The Berkana Institute

Whatever the problem, community is the answer
These communities in many different cultures 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.

— Margaret Wheatley
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.
There’s a new email address at Berkana: community@berkana.org. This might not seem like such a big deal, but it feels wonderfully significant to me and all of us here at Berkana working to strengthen communities. These past several years, we’ve worked in geographic communities and virtual communities of practice. We’ve been exploring what’s possible in community that’s impossible to achieve alone.

We’ve done a wide variety of things, many of which are detailed in this report. What’s important to notice is that everyone working within the embrace of Berkana has developed a strong, shared commitment to continuing our work at the community level. After years of experimenting, we’ve become clear:

There is no power for change greater than a community discovering what it cares about.

Whatever the problem, community is the answer.

This new email address-community@berkana.org-supports the launch of our newest product, “Engaging Community: A Toolkit for Building Healthy and Resilient Communities.” More than a toolkit, “Engaging Community” is an embodiment of our belief in the power of people working together to create change. It’s a coherent, theory-grounded offering to promote grassroots efforts anywhere there are willing activists. It’s a collection of resources

Dear Friends,

The social fabric of community is formed from an expanding shared sense of belonging. It is shaped by the idea that only when we are connected and care for the well-being of the whole that a civil and democratic society is created.

— Peter Block

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and practices (in both English and Spanish) for communities to discover their wisdom and wealth to resolve their own challenges. And it’s a beautifully designed package to inspire people’s creativity and resolve to step forward as leaders for their communities.

After our many years of experimentation, after so many diverse and rich learning experiences in communities around the world, after our failures and successes, our elation and exhaustion, it comes down to this simple message: community@berkana.org.

Margaret Wheatley
Co-Founder and President Emerita
Message from the Board Chair: Celebrating the New Berkana

2009 was a year of big changes for the world and for Berkana. Since our founding, we have been talking about new forms of organizing and organizations. How do we bring forward the gifts, wisdom, passion and responsibility of the people involved? How do we create organizations that work in alignment with the principles of living systems? How do we build leaderful organizations?

Berkana took the leap in 2009. We are now a self-organizing system that grows in partnership with the organizations, communities and initiatives we’re closest to. We are a host and fiscal sponsor for many initiatives aligned with Berkana’s core commitments: cultivating life-affirming leadership and self-organizing systems, working intentionally with emergence, and building healthy and resilient communities.

I’m looking forward to a bold 2010. We see our pioneering initiatives deepening their work and being joined by new ones.
We’re launching our Engaging Communities toolkit, a powerful tool for community change packed full of resources. We’re continuing to champion the growth of the Art of Hosting in North America, and launching the Berkana Collaborative as we partner with communities and organizations around the world. And we’re publishing more of our ideas through articles, blogs and other social media.

We are learning how to live the future now. This new architecture for our organization is one that can grow with our dreams.

We are inspired by the many members of the Berkana community around the world whose work touches our hearts. We hope you’ll join us as donor, friend, colleague, initiative leader or champion. Long ago, we envisioned Berkana leadership as “people everywhere leading the way.” Now we are seeing that vision come true. It is time.

Teresa Posakony
Board Chair

How do we build leaderful organizations?
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.
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.
Berkana as a Self-Organizing System

Berkana is reinventing itself, and we’d like to share our new direction with you.

Since 1992, when Berkana was founded, we have been learning about how to create the conditions for self-organizing to happen. During this time, we ourselves have operated in a somewhat traditional form: as a nonprofit institute with staff, offices and professional leadership. The gift of 2009’s challenging economic environment has been to call us far deeper into the experiment in self-organizing.

For all of us working to create social change, we are confronted with the paradox that there is less money available but more need than ever for the kind of work we do. The nonprofit model Berkana has been working in is proving to be unsustainable, and we believe it is time to invent a way to do our work that is flexible, resilient and adaptive.

Fortunately, we know a little something about flexible, resilient and adaptive systems. The organizational model that we are experimenting with is a self-organizing system that invites many people throughout the Berkana community to step forward with the leadership they wish to offer. It calls for entrepreneurship, creativity and ingenuity. It requires that many people engage in a whole new level of effort around the actions they wish to commit to.

We invite you to learn more about how self-organizing can harness our collective creativity and commitment for building healthy and resilient communities.

What if the process of conversation was the most simple way to support healthy, thriving, learning-filled, systems? In work, in community?

– Tenneson Woolf, Salt Lake City, UT
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.

Consulting Services Berkana has a wealth of learning relationships around the world through which we encounter new ideas, practices, insights and stories. We bring this learning home to community-based organizations, municipalities, social networks and other organizations through our work as speakers and consultants. We partner 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.

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. The clarity and courage they carry is contagious: Others see what is possible and consider how they, too, can make a difference. It is the combination of these many separate actions—rather than someone’s master plan—that 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 directly and develop lasting relationships.

The Art of Hosting was one of the most meaningful leadership training events I have participated in. I was able to apply the things I learned immediately in every aspect of my life; at work, at home and in my interactions with my community.

- Heather Loeppky, Alberta Agriculture and Rural Development Canada
Pioneering the New

Transforming Communities through Food

In 2008, Berkana, Community Services Unlimited (CSU) in Los Angeles, The Food Project in Boston and Santropol Roulant in Montreal created a community of practice focused on youth-driven transformation of communities through food. Our intention is to increase our effectiveness at home by exchanging innovative solutions in urban food production, youth leadership, volunteer engagement and organizational development.

In January 2009, Tim Murphy from Santropol Roulant traveled to Los Angeles for a two-week learning exchange with CSU. Tim’s visit led CSU to launch a bike program, procuring a fleet of bikes to deliver their organic CSA (community-supported agriculture) bags. CSU Director Neelam Sharma said that the exchange gave CSU the inspiration and motivation to do things that they had been hoping one day to do.

Upon his return to Montreal, Tim launched a CSA program at the Roulant, delivering baskets of fresh organic produce to underserved clients. He said, “I’ve been kind of scared to initiate this program in the past, but the exchange made me feel like: Yes, we can do this in Montreal! There are things that we will change for our own local environment, but I was really given the inspiration to try something that I hadn’t learning centers exchanged many practical techniques as well, including raised garden beds, self-watering pots and ways of engaging volunteers and younger children.
**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 around youth-driven transformation of communities through food.

**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 in system-wide shifts in the social, economic and ecological health of the region.

**Swaraj University:** Based in 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 Portal:** In this online portal, upcycling practitioners exchange ideas and learning around 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.

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*I have come back to work from the perspective of the person who stepped out of my bubble. I am coming back with more motivation and more inspiration about my own work than I had before I left.*

– Tim Murphy, learning exchange participant
Transforming Existing Systems

Working With the Wisdom of Parents

Community change in Springfield, Illinois, started in 2005 when social worker Lina Cramer invited parents to sit together in small groups and talk about issues that were central to their lives and experiences. Today, these Parent Cafés are thriving throughout the state, convened by empowered parent leaders addressing the pressing issues in their communities. “Parents need to be seen as a resource, not as a problem,” Lina says. “The relationship that a child has with a parent is the most powerful transformative relationship they’ll have.”

In the wake of the Parent Cafés success, Lina has partnered with Berkana and Strengthening Families Illinois to launch the first Art of Hosting focused on fostering healthy and resilient families. The team convened parent leaders, mental health workers, social workers, educators, restorative justice practitioners, and other community leaders who are working to strengthen families from across the state. As a result of their first three-day Art of Hosting experience, participants revived their personal commitments to their work, challenged their view of the whole system, and innovated how to use dwindling resources more effectively.

Berkana Learning Products

Landmarks for Leaders, article
Using Emergence to Take Social Innovation to Scale, article
The Leaders We Need Are Already Here, booklet and film
Women’s Circle Starter Kit, toolkit
Art of Hostings in North America in 2009
Boulder, Colorado
Columbus, Ohio
Gold Lake, Colorado
Leavenworth, Washington
New York City, New York
Pembroke, Ontario
Springfield, Illinois
St. Louis, Missouri
Vancouver Island, British Columbia

Communities We Consulted with in 2009
Canadian Labour Congress, Ottawa, Ontario
The Canadian Media Guild, Toronto, Ontario
Cherokee Nation, Tahlequah, Oklahoma
Disciples of Christ, Indianapolis, Indiana
Financial Planning Association
Greater Tacoma Community Foundation, Tacoma, Washington
Institute of Noetic Sciences (IONS), Petaluma, California
International Disciples Women’s Ministries, Indianapolis, Indiana
National Disability Services, Brisbane, Australia
The Planning Center, Costa Mesa, California
Providence Healthcare, Kingston, Ontario
Salt Lake Center for Engaging Community, Salt Lake City, Utah
St. Luke’s Health Initiative, Phoenix, Arizona
Voices for Illinois Children, Chicago, Illinois
Financial Summary

Berkana made its transition into our new self-organizing structure on July 1, 2009. Part of this shift included fundamentally altering our financial model from one that centrally managed resources to one that distributes financial responsibility throughout the system. For that reason, we closed our books on June 30, 2009 and opened new books on July 1. The financial report below shows the two periods separately, as well as the activity level combined for the year. Some of the accounts have been renamed in the new books, but have been simplified here for the purposes of the Annual Report.

<table>
<thead>
<tr>
<th>INCOME</th>
<th>Jan-Jun 2009</th>
<th>Jul-Dec 2009</th>
<th>Total 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income From Fundraising</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Donation Income</td>
<td>92,433</td>
<td>28,730</td>
<td>121,163</td>
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<td>Direct Donation Income</td>
<td>19,163</td>
<td>21,750</td>
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<td>In-Kind Donations</td>
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<td>Fundraising Events</td>
<td>-</td>
<td>2,024</td>
<td>2,024</td>
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<td>Foundation Grants</td>
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<td>184,365</td>
<td>321,798</td>
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<td><strong>Total Fundraising Income</strong></td>
<td>295,960</td>
<td>239,238</td>
<td>535,198</td>
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<tr>
<td>Income From Initiatives &amp; Other</td>
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<td></td>
<td></td>
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<tr>
<td>Art of Hosting</td>
<td>95,586</td>
<td>49,097</td>
<td>147,683</td>
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<tr>
<td>Consulting Services</td>
<td>168,236</td>
<td>44,131</td>
<td>212,367</td>
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<td>Product Sales</td>
<td>4,724</td>
<td>2,452</td>
<td>7,176</td>
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<tr>
<td>Other Income</td>
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<td>1,203</td>
<td>1,536</td>
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<tr>
<td><strong>Total Income From Initiatives &amp; Other</strong></td>
<td>271,879</td>
<td>96,883</td>
<td>368,762</td>
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<tr>
<td><strong>TOTAL INCOME</strong></td>
<td>567,839</td>
<td>336,121</td>
<td>903,960</td>
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<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>Jan-Jun 2009</th>
<th>Jul-Dec 2009</th>
<th>Total 2009</th>
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<tbody>
<tr>
<td>Initiative Activity</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Pioneering Initiatives</td>
<td>104,338</td>
<td>58,760</td>
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<td>Art of Hosting</td>
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<td>62,890</td>
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<td>Consulting Services</td>
<td>155,274</td>
<td>46,272</td>
<td>201,546</td>
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<td>Sharing Our Learning</td>
<td>21,086</td>
<td>9,899</td>
<td>30,985</td>
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<tr>
<td><strong>Total Initiative Activity</strong></td>
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<td>177,821</td>
<td>535,891</td>
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<td>Shared Services</td>
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<td>58,234</td>
<td>170,927</td>
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<tr>
<td>Fundraising Activity</td>
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<td>-</td>
<td>9,433</td>
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<tr>
<td><strong>TOTAL ACTIVITY</strong></td>
<td>480,196</td>
<td>236,055</td>
<td>716,251</td>
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<tr>
<td><strong>NET ORDINARY INCOME</strong></td>
<td>87,643</td>
<td>100,066</td>
<td>187,709</td>
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In our new model, each initiative at Berkana is now responsible for its own financial well-being—raising funds, writing grants and generating income. The initiatives pay a percentage of their income to cover a portion of Shared Services provided by Berkana, which includes financial management and accounting, brand and materials development, web site and database, governance, fundraising support, event management and more. The decreased level of activity in the second half of the year reflects the adjustment period that each initiative has gone through as it learns how to operate in this new structure. We are confident that we’ll see increased levels of activity and impact in 2010.

Program Expenses (2009)

- **38%** Pioneering Initiatives
- **30%** Consulting Services
- **26%** Art of Hosting
- **6%** Sharing Our Learning

We see Berkana’s work as directly related to global oneness. You know that engaging communities requires not only people’s hands and minds, it requires their hearts and spirits. You know that we each are part of an interconnected web of life and that the invitation of these times is to find our way into a sustainable future together. It is a privilege to learn with you and to provide you with support for your ventures.

– Barbara Cushing, Kalliopeia Foundation
Acknowledgments and Invitations

We believe that supporting ideas that are community grown and connected trans-locally helps to build a more resilient and adaptive world. In 2009, we launched the Opportunity Fund to create a strong foundation for all of Berkana’s work and to catalyze pioneering efforts that are experimenting in building healthy and resilient communities. We have done this in partnership with communities in Southern Africa, South Asia and North America; we have helped to create communities of practice around sustainable food systems, alternative learning models, women’s leadership, families and more. As these initiatives continue to deepen and broaden their work, we see the opportunity to extend their reach and experiment with new ideas, new practices, and new communities joining these bold efforts.

Thank you to our generous community of donors, volunteers and contributors for all that you gift into our system. We hope that you will continue your relationship with these pioneering efforts.

We invite you to join us in nurturing these pioneering leaders and communities by donating to the Opportunity Fund. It is through support from friends like you that these initiatives and leaders can thrive and create the world we wish for.

Contact Us: community@berkana.org or www.berkana.org.