

TIPS FOR CREATING A WISDOM TRUST



These steps are what we found helpful in holding the Wisdom Trust. Below are a few tips from our experience.

Step 1: Acknowledge your capacity as a leader, which means you will have many roles. Embrace not knowing and prepare yourself for all the questions you will not have answers to, missteps that you will make and small victories to celebrate. You may never be ready but getting started is key.

Step 2: Create your calendar of meetings, write your goals, define what progress looks like, and outline an agenda. Every group functions best at the most basic level when there is structure of when to meet, what topics will be addressed and still have the flexibility to adapt as needed. Therefore, identify whether meeting weekly, monthly, or quarterly will be most effective for your group. At a deeper level, this is the beginning of a strategic plan that leads you to a purpose. You may find that just meeting to build fellowship is the purpose or that there is a shift your group wants to achieve.

Step 3: Learn about parts of your community that you do not know. Growing your wisdom trust community from roots requires the building of relationships and so it is essential to allow time to get to know one another. Identify what ways your group can get to know each other. Then, find opportunities to experience the diversity of your community. While

the aim is to not have any hierarchy, the inviter is always going to have a bit more sense of ownership than the invitee until the invitee is part of the decision-making process. Even small things like what food to bring helps build communal power sharing.

Step 4: Identify who the right people are after learning about your community. Choosing who to invite requires a level of humility, that one does not know everything. This is like developing a list of trustees for an organization. Instead of the traditional, who is the lawyer, CEO, etc., we ask you to think of it in two ways. Invite diversity of race, class, gender, sexual orientation, nationality, age, religion, ability, geography, family status and language. Invite individuals who demonstrate some level of competency in being innovative, adaptable, able to think critically, cross-culturally communicative, and collaborative.

Step 5: Leverage your social capital (allyship) to support the group. If you have successfully brought a diverse group together, then you can have authentic conversation about the social positionality of each member. We each have hurdles that are part of society we overcome and there is value in identifying how one can be an ally to another. Leave room in your agenda each time you meet for individuals to share what they are struggling with so that there can be either thought partnership or actual action support.

Step 6: Don't get stuck on yourself. Practicing critical reflection is essential in holding the Wisdom Trust group together. This involves becoming aware of the issues you have strongest feelings about and identifying your proximity to these issues. One way to be successful is to focus on how you can be an ally on issues that do not impact you directly. Your point of entry does not matter, just that you enter. Acknowledge the way each person enters the dialogue; it matters

Step 7: Commit to the journey and show up. Do not focus on what to do or how to do it, just jump and keep doing. Often, we can get stuck in figuring things out - a terrible disease of perfectionism -and our focus needs to be on consistency as this develops the habit of excellence.

Step 8: Mentorship and humility. An ongoing process will require you to consider how your group can shift the roles of mentorship so that it does not become a one-way street. Ethel was humble enough to be our mentor and allow us to be her mentor.

Step 9: Find moments to support each other when life happens. In the routine of meeting on a regular basis, there are moments in which the group becomes not only a listening space and safe space for each other to think out loud with the group, but at times, support each other through challenges. Ethel showed up for us and often met us with us outside of the group our own events.

Step 10: Keep on, regardless of who shows up. It is too easy to get caught up on who shows up or how many people show up. Showing up is the most important thing. In our Wisdom Trust, sometimes, there were only three of us. Quality over quantity is an essential part of holding the Wisdom Trust.

Step 11: Identify what success means for you. Each person will identify their measurement of success and as the holder of a wisdom trust you will do the same. Our invitation is to consider that happiness is the new rich, service is new success, health is new wealth, kindness is the new cool, connection is the new currency. Each person brings their uniqueness and collectively the group becomes your Wisdom Trust.

Step 12: The prize of aging is wisdom. Allow the process of your Wisdom Trust to age. The wisdom nuggets will continue to arrive.