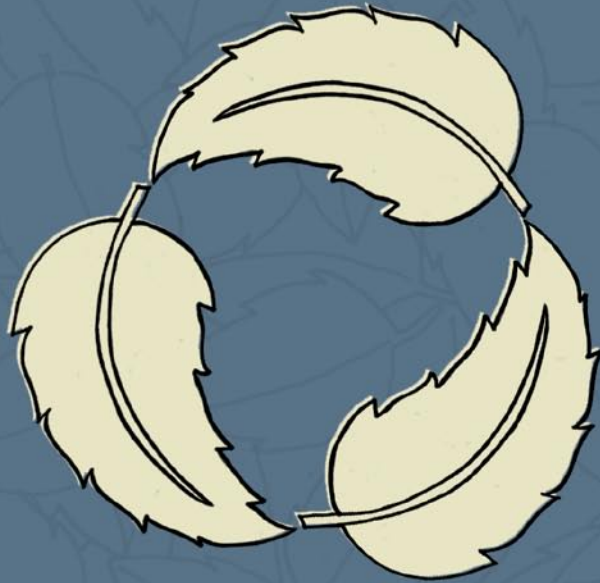


Annual Report 2008



The Berkana Institute

Whatever the problem, community is the answer.

It is possible that the next Buddha will not take the form of an individual. The next Buddha may take the form of a community—a community practicing understanding and loving-kindness, a community practicing mindful living. This may be the most important thing we can do for the survival of the earth.

—*Thich Nhat Hanh*

Whatever the problem, community is the answer.

The Berkana Institute works in partnership with a rich diversity of people around the world who strengthen their communities by working with the wisdom and wealth already present in their people, traditions and environment. As pioneers, we do not deny or flee from our global crisis. We respond by moving courageously into the future now, experimenting with many different solutions.

Berkana and our partners share the clarity that whatever the problem, community is the answer. We prepare for an unknown future by creating strong and sustainable relationships, by wisely stewarding the earth's resources, and by building resilient communities. We rely on the belief that human beings are caring, generous and want to be together.



It has been quite a journey... a journey of learning and checking assumptions, of sharing and being vulnerable, of gaining perspective on the connection between the very big picture and the most intimate moments, and on nurturing relationships with each other, ourselves and our places of living, as well as those spaces in between us.

— *Vanessa Reid, Montreal, Canada*

Dear Friends and Fellow Pioneers,

One of the most commonly heard phrases in the United States today is, “We’re all in this together.” From President Obama and high-level leaders to local school board members and teenagers offering service, this is the mantra of our time.

I am heartened by the continuing news coverage of workers who support each other’s continued employment by taking decreased hours; by the many food banks, shelters and other forms of care springing up in communities across America; by the new National Service Act that encourages public service and promotes volunteerism. On my most recent trip to New Orleans, the plane was filled with a church group volunteering a week of service to the rebuilding efforts, three-and-a-half years after the devastation of Hurricane Katrina. The gentleman sitting next to me said quietly, “I’m going because it’s the right thing to do.”

It seems that America is waking up to both the need and the rewards of being “in this together.” We may even be waking up to the fact that most people want to help others, want to be generous, and care a great deal about the welfare of neighbors and strangers. We can rely on human goodness (one of Berkana’s core values.)

These are the first signs of a major turning in the United States—turning toward one another to discover what we might create together, how we might help each other, how

we might console and strengthen one another. Berkana began working deeply in communities in the Global South starting in 2000. (It seems apt that we began discovering the power of community at the start of this new century of conflict and disintegration.) Many communities, cultures and peoples have taught us that, in spite of the worst external circumstances—war, famine, abuse, societal collapse, ecological devastation—human beings can get through anything as long as we're together.

We at Berkana are now bringing this simple clarity back home, because we feel strongly that America needs to learn this undeniable truth of human experience. No matter what's going on around us, if we truly believe that we're in this together, and we work hard to be there for one another, we can make it through.

Yet there's a long journey ahead, filled with many questions about our capacity to give up individualism and truly embrace community. Here are a few:

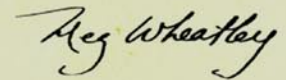
- * Can we get over ourselves? Can we stop focusing on our private needs and open to the greater good, to what will benefit many?
- * Can we realize that in this intertwined world, if the least among us benefit, we all benefit? If they suffer, we suffer.
- * Can we let go of our need to blame, to judge, to scapegoat—all the thoughtless and hasty ways we separate from each other?
- * Can we shift away from self-interest and self-protection? And can we do this everywhere—at work, at home, in public meetings?
- * Can we give up fear in exchange for generosity?

This is the experiment going on in America. Will we choose to engage wholeheartedly with one another, working together to create healthier communities, persevering through the difficulties and frustrations of working together? Or will we withdraw and hunker down in self-protection, giving up, overwhelmed and exhausted?

If we truly believe that we're in this together, we can make it through.

One of my dear friends who has worked endlessly to provide relief and leadership in areas of natural devastation said, "Everyday I have to choose not to give up."

We, too, have a choice to make every day. We can choose to be in this together. Or not. I am grateful that my dear friends and companions and teachers in Berkana are making the choice to be in this together.



Margaret Wheatley
Co-Founder and President Emerita



Message from the Co-Presidents

Five years ago, we launched the Berkana Exchange, creating a learning network of people around the world who are committed to creating healthy and resilient communities where they live. Today, more than 17 participating places representing 10 countries are in intimate and profound learning relationships with one another. These pioneering leaders are freely sharing their knowledge, ideas and innovations; engaging together in transformative action; and building the foundation for a new worldwide movement of communities that proudly work with the wisdom and wealth already present in their people, traditions and environment.



Five years ago, the Art of Hosting was still a nascent movement of practitioners seeking to learn together how to host powerful conversations that matter. As of today, there have been nearly 100 gatherings in more than 20 countries around the world. Berkana has been just one part of this groundswell of people unleashing the power of collective intelligence into organizations and communities. Around the world, people are taking on the challenges of inadequate healthcare, failing schools and threatened food systems by convening gatherings that invite each of us to experiment with many different solutions.

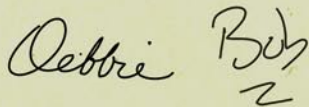
Berkana's work has been about creating the conditions for people to self-organize into meaningful relationships that increase their effectiveness in communities. Over the past five years, we have placed most of our attention on doing just that with the Berkana Exchange and Art of Hosting communities—and today, both of those communities are demonstrating remarkable vitality. In Southern Africa, six different learning centers have formed a network that invites in system-wide shifts in the social, economic and ecological health of the region. In South Asia, several partners are co-creating "Swaraj University," an ambitious approach to creating sustainable livelihoods that serve community. In North America, a youth-led community of practice has formed around urban food systems.

We are one among many organizing for action around our most heartfelt commitments.

Globally, a community of inquiry is exploring the power of place to transform human action. Berkana is not at the center of these initiatives: We are one among many organizing for action around our most heartfelt commitments.

Now that five more years have passed, we at Berkana recognize that it is time once again to focus on making what we've learned visible by creating new publications and electronic media that share the stories and lessons learned with a broader audience. Now more than ever, we are turning our attention toward home, as we apply what we've learned in communities throughout North America.

We thank you for your friendship on this stimulating journey.



*Deborah Frieze and Bob Stilger
Co-Presidents*



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Our learning is exponential
A belief in human goodness
essential
The feeling of community
more important than
the mental
Model or theory.
It is the feeling that allows
me to act clearly
From internal intention
From collective question
The experience that tells
me when to sit back
and when to make an
intervention.

— Tim Merry, *the Shire, Canada*

Local action and trans-local learning as a model for change in uncertain times

There is no universal solution for the challenges of poverty, community health or ecological sustainability. But there is the possibility of widespread impact when people working at the local level are able to learn from one another, practice together and share their learning with communities everywhere. We call that “trans-local” learning, and we believe that large-scale change emerges when local actions get connected globally while preserving their deeply local culture, flavor and form.

In many ways, our work is quite simple. We *name* communities of pioneering leaders who belong together, *connect* them to one another, *nourish* them with wisdom and resources, and *illuminate* their stories to the world so many more can join in.



I. Name the Community

Pioneering leaders often act in isolation, unaware that they are part of a broader community of kindred practitioners. Berkana’s gift to these leaders is noticing who they are and naming the broader community that they could connect to.

Through our initiatives, we help form communities of diverse leaders who share similar values and visions. United by purpose and intention, these leaders gain confidence, courage and commitment. They find new energy to stay in the challenges and struggles of pioneering the new. They become an inspiration to others and a powerful source of new knowledge about what works.



II. Connect the Community

In nature, if a system lacks health, the solution is always to connect it to more of itself. A human community becomes stronger and more competent as new connections are formed with those who formerly were excluded or on the periphery, as communication reaches more parts of the system and as better relationships develop.

Berkana helps form strong and effective human communities. We design gatherings and host networks of people interested in exchanging ideas and resources.



III. Nourish the Community

Learning communities need to be nourished with many different resources. They require ideas, methods, mentors, processes, information, technology, equipment, money. Each of these is important, but one great gap is that of knowledge—knowing what techniques and processes are available that work well.

Berkana helps communities to fill the gaps in their knowledge, leading them to discover, adapt and use techniques and processes that work well in multiple settings. Strong, healthy communities emerge as leaders offer one another new approaches to shared challenges.



IV. Illuminate the Community

It is difficult for any of us to see a new paradigm, even when it's right under our noses. If people even notice pioneering efforts, they are most likely to see these as inspiring and temporary deviations from the norm. It takes time, attention and a consistent focus for people to see them for what they are: examples of what's possible, of what our new world could look like.

By shining a light on the efforts of pioneering leaders, Berkana is working to develop a high level of public awareness, to attract attention and resources to their efforts, and to encourage others to step forward on behalf of the issues that most concern them.

Our Programs

We are living in a time of large-scale global instability around our systems of food, health, climate, energy, economy and politics. What strategies should we pursue? What actions make a difference?

The question we are invited to engage in is how to prepare ourselves for living in a world that looks quite different from the one we've gotten used to. How will our communities and families find stability in an environment that is replete with the unexpected and the unpredictable? The word that comes to mind is *resilience*: We need to become adaptive to changing circumstances, to recover ourselves in times of chaos. At Berkana, we believe that community resilience is a property of relationship: By being connected to one another, we develop the flexibility we need to find new balance.

We need to be connected as pioneers, experimenting with new solutions to chronic challenges. We need to be connected as insiders, working to transform existing systems. And we need to be connected as storytellers, illuminating what our new world could look like. *Pioneering the new, transforming existing systems and illuminating the choice*: these are the initiatives of Berkana.



Working with Pioneering Leaders

The **Berkana Exchange** connects pioneering leaders throughout the globe around their shared commitment to making a difference in and beyond their communities. These leaders are developing the capacity to solve their most pressing problems—such as community health, ecological sustainability and economic self-reliance—by acting locally, connecting regionally and learning trans-locally. They are doing this work at *leadership learning centers*, places where people gather to develop their capacity as leaders in their organizations and communities. Today, Berkana is working with learning centers in Brazil, Canada, Greece, India, Mexico, Pakistan, South Africa, the U.S. and Zimbabwe.

Art of Learning Centering: Cooking Through Chaos

In October 2008, 50 people from 10 countries came together for the Art of Learning Centering at Kufunda Village in Zimbabwe. The purpose of this 10-day gathering is to consciously and collectively create a field of shared learning around the practice of hosting places where people gather to create the conditions for communities to become healthy and resilient.

Our visit came two weeks before a cholera outbreak and in the midst of Zimbabwe's economic and political collapse. Even as their country faced the harshest scarcity, the Kufundees assured us we wouldn't go hungry—though no one was quite sure exactly how we would feed ourselves.

Together, a cross-cultural group from all over the world stepped forward

We stand for love
and kindness

We stand for the future
that we are living now

The future that many of us
dream of and hope for

The circle agreements
bind us together

We need to practice
to be together again

We need to touch
our souls again

We need to smile
at each other again

I am human when I am here

I am full when I am here

— Sailesi Lusias,
Kufunda Village, Zimbabwe



**We are cultivating
the capacity to
self-organize.**



to self-organize in the kitchen. Often cooking over fires when the electricity went out and using the little water that was available, we prepared feasts three times a day. We baked bread on coals in the ground, cooked without oil and experimented with surprising spices. We talked about our dreams, passions and fears while chopping for an hour. If one person was not available to come to the kitchen, another stepped in and the task at hand was accomplished each time—in a loving and chaotic way.

As a community, we are cultivating the capacity to self-organize in the absence of the resources we're used to. When we declare abundance, even in the face of scarcity, what emerges is pioneering leadership that is creative, powerful and joyful.



Berkana Fellows: Cultivating Right Livelihood

The Berkana Fellows program in India was designed to serve the many younger leaders today who are resisting the lure of the mainstream and struggling to journey on a road of their own making; they have taken bold steps to “walk out” of their current livelihoods and to “walk on” to create something new. The program, which ran 2006 to 2008, assembled cohorts of younger leaders through gatherings, learning journeys and dialogues in order to strengthen their local initiatives, raise questions about right livelihood, and enhance their learning through collective sharing. The fellows took on an incredible array of projects, from creating bio-fuel and rethinking how to use waste as an asset to offering herbal medicine and reviving the practice of traditional song as a means of communal expression.



We believe many young people are ready to walk their own unique paths, but any number of factors stops them: socio-economic responsibilities, fear and doubt, lack of mentorship or guidance, or simply not knowing how to start. After completing two cohorts of fellows, we are launching Swaraj University, a three-year learning program that enables learners to become self-directed and fulfilled leaders who are connected with their communities and who serve a vision of building livelihoods that bring about social transformation. By being together as a cohort, learners strengthen their knowledge, skills, relationships and inner perspective to facilitate a livelihood and life based on sustainable and harmonious values in communities throughout India.



Transforming Existing Systems

The **Art of Hosting** is a workshop that cultivates people's capacity to host conversations about what matters. We believe that one of the most critical needs of our time is for people to once again learn how to engage in deep and meaningful conversations that nurture collective intelligence and lead to wise action.

Learning Services allow us to bring what we're learning to organizations and communities throughout the United States and beyond through consulting, speaking engagements, dialogues, events and publications.

Art of Hosting: Creating a Community of Place

In October 2008, 40 courageous leaders from New York City came together for an Art of Hosting workshop. With the collapse of the banking sector, the timing was perfect for exploring how to lead and engage conversations of transformation and change within our organizations and communities. Participants came from healthcare, financial planning, literacy education, strategic forestry, the AIDS movement, women leading sustainability, and more.

We gathered to gain clarity and insight for our efforts, to lead from a place of fearlessness, and to attain our next level of competence as hosts of conversations that matter. Everyone took away tools and practices to bring back home—this we expected. But something else also emerged: a community committed to supporting each other locally across many different sectors. Participants continue to



meet twice monthly by phone, inviting one another to offer collective wisdom around each individual's unique challenge. This New York community is learning together how to cultivate transformation in the workplace and resilience in our lives.



Consulting: Creating a Community of Practice

In October 2007, Lauri Prest went on a Women's Learning Journey to South Africa hosted by Berkana. Although this was a personal journey, Lauri returned to her corporate position at Providence Care in Kingston, Ontario, with the intention of cultivating a new kind of leadership in healthcare by building a community of practice.

Throughout 2008, many members of the Berkana community partnered with Lauri

and played key roles with Providence Care. We gathered together to explore how to address the increasing stresses on the healthcare system. These stakeholders acknowledged an overwhelming call for healthcare leaders to use their collective wisdom to ensure that the healthcare system is accessible and effective for all. Through participatory processes such as World Café, they began to practice a new way of being in conversation together that invited in each participant's unique wisdom. This community of practice called together people who had been working separately to solve the same problems. Today, the community is introducing innovation into this complex field and a sense of renewal for each participant.



I am savoring and absolutely embodying the spirit, intent and tools that we shared—especially the spirit of regard and inclusion. We can and must repeatedly create the conditions for such deep learning and being in other situations.

— Frances Baldwin,
Georgia, United States,
Art of Hosting participant

Illuminating the Choice

Learning Journeys are an opportunity to discover the new forms of leadership emerging beyond our own communities. We believe the rest of the world has something essential and important to teach us about leadership. Meg Wheatley and local pioneering leaders from the Berkana Exchange host groups of up to 20 people for these transformative two-week trips.

The **Women's Leadership Revival Tour** invites women in communities all over North America to gather together in deep reflection and joyous discovery of where women can most meaningfully offer their leadership.

Journey to Southern Africa: Families Learning Together

In the summer of 2007, several parents began to dream together about what it would be like to journey to Southern Africa alongside their adult children. It would be an opportunity for families to witness one another go through a life-changing and mind-expanding experience together. A year later, five families departed for two weeks in South Africa. Participant Nancy Fritsche Eagan said, "What surprised me about traveling as a family was that it seemed like we could more deeply feel the *ubuntu* philosophy of South Africa in a culture that sees

everyone as family and where everyone called me 'Sister' or 'Mama.'"

Families returned to the U.S. with a sense of global community that they didn't have before. In Africa, they had witnessed the capacity of individuals to make a difference by freely sharing their gifts with others. Once home, they found themselves engaging friends, neighbors and co-workers around their experience on the journey and the possibility of being deeply connected to something much bigger than themselves.



Women's Tour: Circles of Leadership

After attending a Women's Leadership Revival Tour in Spokane, Washington, Sherry Helmke returned to her community in Tacoma with a Women's Circle Starter Kit in hand. Her idea was to offer conversation circles to as many women as possible, believing that by supporting one another through this tool, women would discover their capacity for leadership.

Sherry convened a small group of dedicated changemakers who received a grant to work with seven community-based organizations that support women in transition, such as those overcoming homelessness, drug

addiction and abuse, and entering job force training programs.

Over an eight-week period, Sherry and her team hosted conversation circles for 70 women. The women, who said they often felt unseen and unheard, had the experience of being part of an intimate community that offered listening and support. One participant described sharing her dream of working to protect the environment. By speaking it, she said, she could see her way forward to pursuing it.

Not only have these women found one another, but they also have learned to see themselves as leaders in their communities and as authors of the future they wish for.



I was able to connect to people who know that the relevant dominant notions don't work. I was interested in connecting myself with their stories. I was inspired by the way people are living and thinking—I am not alone anymore.

— Noreen Lehri, Pakistan,
Art of Learning Centering participant

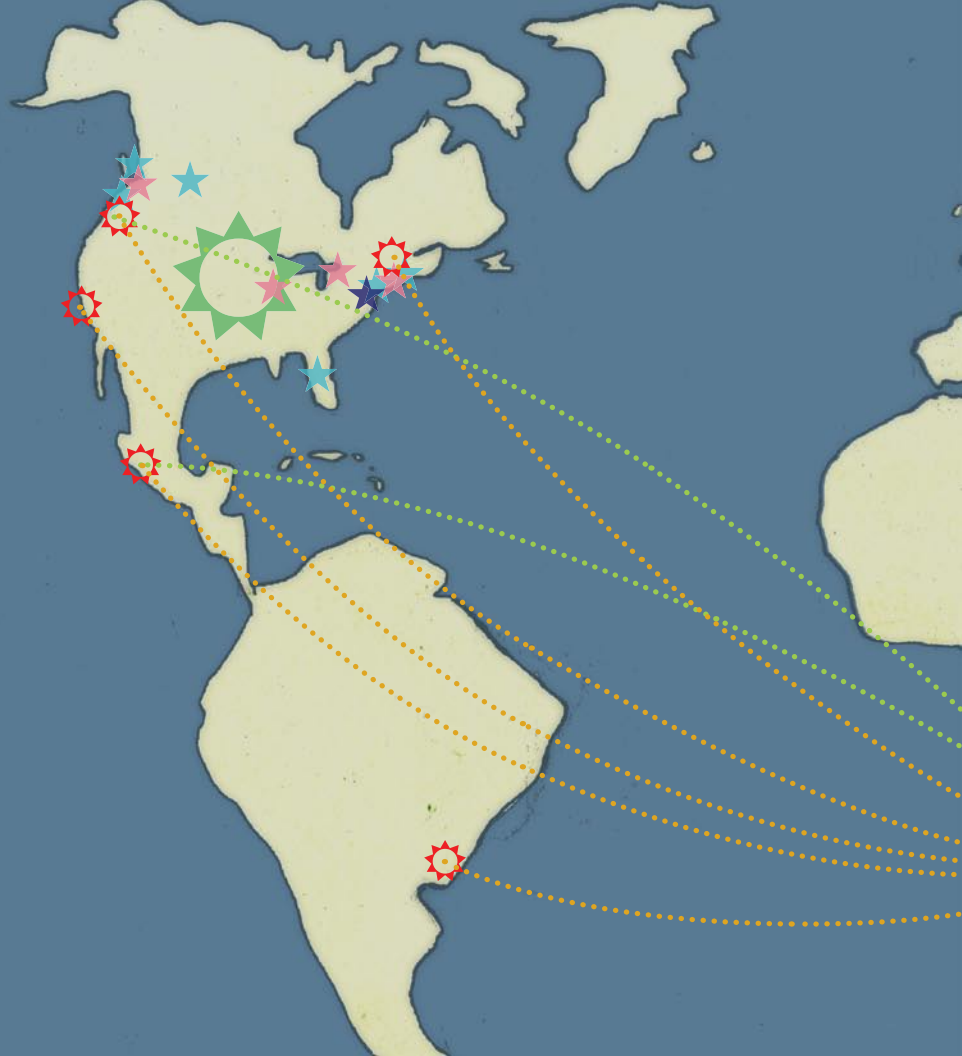
Making visible the vitality of the community

Participating Places

Abhivyakti Media for Development, *India*
Axladitsa-Avatakia, *Greece*
Community Services Unlimited, *United States*
Durban INK, *South Africa*
Elos Institute, *Brazil*
The GreenHouse Project, *South Africa*
Fisherwomen's Association, *South Africa*
Institute of Development Studies Pakistan, *Pakistan*
Kufunda Learning Village, *Zimbabwe*
Lapeng Family Center, *South Africa*
Santropol Roulant, *Canada*
Shikshantar, *India*
Split Rock Learning Center, *Canada*
TLC Farm, *United States*
Uhuru Collective, *Zimbabwe*
Unitierra, *Mexico*


Regional Learning Communities

North America Feeding Ourselves Sustainably
South Asia Fellows Program
Southern Africa Regional Learning Collaborative






 **Art of Learning Centering - Zimbabwe**

 **Art of Hosting hosted by Berkana**


- Boston, MA, *United States*
- Bowen Island, BC, *Canada*
- Cochrane, AB, *Canada*
- New York City, NY, *United States*
- Tampa Bay, FL, *United States*
- Whidbey Island, WA, *United States*

 **Women's Leadership Revival Tour**

- Boston, MA, *United States*
- Milwaukee, WI, *United States*
- Toronto, ON, *Canada*
- Vancouver, BC, *Canada*

 **Learning Journeys**

- Parent-Child Learning Journey to South Africa
- Women's Retreat to Greece

 **Learning Exchanges**

- Abhivaykti & Shikshantar to Kufunda
- Unitierra to Kufunda
- TLC Farm to Kufunda

 **Rhyming for a Reason - Boston, MA**

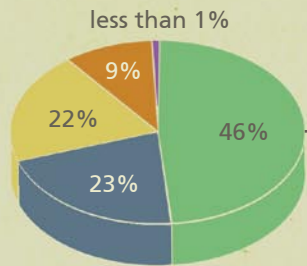
Financial Summary

As for many non-profits, 2008 was a turbulent year which ended with a sharp decrease in fourth-quarter contributions due to the economic environment. Overall, Berkana's income declined 11 percent in 2008, while expenses increased 6 percent. Key factors include a decline in Learning Journey revenue and increases in fundraising and central service expenses due to a larger staff. Fortunately, we entered 2008 with a surplus from 2007, and in combination with recent cuts in spending, we were able to eliminate this shortfall by the end of the first quarter of 2009.

INCOME	2008	2007	EXPENSES	2008	2007
Income From Fundraising			Program Expenses		
Donation Income	248,077	316,069	Berkana Exchange	346,573	347,614
Directed Donation Income	84,566	83,004	Art of Hosting	176,017	97,214
In-Kind Donations	91,692	90,358	Learning Services	165,913	141,605
Fundraising Events	41,119	7,256	Learning Journeys	66,208	198,479
Foundation Grants	101,084	147,402	Berkana Marketplace	2,307	4,951
Total Fundraising Income	566,538	644,089	Other	1,100	-
Income From Programs & Other			Total Program Expenses	758,118	789,863
Art of Hosting	162,397	86,426	Central Service Expenses	292,562	225,489
Learning Services	170,624	109,503	Fundraising Expenses	43,985	14,477
Learning Journeys	71,802	248,754	TOTAL EXPENSES	1,094,665	1,029,899
Berkana Marketplace	14,063	12,106	NET INCOME	-107,261	77,490
Other Income	1,980	6,441	CUMULATIVE NET INCOME	-29,771	77,490
Total Programs and Other Income	420,866	467,075			
TOTAL INCOME	987,404	1,102,987			

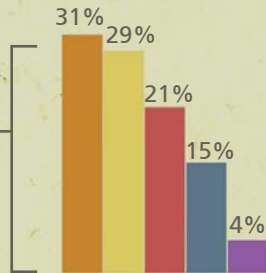
The Berkana Exchange continues to represent the bulk of our program expenses. We provided funds to learning centers to participate in our annual Art of Learning Centering gathering, as well as to support a variety of learning exchanges. In 2008, Berkana began deeper community of practice work in upcycling and food sustainability, as well as in regional networks in Southern Africa and South Asia. We also continued to support the spreading of the Elos Institute's Warriors Without Weapons program from Brazil to Mexico.

Program Expenses (2008)



- Berkana Exchange
- Art of Hosting
- Learning Services
- Learning Journeys
- Other

Berkana Exchange Expenses



- Learning Center Support
- Art of Learning Centering
- Communities of Practice
- Hosting the Trans-Local Community
- Warriors Without Weapons

The work you engage in is not hard to understand: It's about getting us to open our minds to the possibilities that we—not a formal structure or organization—can make amazing things happen that make a real difference in people's lives. Once we get our minds and hearts around that, then the work becomes clear and very important.

— Abby Shapiro, Boston, *Rhyming for a Reason* attendee

A Culture of Gifting

Berkana is a growing and adaptive organization with friendship and support coming from many places. You, our community, make it possible for Berkana to increase the effectiveness of leaders who are working to create healthy and resilient communities.

A living system requires continuous sustenance. We invite you to make Berkana stronger, more resilient and sustainable by offering the gifts of your wisdom, relationships and resources.



Gift culture is the key to sustainable living and real happiness on the planet. By seeing and valuing our own gifts and the gifts of others, we open the possibility for the organic unfolding of our whole beings and for accessing our deepest humanity to ensure the collective well-being of all life on the planet.

— Manish Jain, Shikshantar, India

Pioneering

Berkana Exchange – harvesting learning - \$500

Feeding Ourselves Sustainably – sponsor a learning exchange - \$1,500

Southern Africa – support a community workshop - \$750

Swaraj University – provide one year's tuition - \$2,500

Upcycling Portal – sponsor video footage - \$500

Illuminating

Publications – underwrite an article - \$2,500

Learning Opportunities –
support a web conference - \$300

Transforming

Art of Hosting – provide a scholarship - \$1,500

Women's Leadership – send a circle starter kit
to women in transition - \$100





We acknowledge you,
our community...





with gratitude.





www.berkana.org

Photos by Chris Corrigan, Aerin Dunford, Nancy Eagan, Deborah Frieze,
Jenny Leis, Nitin Paranjape, Lauren Parks, Daniel Seguin, Filiz Telek, Tenneson Woolf
Report designed and illustrated by Todd Stewart