

Global Philanthropists Circle



Discovering Common Interests

Visit to Mexico

November 27–December 4, 2001
Oaxaca, Guanajuato, Mexico City

Special Moments, Experiences and Connections

On November 27, 2001, members of the Global Philanthropists Circle began a seven-day immersion into the world of people, communities and organizations working to reduce poverty in Mexico. The trip consisted of visits with some of the country's top leaders in the public, corporate and nonprofit sectors, working sessions and presentations by Synergos' partners and other civil society organizations in Mexico, and absorbing trips to community initiatives supported by these groups. Participants left with heightened commitment to their own philanthropy.

This report presents that experience.

Synergos is working with GPC members and Mexican partner organizations on opportunities for future action that build upon this special event. We thank trip participants and the Mexican individuals and organizations that helped to make the trip a success.

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First Stop – Oaxaca

Day One

Members of the Global Philanthropists Circle (GPC) arrived in Oaxaca, Mexico on the afternoon of Tuesday, November 27. Synergos staff and a committee of Mexican associates who were an integral part of the organization and implementation of the trip received the group. Vivian Blair, an independent consultant and Mexican national who serves as a senior advisor to much of Synergos' work in Mexico, Adriana Cortés, Executive Director of the Bajío Community Foundation and Javier Vargas, President of the Vamos Foundation, welcomed the group to Mexico with a presentation of the intellectual and conceptual framework for the trip.

After an overview presentation of the trip activities and reflections from Jaime Bolaños, Executive Director of the Oaxaca Community Foundation (OCF), Rodolfo and Norma Ogarrio, both OCF board members, hosted us for dinner at their exquisite home. We enjoyed an informal opportunity for the members of the group to become acquainted with each other and meet several members of the Oaxacan community, including Paco Chapela and Yolanda Lara who manage a nonprofit



David Brewer (left) asks a question of a representative of CEPCO (far right) at the organization's offices, while Juliette Gimon, Jim Brasher and Anne Mai listen.



Key Encounters

Javier Vargas, President, Vamos Foundation
 Jaime Bolaños, Executive Director, Oaxaca Community Foundation
 CEPCO
 EDUCA
 CAMPO
 CENTEOTL

Cultural Detours

Monte Alban by day and by night
 Santo Domingo de Guzmán temple
 Guelaguetza dance performance

organization, called Estudios Rurales y Asesoría, that assists indigenous forest communities to develop sustainable forestry plans and market certified timber and other forest products.

Day Two

On Wednesday, Javier Vargas and the Vamos Foundation hosted our group for breakfast with a diverse group of civil society actors working with Vamos to promote equitable social development programs in the Oaxaca region. Special guests were representatives of EDUCA, CEPCO and CAMPO. These local institutions gave an overview of their work and engaged the GPC group in a discussion of the major social and development issues facing indigenous communities in Oaxaca.

After breakfast, the group traveled to Monte Alban, one of the pre-Columbian architectural jewels of southern Mexico, and then returned to Oaxaca where we toured the magnificent Santo Domingo de Guzmán temple. The temple was recently renovated with generous support from the Fomento Social Banamex and GPC Founding Member Roberto Hernández. Following dinner featuring a marvelous presentation of a traditional regional dance, the *guelaguetza*, some intrepid members of the GPC were treated to an unparalleled opportunity: a private, night-time visit to Monte Alban, guided only by the light of the full moon.

Day Three

For breakfast on Thursday, the group traveled to the offices of CEPCO (State Coordinator of Oaxaca Coffee Producers) and was engaged in a very lively discussion with CEPCO staff on the issues facing the coffee industry in Mexico.

CEPCO has played a critical role for more than a decade in opening fair trade market options for more than 20,000 small producers, particularly those producing organic coffee. By negotiating long-term fixed price contracts, they have been able to



Staff of CENTEOTL describing the organization's work and impact.



Santo Domingo de Guzmán temple, which was recently renovated with support of the Fomento Social Banamex and GPC member Roberto Hernández.

cushion organic coffee producers from the recent abrupt downturn in global coffee prices. However, as they explained to our group, the small, non-organic coffee producers have been hit hard to the point where they are unable to recoup their production costs. CEPCO is working hard to develop alternative methods to prevent small-scale coffee production collapses.

A highlight of this discussion was a commitment by GPC members to support CEPCO's efforts to promote fair trade and fair-pricing practices through consultations with Starbucks, the well-known Seattle-based coffee retailer.

Following breakfast, the group traveled to the small rural town of Zimatlán, where CENTEOTL bases its operations. CENTEOTL gave the group an extremely warm (and musical) welcome with the support of local musicians and presented their work in the areas of sustainable agriculture, alternative income-generation, environmental protection, and social development directed towards indigenous children and youth. This visit featured a tour through the organization's amaranth cultivation and processing sites. Amaranth is a nutritious grain that can be produced in culturally and environmentally sustainable ways.



Staff of CENTEOTL explain the use of equipment that processes amaranth, as Judith Hernstadt (left), Eleanor Gimón and an interpreter listen.

Our time in Oaxaca concluded with a discussion hosted by Vamos about the role and capacity of diverse local actors to promote sustained and effective social change and development in Oaxaca. This discussion featured 15 representatives of



Participants at the site visit to CENTEOTL organized by the Vamos Foundation included children active in environmental education. This girl gave a presentation on how she and her family are involved in CENTEOTL's work.

local organizations with which Vamos works and highlighted the importance of citizen capacity and participation in the decisions that affect their lives in rural Mexico.

It was clear from the discussion how much the organizations valued the dialogue with GPC members. They expressed a desire to continue conversations with individual GPC members and with the group as a whole and welcomed the possibility of partnering with GPC members on concrete projects. Philip Walsh, Associate for Latin America at Synergos, is coordinating with both GPC members and our partner organizations in Oaxaca, Guanajuato and Mexico City to evaluate concrete opportunities for future activities and collaboration.

Concluding this discussion, the representatives of the local organizations presented each of the GPC members with a hand-made carpet with the logos of Synergos and the GPC to commemorate our visit. Armed with our souvenirs and strong impressions of the work being done in Oaxaca, the delegation departed for Guanajuato by private plane, which had been graciously offered by GPC Founding Members Alberto Baillères and Manuel Arango.

Upon arrival in Guanajuato, we were met by representatives of our host in that city, the Bajío Community Foundation (BCF), including Adriana Cortez and several BCF board members.

Second Stop – Guanajuato

Day Four

Our day began with a breakfast in downtown Guanajuato hosted by the Bajío Community Foundation. The BCF's board, composed of local philanthropists and private sector leaders, welcomed our group and presented an overview of their institutional mission and strategic approach.

Adriana Cortés, Executive Director of the foundation, presented specific program activities of the foundation as a critical framework for understanding the different site visits we were to make that day.

Following breakfast, the group visited several different project sites. The first site was the Albergüe Infantil, a home for children that provides integrated social services to children in need. At the Albergüe, representatives of the foundation presented their work related to the issues of drug and alcohol abuse and treatment. During the presentation, 11-year old GPC Member David Taylor, son of GPC Founding Member Ralph Taylor, decided his time would be better spent playing football with the children living in the home – proving that a common language is not necessary to



Key Encounters

Vicente Fox, President of Mexico

Martha Sahagún de Fox, First Lady of Mexico

Adriana Cortés, Executive Director, Bajío Community Foundation

Carlos Romero Hicks, Governor, State of Guanajuato

Julio Velasco, President of the Board, Bajío Community Foundation

Cultural Detours

A *callejoneada* through the streets of Guanajuato

build bridges across cultures. As we departed for our next site visit, David demonstrated his own personal philanthropic commitment by giving his football to his new friends.

The group then traveled to San Juan de Retana, in Irapuato, where BCF is collabo-



President Vicente Fox makes a point during the visit at his ranch, as GPC members Ralph Taylor, Marie Thérèse Arango, Manuel Arango, Teresa Bulgheroni and Eleanor Gimón look on.



GPC members including Amir Farman-Farma, Guillermo Donovan, David Brewer, Ann Mai and Peggy Dulany, with mothers, children and supporters of Albergüe Infantil, outside a community kitchen during a site visit organized by the Bajío Community Foundation. Also pictured are Judith Hernstadt, William Foote (an advisor to GPC Founding Member Ralph Taylor), and Synergos staff members David Winder, Jim Brasher and Philip Walsh.

rating with the municipal government and the private sector to create a community-based development model for marginalized communities. There the group visited a newly constructed school where parents are implementing a self-sustaining, volunteer-coordinated school lunch program that is meeting critical nutritional needs for youth in the community. Finally, the group visited a residential treatment home for drug addicts in one of the most marginalized communities of Irapuato.

Julio Velasco, President of the board of the Bajío Community Foundation and his wife, Angelica Ortiz, also a member of the board, then hosted the GPC group and the other members of the foundation's board for a lunch at their beautiful home in Irapuato.

In the evening, the GPC members were treated to a unique cultural experience in Guanajuato – the *callejoneada*, a musical tradition imported from Spain featuring local university students dressed as troubadours leading the people through a song-guided tour of the beautiful colonial streets of the city.

Day Five

On Saturday, President Vicente Fox and First Lady Martha Sahagún de Fox hosted the GPC group for breakfast at their private ranch in San Cristobal, Guanajuato. Mexican GPC members Alberto, Tere and Alejandro Baillères, and Manuel and Maria Thérèse Arango flew to the ranch on Saturday morning to join our group for the breakfast. The President treated the group to an intimate, off-the-record conversation of the challenges and opportunities faced by Mexico. Mrs. Fox discussed her new philanthropic initiative to promote institutional capacity and resource development for the social sector. President Fox set a very personal tone for the event, asking each GPC member, including the young David Taylor, to say a little about him or herself.

The group left the President's ranch and traveled back to Guanajuato, where they participated in an international conference jointly sponsored by the state government of Guanajuato, a committee of private sector actors, the Bajío Community Foundation and Synergos. This forum addressed the issues of social development in the context of Guanajuato, with a specific emphasis on the impact of increased inter-connectedness within and between the different sectors at the regional, national and international levels.

The forum featured over 250 participants and included presentations by several Synergos Senior Fellows and board members, including Javier Vargas; Wanda Engel Aduan, Secretary of Social Development of Brazil and a member of Synergos' board; and Peggy Dulany, Chair of Synergos. David Rockefeller, Founding Member of the GPC, gave the keynote address closing the conference and

delighted the crowd with his command of Spanish.

At dinner that evening, the GPC members were joined by several esteemed guests, including Carlos Romero Hicks, Governor

of the State of Guanajuato, David Valenzuela, President of the Inter-American Foundation, and Elan Garonzik, Civil Society Program Officer of the C.S. Mott Foundation.

Third Stop – Mexico City

Day Six

On Sunday, we traveled to Mexico City where we were treated to a presentation of the Access Initiative, a program of environmental protection in Mexico financed by the World Resources Institute (WRI). This presentation was coordinated through Ralph Taylor, who is a WRI board member. In the afternoon, new GPC members Clemente Serna and Maria Luisa Barrera de Serna hosted the group on a cultural tour of the historic center of Mexico City. This tour included a private visit to the National Palace to view the mural works of famed Mexican painter Diego Rivera and a visit to the National Cathedral.

In the evening, the group was hosted for dinner by business leader and philanthropist Carlos Slim in his private museum, Museo Soumaya, which is named in honor of his late wife. The group was led on a tour of the magnificent museum by Soumaya Slim, Mr. Slim's daughter and curator of the museum, and was joined by his son Julian Slim. The tour featured presentations of the private collection of Mr. Slim, including a unique collection of screens dating from the 17th, 18th and 19th centuries, celebrated works by such Mexican artists as Hermenegildo Bustos, and the largest collection of sculpted works by Auguste Rodin in all of the Americas.



Key Encounters

Carlos Slim
 Manuel Arango, Founder, CEMEFI
 Jorge Villalobos, Executive Director, CEMEFI
 Josefina Vasquez, Secretary of Social Development of Mexico

Cultural Detours

Historic Mexico City
 Diego Rivera's murals
 National Cathedral
 Museo Soumaya



GPC member Alfredo Achar makes a point during the dinner hosted by the Baillères family, as Carlos Slim looks on.

Day Seven

The final day of the trip began with a private breakfast at the Industrialists Club in Mexico City hosted by GPC Founding Member and founder of the Mexican Center for Philanthropy (CEMEFI), Manuel Arango. The GPC group was also joined at breakfast by the board of directors of CEMEFI and its Executive Director, Jorge Villalobos, who spoke about CEMEFI's institutional approach to strengthening the social sector in Mexico.

After breakfast, the Vamos Foundation hosted the GPC delegation and a group of 120 private sector leaders for a discussion of corporate social responsibility in Mexico. This discussion featured presentations by Josefina Vasquez, Secretary of Social Development of Mexico; Gerardo Villareal, Director of T1MSN; Kimmo Lipponen, Director of Corporate Marketing for the Nokia Corporation; Peggy Dulany; and David Rockefeller.

On the final evening of the trip, the group was hosted for dinner by GPC Founding Members Alberto and Tere Baillères and their son Alejandro in the exquisite pent-



Panelists at a meeting on corporate social responsibility in Mexico organized by the Vamos Foundation, including (left to right) Gerardo Villareal of T1MSN, Kimmo Lipponen of Nokia, Bernardo Barranco of Vamos, David Rockefeller and Josefina Vasquez, Secretary of Social Development of Mexico.



A representative of Coca-Cola speaking, as Pablo Farias of the Ford Foundation's Mexico office listens.

house of the Grupo BAL office complex. Special guests included GPC members Alfredo and Paz Achar, Manuel and Maria Thérèse Arango, Clemente Serna and Maria Luisa Barrera de Serna, and Pepita Serrano, as well as Carlos Slim and Pablo Farias.

Before cocktails, the group was treated to a presentation by the Rector and Deans of the Autonomous Institute of Technology of Mexico, one of the premier Mexican private universities, which was founded and is supported by the Baillères family. During dinner, each of the Mexican GPC members and attendees offered personal testimonials of their philanthropic interests and activities, providing our group with a new perspective of the diverse philanthropic interests and activities of our Mexican colleagues.

Members of the delegation returned home the next day. Synergos is working with GPC members and Mexican partners to evaluate opportunities for future action and collaboration.

Report text by Philip Walsh with Giovanna Blackston. Photos courtesy of Teresa Bulgheroni, Peggy Dulany, Andrés Millán/View Irapuato, Jennie Walker and David Winder.

GPC Delegation to Mexico

Alfredo Achar
 Wanda Engel Aduan
 Manuel Arango
 Marie Thérèse Arango
 Alberto Baillères
 Alejandro Baillères
 Tere Baillères
 Vivian Blair
 Jim Brasher
 David Brewer
 Carlos Bulgheroni
 Teresa Bulgheroni
 Adriana Cortés
 Guillermo Donovan
 Peggy Dulany
 Amir Farman-Farma
 Nathalie Farman-Farma
 William Foote
 James Ford
 Eleanor Gimon
 Juliette Gimon

Claudia Hernández
 Roberto Hernández
 Judith Hernstadt
 Ary Kahan
 Anne Mai
 David Rockefeller
 Lucia Moreira-Salles
 Clemente Serna
 María Luisa Barrera de Serna
 José Serrano
 María Joseph Serrano
 Carlos Slim
 David Taylor
 Ralph Taylor
 Javier Vargas
 Jorge Villalobos
 Jennie Walker
 Philip Walsh
 David Winder



The group with the President and First Lady of Mexico, following breakfast and discussion at the Fox's ranch outside Guanajuato.

Agenda of GPC 2001 Trip to Mexico

Tuesday, November 27

Afternoon Arrival in Oaxaca

6:00–7:30PM Welcome and Introduction: A Portrait of Social Development in Mexico
Presenters: Vivian Blair, Senior Advisor to Synergos, Javier Vargas, President, Vamos Foundation and Adriana Cortés, Executive Director, Bajío Community Foundation

8:00–10:30PM Inaugural Dinner hosted by Rodolfo and Norma Ogarrio at their home.

Wednesday, November 28

8:00–10:00AM Breakfast Presentation on the Socio-cultural Context in Oaxaca
With Javier Vargas, President, Vamos Foundation and representatives of CAMPO, CENTEOTL and EDUCA

11:00AM–12:30PM Cultural Site Visit to Monte Alban Archeological Zone

4:00–5:30PM Tour of the Templo-Museo Santo Domingo de Guzmán
Guided by Pablo González

8:00–10:00PM Cultural Evening with Guelaguetza and Dinner

Thursday, November 29

8:15–10:15AM Breakfast with CEPCO

10:45AM–12:30PM Presentation and site visits with CENTEOTL

3:30–5:30PM Presentation: Alliances and Actors in Oaxaca
With representatives of CAMPO, CENTEOTL and EDUCA

7:30PM Departure to Guanajuato
Travel on personal airplanes provided by GPC Founding Members Alberto Baillères and Manuel Arango



Vivian Blair Torres, a senior advisor to Synergos, walks with a group of children during the site visit with CENTEOTL.

Friday, November 30

- 8:00AM** Breakfast: Introduction to Site Visits
Hosted and presented by the Bajío Community Foundation
- 10:15AM–2:00PM** Site Visits hosted by the Board of Directors of the Bajío Community Foundation
The Addictions Network Sites:
Resurge Rehabilitation Center
CEDOJC
The Children's Network Sites:
Albergüe Infantil
Villa Infantil
- 2:30–4:30PM** Lunch: Hosted by Julio Velasco and Angelica Ortiz at their home
- 5:00–6:30PM** Guanajuato Debriefing
- 8:00PM** *Callejoneada* and Cocktail Reception



David Winder, Director of the Global Philanthropy & Foundation Building Program at Synergos, and GPC Founding Member Maria Josepha Serrano.

Saturday, December 1

- 9:00–10:30AM** Breakfast with the President and First Lady of Mexico at their private ranch in San Cristobal, Guanajuato
- 11:00AM–2:00PM** International Forum: Local Development in the Face of Globalization
Organized by the Bajío Community Foundation at the Teatro Juárez of the University of Guanajuato. Participants join sessions on *The Challenges of Local Development* and *Development: A Shared Human Project*.
- 3:00–5:00PM** International Forum Lunch

Sunday, December 2

- Morning** Travel to Mexico City
- Noon–2:00PM** Lunch and Presentation of the Access Initiative
- 4:00–7:00PM** Mexico City Cultural Tour including the National Palace, the Metropolitan Cathedral and the Aztec Museum
Arranged by Clemente Serna and Maria Luisa Barrera de Serna and conducted by Carlos McKinley of the Mexico City Tourism Department
- 7:30–9:30PM** Dinner hosted by Carlos Slim at the Soumaya Museum



Wanda Engel Aduan, Secretary of Social Assistance of Brazil, during the International Forum: Local Development in the Face of Globalization, hosted by the Bajío Community Foundation.



Monday, December 3

- 8:30–10:00AM Breakfast hosted by Manuel Arango With the Executive Committee of the Mexican Center for Philanthropy (CEMEFI)
- 10:00–11:30AM Dialogue with CEMEFI on its work and the role of philanthropy in Mexico
Discussants: Jorge Villalobos, Executive Director, CEMEFI; Maria Luisa Barrera de Serna, Chair of the board, CEMEFI; and members of CEMEFI's Executive Committee
- Noon–2:00PM Social Development Dialogue and Reception on Business Social Responsibility in Mexico Hosted by the Vamos Foundation
Panelists: Josefina Vasquez Mota, Secretary, Mexican Ministry of Social Development; Peggy Dulany, Chair of the board, Synergos; Kimmo Lipponen, Director, Corporate Marketing, Nokia International; David Rockefeller; and Gerardo Villareal, General Director, T1MSN
- 2:30–4:30PM Lunch with the Vamos Foundation
- 8:00PM Dinner and Reflection hosted by Alberto and Tere Baillères

Tuesday, December 4

Morning Departure



Several Mexican and US GPC members. From left to right – Marie Thérèse Arango, Alberto Baillères, Peggy Dulany, David Rockefeller, Alejandro Baillères, Tere Baillères, Roberto Hernández, Claudia Hernández, Juan Pablo Baillères and Manuel Arango

Key Nonprofit Groups Met in Mexico

Bajío Community Foundation

The Bajío Community Foundation is one of the oldest community foundations in Mexico and promotes particularly progressive inter-sectoral programs and collaborations with both government and the private sector..



Julio Velasco, President of the Board of the Bajío Community Foundation, Angelico Ortiz of the BCF Board, and Synergos Chair Peggy Dulany.

CAMPO

CAMPO works to improve living conditions in the indigenous populations of the state of Oaxaca through initiatives in the following areas: economic stability, social welfare, sustainable use of natural resources, and environmental improvement. It works in collaboration with community associations, civic organizations, municipal governments and government institutions to strengthen the presence, organization and participation of women.

CEPCO

CEPCO (State Coordinator of Oaxaca Coffee Producers) is an agricultural organization that incorporates over 20,000 small coffee producers in the state of Oaxaca in an effort to improve agricultural production and processing methodologies, promote fair-trade and marketing strategies, and implement social and economic development programs to improve the quality of life for producers in rural Oaxaca.

EDUCA

An organization working with primarily Mixtec populations, EDUCA promotes sustainable development in rural and indigenous communities by providing support to community organizations, supporting economic development projects, and by promoting a new culture of citizen participation in Oaxaca through civic education and technical assistance to local governments.

Mexican Center for Philanthropy

The mission of the Mexican Center for Philanthropy (CEMEFI) is to promote the culture of philanthropy in Mexico, and to strengthen the organized participation of civil society in the solution of the problems facing communities in Mexico. CEMEFI's members include over 500 civil society organizations and individuals. It maintains a database on nonprofit organizations receiving donations and volunteer help and works closely with Mexican business, government and nonprofit groups, as well as international agencies. It was founded by GPC Member Manuel Arango, who now

serves as its honorary chairman. CEMEFI is one of Synergos' primary institutional partners in Mexico.

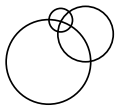
Oaxaca Community Foundation

The Oaxaca Community Foundation conducts programs on the issues of children and youth, women, culturally and environmentally sustainable development, corporate social responsibility and the creation of alliances among the public, business and nonprofit sectors. It works to strengthen civil society organizations and provides funding for their initiatives. It has been supported by the Ford, Rockefeller, MacArthur, Kellogg, International Youth and Inter-American Foundations.

Vamos Foundation

Vamos was established in 1996 by a group of 50 Mexican civil society organizations and is led by Board President Javier Vargas. Vamos spearheads the quest for a solution to poverty in Mexico by capturing and mobilizing human, financial and material resources to support initiatives of local civil organizations to achieve sustainable development and improve quality of life. Vamos targets indigenous communities in southern Mexico as well as groups living in situations of extreme poverty. The foundation emphasizes close collaboration between different actors, particularly government and the private sector. Vamos is one of Synergos' primary institutional partners in Mexico.





Global Philanthropists Circle

James M. Brasher III
Director
9 East 69th Street
New York, NY 10021 USA
Tel +1 (212) 517-4900
Fax +1 (212) 517-4815
jbrasher@synergos.org
www.synergos.org