

Annual Report 2007



**The Berkana Institute**

We are learning how to live the future now.

Again and again  
Some people in the crowd wake up.  
They have no ground in the crowd  
And they emerge according to broader laws.  
They carry strange customs with them,  
And demand room for bold gestures.  
The future speaks ruthlessly through them.

— *Rainer Maria Rilke*

## We are learning how to live the future now.



**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.

*Year The Berkana Institute was founded: 1992*



We don't have to wait for some grand utopian future. The future is an infinite succession of presents, and to live now as we think human beings should live, in defiance of all that is bad around us, is itself a marvelous victory.

— Howard Zinn, *American Historian*

Dear Friends,

It is time to think about the future. Truly.

Although we might agree that this is important, how many of us are considering what might lie ahead? Or how we might best prepare for alternative futures? Or what preparation means?

In 2007, there have been many opportunities for members of the Berkana community to meet together, and also with like-minded others, in deep, probing, exploratory conversations. There seems to be a shared sense of a darkening future and an emerging clarity about how best to prepare.

We are of one mind that the only way to prepare for an unknown future is to begin practicing how we would like that future to be, now. We desire a future in which the human spirit is seen as the blessing, not the problem. We dream for a world in which all people can experience themselves as whole, healthy, sacred and free. We envision communities that are healthy and resilient. And to bring these dreams into form, we realize that it's up to us to start embodying these ideals and practices right now, day-to-day—that we can't "wait for some grand utopian future."

This is very clear, very idealistic and incredibly challenging! Here are just a few of the challenges and paradoxes we're discovering in our Berkana work:

- \* We have to simultaneously create the new organizing forms and practices while doing the work. We're designing the vehicle in which we're already traveling, and we don't have all the parts we need even identified.
- \* We have to embody new ways of relating and working together while recognizing that the old ways still are alive in us and keep reappearing in troubling ways.
- \* We know we need ever stronger relationships of deep trust, yet we work far distant from each other in very different cultural contexts, conditions that often breed mistrust and misunderstanding.
- \* We are giving birth to the new while dealing simultaneously with the breakdown of the old. We are both midwives and hospice workers.
- \* We strive to live the future without knowing what that means in practice. We're making it up as we go along.

In its 15 years of existence, Berkana has been privileged to be invited to partner

with many communities where material resources are lacking and people know that they'll never receive help from outside, that it's up to them. These communities are constant teachers about the importance of relationships, how we must stay together to discover that the true sources of health and resilience are found in our relationships. They also teach us that human beings are incredibly resourceful and ingenious, transforming cast-away materials and forgotten souls into new possibilities and contributions.

These days, I confidently proclaim that whatever the problem, community is the answer. As long as we stay together, we can discover the wealth and wisdom that resides in us, in our traditions and in the land we inhabit. And we can learn together—little by little, step by step—how to thrive and enjoy life even if our material advantages no longer are available.

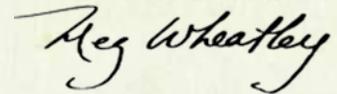
If we are brave enough to contemplate the future, and wise enough to know that the essential preparation is about our relationships, then we might become living proof that "to live now as we think

# Whatever the problem, community is the answer.

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human beings should live, in defiance of all that is bad around us, is itself a marvelous victory."

I can't dream of any better journey to be on, together.



*Margaret Wheatley*  
Co-Founder and President Emerita

## Message from the Co-Presidents



Dear friends,

The living-systems principles we've seen in our work at Berkana resonate with many people these days. The world looks different—and a bit more sane—when we believe that the leaders we need are already here, we have among us the wisdom and wealth we require, and we turn toward one another to create change in our world. These are some of the basic principles of resilient communities that have the capacity to work with whatever life tosses our way. They are principles that the communities we meet are remembering and rediscovering.

But how do we practice with these principles in times of uncertainty? When we don't know where we're headed, it is easy to be drawn back into the familiar world of command and control, strategic plans and measurable outcomes. Many of us talk about embracing ambiguity and uncertainty, but how good are we at staying still long enough to allow something new to emerge?

In 2007, Berkana deepened our practice of slowing down to work intentionally with emergence. We extended our "Art of Learning Centering" gathering of the Berkana Exchange from 5 days to 10 to give space for the learning center community to generate new forms of leadership. They created the Berkana Exchange Council for governing themselves. Members are planning the 2008 gathering. New working groups are forming around harvesting our knowledge, exploring regional cooperation and sharing learning through communities of practice. Women in cities throughout North America are stepping forward to call and create the Women's Leadership Revival Tour. People everywhere are gathering to deepen their practice of hosting conversations that matter. Berkana's role is to continue to create the conditions for more self-organizing to occur so that the work can be carried out in community.

# How good are we at staying still long enough to allow something new to emerge?

In 2007, we've been confronted by the complexity of being an organization based in the global North that works in partnership with people in the global South. How do we all offer our gifts in ways that honor our differences rather than reproduce outdated power dynamics? As Berkana's story attracts more attention, how do we ensure that the breadth of this community is recognized for its contribution? Perhaps most important, as we discover what works, how do we avoid believing we have the answer?

We are developing practices that help us pay attention to each of these questions. And we are inviting friends and colleagues to learn with us so we can collectively build the muscle we need to build healthy and resilient communities.

This is quite an adventure. As always, we invite you to come along.



*Deborah Frieze and Bob Stilger  
Co-Presidents*



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What I understand is the simple truth that regular people in everyday circumstances have a chance to change the field. With their whole selves present and engaged, they have the ability to shift the dynamics, to re-set the stage and create a whole new play. In a moment, they can speak truth and, through this, hold up a mirror to those before them, inviting them to revisit their own humanity. This is not only effective, but also inspiring and even magical.

— Shilpa Jain, Shikshantar, India

## 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.

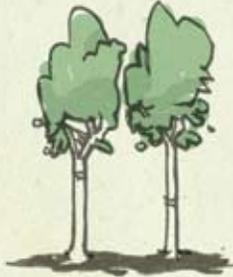
In many ways, our work is quite simple. We *name* communities of pioneering leaders who belong together, *connect* them to one another, *nourish* them with wisdom and resources, and *illuminate* their stories to the world so many more can join in.



### 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? Which 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.

Most of our work is designed to provide us with the tools, ideas, connections and conversations that give us access to deeper relationship and greater resilience. Each of our initiatives is based on a coherent, in-depth theory of how life organizes in cooperative, generous and interdependent systems—work we've developed with hundreds of colleagues over many years of dialogue, think tanks and practical applications in all kinds of settings.

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, Senegal, South Africa, the U.S. and Zimbabwe.

**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 **Art of Hosting** is a workshop experience 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 North America and beyond through consulting, speaking engagements, dialogues, events and publications.

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.

A Learning Journey is a life-changing experience... It's an opportunity to learn and to put aside what you think you know. The people that I met on the journeys were incredible, spiritual, caring, curious people who are really interested in bringing that wisdom into their own lives and into the northern hemisphere.

– Ginny Sams, Mexico Learning Journey participant (October 2007)

## What does it mean to practice living the future now?

People often ask how we choose the learning centers that we work with. What could a rural village in Zimbabwe, a food center in downtown Montreal and an inner-city community in Brazil possibly have in common? Certainly, our learning partners are working in radically different contexts and confront uniquely local challenges. What unite them, however, are the principles, values and beliefs about change that call them into action in the world. Beliefs like *the leaders we need are already here. We have what we need. We are creating the worlds we want today.* And so on.

Here are some stories from members of the of the Berkana community who are living the future now by practicing these principles in their homes, their neighborhoods and the world.

### Start anywhere, follow it everywhere.

#### A story from India

Mukesh Jat started with one cow.

Kali, a black Jersey cow, provided milk and hope to the Jat family in the small town of Anjad, India. But the milk business was not enough to sustain a family of four.

Migrating to the bustling nearby city of Indore was looking increasingly promising when Mukesh was granted a yearlong fellowship with Berkana.

The invitation of the fellowship rested on one core premise: to engage locally in a

self-directed learning process that would create greater health and resilience for Mukesh's family and community. Mukesh wanted to produce organic fertilizer.

His house had a small courtyard. Kali, the cow, had a small corner. There was cow dung available, and soon, a small biogas plant was built. On top of the biogas pit came the vermi-beds (worm composting).

A shed was erected from discarded material; the vermi-wash unit was built out of a broken pot and recycled tank. The biogas flowed into Mukesh's kitchen and into his uncle's house. In three months time, fresh organic manure was ready for use on the Jat farm. Soon, another batch had been produced which was sold to local farmers.

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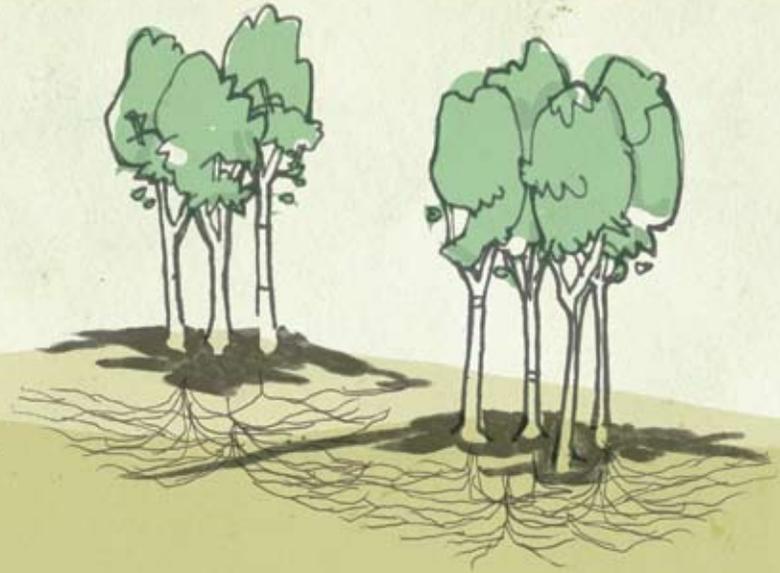
What would it look like if the future you wished to give birth to began in your own home?



Mukesh Jat

Ten months later, the scene has transformed. Three big cows stand next to Kali. They have given birth to four young ones. Mukesh's backyard is growing, and so is his fledging enterprise. He has connected one more kitchen to the biogas plant, as well as the new home toilet. A cousin has leased him another plot of land. There, 90 more vermi-beds stand with loads of cow dung. The demand for Mukesh's organic manure has risen among local farmers. Mukesh has cultivated a network of relationships with the farmers, many of whom are starting similar projects in their own homes and farms.

The Jat home has been transformed into a fertile learning ground for everyone—Mukesh, his wife and daughter, mother and uncle, friends and fellow farmers. Kali is pregnant. So, too, is this new learning center with infinite possibilities.



*Number of learning centers in 2007:* **12**

*Number of countries where learning centers are located:* **10**

*Estimated number of team members at the learning centers:* **375**

*Estimated number of people involved in programs hosted or facilitated by learning centers:* **9200**



## We make our path by walking it.

*A story from Zimbabwe, by Jackie Cahii*

In Zimbabwe, we are witnessing collapse. We live coping with the day-to-day reality that people are starving, that manufacturing and industry have virtually shut down, that the average life expectancy is now 34 for women and 36 for men, that infant mortality has increased tenfold in the last 5 years, that inflation has increased the exchange rate to the US dollar to 3 billion times what it was in 1980.

In all of this uncertainty, the gifts we are discovering at Kufunda Learning Village are the gifts of time, of caring, of love. It takes time to collect wood, to prepare a fire, to heat water for a guest to bathe.

It takes time to gather mushrooms in the forest, to carefully clean and present them ready to cook. It takes time to grind the maize or wheat, to cook the *sadza* or bake the bread. We take time for the slow preparation of herbal remedies; the herbs steeping in alcohol, preserving their healing properties, to be captured in beeswax, oils and lotions. And we take time to visit people and listen to them talk about their lives, their children, their illnesses, their fears, what keeps them awake at night, what happens to their families and children if they die.

Increasingly, we share and exchange. I have lots of mangoes and bananas in my garden. Lorraine has avocados. Allan's mother has a wheat crop. Fidelis has maize. Sikhethiwe and Sophia gather wild mushrooms in the forest. The Kufunda permaculture garden has spinach and beans. Tsitsi and Ticha have bright yellow cherry tomatoes and lots of mint. We buy butternuts and cucumbers from the next door farm, peanut butter from one of our community members, milk from Marianne's mother.

## Imagine if your world were on the brink of collapse. Would you dare to bring forth your full creativity and commitment?

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In Zimbabwe today, we are learning how to live with the collapse of infrastructure, of institution, of many formal systems. Every day, we have to deal with what that means and find alternatives. We have to work out sustainable ways to eat, to produce energy, to manage our waste, to keep our water clean.

It is this work which gives us the strength and hope to continue walking our path.



## We have what we need.

***A story from Guatemala, Mexico, Iran and India, by Daniel Perera***

*Daniel Perera saw his first bicimachina, or bicycle-powered machine, in Guatemala, where he was born. When he moved to Mexico to work with Unitierra, he brought his ideas with him. Through his participation in the Berkana Exchange, he traveled to Iran and India to pass along his knowledge and to learn new ways of putting this tool to use. He shares these reflections from his time in India.*

I'm excited to announce that we have developed a new and improved *bicilicua-dora* (bicycle-powered blender). People here call it the "cycle-mixie," and I'm really impressed by the way we built it. Frankly, I was skeptical when I asked Panji, Vishal, Nirmal and Ram where the tools were

and they brought out a screwdriver, a handsaw, a file, a couple of wrenches and a hammer. I've gotten used to working in a fully-equipped workshop in Oaxaca that includes a large work table, welding machine, vertical drill, table saw, angle grinder and the standard instruments you find in a toolbox.

Instead, we began by asking, "How can we build a cycle-mixie with what we have?" rather than, "Where do we get what we need in order to build the *bicilicua-dora* I know how to make?" As a result, the machine we built was entirely new, and the workshop became more than technology transfer. It was a creative process of people locally adapting a tool in a way that made sense to them. I'm now confident that we could do this even



with more complex machines, such as the cycle-pump [bicycle-powered irrigation system]...

I've been asked many times why I came all the way to India from "gho-Ah-the-maallah" to make cycle-machines. Most people expect to hear an environmentalist's account of the urgent need to cease depending on fossil fuels, or an enthusiast's tale of how he came to make quirky gadgets out of waste, or an activist's pontification on the value of physical labor. I usually just smile and say they are fun to make, they are more productive and efficient than manual tools, and they don't pollute nature. But what really underlies my current activities is a sense that *bicimachinas* are a concrete and symbolic way of re-building community as well as caring for Mother Nature.



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**What might it be like to let go of our stories of scarcity and create a context of abundance?**

Daniel Perera and the bicimachina

# Our Trans-Local Community

When separate, local efforts connect with each other as networks, then grow and transform into active, working communities of practice, new systems emerge at a greater level of scale.

## Learning Centers

Abhivyakti Media for Development, *India*

Axladitsa-Avatakia, *Greece*

Universidad de la Tierra, *Mexico*

Elos Institute, *Brazil*

The GreenHouse Project, *South Africa*

Institute of Development Studies Pakistan, *Pakistan*

Kufunda Learning Village, *Zimbabwe*

Llano Grande, *United States*

Santropol Roulant, *Canada*

Shikshantar, *India*

Synapse Center, *Senegal*

The Shire, *Canada*

★ Art of Hosting

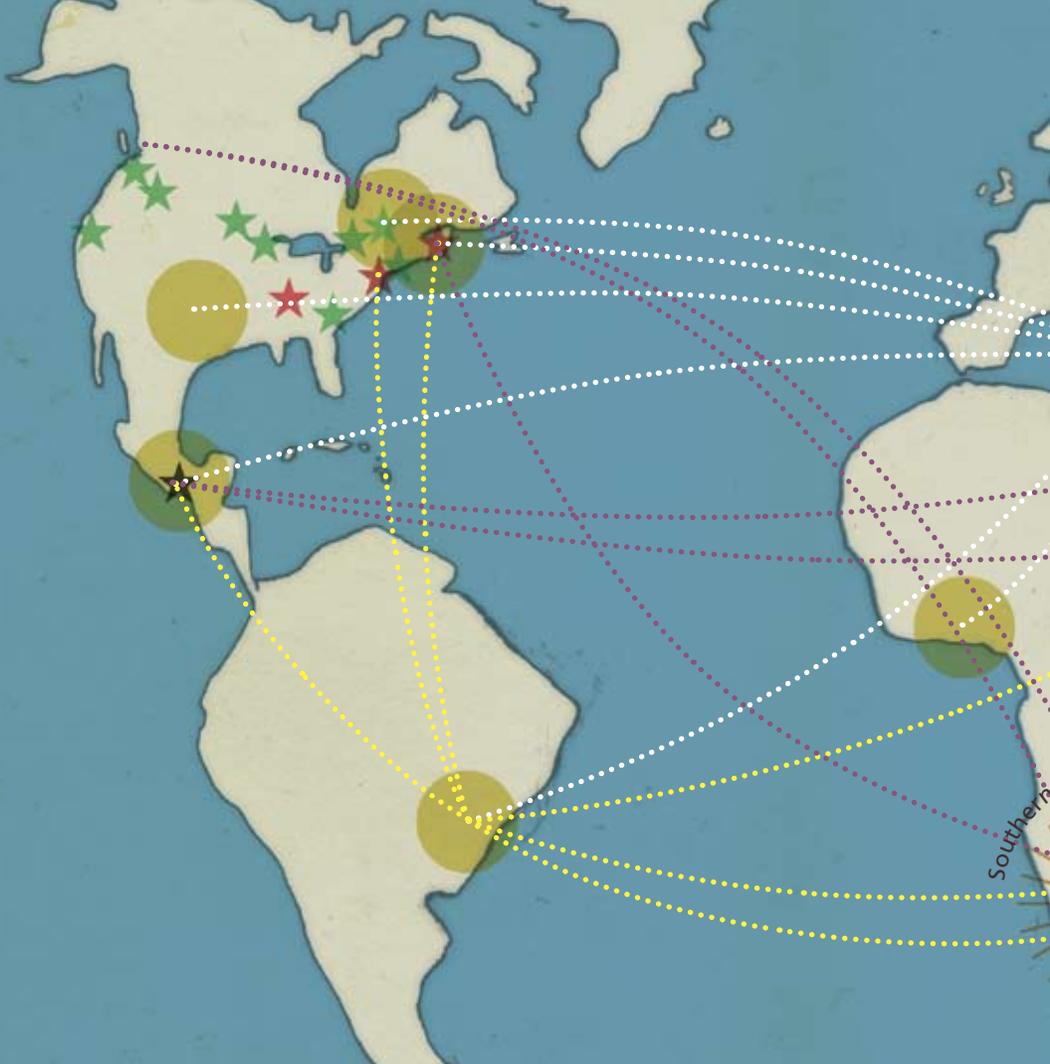
★ Learning Journeys

★ Women's Leadership Revival Tours

••••• Art of Learning Centering, *Greece*

••••• Learning Exchanges

••••• School of Warriors Without Weapons, *Brazil*





## Organizing as Communities of Practice

A resilient community is one that engages all of its members—women, men, elders, youth and families—in holding a shared concern for the six practice areas listed below. At the Berkana Exchange, we organize as “communities of practice” that share a concern or a passion for something and interact regularly to learn how to do it better. These communities provide an opportunity to develop our skills and wisdom as leaders, and to build relationships that will allow us to better serve our communities.

***Feeding Ourselves Sustainably:*** developing the practices our communities need to maintain a sustainable food supply.

***Health and Healing:*** exploring the intersection of traditional wisdom and modern solutions to individual and community health.

***Beyond Schooling:*** moving beyond institutional definitions of education to rediscover the essential role of learning in our cultures.

***Ecobuilding & Upcycling:*** reconceptualizing waste as an asset with which we can build our homes, create technologies and support our livelihoods.

***Media, Arts and Culture:*** reclaiming our creativity by exploring media forms which encourage reflection, cultural expression and dialogue.

***Businesses We Believe In:*** creating and sustaining businesses and local economies that honor workers, communities and the environment.

# Financial Summary

Despite our intention to slow things down this year, Berkana grew our income by 34 percent in 2007. Generous increases in donations from individuals and foundations allowed us to deepen the impact of our programs while making critical investments in the organizational infrastructure that supports our work. In particular, we were able to expand our core team to six full-time staff members in two offices, complemented by several contract relationships throughout the globe. We anticipate modest increases in income and expense in 2008.

<b>INCOME</b>	Budgeted <b>2008</b>	<b>2007</b>	<b>2006</b>	<b>EXPENSES</b>	Budgeted <b>2008</b>	<b>2007</b>	<b>2006</b>
<b>Income From Fundraising</b>				<b>Program Expenses</b>			
Donation Income	360,000	320,630	159,136 <sup>1</sup>	Berkana Exchange	454,357	348,203	333,085
Learning Center Directed Donations	75,000	77,594	81,018	Learning Journeys	122,762	198,479	133,575
In-Kind Donations	76,371	78,286	64,000	Art of Hosting	186,027	93,743	100,058
Fundraising Events	30,000	-	-	Learning Services	162,407	141,613	116,256
Foundation Grants	150,000	159,402	77,454	Berkana Marketplace	6,680	12,652	30,541
<b>Total Fundraising Income</b>	<b>691,371</b>	<b>635,912</b>	<b>381,608</b>	Local Work	2,882	-	-
<b>Income From Programs &amp; Other</b>				<b>Total Program Expenses</b>	<b>935,115</b>	<b>794,690</b>	<b>713,516</b>
Learning Journeys	146,700	248,754	143,090 <sup>2</sup>	<b>Central Services Expenses</b>	<b>223,437</b>	<b>225,238</b>	<b>123,057</b>
Art of Hosting	198,000	86,606 <sup>3</sup>	104,026	<b>Fundraising Expenses</b>	<b>64,367</b>	<b>14,397</b>	<b>16,661</b>
Learning Services	176,500	117,205	166,145	<b>TOTAL EXPENSES</b>	<b>1,222,918</b>	<b>1,034,326</b>	<b>853,233</b>
Berkana Marketplace	15,000	8,069	23,470	<b>NET ORDINARY INCOME</b>	<b>7,653</b>	<b>68,661</b>	<b>(31,925)</b>
Other Income	3,000	6,441	2,969				
<b>Total Programs and Other Income</b>	<b>539,200</b>	<b>467,075</b>	<b>439,701</b>				
<b>TOTAL INCOME</b>	<b>1,230,571</b>	<b>1,102,987</b>	<b>821,308</b>				

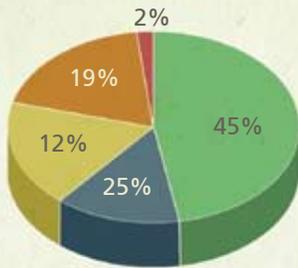
<sup>1</sup> In order to give a clear comparison across 2006-2008, we have excluded from this figure one-time donations of \$130,389 provided as forgiven debt from prior years.

<sup>2</sup> We included in this figure Learning Journey revenues of \$33,402 received in 2005 because this revenue was applied to 2006 expenses.

<sup>3</sup> We excluded from this figure Art of Hosting revenues of \$23,756 received in 2007 because this revenue will be applied to 2008 expenses.

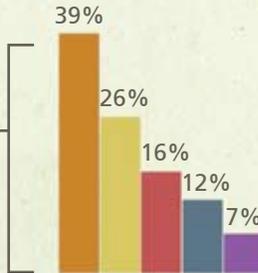
The Berkana Exchange continues to represent the bulk of our program expenses. Each learning center receives approximately \$10,000 to be used for participating in learning exchanges and our annual gathering, to fund critical projects and to pilot new work. In addition, we are supporting regional networks in Southeast Asia and Southern Africa. The School of Warriors Without Weapons is a learning program piloted by the Elos Institute in Brazil that is being shared with five other learning centers.

Program Expenses (2007)



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

Berkana Exchange Expenses



- Learning Center Support
- Art of Learning Centering
- Hosting the Trans-local Community
- Regional Networks
- Warriors Without Weapons

The real juice comes down to getting to know the unique expression of being in each person—the passions, the struggles, the commitment to new possible worlds. As others have been inspired to share themselves, so I have been called to reveal the depths of who I am. In knowing and appreciating each other, we have forged relationships that enable us to strengthen the expression of our deepest desires for the world.

— Ben Mates,  
The Hemingway Foundation



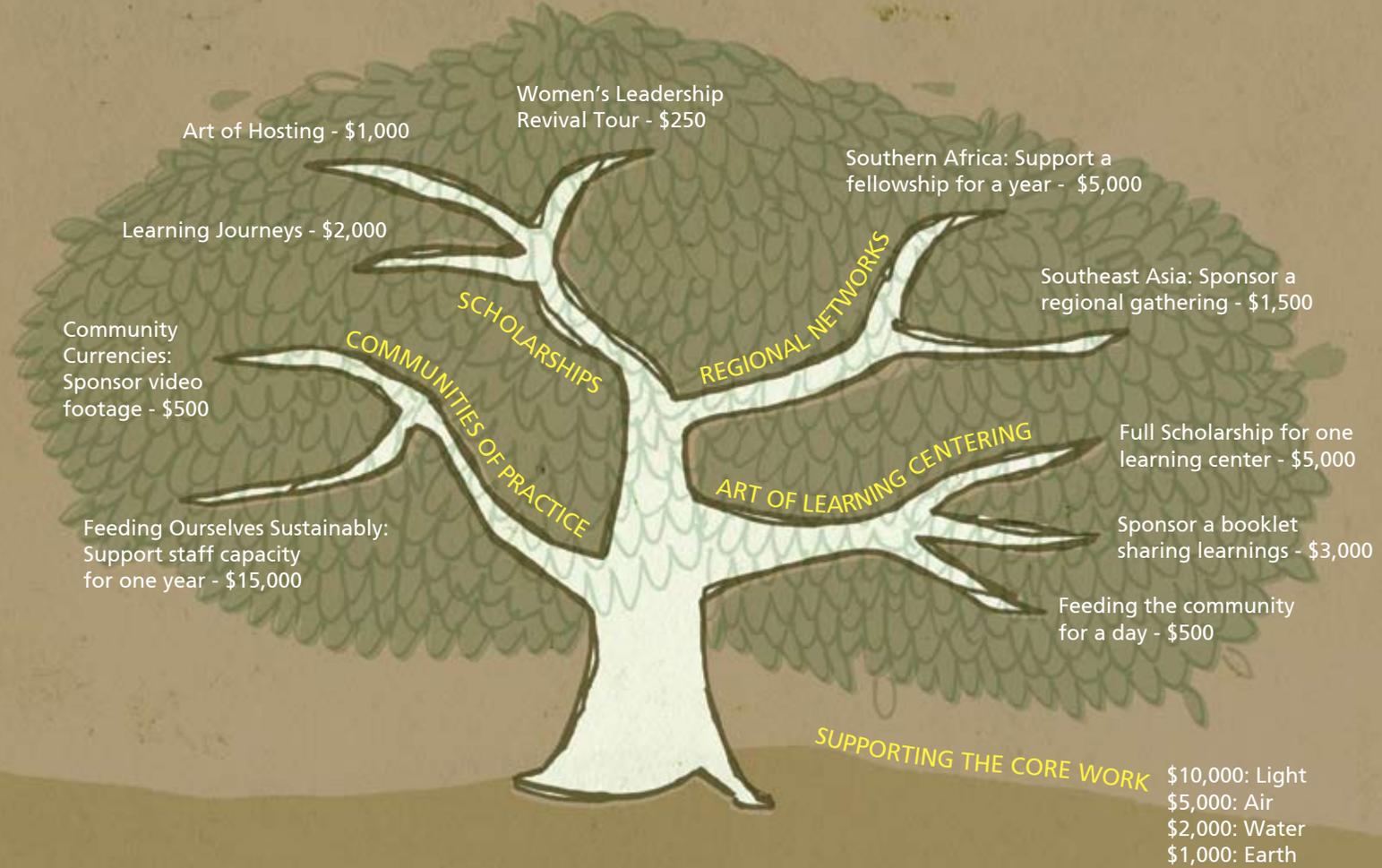
## The Tree of Gifting

Berkana is a growing, adaptive, organic organization with friendship and support coming from many places. You, our community, make it possible for the roots of our core work to be solid and the branches of our initiatives to reach farther.

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.

What is the feeling to be gifted, what new reality uplifted  
That will support my work at home, support us feeling less alone?  
We are building new community that nobody owns.

— Tim Merry, The Shire, Canada



Art of Hosting - \$1,000

Women's Leadership Revival Tour - \$250

Southern Africa: Support a fellowship for a year - \$5,000

Learning Journeys - \$2,000

Southeast Asia: Sponsor a regional gathering - \$1,500

Community Currencies: Sponsor video footage - \$500

SCHOLARSHIPS  
COMMUNITIES OF PRACTICE

REGIONAL NETWORKS

ART OF LEARNING CENTERING

Full Scholarship for one learning center - \$5,000

Sponsor a booklet sharing learnings - \$3,000

Feeding Ourselves Sustainably: Support staff capacity for one year - \$15,000

Feeding the community for a day - \$500

SUPPORTING THE CORE WORK

\$10,000: Light  
\$5,000: Air  
\$2,000: Water  
\$1,000: Earth



**We acknowledge you,**

Sarah Ailey Dana Ainsworth Helaine Alon Rodrigo Alonso Donna Alvarado Kelly Andersen Edmond Antoine Nicole A  
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