



## *Sage-ing Chapter Guide*

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*Sage-ing International: [www.sage-ing.org](http://www.sage-ing.org)*

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## Introduction

In 2011, Sage-ing International leaders met near Seattle to consider our long-range plans as an organization. Among other things, we acknowledged the importance of local activities facilitated by our SI members for ourselves or for the general public, identifying these as the three legs of local support: Learning, Community and Service. Sage-ing Chapters (Chapters) are one leg, representing the promotion of Learning about Sage-ing philosophy in the local community. Wisdom Circles typically represent the Community leg, while either individual volunteerism or community projects support the Service leg. One could argue that Chapters actually encompass all three legs, since they also bring like-minded people together (Community) to do the Chapter work and often provide various Services to the community through the programs they sponsor or present.

This Guide is designed to describe how existing Chapters operate, what their objectives are, and how others could create Chapters in their own local areas. Sage-ing International supports the formation and activity of local Chapters, and is prepared to help you to either create a new Chapter or enrich an existing Chapter.

[Gary Carlson](#), Coordinator of Chapter and Circle activities for Sage-ing International

## Chapter Survey

The Outreach Committee of SI was tasked by the Coordinating Circle in late 2015 to take over the management and support, broadly speaking, of Wisdom Circles and Sage-ing Chapters for SI. The initial objectives were to find out what the current state of Circles and Chapters is (how many are active and how they operate) and to offer organizational help and guidance for existing Circles and Chapters and for communities or individuals who wish to create either a new Chapter or Circle in their area.

In January, 2016, a survey was sent by to all SI members to find out how many were part of either a Circle or a Chapter. Based on the response, a second survey was sent to approximately 40 Wisdom Circle leaders to explore their Circle experience. That information was used to update the [Wisdom Circle Guide](#), a document first published several years ago that outlined how Wisdom Circles could be created and operated.

In August, 2016, a third survey was sent to ten Sage-ing Chapter leaders who had been identified in the first survey. This Sage-ing Chapter Guide is structured on the survey results received. The Appendix to this Guide includes particular information from one Chapter on an annual workshop program that they present to their local community.

### **What Is a Sage-ing Chapter?**

Broadly speaking, a Sage-ing Chapter is a group of Sages (mostly but not always members of Sage-ing International) who organize locally to carry out a program of Sage-ing activities, either for their members or for the general public (or both). They are loosely affiliated with Sage-ing International, but have no specifically identified role in or responsibility to SI. Chapter members come from a geographic region as small as a city or county, or as large as a state. Based on the latest survey results, we have identified six currently active Chapters (Boulder, CO; Central Indiana; Edmonton, AB; Florida; New Mexico; and the Greater Washington DC area). Several other Chapters have disbanded recently, not finding a viable focus or energy to continue. Since there were a significantly larger number of Chapters (~10+) a few years ago, it appears that it may be challenging either to organize a Chapter or to successfully keep a Chapter active. One of our goals in this Guide is to develop a template for a successful Chapter that others can use to guide their own Chapter organizational structure and activities.

### **What Is the Leadership Structure of a Chapter?**

Each Chapter develops its own leadership structure, but typically leadership is provided by a person or persons with significant Sage-ing experience and strong commitment to Sage-ing as a beneficial way of life for those in the second half of life. Some Chapters have a single leader, and some have a group of leaders (Identified Officers or a Steering Committee). The important factor seems to be the ongoing commitment of the leader(s) to the vibrancy and activity of the group.

Typically, the leadership group will establish the plans and priorities of the Chapter, either independently or with input from other Chapter members. These plans and priorities may be adopted on an annual basis or more frequently, as the group decides.

### **How Often Do Chapters Meet?**

Again, there is a considerable spread among various Chapters. One meets weekly (generally in a Circle format, taking up Chapter business only when needed), and some meet much more infrequently (perhaps only once or a few times a year, although the leaders may meet more frequently to plan activities that group members may participate in). Frequency seems to be dependent on the overall programmatic focus of the Chapter, and what works to carry that out.

### **Are Chapters Limited to Members of Sage-ing International?**

In general, Chapters do not require membership in SI for their members, although they usually encourage it. More than one Chapter automatically submits their member names to SI for addition to the SI membership list. Some Chapters also submit names of persons attending their programs/workshops to SI for addition to the SI membership list, and identify that automatic membership as a “benefit” of participation. Members of SI can be but are not required to be active in local chapters.

### **What Are Typical Programmatic Offerings of Chapters?**

Again, there is a broad range of activities that various Chapters sponsor or present for their members or for the general public. The most active Chapters seem to have a relatively broad range of programs, while others focus in on a smaller palette of programs. One Chapter, relatively new, is focused on supporting various community service activities, while others sponsor workshops for their group or for the general public.

### **Do Chapters Bring In or Spend Money?**

Most Chapters have a modest number of activities from which income is produced or expenses are incurred. And most Chapters do not have enough financial activities to require a bank account (one Chapter works through a dedicated account within the SI accounting system and one Chapter has its own bank account and a Treasurer to manage its financial operations). The latter is the only Chapter that has reported long-term financial viability. It has even made modest financial contributions to SI (not something that is expected by SI). One or two other Chapters have requested (and received) modest financial support from SI for some of their programs.

## **What Is the Difference Between a Chapter and a Circle?**

Some groups have served as Chapters and Circles at the same time. In fact, most Chapters have at a minimum had a close relationship with Circles in their area, even while maintaining independent operations. However, there are some significant differences between Chapters and Circles that may make it important for them to maintain separate goals and organizational structures. Generally, Wisdom Circles are sources of community for persons who attend them. They may also have an educational component (many have facilitated discussions about various topics that are chosen by the Circle members), but that is usually less important than the social connections made among members. On the other hand, a Chapter usually has a strong educational component, often directed at the aging population in their community. This can be expressed through workshops, talks, retreats and other activities related to Sage-ing. A Chapter tends to be more outwardly-directed relative to a Circle.

## **What Is the Overall Success of Chapters?**

Generally, Chapters have had a difficult time maintaining viability (witness the current small number of active Chapters). However, there are some outstanding successes, especially for those Chapters who have had visionary and committed leaders. There are also some newly-formed Chapters that have an excellent chance to become successful over time, and there is considerable opportunity for other communities to create successful Chapters. We hope this Guide will provide information and a template for creating active and successful Chapters in more communities.

## **A Template for a Successful Sage-ing Chapter**

The New Mexico Chapter will be presented as a template for a successful Sage-ing Chapter. It has essentially all the positive attributes of other Chapters, and some additional characteristics that have made it successful over many years.

**Bring together a critical mass of like-minded people:** The New Mexico group actually began in 2002, at a gathering of elders from Albuquerque and Santa Fe who were interested in exploring conscious aging issues and helping others to explore these issues. Within the first year, the group named itself the Conscious Aging Network of New Mexico (CAN-NM), a name that has remained until the present, although now it also refers to itself as the New Mexico Chapter of SI. Over time, some of the original group members dropped out, but others came in, creating a

dynamic leadership group that has morphed over the years, but always included some consistent long-term supporters.

**Take a risk:** CAN-NM took a big chance in its second year, bringing in two well-known (and well-paid) professionals to do a weekend workshop (*The Tao of Aging*). Although the expenses for these presenters were high, we minimized other costs by getting free space (in a community center), free food (Whole Foods donations) and free publicity (primarily newspaper and magazine articles that we wrote). We ended up with over 100 participants, and made a significant amount of money, which was put in the bank to underwrite other future programs.

**Give the public programs they want and can relate to:** Following this workshop, a group of participants decided to continue meeting in what became the second Wisdom Circle in New Mexico (the first Circle in NM had been organized about 5 years before by followers of Reb Zalman in Los Alamos, NM). Both the Los Alamos and Albuquerque groups remain active today, attesting to the importance for our elder population of gathering regularly for community and conversation. Both were organized and have been run independently from CAN-NM, but with our blessing and with many overlapping members.

**Be part of the larger conscious aging/Sage-ing community:** For over 30 years, New Mexico has had an annual Conference on Aging, sponsored by the state Aging and Long Term Services Department. When CAN-NM was first organized, several of our members became members of the Planning Committee. We introduced a Conscious Aging track in the program (involving, at times, as many as 20 workshops with a conscious aging focus, many presented by CAN-NM members) and in identifying and inviting important CA keynote speakers (including Richard Leider, Rick Moody and Bill Thomas, who all later became members of SI's Council of Honored Sages). Whenever we invited a key conscious aging speaker, we also invited them to meet for dinner with our group so we could discuss our common interests.

**Create a loyal following:** In order to not have to spend a lot of money on paid publicity, we made a point of gathering email addresses whenever we could from any events we sponsored or were part of. This takes a certain amount of effort, but can be very effective in the long run. Over the years, our email interest list has grown to nearly 1000 persons in New Mexico, including a separate list of about 200 mental health professionals which came to one of us by accident, and which we have since used in our publicity emailings. We have also, for a number of years, worked with the National Association of Social Workers-NM for CAN-NM presenters to be certified as CEU providers. For a reasonably small fee, our Chapter is able to offer CEUs to Counselors and Social Workers, increasing our outreach to the mental health community.

**Manage frustration, be patient and weather the fallow times:** As in all organizations, a Chapter will experience good times and difficult times. Membership is fluid and enthusiasm is

variable, depending on circumstances within and outside the organization. There were times over the years when CAN-NM had difficulty identifying new, committed leadership or Sage-ing activities that the group was excited to support. There were periods when our members did not choose to attend meetings or present workshops or talks for the public or at Conferences, and this was sometimes frustrating.

These were important times for CAN-NM, when a few key leaders stayed patient, kept the faith and kept us going forward, although with a smaller plate of activities. These were also times when we began to realize that being more closely affiliated with SI and with Sage-ing ideas might bring both support and enthusiasm for a new, slightly modified mission (more of a public education outlook). We made the transition to becoming a Sage-ing Chapter about four years ago (unofficially, we had been closely aligned with SI for many years). Since officially becoming a SI Chapter, we have become stronger and more committed to serving the elders in our community.

**Serve the public:** When CAN-NM transitioned to being a Sage-ing Chapter, we also modified our goals and our yearly activities schedule somewhat. Whereas before, we had focused our attention on being affiliated with the Conference on Aging and not doing many CAN-NM-sponsored workshops outside of this venue, we have for the past four years planned an annual series of CAN-NM workshops, one each quarter (except for the quarter when the Conference on Aging is held). We solicit workshop proposals from within and outside of CAN-NM. We sometimes, but not always, have a specific Sage-ing theme for the year (such as End of Life Issues).

Our workshops are designed to be three hours on a Saturday afternoon, which we have found to be an effective format. We rent inexpensive space at a local church, provide healthy snacks, and make sure that the workshops are engaging and interactive. We charge a reasonably low fee (\$25 for SI members, \$10 extra for CEUs) and typically get 35-40 participants (low has been about 20 and high about 60). Our events always are profitable, and we give 70% of the net profits to the presenter(s). We ask participants to evaluate the workshops for quality control, and the reviews are generally very good to excellent.

A Request for Proposals we have used to solicit potential workshops is included in the Appendix, along with a sample flyer and registration form, a sample evaluation form and a list of recent workshops.

**Serve and support SI:** Although Chapters do not have a close organizational relationship with SI, we do try to serve SI interests when we can. Several of our Chapter members are Sage-ing Leaders also, and these persons often present workshops that are separate from the CAN-NM series, such as *Awakening the Sage Within* or a *Sage-ing Intensive*. Following these offerings, a



number of people have been encouraged to enroll in Sage-ing certification programs (CSL training, for example). These introductory Sage-ing workshops can also be an excellent kickoff activity for a new Wisdom Circle.

Additionally, we have made it a policy to take our participant list from each CAN-NM workshop and submit it to SI with the request that these persons be given a free SI membership. Other groups have suggested to their participants that they consider joining SI (with free membership), but that's often a less effective means of growing membership. We always tell our participants they are getting a free SI membership, and if they don't want it, they can opt out. That seldom seems to happen. The bottom line is, we have about 160 SI members in New Mexico, a relatively small population state. Per capita, New Mexico has over 10 times the number of SI members as the rest of the United States. That's a result of CAN-NM's longevity, persistence and popularity.

Finally, we've decided as a group to support SI with our energies and our finances. This fall, CAN-NM members will be putting on one of the pre-conference day programs at the Sage-ing International Conference. This will include a morning session on Wisdom Circles and Sage-ing Chapters, featuring five CAN-NM leaders, and an afternoon session on advanced Sage-ing workshops, featuring Gary and Charlotte Carlson giving a 3-hour workshop on End-of-Life issues, *No Regrets—Living Well and Dying Well*.

**Synergy of Chapters, Workshops and Circles:** For the most success in creating a local Sage-ing program, it is probably most effective to think about a multi-pronged approach, including not only a stand-alone Sage-ing Chapter but also a workshop program or series and one or more Wisdom Circles. In fact, a Chapter is probably the last piece of the organizational puzzle to bring together. Here is one way to proceed that has been used effectively by others.

First, present (or bring in a CSL to present) an *Awakening the Sage Within* or *Sage-ing Intensive* workshop in your community. Good—now you should have a number of people who have been introduced to Sage-ing principles and who would probably like to do more Sage-ing work (one of the worst practices of some workshop presenters is to present a great workshop and then not give the participants an opportunity to do more). These people might well enjoy participating in a Circle, which you could organize (or be part of organizing). Wisdom Circles are very easy to organize and very popular with their participants.

Do this a couple of times, then sound out some of the people for interest in a Sage-ing chapter. Not all will be interested, since to some degree this involves organizational work, not everyone's cup of tea. If you find a critical mass of people (perhaps 10 or more who show reasonable interest), meet a few times and see whether there's energy for creating additional

Sage-ing activities. These could be workshops, service projects, new Circles, whatever seems to be appropriate for your local area and community.

If you're in a large metropolitan area, that population may be an appropriate size for your Chapter. If you're in a rural area, or a smaller town or population center, you may wish to increase your outreach to a larger geographical area. Just remember, most activities work best when they involve meeting each other face-to-face and that becomes more difficult as the size of your area becomes larger.

**How can SI help you?** Sage-ing International wants to help you to be successful with your Chapter work. This Guide is one part of that help. The orientation work at this year's Conference in October is yet another way that we can share ideas about how to make Chapters work well. Finally, SI has tasked the Outreach Committee to provide support to persons leading Chapters or organizing Chapters. Just give us a call, and we'll help if we can!

## **Appendix**

### **Documents Related to the Workshop Series in New Mexico**

#### **Request for Workshop Proposals—Example**

The following is a Request for Proposals that has been used recently in New Mexico to solicit workshop proposals. Following a process of judging submitted RFPs by the Steering Committee of SI-NM, three workshops are selected for presentation during the coming year.

#### **Conscious Aging Network of New Mexico**

##### **Call for Proposals for 2017**

The purpose of The Conscious Aging Network of NM (CAN-NM), a chapter of the nonprofit organization Sage-ing International ([www.sage-ing.org](http://www.sage-ing.org)), is to help promote meaning in the second half of life and to help the public understand and embrace the concepts of conscious aging.

CAN-NM sponsors workshops for the general public and those professionals who work with individuals in the second half of life. CAN-NM invites individuals with expertise in topics related to conscious aging to submit a proposal for a three-hour interactive workshop for an audience made up of the general public and social work professionals.

##### **Goal of Each Workshop**

Our goal for each workshop is that participants engage with the content material and with one another in a highly interactive, welcoming workshop. Our target group size is 25-35 participants.

##### **Responsibilities of CAN-NM and Presenter**

CAN-NM will procure a venue, publicize the event, handle registration, provide CEU credits for social workers, and have snacks available at a midway break. The presenter will work with CAN-NM to prepare a workshop flyer and will send copies of the flyer to their own email lists for further publicity. After expenses the profit will be divided 70% to the presenter and 30% to CAN-NM.

##### **Schedule of Workshops**

At this time we are requesting proposals for the 2017 season of CAN-NM workshops. We plan

to sponsor three 3-hour Saturday afternoon workshops in Albuquerque—February 25, May 13 and October 14, from 1:00 PM to 4:00 PM.

### **Submission of Proposals**

Proposals should be submitted to Fran Anderson at [franand@hughes.net](mailto:franand@hughes.net).

Deadline for receipt of proposals is November 10. You will be informed of the results of our review of all proposals by December 15, 2016.

### **Review Criteria**

1. Relevance to CAN-NM mission to educate the public about conscious aging
2. Degree of audience participation anticipated in workshop
3. Attractiveness of topic to general public as well as to professionals
4. When appropriate to the topic, presentations are supported by research on aging.

### **Preference will be given to the following Conscious Aging/Sage-ing Topics**

- Learning throughout life
- Being in community
- Finding passion/purpose in the second half of life
- Engaging actively in life
- Being of service
- Creating a legacy
- Embracing your spirituality
- Practical end of life considerations (preparing will, advance directive, etc.)
- Becoming comfortable with your mortality (please note that this topic was covered extensively in 2015 and early 2016)
- Taking care of unfinished business

### **REQUIRED ELEMENTS OF YOUR PROPOSAL FOLLOW:**

#### **Proposed Title**

1. Provide your name and contact information.
2. Briefly describe your proposed workshop in two or three paragraphs.
3. Write two to three paragraphs about yourself, including your educational and professional bio and your expertise in topics related to aging.
4. List the titles and brief descriptions of your presentations on aging or related topics in the past two years.

5. List two names and contact information (telephone and email) for individuals who are familiar with your presentations and who have been notified that a member of CAN-NM will contact them.
6. Describe the goals of your workshop. CAN-NM will prepare and conduct evaluations from participants at the end of the workshop.
7. Briefly list the components of the workshop and the approximate time for each component. Identify interactive elements. (Examples: introduction to concepts or skills, participants working directly with materials, table discussions, participants interacting with one another, writing or art activities, etc.)
8. Identify all dates when you could present your workshop:  
\_\_\_ February 25  
\_\_\_ May 13,  
\_\_\_ October 14

### **QUESTIONS?**

Contact Fran Anderson, [franand@hughes.net](mailto:franand@hughes.net)

505-658-5361

## Workshop Flyer—Example

*The Conscious Aging Network of New Mexico presents*

# No Regrets—Living Well and Dying Well with Charlotte and Gary Carlson

Saturday, October 10, 2015 1:00 pm-4:00 pm

First Unitarian Church Memorial Hall  
3701 Carlisle NE, Albuquerque, NM 87110

**Workshop Description:** Death and dying is a topic of great interest and concern to those in the second half of life. In fact, fear of dying can keep us from fully living, while a healthy relationship with death and dying will help us to live well. We will explore this last stage of life from a number of perspectives, including our feelings and beliefs about death and dying; how to talk to family about our wishes; leaving a legacy; practical considerations; and spirituality in our later years. The workshop will be highly interactive, using a variety of exercises. Come prepared to share your beliefs, to explore new ideas, and to expand your intellectual, practical and emotional understanding of living and dying without regrets.

**The Presenters:** Charlotte M. Carlson, PhD, Jungian Analyst, has recently retired from private practice in Albuquerque, New Mexico. She has worked extensively with the dying and their families in her professional career, including work at the UNM Cancer Research and Treatment Center. Gary A. Carlson, PhD, is a retired research scientist and technical manager whose work is now focused on issues related to conscious aging. He is also a clay artist and has been a hospice volunteer for over 10 years. Charlotte and Gary are both Certified Sage-ing Leaders and Sage-ing Circle Facilitators for Sage-ing® International, a non-profit which Gary helped to create eleven years ago. Gary is also a leader of the Conscious Aging Network of New Mexico, a group that focuses on a positive vision of our elder years as an exciting and productive time of life.



**CEUs:** 3 CEUs are available for counselors and social workers

**Registration Form**

**No Regrets—Living Well and Dying Well**  
**Saturday, October 10, 2015 1:00 pm-4:00 pm**  
First Unitarian Church Memorial Hall  
3701 Carlisle Blvd. NE  
Albuquerque, NM 87110

Your Name: \_\_\_\_\_

Your Email: \_\_\_\_\_

I wish to register for the Workshop.

\_\_\_\_\_ Fee for member of general public (\$30)

\_\_\_\_\_ Fee for general public including 3 Social Worker CEUs (\$40)

\_\_\_\_\_ Fee for Sage-ing International (SI) member (\$20)

\_\_\_\_\_ Fee for SI member, including 3 Social Worker CEUs (\$30)

\_\_\_\_\_ I can only afford this much (fill in amount)

Please make checks payable to CAN-NM and send with registration form to:

Gary Carlson, SI-NM  
Conscious Aging Workshop  
413 La Comunidad NW  
Albuquerque, NM 87114

Your registration will be acknowledged by return email. Thank you.

## Workshop Evaluation Form—Example

### No Regrets Workshop October 10, 2015

*To help CAN improve our workshops please give us your feedback.*

Please indicate your response to the questions below by circling the most appropriate number, with **1 = MOST NEGATIVE** and **5 = MOST POSITIVE**

1. Did the workshop hold your interest?.....1    2    3    4    5
2. Overall, how would you rate the workshop?.....1    2    3    4    5
3. Would you recommend this workshop to others?.....1    2    3    4    5
4. Would you recommend this workshop leader to others?.....1    2    3    4    5
5. What did you like the most about the workshop?
  
6. What do you recommend changing about the workshop?
  
7. What other workshops would you like CAN to offer?
  
8. If you would like to present a CAN workshop please include your name and contact information.
  
9. Other comments, observations, suggestions.

*Thanks for your feedback!*



## **List of Recent Workshops Sponsored by CAN-NM**

Here is a list of workshops that CAN-NM has sponsored over the past few years.

2013 Resilient Aging, with Mike and Annie Milstein

Salt and Pepper, A play by Robert Benjamin

2014 The Healing Power of Creativity as We Age, with Patricia Flasch

Creativity: Habits for Aging, with Edi Klingner

Conscious Aging: Growing, Savoring and Serving in Life's Later Chapters, with Ron Pevny

2015 Living a Legacy, Leaving a Legacy, with Rick Light

Why Die at 75?, With Emily Freede

No Regrets: Living Well and Dying Well, with Charlotte and Gary Carlson

2016 Laughing and Learning: A Practical End-of-Life Workshop, with Gail Rubin

Flourishing, with Steve Poland

Harvesting While Still Planting, with Susan and Robert Benjamin