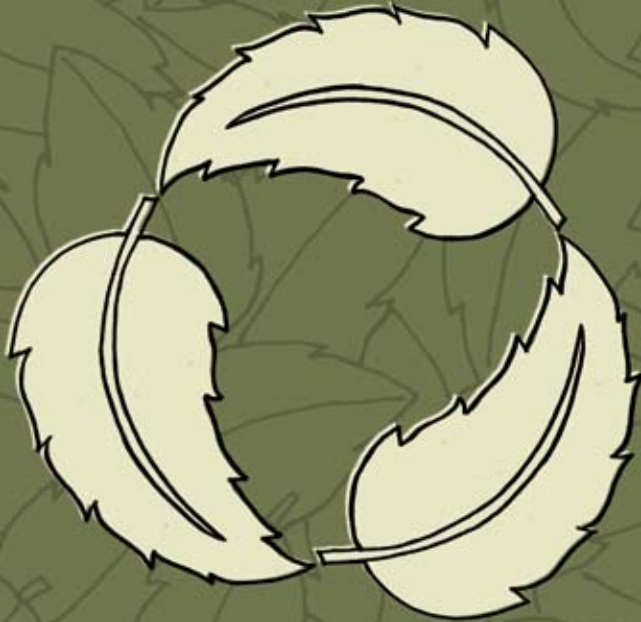


Annual Report 2010



**The Berkana Institute**

Whatever the problem, community is the answer

Ours is not the task of fixing the entire world all at once, but of stretching out to mend the part of the world that is within our reach. What is needed for dramatic change is an accumulation of acts: adding, adding to, adding more, continuing...

— *Clarissa Pinkola Estés*

# 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.

Since 1992 when Berkana was founded, we have been learning about how to create the conditions for self-organizing to happen. Today, Berkana itself has become a self-organizing system that invites many people throughout our community to step forward with the leadership they wish to offer.



In times of change, the learners  
will inherit the earth,  
while the knowers will find  
themselves beautifully equipped  
to deal with a world that no  
longer exists.

— *Eric Hoffer*

## Dear Friends,

The early part of 2011 brought the overturning of governments by the people, state-level protests regarding radical budget cuts and dramatic shifts inside organizations and nonprofits as they dealt with the pressures of unsustainable systems. This is the kind of uncertainty we at Berkana have been practicing with for many years, as we've experimented with creating flexible, resilient models for working with change in times like these.

We work in friendship and partnership with a global Berkana community, deeply engaged in discovering how to work with the collapse of existing systems and the simultaneous birth of new paradigms. We are seeing how interconnected we really are. We continue to adapt and learn how to navigate these times; leaning in to create the futures we want. What kinds of unconventional partnerships and practices can help us discover the paths forward? How can these times bring forth our resilience, wisdom and an abundance of life-affirming leadership?

Our 2010 annual report highlights this web of relationships. Berkana's self-organizing global community is comprised of diverse leaders who share similar practices, values and visions. United by purpose and intent, we gain confidence, courage and commitment when we connect to one another. The Berkana web continues to grow stronger as we focus on our local work, share what we are learning trans-locally, deepen our relationships and form new connections.

We have eagerly anticipated the release of Meg Wheatley and Deborah Frieze's book, *Walk Out Walk On: A Learning Journey into Communities Daring to Live the Future Now*. It is filled with intimate stories and portraits of the people and places we at Berkana have come to know through years of working together. Berkana is committed to sharing powerful stories and engaging in experiments in which we work intentionally with paradigm shifts and emergence. We continue to explore social media outlets as a platform for illuminating our learning, and in the coming months, we are launching a new website, blog and collaborative virtual space.

Thank you for being part of the Berkana web.



Teresa Posakony,  
Board Co-Chair

**United by purpose and intent, we gain confidence, courage and commitment when we connect to one another.**



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From Mexico to India to Africa I have had authentic experiences with real people around real issues. There are lots of programs like this, but something Berkana has done so well is identify authentic heartbeats around the world—it's hearts going to meet with other hearts. It's so much deeper than just a program.

— Alicia Pace, Montreal, 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

Trailblazing 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.

The conversations I was brought into at Weaving the Web have shifted and deepened my understanding beyond awareness. I realize now how true it is that we are 'walking the edge'. For me, I feel I am walking the edge between what is and is no more, and what should and is yet to be.

– *Mabule Mokhine,*  
*Johannesburg, South Africa*

## Weaving Our Self-Organizing Web

This isn't just our theory, this *is* our practice.

2010 offered great opportunities for those of us at Berkana to walk our talk about resilient, self-organizing systems. Since making the declaration to "walk out" of the conventional nonprofit model, Berkana has been practicing a unique form of self-organizing that we believe best harnesses our collective creativity and commitment. This means that leadership, accountability and decision-making are distributed throughout our system. It means that initiative leaders are defining the business model and finding the resources they need in order to do their work. Berkana's principles govern our practices. Principles like "we have what we need" and "we make the path by walking it" form the threads that connect the diverse initiatives throughout our web.

Our Berkana web is connected to and consists of many networks, communities of practice and communities of place. Throughout 2010, the eight Berkana initiatives were immersed in their own local work: hosting events, launching new programs, reflecting on their successes and challenges. But to create meaningful and lasting change, we know that different parts of a system must be connected to the



whole. So we created an opportunity for each of us to share what we're learning and seeing as a community.

In October 2010, we gathered together for "Weaving the Berkana Web: A Storytelling Gathering" to refresh our understanding of the Berkana system, share stories and reconnect to the principles that ground our work. We noticed that we are learning how to invite more people to step forward with their unique ideas and initiatives; we're experimenting with gift culture; and we continue to exchange stories with people, communities and organizations all over the world who are creating healthy and resilient communities. The Berkana web is truly alive with activity.





## Berkana Initiatives

For nearly 20 years, The Berkana Institute has attracted innovative thinkers and practitioners who recognize in our vision and principles their own approach to leadership and change. But then they go on to ask, “Yes, but what do you actually *do*?” The best way we know how to answer that question is through sharing stories.

Building healthy and resilient communities is the thread that weaves through all our work. We believe that community resilience is a property of relationship. By being connected to one another, we develop the flexibility and perspective needed to create whatever is called for now in our communities. We need to be connected as trailblazers, experimenting with new solutions to chronic challenges. We need to be connected as changemakers, 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 sharing our learning:* this is the work of Berkana.

**Consulting Services** Berkana has a wealth of learning relationships through which we encounter new ideas, practices, insights and stories. We bring this learning home to community-based organizations, municipalities, social networks and others through our work as speakers and consultants. In 2010 much of this work took shape within the Berkana Collaborative, a group of practitioners offering consulting and learning services based on the work of The Berkana Institute. The Collaborative partners with clients to design events, host dialogues, offer coaching and share learning so that they can create the conditions for system-wide change in their field. Learn more by visiting [berkanacollaborative.org](http://berkanacollaborative.org).

The **Art of Hosting** is a global community of practitioners who use participative change processes to engage groups in meaningful conversation that gives rise to action for the common good. Berkana participates in this self-organizing network by convening, administrating and hosting many Art of Hosting trainings in North America each year.



**Pioneering Initiatives** are communities of practice, grassroots-based initiatives, individuals, regional learning communities and movements all working to create healthy and resilient communities. Participants are developing the capacity to solve their most pressing problems—such as community health, ecological sustainability and economic self-reliance—by drawing on the wisdom and wealth already present in their people, traditions and environment.

**Sharing Our Learning** Around the world, ordinary people are creating healthy and resilient communities when they see the difference they can make and step forward. Their clarity and courage are contagious: Others see what is possible and consider how they, too, can make a difference. The combination of these many separate actions—rather than someone’s master plan—creates resilient communities. Berkana seeks to illuminate these important stories. We publish articles, share our learning at conferences, and host learning journeys where people visit pioneering efforts, engage with them and develop lasting relationships.

The Art of Hosting is a life-changer. It has totally influenced the way I work and live... the way I talk with people and the way I listen. I realize I have a lot more to learn and to share. I really get the power of ‘turning to one another’.

– Christine Westerlund,  
participant in Illinois AoH

## Pioneering the New

### *De la Huerta a la Boca*

Last November, the Autonomous Network for Food Sovereignty (RASA) and Berkaná's Feeding Ourselves Sustainably Community of Practice hosted a diverse group of more than 40 practitioners working toward food sovereignty in North America at a gathering called *De la Huerta a la Boca*. We came together in Oaxaca, Mexico to learn from one another about how to plant, cultivate, exchange and consume food in a healthy and just way. This gathering offered us an opportunity to develop relationships with other practitioners and strengthen our networks in the U.S., Canada and Mexico.

*De la Huerta a la Boca* was hosted at the Hub Oaxaca where we gathered for a daily circle and dialogued in small groups around themes like food sovereignty, seed

exchanges, migration and how to build community gardens. Hands-on workshops and presentations took place in ten other locations around the city: in private houses and urban gardens, in offices and restaurants, in orchards and alternative healing centers.

*De la Huerta a la Boca* was a truly collaborative event. The design of the gathering offered everyone the opportunity to share their knowledge, which inspired participants and allowed each person to see the great value of his or her work. There were no experts, nor beginners; everyone had something to learn and something to offer. Participants returned home energized with new skills, ideas, partnerships and friendships to strengthen their path toward a more sustainable food system.



**Berkana Exchange:** The Berkana Exchange is an ecosystem of learning centers, grassroots-based initiatives, individuals, regional learning communities and movements all working to create healthy and resilient communities.

**North America Feeding Ourselves Sustainably:** This community of practice in North America is focused on engaging in new and traditional practices for attaining food sovereignty at a local and regional level.

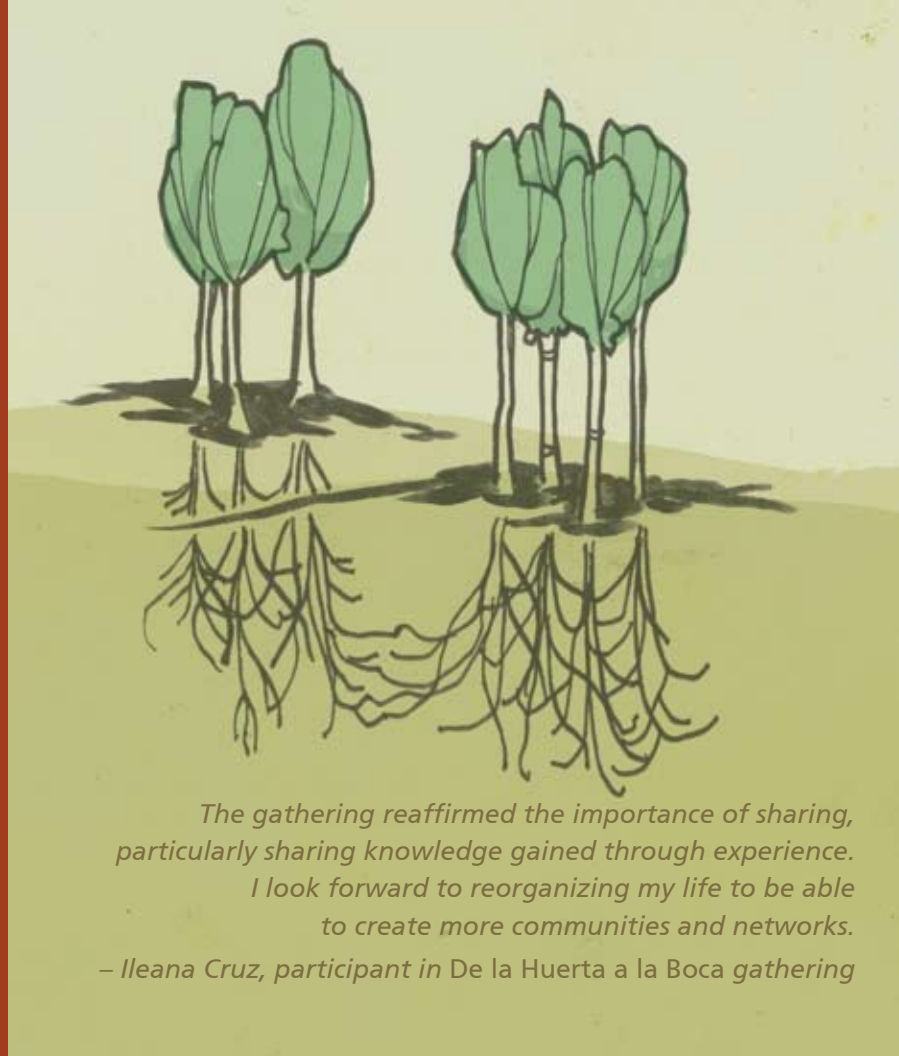
**Powers of Place:** People around the world are exploring how place, space and environment contribute to individual and collective transformation.

**Southern Africa Learning Community:** Six learning centers in Southern Africa are exchanging their knowledge, skills and innovations to invite system-wide shifts in the social, economic and ecological health of the region.

**Swaraj University:** Based in Udaipur, India, this self-directed learning program creates opportunities for younger learners to develop the knowledge, skills and perspectives they need to create sustainable livelihoods and to support healthy and resilient local communities.

**Upcycling Initiative:** Upcycling practitioners around the world are exchanging ideas and learning about how to create alternative technologies, functional items and art out of waste.

**Women's Leadership Initiative:** Berkana hosts events and provides resources for women around the world who are stepping forward to offer their leadership.



*The gathering reaffirmed the importance of sharing, particularly sharing knowledge gained through experience.*

*I look forward to reorganizing my life to be able to create more communities and networks.*

*– Ileana Cruz, participant in De la Huerta a la Boca gathering*

## Transforming Existing Systems

### *Future Centers Summit*

Last year, Berkana's former co-president Bob Stilger packed his suitcase and headed to Japan, a journey he's made often since first visiting 40 years ago. This time he went to offer ideas from Berkana and the Art of Hosting to a new partner, Knowledge Dynamics Initiative (KDI) of Fuji/Xerox.

KDI has realized that while knowledge management is important, conscious creation of spaces for innovation is essential. One way spaces like these are emerging is in the form of Future Centers: facilitated working environments that help organizations prepare for the future in a collaborative way. The centers are "zones of safety" within companies in which dialogue and innovation can occur. Future Centers bring management, employees and stakeholders into closer contact with each other to experiment with new tools and ways of working.

Bob co-hosted the 2010 Future Centers Summit in Tokyo. Between intense work in small groups, participants took a silent walk through downtown Tokyo at rush hour, visited a Noh theater and practiced za-zen in an ancient temple. People were calm and focused; in just two hours, the work of three days came together with a number of heartfelt commitments for next steps.

There is a strong resonance in Japan with Berkana's living systems approach, as well as with Art of Hosting practices of deep listening and truth-speaking. Bob's role has been to be a catalyst, a listener, a storyteller and a host of conversations—inviting in others from the Berkana web. Today, Berkana is a proud partner with many in Japan who are courageously exploring how to transform existing systems. We invite you to follow this unfolding work at [resilientjapan.org](http://resilientjapan.org).



## Art of Hostings in 2010

Arnprior, Ontario  
Bowen Island, British Columbia  
Edmonton, Alberta  
Essex, Massachusetts  
Estes Park, Colorado  
Halifax, Nova Scotia  
Karlskrona, Sweden  
Kiyosato, Japan  
Kyoto, Japan  
Nagoya, Japan  
New York City, New York  
Springfield, Illinois  
Takamatsu, Japan  
Tokyo, Japan

## Communities We Consulted with in 2010

Business Alliance for Local Living Economies (BALLE),  
Bellingham, Washington  
Canadian Labour Congress, Port Elgin, Ontario  
Casey Foundation, Seattle, Washington  
Financial Planning Association, Denver, Colorado  
First Alaskans Institute, Anchorage, Alaska  
Fuji-Xerox Knowledge Dynamics Initiative, Tokyo, Japan  
Greater Tacoma Community Foundation,  
Tacoma, Washington  
Healthy People, Healthy Community, Midvale, Utah  
Hope Community Center, Apopka, Florida  
Idaho State University, Moscow, Idaho  
Klamath Health Partnership, Inc., Klamath Falls, Oregon  
National Disability Services, Queensland, Australia

NOAA Fisheries/National Marine Fisheries Service,  
Seattle, Washington  
Optimum Health/United Behavioral Health,  
Pierce County, Washington  
Providence Care, Kingston, Ontario  
Reos Partners, Johannesburg, South Africa  
Salt Lake Center for Engaging Community,  
Salt Lake City, Utah  
Salt Lake City Arts Council, Salt Lake City, Utah  
St. Luke's Health Initiatives, Phoenix, Arizona  
University of Southern Florida, Tampa, Florida  
Washington DSHS - Family Policy Council,  
Washington State



## Sharing Our Learning

### *Engaging Community: A Toolkit*

We know that we can rely on human goodness—that most people, whatever their circumstances or experiences, want to work well with others to restore hope for the future. After several years of partnership with Margaret Wheatley, [Neighborhood Centers Inc.](#), a Houston-based NGO helping people improve their communities, collaborated with Berkana to create a multi-faceted toolkit that reflects knowledge we have gained from on-the-ground work from Texas to Zimbabwe. The Engaging Community Kit is more than a collection of tools; it's a package of practices that embody our shared philosophy.

Tennessee Woolf, a long-time supporter of Berkana's work, has brought the kit into Art of Hosting trainings in Illinois, Nova Scotia and Edmonton. He uses the "12 Principles for Creating Healthy

Community Change" card deck in his work. "One of the reasons I love these cards," Tennessee says, "is that I feel a deep embodiment of them... I introduce the cards as 'principles for freedom in design' whether working with teams, communities or movements. It's great for process reflection, staff meetings, setting group norms and working with community movements at scale."

The Engaging Community Kit was created based on beliefs that transformation is made possible through deep connection and that connections are built through new conversations. The change we seek begins with the first new question. As people move into closer connection, new ideas emerge, leaders step forward, actions flow and communities come together with a shared purpose.





## NPI: The New Prosperity Initiative

In 2010, we connected with the Boston-based organization The New Prosperity Initiative (NPI). NPI highlights individuals and organizations working to build social and economic prosperity in the form of articles, videos, and podcasts, and also hosts community dialogues and networking events aimed at connecting local leaders working on similar issues. In 2010, NPI joined the Berkana web to collect and share the stories of pioneering leaders throughout our community.

## Articles

An essential part of Berkana's mission is to make our learning visible so that others can apply new ideas in their own organizations and communities. Our current set of articles includes:

- \* *Espirited Leadership: Landmarks for Uncertain Times*
- \* *Lifecycle of Emergence: Using Emergence to Take Social Innovation to Scale*
- \* *From Hero to Host: A Story of Citizenship in Columbus, Ohio*
- \* *Alive in Community: Designing and Hosting Transformative Gatherings*

## Social Media

In 2010, Berkana developed a strategy to leverage social media by inviting more people more frequently into conversations, networks and relationship. Our principle goal is to create more opportunities for connecting within and beyond the Berkana web. We also hope to accelerate the flow of information through our community. You can now find Berkana on [Twitter](#), [Facebook](#), [LinkedIn](#), and [WiserEarth](#).

# Financial Summary

In 2010, Berkana continued its transition to a self-organizing structure that began in June 2009. This shift involved significant changes to our accounting system in order to shift greater responsibility to the initiatives for their own financial well-being. The figures below reflect Berkana's income and expenses in both 2009 and 2010.\* Berkana ended the year with a positive net income of \$65,373. Reflecting the principle of shared responsibility distributed throughout the system, there was an increase in donations directed to Pioneering Initiatives; we expect to see more of this type of directed giving in 2011. The decrease in donation income from \$121,163 in 2009 to \$58,935 was in part due to the fact that we did not host a large international gathering in 2010.

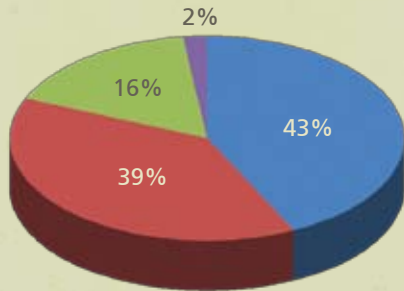
<b>INCOME</b>	<b>2009</b>	<b>2010</b>	<b>EXPENSES</b>	<b>2009</b>	<b>2010</b>
<b>Income From Fundraising</b>			<b>Initiative Expenses</b>		
Donation Income	121,163	58,936	Pioneering Initiatives	163,098	221,961
Directed Donation Income	40,913	85,357	Art of Hosting	140,262	229,695
In-Kind Donations	49,300		Learning Services	201,546	139,758
Fundraising Events	2,024	13,192	Sharing Our Learning	30,985	50,769
Foundation Grants	321,798	194,062	<b>Total Initiative Expenses</b>	<b>535,891</b>	<b>642,183</b>
<b>Total Fundraising Income</b>	<b>535,198</b>	<b>351,547</b>	<b>Shared Services Expenses</b>	<b>170,927</b>	<b>107,653</b>
<b>Income From Initiatives &amp; Other</b>			<b>Fundraising Expenses</b>	<b>9,433</b>	<b>9,011</b>
Art of Hosting	147,683	318,188	<b>TOTAL EXPENSES</b>	<b>716,251</b>	<b>758,847</b>
Learning Services	212,367	135,481	<b>NET ORDINARY INCOME</b>	<b>187,709</b>	<b>65,373</b>
Product Sales	7,176	16,876			
Other Income	1,536	2,128			
<b>Total Income From Initiatives &amp; Other</b>	<b>368,762</b>	<b>472,673</b>			
<b>TOTAL INCOME</b>	<b>903,960</b>	<b>824,220</b>			

\* In June 2009, we changed our financial accounting structure; as a result, figures for 2009 and 2010 may not be directly comparable.

On the expense side, we were able to decrease our Shared Services costs by 37 percent through strong cost management. Pioneering Initiatives expenses increased by 37 percent, reflecting growth in initiative activity. We are learning to do more with less.

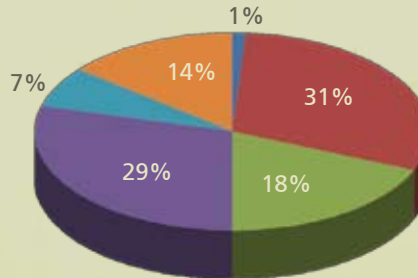
In 2011, Berkana will be increasing income through new initiatives including learning journeys and events associated with the release of *Walk Out Walk On*. We will also launch new fundraising campaigns stewarded by a team comprised of Berkana board, staff and friends.

Source of Income



- Fundraising
- Art of Hosting
- Learning Services
- Product Sales

Expenses



- Fundraising
- Art of Hosting
- Learning Services
- Pioneering Initiatives
- Sharing Our Learning
- Shared Services

A big conversation we are in now at Berkana focuses on how we deal with the economics of our work, financing and the gift culture. We're also thinking about how we might re-imagine our work and engage in experiments around money.

– Nancy Fritsche Eagan,  
Berkana Board Co-Chair



## On the Horizon for 2011

It is through the depth, breadth and strength of our community that we continue to grow, learn and thrive at Berkana. As we look ahead together, we realize the value of illuminating the innovative collaborations and activities alive within Berkana's web. We will be focusing much of our time and energy in the coming year on the work of Sharing Our Learning. By making our own learning more accessible, we strengthen the ties that sustain us as a trans-local community of practitioners. As we experiment with a variety of distribution methods, including social media, we invite you to explore these offerings, and we hope they spark inspiration for healthy and resilient communities everywhere.

Berkana's co-founder Margaret Wheatley and former co-president Deborah Frieze share many of these stories in their new book, *Walk Out Walk On: A Learning Journey Into Communities Daring to Live the Future Now*. Join us in celebrating the release of *Walk Out Walk On*, including a North American book tour, learning journeys to Mexico and Southern Africa, "deep dive" workshops and the online community [walkoutwalkon.net](http://walkoutwalkon.net).



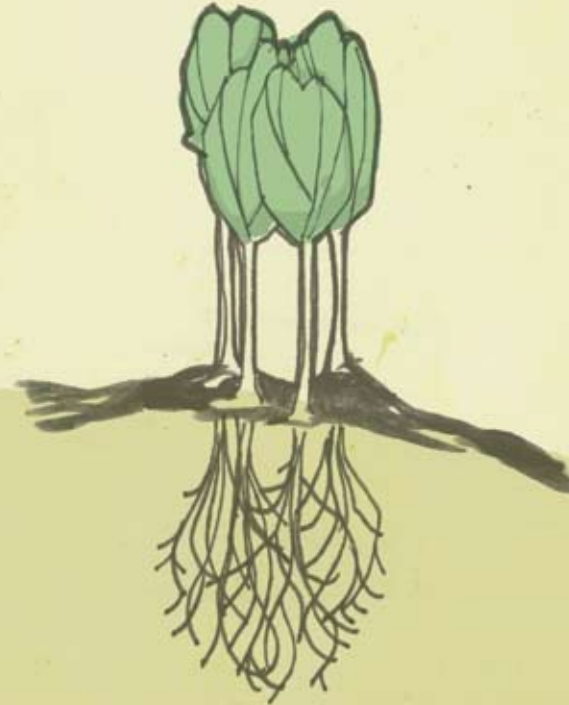
*Storytelling awakens us to that which is real. It is basic to who we are.  
A story is a composite personality which grows out of its community.  
These stories become the conscience of the group. They belong to everyone.*

*– Terry Tempest Williams*

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We also invite you to explore upcoming Art of Hosting opportunities on issues such as money, healthcare, resilient family systems and how to engage community in pioneering ways at [artofhosting.org](http://artofhosting.org). Or delve deeper into stories from the Berkana initiatives and web of collaborators through the interviews and videos created by The New Prosperity Initiative at [thenewprosperity.org](http://thenewprosperity.org).

We invite you to contribute to the conversation, join us on a [learning journey](#), support our work with a [donation](#), follow us on [Facebook](#) and [Twitter](#), and share your own story. We welcome your contribution, whatever form it may take.





We acknowledge you,  
our community...





with gratitude.





[www.berkana.org](http://www.berkana.org)

Photos by Aerin Dunford, Robert Stilger, Chris Corrigan, Deborah Frieze, Tenneson Woolf, Tuesday Ryan-Hart, NYC Art of Hosting Community of Practice and Swaraj University.

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