

SAGE/Task Force LGBT Aging Leadership Initiative



A Case Study in
Collaboration
April 2011

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Creative Tensions: Building Camaraderie Out of Conflict

When Michael Adams became the new Executive Director at Services and Advocacy for Gay, Lesbian, Bisexual & Transgender Elders (SAGE) in 2006, he had his work cut out for him. The New York based organization was facing a serious financial crisis and had responded by severely scaling back its longtime work in national policy and education in order to focus almost exclusively on local service programs for lesbian, gay, bisexual, and transgender (LGBT) elders.

In the meantime, the lack of focus on policy and advocacy for LGBT seniors at the national level had led the National Gay and Lesbian Task Force (Task Force) to reestablish its previous work on elder issues by creating a new position it was able to fill with a former SAGE policy staff member. The Task Force affirmed its leading role in the field that started with the 2000 publication of the groundbreaking *Outing Age* report on LGBT elder policy issues. Building on its policy expertise in other LGBT issues, the Task Force initiated the first National LGBT Aging Roundtable in 2006, bringing together service providers and activists in the field in the hopes of building a national network.

These shifting organizational roles – with SAGE pulling back its national presence and the Task Force stepping in – created confusion and tension between the organizations that Michael knew needed to be addressed. Soon after he started with SAGE in 2006, he arranged a meeting with Task Force Executive Director at the time Matt Foreman. Michael needed to better understand the history behind the organizational role changes and wanted to prepare SAGE for a larger role in national policy work as finances improved. Michael found a receptive partner in the Task Force, which had developed a strategic focus on building the LGBT movement nationally by fostering and sharing leadership with other organizations. Under Matt's direction, the Task Force had dedicated considerable resources to training local leaders and generating resources for networking and institution-building on a state and local level. Matt welcomed Michael's interest in rebuilding SAGE's historical national role.



Photo: SAGE Executive Director, Michael Adams speaks at the SAGE 2010 National Constituent Conference "The Future of Aging is in Our Hands"

"Matt reassured me that it was not the Task Force's intention or philosophy to sideline SAGE from the national work," explains Michael. "His vision was two organizations working in partnership, and he wanted the Task Force to share leadership in aging issues. Matt wanted SAGE to have more of a national leadership role." Rea Carey, then the Task Force's Deputy Executive, responsible for managing the organization's programs, describes in greater detail the nuances of the relationship, "We understood from the beginning that there would be a leadership role for both organizations to play. Rather than the Task Force stepping back, I saw it more as shared leadership, and recognized that in different arenas, one organization or the other would lead."

Within three years, the two organizations created a formal collaboration to work together on LGBT elder policy issues that would achieve significant successes. “We came together over conflict around our roles,” recalls Carey, “and in dealing with that we built trust.” That trust was fostered through a mutual desire to develop the best model to serve the mission, a commitment to direct communications, and a willingness to share leadership.

Developing a Partnership

The partnership deepened over the next couple of years, as Michael stabilized and expanded SAGE and as Rea became Executive Director of the Task Force. During this time, the organizations experienced both positive examples of collaboration, and some tensions that had to be resolved.

For example, the premiere LGBT activist event of the year is the National Conference on LGBT Equality: Creating Change conference, long produced by the Task Force. When Michael engaged in a discussion with staff at the Task Force around SAGE’s role at the 2007 event, he thought an agreement had been reached about SAGE’s participation. As the conference drew near, however, he discovered that SAGE had not been included in some of the ways he had expected. “I felt like we were left behind,” he recalls. “It seemed like staff organizing the conference had not received the message that SAGE and the Task Force were developing a special relationship, and that included some consideration at Creating Change.”

But when approached by Michael about the oversights, Task Force management was quick to acknowledge the problem, provide better instruction to their staff, and fix what could be fixed. Their responsiveness to Michael’s concerns increased the mutual trust.

This and other missteps along the way drove the need to develop a written document to capture their partnership agreements. During 2007, the organizations engaged in conversations about the type of work they could do together. “We focused on our relevant expertise,” says Rea, “and how we could work together using each other’s strengths to get more done.” Michael recalls that the Task Force was respectful of SAGE’s smaller size and the fact that he was the only person engaged in this collaboration at the time – whereas the Task Force had several different staff members involved. The emerging agreement demonstrated not only a shared commitment to furthering LGBT aging issues, but also a respect for building the two institutions through agreements around visibility and credit for activities undertaken jointly.



Photo: Task Force Executive Director Rea Carey speaks at the 2010 Creating Change conference in Dallas, TX. Photographer: Beck Star.

By the end of the year, both organizations had approved a Memorandum of Understanding (MOU) describing their partnership and successfully approached the Arcus Foundation to support a collaborative project. Arcus agreed to fund the joint effort to increase the visibility of LGBT aging issues nationally and awarded the organizations a \$500,000 grant in December 2007.

The grant agreement built on the MOU, which called for collaboration overall, while specifying that SAGE would lead on areas of its strengths and the Task Force in areas of its expertise. For example, SAGE would create SAGEConnect, an online community and resource center building on its expertise in direct services. The Task Force would update *Outing Age*, using information it had received through the years following its original publication and its knowledge of how to speak to national policy issues.

“We built an agreement that met SAGE’s need to be a leader where we were ready to lead, and allowed us to do that collaboratively with the Task Force,” says Michael. “We agreed to support the Task Force’s lead visibly and completely where they were most able.”

The initial Arcus grant outlined four primary objectives for the collaboration:

- **Networking:** Building an action- and goal-oriented advocacy network among disparate groups currently working on LGBT aging, and providing leadership to that network;
- **Policy:** Identifying and realizing key opportunities for strategic policy victories for LGBT elders at the federal and state/local levels;
- **Capacity Building:** Enhancing the capacity of the LGBT community to successfully advocate for local and national policies and resources that serve the interests of LGBT elders; and
- **Collaboration:** Securing a place for LGBT aging issues on the broader aging agenda by partnering with mainstream senior organizations and diversity in aging advocates.

Perhaps the most visible example of the two organizations’ formal collaboration has been seen in leadership of the National LGBT Aging Roundtable, a regular meeting of service providers and activists on LGBT aging issues from around the country. The Task Force first convened this group of individuals representing groups involved in LGBT aging services from around the country in June 2006. In negotiating their new roles, Michael and Rea both agreed that SAGE, with its content focus, was the better long-term lead for the Roundtable. But they also understood that SAGE did not yet have the resources to take on this responsibility. Thus, the Task Force continued to convene the Roundtable through 2008. By then, SAGE had used Arcus funding to hire Karen Taylor as its Director of Advocacy and Training. Taylor worked closely with Laurie Young – the Task Force’s Aging Policy Analyst who began work at almost the same time as she – to manage a transition of Roundtable leadership.

By March 2009, they were ready. At the Roundtable that month, Karen and SAGE were to officially take over leadership of the Roundtable. Illustrating how each would continue to support each other's organization after the transition, Laurie showed up at the meeting proudly sporting a brightly-colored SAGE t-shirt, and Karen wore her own Task Force version – eliciting a laugh from the participants and making a powerful statement. Not only did Karen and Laurie reinforce their commitment to partner, but they also modeled for national leadership how it could be done. “People saw the t-shirts and respected both organizations for it,” recalls Michael. “It drove home the point that this was about partnership, not turf.”

After that, the two became inseparable in promoting LGBT aging issues. “It’s hard to go back and remember who started what, me or Laurie,” says Karen. “We’ve done key things together and also worked in places where one organization built on the work initiated by the other.”

Leveraging each others’ relationships and skills has resulted in a partnership that is more than the sum of its parts – and that has achieved successes beyond what either could have accomplished independently. One major success achieved by leveraging their respective work was their approach to SAGE joining the Leadership Council of Aging Organizations. The Leadership Council is the coalition of major organizations working on aging issues nationally; it is influential in crafting federal legislation, regulations, and funding. The Task Force had never gained entrance to the organization because it did not focus primarily or solely on aging. SAGE had not been admitted because it did not maintain a Washington D.C. presence. Both organizations understood that the LGBT community needed a voice at the Leadership Council.



Photo: The SAGE contingent at New York's Gay Pride Parade in 2010

To achieve this goal, the Task Force provided a SAGE “office” in Washington D.C., by lending its address, local area code, and space for Karen to work from when she was in town. Laurie also provided introductions to the broad number of colleagues in the field she had cultivated over many years in non-LGBT aging work. Thanks to Arcus funding for Karen’s position, SAGE built on those introductions to navigate the political waters and introduce itself to the Leadership Council as a potential partner. With all the requirements in place, SAGE petitioned for membership and, when accepted in 2009, became the first LGBT member organization to that

group. Finally, the LGBT community had a voice at the most important non-profit forum on national policy and resource development around aging issues – and that voice had only gained entrance because the Task Force and SAGE leveraged their respective expertise for the good of their shared goals.

Karen tells the story of how this shared experience moved the LGBT aging agenda forward faster and further than possible had the two organizations acted alone:

During our first spring working together, we put on paper the federal priorities that we wanted to achieve around LGBT aging issues. It's great to have it on paper, but then what do we do with that? Because of Laurie's years of doing aging work, she said we should meet with Sandy Markwood, the Executive Director of the National Association Area Agencies on Aging ("N4A"), who she knew. The meeting would have happened sooner or later if it had just been me reaching out, and would have been more formal. But with Laurie and me both at the meeting we could conduct a thorough, informal briefing.

We talked about our policy agenda. Sandy was supportive and invited us to present at their conference – which Laurie and I did together. And, having laid out our advocacy agenda, I was able to follow up with Sandy and her staff directly about ways her agency could help us move those issues forward.

When SAGE successfully applied for an Administration on Aging grant for the first-ever National Resource Center on LGBT Aging, we were able to include N4A as a key partner in our proposal because we had a relationship with them. SAGE's relationship with N4A would have developed anyway, but much more slowly and with more time invested than I could put in. Because Laurie and the Task Force are on the ground in D.C. and had those relationships, those doors were opened for me more quickly.

Elements of Success

Although the collaboration's achievements are inspiring, the real lessons learned are around how the two groups succeeded in working together for the greater good. We have identified key elements of success in this effort.

Meet each others' needs

Putting your partner's needs on an equal footing as your own will solidify a relationship. For example, SAGE had largely pulled out of national policy work before Michael joined it, and the organization needed public attention to communicate its re-entry into the field. Such a need was especially important in a sometimes fractious LGBT community that would be looking for tensions between the partners. To meet this need, organizational leaders committed at the outset to publicly praise and promote each other. The SAGE newsletter carried articles describing the Task Force's work on aging issues, and the Task Force invited SAGE staff to lead workshops at the Creating Change conference. SAGE has represented the Task Force before funders – and the favor has been repaid with the Task Force representing SAGE at the

Leadership Council when Karen has been unable to attend. By meeting each others' needs, trust was built, and the common mission advanced.

“Each of us has had to be honest about communicating what our agency needs to be healthy and successful, and to honor that,” says Michael. For example, it was okay for SAGE to say to the Task Force ‘We need to be promoted so that we will be recognized as a leader.’ It was also okay for the Task Force to say to SAGE ‘we need to keep a role in this.’ The willingness to put respective organizational needs on the table and be committed to ensuring that those needs are met is important to our success. People sometimes are uncomfortable about that, but it’s a significant part of our reality and not talking about it will cause conflict.”

Achieving More Together

The successes that SAGE and the Task Force achieved from 2006 through 2009 have taken the national effort to improve the landscape for LGBT older people further than ever before. Although progress began with the leaders of the organizations, it really accelerated once Arcus funding was granted and Karen and Laurie were on board. Early successes proved the value of the partnership, thus reinforcing the value of sustaining the effort going forward:

- They have developed the first-ever guidebook to help service providers and activists succeed in finding federal funding and influencing federal policy makers. The *Roadmap to Federal Funding for Aging Services* has been followed by the *Catalogue of Policy and Regulatory Rules in Aging*, published by the Task Force while acknowledging its production as a partnership of the two organizations.
- With the close partnership, and focused staffing, provided by Laurie and Karen, the Roundtable has been strengthened and a series of Action Teams created; this has sharpened the focus of other advocates and increased the capacity of organizations beyond SAGE and the Task Force to participate in advancing the LGBT aging agenda.
- SAGE has reaffirmed its commitment to advocacy, increased its capacity for policy leadership, and strengthened its role as a leader in building a national LGBT aging network.
- The Task Force has enhanced its long-time efforts to raise aging issues at Creating Change – increasing capacity around aging issues within the LGBT community – and further institutionalized its support nationally for others engaged in aging work.
- In October 2008 the U.S. Administration on Aging, spurred on by SAGE, the Task Force, and the allies they had jointly cultivated, announced the establishment of the National Resource Center on LGBT Aging, which SAGE was subsequently chosen to run.
- During the first weeks of the Obama Administration, SAGE and the Task Force, in consultation with members of the Roundtable, developed a clear policy agenda and communicated that agenda through multiple messengers to key incoming leaders at the White House.

Be direct

This process was not always smooth and mistakes were made. Rather than let the mistakes fester, key participants made the effort to turn them into learning moments – to improve their ability to trust and work together – by asking what happened and taking corrective action. For example, on one occasion SAGE issued a press release on a policy victory without consulting with the Task Force. Another time, the Task Force didn't properly credit SAGE for work it had done in a publication that was going to print. In moments like these, staff and leadership from each organization talked through the problem to understand why the mistakes occurred. A misunderstanding about responsibility led to the mistaken press release; staff unaware of shared branding agreements led to the publication problem. The clarity in correcting these issues through subsequent steps coupled with a readiness to forgive mistakes has resulted in a healthy relationship.

“There was a graciousness in correcting mistakes,” Rea recalls. “Even when Michael made the change to the press release, we hadn't yet learned what went wrong, but we agreed to fix it and figure out what went wrong. It made a difference in our relationship.”

“Right,” Michael adds, “the issue is giving each other the benefit of the doubt. Mistakes are made, but they are only mistakes, and you know that because of the trust we've built.”

“No grudges are held,” agrees Rea.

Document agreements

The best meeting of minds can get off-track when the minds remember events differently. SAGE and the Task Force made a habit of writing down the outcomes they reached in their conversations – even informal understandings – and sharing the written record. This enabled the team to quickly resolve misunderstandings and ambiguous statements because they were able to refer back to written notes to clarify expectations, agreements, and decisions – and to share these agreements with absent or new staff.

“Tensions led to a need to memorialize agreements,” Michael says, “and that's very important at the outset. But the need doesn't go away entirely. Over time, we built a great collaboration – we have a good MOU that lays out how we will work together – but then, what happened with our collaboration is that more people in each organization got involved. Some of the people newly involved may not be fully briefed on the collaboration or the spirit of it. The relationship grows. We established it at the beginning, but we've had to work to keep it alive. The documented reminders are a part of that.”

Focus on shared mission and values

From the beginning, the organizations focused on how the collaborative mission would support the mission of the respective organizations and how their shared values would contribute to collaborative success. SAGE's mission is around LGBT elders; the Task Force's mission is around building the grassroots LGBT movement and political power. The two organizations focused their collaborative efforts at the intersection of these missions. But they were only able

to do that because the individuals involved shared values around directness, shared leadership, and a clear focus on improving the lives of and changing policies to benefit LGBT elders.

Significantly, the Task Force and SAGE didn't decide to pursue a collaborative relationship because a funder offered them a grant. Instead, each organization determined its own interests and built the collaboration where those interests were best served through partnership. They defined their own agenda – and their enthusiasm for what they could do motivated funders to support them.

Relationships begin at the staff level

When Michael stepped in as Executive Director, tension at the staff level had affected some SAGE board members. Despite the challenges, the SAGE board observed and responded to his direct communication and trust building with Task Force leadership. Once board members saw the Task Force follow through on commitments, they moved wholeheartedly behind the collaborative effort.

Beyond Michael, Matt, and Rea, the ability of staff to follow through on institutional agreements has been crucial. As already described, Laurie and Karen began work on the collaboration at about the same time, making it easy to bond and to look for best solutions to their shared goals without reference to any history between the organizations. The positive tone set by leadership was echoed in the actions of other staff.

“We focused on our relevant expertise and how we could work together using each other’s strengths to get more done.”

Rea Carey
Deputy Director, National Gay and Lesbian Task Force

“These types of partnerships are never a problem to conceive – especially for funders,” says Cindy Rizzo, Senior Director for Grantmaking and Evaluation at Arcus Foundation. “We see who could work together or who could merge. But it all comes down to the people. In this case, these people made this work. They hired extraordinarily talented people to make it work. Karen and Laurie have an incredible relationship, bring much to the project, and are invested in mutual success. And Michael and Rea bring the same ethics to the project.”

Good collaboration takes time

Successful partnerships are time consuming, especially in the beginning. Each principle for success identified here has required an investment in time. Each principle is also supported by good communications – another time-intensive activity if partners are to explore the shared mission and understand each others' needs, to build interpersonal relationships, to document agreements, and so forth.

“Karen and I are constantly in touch. We talk together three or four times each week,” says Laurie. “The critical issue is keeping each other informed of all our activities.”

“Yes,” adds Karen, “I’m in DC once each month and see Laurie every time.”

“It has to take a little patience and capital,” adds Cindy. “Collaborations take money and take time. In this situation, we funded them for two years. In the first two years we didn’t expect them to change the world. They put together an excellent collaboration in that time, catalogued federal programs relevant to their agenda, prioritized policy needs, and became members of the Leadership Council on Aging. Those were their outcomes, and that was good work for a new collaboration.”

Find the places where the sum equals more than the parts

Each organization flourished because they worked together to make a bigger pie rather than fighting over crumbs. Rather than compete for limited funds, they cooperated in promoting a dynamic agenda that attracted new resources. For example, although the Arcus Foundation already funded each separately, their willingness to approach Arcus jointly with a convincing proposal about how they could do more together compelled the Foundation to give a collaborative grant in addition to the funds already granted to the respective organizations.

The collaboration has now positioned both organizations to reach new funders – both to educate traditional aging funders about LGBT needs, as well as to promote successful partnerships with core LGBT funders.

Shared leadership means greater impact

Senior staff in both organizations readily saw each other’s strengths and sought to share leadership in the national arena in order to leverage their unique skills. The example of how the Task Force facilitated SAGE’s ascension to the Leadership Council is a great example of achieving success in a shared mission. Rather than fighting about who carried the mission, both organizations achieved greater impact through cooperation.

In Closing: Advancing the Field

This collaboration has generated greater attention for LGBT elder issues, both within the LGBT community as well as in policy making circles in Washington. Cindy Rizzo of the Arcus Foundation sums up the project’s success:

It was a risk. We took an organization steeped in its field and a policy organization and wanted to see if they could leverage each others’ strengths. It was a test, a sort of theory of change. There are successful and unsuccessful collaborations in our movement; there is no formula for predicting one or the other. It was a leap of faith, although we knew we had solid leadership on both sides. About six months into the grant, they came and sat with me, with staff from each side – and that is when I knew it was promising. As a funder you develop a sixth sense, you sit up and pay attention. This was one where you know it is going to work.

The collaborative relationship between SAGE and the Task Force continues and the 2-year, \$500,000 grant from Arcus was renewed for another two years in 2009. The collaboration maintains an aggressive work plan going forward, including:

- Implementation of a joint federal advocacy effort
- Creation of a new state-by-state catalogue of aging and LGBT policy and implementation to complement the national aging services funding roadmap
- Presentation of regional constituent-focused advocacy trainings that provide LGBT older people with key skills in advocacy, communications, and grassroots fundraising
- Partnering with the National Senior Citizens' Law Center on discrimination perceptions in nursing homes and assisted living
- Research in partnership with Training to Serve, the University of Minnesota, and the National Association of Area Agencies on Aging to assess the readiness of area agencies on aging throughout the country in their readiness to serve LGBT seniors
- Training participants at two national aging conferences, on Research to Policy to Practice for meeting the needs of LGBT older adults
- Exploration of new platforms for constituent advocacy involving new organizations

Education and networking through annual conferences and roundtables, and the distribution of key reports such as *Outing Age* by the Task Force and a series of LGBT aging policy briefs by SAGE, will also continue.

The leadership demonstrated by SAGE and the Task Force is resulting in improved policy, new funding, and growing levels of service. Thanks to this partnership, prospects for LGBT elders have never been brighter.

Update on 2010 Developments:

After consultation with the Task Force, in March 2010 SAGE posted its own Director of Federal Relations in Washington, D.C. to make sure that there was sufficient staff on hand to take advantage of expansive policy opportunities available through the Obama Administration and Congress. John Johnson, a 15-year veteran of Capitol Hill and federal agencies, was hired by SAGE for this new role. SAGE and the Task Force are continuing to work closely together on federal policy issues, with John and Laurie Young quickly forming a successful partnership. Karen Taylor left SAGE in May 2010. Serena Worthington has subsequently been hired by SAGE as the Director of Community Advocacy & Capacity-Building, and John Johnson as SAGE's Director of Federal Relations.

For More Information

Services and Advocacy for Gay, Lesbian, Bisexual & Transgender Elders (SAGE) was formed in 1978, and is the world's oldest and largest nonprofit dedicated to addressing the needs of LGBT elders. Visit SAGE at www.sageusa.org, or join them on Facebook or Twitter.

The National Gay and Lesbian Task Force was founded in 1973 to serve as an uncompromising national voice for full LGBT equality. Visit the Task Force at www.thetaskforce.org, or join them on Facebook, Twitter, or YouTube.

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