds and hearts and I felt whole. Uzuri to me is a melting pot, a foundation. I can just be with my own and let my hair down so to speak, and share our history. We have fun -- from the evening of game night, to the pool party, and of course the swearing in of our President. Uzuri came at a time of me feeling lonely, and now I have a greater sense of Pride. -- *Mable Wilson*

In The Office

Sage Upstate made a number of changes in 2008 to help us reach more people and provide enhanced and increased services and programs. A new web site was launched, featuring an interactive event calendar, resources for providers and other audiences on issues faced by LGBT seniors, online sign-ups for members, donors, and volunteers, a photo gallery and a blog. Our office space expanded -- we now have two meeting rooms, and many nights of the week both hold meetings. A toll -free number was added so everyone in our 7-county service area can easily reach us. We purchased a sound system to make sure everyone can hear at our potluck programs and other events, and an LCD projector to enhance our educational presentations. Another big change in the office came in 2009 -- we recently hired an Office Manager, bringing our number of staff people to four. Pictured L-R: Executive Director Kim Dill, Office Manager Barbara Johnson, Office Assistant Tony Fonehouse, and Program Coordinator Carrie Elliott.



A Report on 2008 Services: Membership, Volunteers

Volunteers

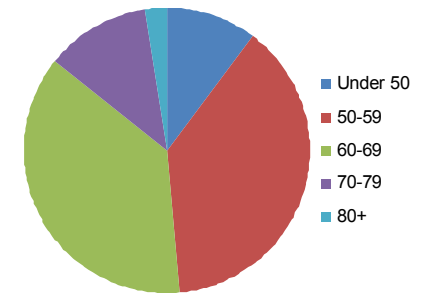
All Sage Upstate programs exist because of the dedication and generosity of volunteers. More than 70 individuals donated their time and energy in 2008, helping Sage Upstate to provide services to aging LGBT people. Volunteers made regional networks in four counties possible. Sage volunteers led classes in dance, acting, Spanish, and tennis. Sage members led groups for people coming out later in life, knitters, people age 60 and older, people of color and transgender people. Volunteers also hosted socials, including Men's Night Out, Women's Coffeehouse, and game gatherings. Volunteer experts led a series of classes on "Improving Longevity." Volunteers helped in the office, and they both mailed out the newsletter and delivered it to drop-off sites in the community. Each of the three dances held in 2008 relied on 15 - 20 volunteers, and the volunteers also helped with the 3 fundraising dances held at the Mystic. And every Second Sunday Potluck was a success due to a committee of volunteers, and folks who volunteered during the event. We couldn't do it without our wonderful Sage

Members

Upstate volunteers! It is important to note that neither age nor membership are requirements for participation in Sage Upstate programs. More than 1,200 US mail and email addresses receive mailings and a monthly newsletter. In 2008, 177 participants were paid members, contributing \$6,365 in dues (up from 133 members in 2007 contributing \$5,111). The current membership continues to maintain gender parity; about half all members were women, half men. Of those members reporting demographic information, ages ranged from 44 to 88 years (15% were age 70 and older; 37% were age 66 to age 69; 38% were age 50 to age 59, and 10% were under age 50).

Age Breakdown of Members

Includes members who provided demographic information.



What Sage Upstate Means To Me ...

Sage Upstate has provided a very solid base of friendships and acquaintances in the LGBT community for me. I have never had more close friendships in my life, and have not felt so safe and accepted as I have in these past few years. In addition to the social setting, Sage also has provided workshops related to health and well being for our LGBT community, which I have participated in. SAGE is a great resource for keeping abreast of current and ongoing legislative and community affairs, and issues that need to be pursued. I cannot imagine what my life would be like now were it not for my association with



Sage Upstate. Everyone needs to get involved and participate for the betterment of our community and join Sage Upstate today. -- *Roger Case*

