



SYNERGOS AT TWENTY

A Reflection on Partnering to End Poverty



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Report on The Synergos Institute Twentieth Anniversary Reflection
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Introduction

The challenges and opportunities facing global society today are more complex and interconnected than at any other time in history. The scope and pace of change – accelerated by forces such as globalization and rapid advances in technology – are lending greater urgency to the search for fresh approaches to problems such as poverty and social injustice, environmental degradation and conflict.

For 20 years, The Synergos Institute and its partners have played a pioneering role in building and supporting new models of collaboration that address the underlying causes of societal divides and give individuals and communities around the world a central role in creating their own sustainable solutions to poverty and inequity.

We all know, at least in broad terms, the kind of world we would like to inhabit: one where people can live in dignity with their basic needs met; where inequities are shrinking, not growing; where conflicts are managed and violence contained; and where humans live in harmony with the rest of the natural environment rather than sacrificing the resources and wellbeing of future generations.

It is less clear how to create this kind of world, but the experience of Synergos to date points to some key ingredients needed to negotiate this complex terrain. These include:

- a climate receptive to inclusive collaboration and partnership
- organizational structures to bring groups together to work to transform dysfunctional systems

“If we have a theory of change, it is the importance of bridging across divides and the inclusion of those affected from the beginning.”

— Peggy Dulany

“Synergos attracts people who can make change happen.”

— Armida Fernandez

- bridging leadership capable of bringing people together across divides
- collaborative problem solving that involves those most adversely affected by the current reality
- processes that build trust and commitment among diverse stakeholders
- emphasis on the underlying causes, not the symptoms, of problems
- local capacity building to ensure the sustainability of needed systems changes.

On the occasion of its 20th anniversary in April 2007, Synergos convened a diverse group of partners, Senior Fellows, Global Philanthropists Circle members, board members and donors at the Rockefeller Brothers Fund Pocantico Conference Center in Tarrytown, New York, for its Twentieth Anniversary Reflection. The aim of the meeting was to examine two decades of work together and explore a path for the future.

The meeting was facilitated by Corazon “Dinky” Soliman and Ernesto D. Garilao of the Philippines, both longstanding members of the Synergos network and familiar with its past work. To guide the discussions, four papers were presented as background.¹

Participants were also invited to comment on the latest version of a strategic planning document prepared by Synergos.

Preliminary observations from the group were shared with a broader gathering of partners and network members, board members, donors and Synergos staff at the International Center for Tolerance Education in Brooklyn on the final day of the conference.

This report, along with its supplementary documentation, offers a compendium of information and insights gathered during the Twentieth Anniversary Reflection. The report was

“It’s good to reflect on what made Synergos different from other organizations in the last 20 years that can make a difference in the next 20 years.”

— Eugenio Gonzales

¹ Dulany, Peggy (2007) *What’s Missing? A Personal Reflection on Synergos’ Twenty Years of Work*; Brown, L. David (2007) *Multi-Stakeholder Partnerships at Synergos: Experience and Learning in the First Decade*; Winder, David (2007) *Understanding Multi-Stakeholder Partnerships: Examples from Latin America and Southern Africa*; Garilao, Ernesto D. with Juan, Michael (2007) *Bridging Leadership at Synergos: Experience and Learnings*.

prepared by Synergos and does not necessarily reflect the views of the Rockefeller Brothers Fund or other event supporters.

This report traces the evolution of Synergos' work over the past twenty years and highlights key lessons learned along the way. It also outlines some of the questions raised and challenges posed by conference participants concerning the proposed future path of Synergos. This report, as well as the four background papers, are available online at www.synergos.org.

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The First 20 Years: Achievements and Lessons Learned

“The question I always have is, ‘What didn’t work?’ What made me change direction? I learn more from mistakes than from what went right.”

— Fernando Rosetti Ferreira

A central purpose of the Twentieth Anniversary Reflection was to give Synergos and its partners the opportunity to reflect on the work undertaken together over the years, celebrate the resulting achievements and share the lessons learned along the way. This provided the opportunity to better understand how to move forward with an ambitious framework for promoting collaborative efforts to address the systemic causes of global poverty and inequity.

Over the course of three days, a rich and complex portrait of Synergos emerged from the commentary of those who have been part of its community of learning and action. A common theme was the unique contribution Synergos has made in identifying and addressing the critical gaps in the social infrastructure that supports collaboration.

The willingness of Synergos to learn and adapt in the face of shifting circumstances as it seeks to fill these gaps has resulted in a range of new and effective approaches that bring people and institutions together to overcome poverty and social injustice around the globe.

Conference participants identified a broad array of activities undertaken during the first ten years of Synergos’ work, from its earliest efforts to build multi-stakeholder partnerships and its work to bring community foundations to life in developing countries, to the creation of an international peer network to connect foundation and philanthropic leaders.

In the past decade, the trajectory of Synergos' work has been just as far-reaching, from identifying and fostering a new style of leadership to bridge societal divides, to creating a global forum for private philanthropists seeking to contribute to sustainable solutions to poverty. Most recently, Synergos has explored the use of new social technologies to promote large-scale, participatory partnerships to reduce poverty.

The following section of the report provides an overview of the main lines of Synergos' work over the past 20 years and includes observations from conference participants about key lessons learned from those activities.

Early Insights

Synergos was founded by Peggy Dulany in 1986 to bring people and organizations together across divides to find lasting solutions to poverty and inequity. Synergos filled a void as a Northern hemisphere organization that was able to work in partnership with Southern organizations. In doing so, the successful partnerships built created links among different sectors and groups in both regions.²

Dulany brought to the table a number of insights from her previous experiences living and working in the *favelas* of Rio de Janeiro, from her work with the New York City Partnership and from her work with the anti-apartheid movement. These learnings and approaches provided the fundamental underpinnings for the subsequent evolution of Synergos' work.

Dulany observed that the poor have the greatest interest in overcoming their own poverty, but they often lack the access and connections to do so. The problems faced by people living in poverty were typically too complex to be solved by any one sector of society. What was required was a multisectoral approach to problem solving that included the active participation of the poor and marginalized.

Also critical was the availability of safe spaces where people with differing views of a problem could build the trust to enable

“Synergos is a clever organization. Faith in the individual and intense relationship building is really key. If Synergos is a tree, the roots of the tree are each of us here, and they're extremely powerful.”

— Youssef Dib

² Dulany, *ibid.*

“The way we ensure that we’re cutting edge is to make sure that the communities and the people who are marginalized are at the center of the work we do, not just as objects, but as subjects.”

— Corazon Juliano-Soliman

them to work together. Dulany’s experiences had also underlined the value of using one’s unique set of skills and connections to build trust with and among groups to help bridge societal divides.

From its earliest days, Synergos has employed a “learning, linking, and enabling” strategy that continues to undergird its work to promote collaboration across groups:

- The learning component seeks to document how partnerships work.
- The linking agenda aims to connect groups working on similar initiatives to each other to permit them to share information and material resources.
- Through the enabling strategy, Synergos works with a limited number of local groups to form and facilitate inclusive partnerships to address issues of poverty in ways that achieve more significant and sustainable results.

Multi-Stakeholder Partnerships

While multi-stakeholder partnerships have become more widely accepted today, they were largely absent from the international development scene in the mid-1980s, when Synergos first decided to explore the role they might play in social and economic transformation in the developing world.

Over the course of the next ten years, Synergos undertook a range of actions to study, test and support the development of multisectoral partnerships.³

To build out the literature, Synergos documented a range of cases from 1986 to 1988 to illustrate how multi-stakeholder partnerships might contribute to social problem solving in both industrialized and developing countries. Comparisons across these six cases helped clarify the differences between cooperation among development actors in the same sector and cross-sectoral cooperation between grassroots organizations, non-governmental organizations (NGOs), government and business.

“One of the most striking insights from Synergos’ early work in partnership building was just how few successful, sustainable, inclusive multisectoral collaborations there were from which to learn.”

— Peggy Dulany

³ See the conference papers by Brown and Winder for further details on Synergos’ historical experiences with multisectoral partnerships.

Synergos also supported efforts to catalyze multi-stakeholder initiatives through direct partnership consultations in Brazil, Mexico and Ghana over the period from 1986-1995. Each consultation involved the participation of a Synergos Associate.⁴

In Brazil, for example, working with Associate Wanda Engel Aduan (a Synergos board member and a participant in the Twentieth Anniversary Reflection), Synergos helped an alliance of academics and activists build a broad coalition of actors to work on the problems of marginalized children and youth in Rio de Janeiro. Drawing on other Associates, Synergos trained the Roda Viva alliance to envision and change their management processes, which they then used to build strategy and to widen participation in the alliance.

Synergos' experiences in Brazil, Ghana and Mexico during this period suggested the potential for multi-stakeholder partnerships to resolve complex problems, but they also underlined the challenges of bridging in polarized contexts and the resulting need for sustained resources and a long-term horizon to operate successfully.

To gain a more systematic understanding of the ingredients of successful partnerships, Synergos next created a consortium of research organizations led by Synergos Associates to develop case studies of successful cooperation between grassroots groups, NGOs and governments in order to compare their experiences within and across regions. While the initial aim was to cover many regions, funding limited the work to Asia and Africa.

The Asian cases were completed in 1991, discussed at a conference in Delhi that year and assessed in several analyses published by the United Nations Development Programme (UNDP). The African cases were analyzed at a conference in Zimbabwe in 1995, and a consortium member, the Institute for Development Research, completed and published comparative analyses across all 13 cases.

“Twenty years ago in Brazil, no one was talking about partnership. Now it’s a common way of thinking about solutions to the complex problems of poverty and inequality. If the problem is multidimensional, the approach has to be intersectoral.”

— Wanda Engel Aduan

⁴ Synergos Associates were a group of development activists from the Southern hemisphere and organizational change consultants and researchers from the Northern hemisphere who provided advice during the early years of Synergos with experience in problem solving across sectors.

“A decade of work affirmed Synergos’ initial insight that multi-stakeholder partnerships have enormous potential as development interventions. An idea that was intriguing but hardly obvious in the mid-1980s is now widely accepted by international development agencies, many transnational corporations and government theorists.”

— L. David Brown

These analyses suggested a number of lessons, including the identification of two quite different forms of partnerships: NGO-centered and grassroots-led. In both patterns, NGOs were central as “bridging organizations,” building links across sectors in the former and building links among grassroots organizations in the latter.⁵

Other key findings included the importance of managing conflict, enabling participation and mutual influence among the parties involved, and generating social learning, new social capital, and solutions to complex problems from successful collaborations across levels and sectors.

An example of a successful NGO-led initiative can be seen in one of the Asian cases, the Gram Vikas Indian Biogas Program. That study highlighted the role of NGO Gram Vikas as a bridging organization critical for forging the cooperation needed between the national government and local communities in order to build biogas plants to supply energy to more than 200,000 poor and marginalized residents of the state of Orissa. The leadership role played by Gram Vikas Executive Director Joe Madiath (a participant in the Twentieth Anniversary Reflection) in bridging these constituencies was highlighted in the Indian Biogas case study.

The comparative analysis across cases proved to be an important tool for influencing development policy and practice at agencies such as UNDP and the US Agency for International Development. Publications emerging from the initiatives helped shape the development debate about inter-organizational cooperation in succeeding years. Teaching cases based on some of the partnerships have been used at the Kennedy School of Government and other institutions to train leaders from many different sectors.

By 1994, its wide-ranging work on partnerships had made Synergos highly visible internationally as a proponent of inter-sectoral collaboration in development.

With the Inter-American Development Bank and leaders from several Latin American countries, Synergos organized a

⁵ The term “bridging organization” was originated by Synergos Associate L. David Brown.

series of national consultations in Brazil, Colombia and Mexico from 1994 to 1996 to explore how partnerships between civil society, government and international donors could foster social development.

Although these experiences resulted in a greater awareness at the top levels of government about possibilities for collaboration with civil society, they illustrated the long-term vision needed for influencing policy at this level. This was made clear through Synergos' direct partnership consultations in Brazil, Mexico and Ghana.

While none of these initial strategies led to definitive solutions to poverty at the scale originally sought, Synergos' experience with multi-stakeholder partnerships from 1986 to 1996 demonstrated a valuable new approach to problem solving that merited further exploration and experimentation.

Insights concerning partnerships and their implications for the future work of Synergos were highlighted by L. David Brown in his remarks and paper presented at Pocantico.

Brown observed that Synergos' credibility and capacity to affect key actors depended on a sustained process of learning and relationship building across many interlinked activities – case studies, direct interventions, comparative case analyses and cross-sector national consultations.

As Synergos is increasingly recognized by powerful actors, Brown underlined the importance of staying closely connected to less powerful stakeholders in order to help balance unequal power relationships.

In light of the sustained effort and long-term vision required to engage and influence events on the ground, Brown also stressed the need for Synergos to remain committed to bringing focus to the development and spread of the theory and practice of multi-stakeholder partnerships.

“Don't just think of Synergos as an organization; think of its role in building connections and networks that can have a wider impact than Synergos as an organization could have.”

— L. David Brown

Community Development Foundations and Other Bridging Organizations

Synergos' earliest experiences with partnership building in Ghana, Brazil and Mexico underlined the difficulties of finding internal and external funding to sustain such efforts.

In recognition of the funding problems that were widespread among community-supported organizations, Grupo Esquel, a Latin American network of NGOs, came to Synergos with a proposal. Why not assist groups in the Southern hemisphere to create community development foundations much like the ones that support local action in the United States and United Kingdom?

With Esquel Ecuador, one of the members of the network, Synergos worked jointly to launch the first national community development foundation in Ecuador, Fundación Esquel, in 1991. What followed was a fertile period of collaboration with other groups across the developing world seeking to create similar institutions to build capacity in their societies.

This development marked an important transition for Synergos, as it gradually phased out working directly on partnerships and took on as a major focus the building and strengthening of grantmaking organizations. It was the intent of Synergos to help empower these new community development foundations to work to strengthen civil society and become bridging organizations capable of convening and facilitating partnerships in their own societies.

This redirection of Synergos' priorities gave rise to a number of trailblazing institutions addressing the problems of poverty and social injustice in their respective regions of the world. These organizations include the Foundation for Community Development in Mozambique, the Community Foundation for the Western Region of Zimbabwe, Fundación Vamos in Mexico (now renamed Rostros y Voces) and Instituto Rio in Brazil. Among participants in the Pocantico conference were individuals who played a leading role in the creation of two of these bridging organizations: Inviolatta Mpuli Moyo from Zimbabwe and Javier Vargas from Mexico.

"Most of us represent some kind of intermediary, but there are countless individuals who are not here who have been affected by the work of Synergos."

— Shannon St. John

Synergos also took on the role of helping to strengthen associations of community development foundations in Mexico, Southern Africa, the Philippines, Brazil and along the US-Mexico border, where Synergos manages the US-Mexico Border Philanthropy Partnership. With the support of a consortium of US and Mexican foundations, this partnership provides a wide range of support to more than 20 existing community foundations on both sides of the border. The partnership has catalyzed the creation of new foundations and has encouraged greater focus on social investment to address poverty issues.

Between 1990 and 2002, major foundations such as Ford, W.K. Kellogg, John D. and Catherine T. MacArthur, Charles Stewart Mott, Rockefeller, Sasakawa Peace and Atlantic Philanthropies began to take an interest in strengthening philanthropy in the Southern hemisphere. Because Synergos was one of the few organizations in the early 1990s doing this work, it sustained its efforts to nurture these emerging institutions largely through the support of large foundations.

By the end of 1995, after nearly a decade of experience, two key lessons emerged that would inform the work of Synergos going forward. First, Synergos had learned the value of creating national and regional associations and support organizations to provide assistance to the expanding field of foundations. Second, sources and types of funding were needed as well to strengthen local grantmaking organizations and civil society.

Reflecting on Synergos' experience with community development foundations and other bridging organizations, participants at the Pocantico conference reaffirmed the value that Synergos has added to the field by providing connections with outside networks and technical assistance.

Regarding Synergos' future efforts to build and support bridging organizations, participants said they were open to a range of models, including community development foundations. Efforts should continue to focus on ensuring inclusiveness, particularly for those who are most marginalized in society, in these institutions.

"Synergos is really addictive. You get to know them and you're with them forever. What's been created over this time is the trust that Synergos has from all its partners in the way it carries out its mission and vision. In international community foundation building, it plays the mobilizing, coordinating and catalyst roles very well."

— Inviolatta Mpuli Moyo

"A bridge is only solid if it's supported on both ends, not lopsided. Is there a role for Synergos in shoring up the weaker end? Do we need to bring others along who don't have a voice?"

— Avila Kilmurray

Senior Fellows

“We can’t possibly stop talking about poverty. It’s all around us in Africa and it’s still increasing. This is where the challenge of poverty is: we not only have to think outside the box, we have to get out of the box and throw the box away and ask, ‘What is it we’re not doing?’”

— Elkanah Odembo

Synergos’ early work with partnerships led to a realization that the learning, linking and enabling framework was applicable to foundation building as well. Experience connecting the growing number of emerging foundations with information and resources suggested the need for a peer network of foundation and philanthropy professionals.

To fill this gap, in 1999 Synergos launched the Senior Fellows program, a cornerstone of efforts to strengthen local foundations in developing countries. The program identifies talented leaders from some of the world’s most successful and innovative development foundations and philanthropic support organizations. Their work produces knowledge on trends and innovative models, which Synergos distributes to a wide audience. The *Foundation Building Sourcebook* and other material at www.synergos.org house much of this learning.

The 82 foundation leaders participating as Senior Fellows in 2006 came from 28 countries around the world, predominantly from Latin America, Africa and Southeast Asia. Nearly half of participants at Synergos’ Twentieth Anniversary Reflection were members of this peer network.

The Senior Fellows program contributes to emerging foundations through four interconnected strategies – global networking, capacity building services, leadership skill development, and knowledge creation and dissemination. By connecting the Fellows to each other through an annual meeting, a website and on-site visits to share their expertise with one another’s organizations, the network has become a powerful tool for linking and learning.

Participants in the Pocantico conference acknowledged the capacity that Synergos had gained with the creation of the Senior Fellows, which has resulted in a peer network that mobilizes and leverages the knowledge and experience of foundation leaders from around the world.

There was a call for Synergos to make better use of that network’s capacity and to restructure programs to better integrate the activities of the Senior Fellows with other work of Synergos in the future. Attention was drawn as well to finding

“Poverty is not just multisectoral, it’s multidimensional — a poverty of ideas, leadership, weak or fragile democracies — partnerships can be operating in these areas as well. What are we doing about leadership in new ideas? What ideas can be generated and how do we capture them?”

— Len le Roux

ways to strengthen leadership. Interest was expressed in exploring the Senior Fellow network and its services as an asset that could generate income to ensure its sustainability.

Bridging Leadership

A theme that has persisted throughout Synergos' history is the notion that social and economic divides must be bridged to reduce poverty in a significant way. As experience accumulated, it became apparent that bridging was not only an organizational function, but also an individual style of leadership exemplified by many Synergos colleagues who were skilled at reaching out across divides to foster the bonds of trust that are the prerequisite for partnership.

In 1999, Synergos convened a peer learning network of individuals from institutions around the world to build out the knowledge of bridging leadership through case studies. Although funding was not available to complete the project, 18 of the 29 cases finished held enough clues to provide a rich database for further study.⁶

As an outgrowth of the Synergos effort, two members of the original network, the Asian Institute of Management (AIM) in the Philippines and Fundación Esquel in Ecuador, have built on these learnings and launched bridging leadership initiatives in their own countries.⁷

In the Philippines, through the leadership of Ernesto D. Garilao, AIM in 2004 established the world's first institute dedicated to research and training in bridging leadership, the Mirant Center for Bridging Societal Divides. Through its research, case studies, teaching and practice, AIM has developed a comprehensive bridging leadership framework that it continues to refine, apply and disseminate.

"There are military commanders who have been through the training, including a two-star general who now talks about bridging. We look for people in leadership positions who have enormous capacity to change things."

— Ernesto D. Garilao

⁶ Institutions represented in the peer learning network included the Asian Institute of Management (Philippines), Fundación Esquel (Ecuador), Tecnológico de Monterrey (Mexico), Associação Brasileira para o Desenvolvimento de Lideranças (Brazil), the University of Natal (South Africa), and the Leadership Regional Network of South Africa.

⁷ See the conference paper by Ernesto D. Garilao and Michael Juan for further details on the learnings of the network, and on AIM's research, case studies, teaching and practice of bridging leadership.

“Do we still have divides in Ecuador? Yes. Do we have tools to address them? Yes, we’re better prepared. If development is about bringing new possibilities for a better life, then this conception of bridging is very powerful, not just in regard to outcomes, but also for people.”
— Boris Cornejo

Through workshops and training programs, AIM is building a cadre of bridging leaders, some of whom are working to heal societal divides in the poorest and most conflict-affected areas in the Philippines. AIM has focused particular attention on the region of Mindanao and is now training local leaders to play a bridging role in mediating inter-communal conflict.

In an effort to disseminate its methodology more widely, AIM is training the staff from a variety of academic institutions, including 12 in Western and Central Mindanao, in the Philippines, in the bridging leadership framework. AIM has also begun to work with organizations in Cambodia, Indonesia and Vietnam to understand the different contexts that affect bridging leadership.

Fundación Esquel has also developed innovative practical programs in bridging leadership in association with local universities in Ecuador. Leaders who have been trained have gone on to build multisectoral partnerships related to youth, education and reproductive health.

Experience to date in Ecuador and the Philippines suggests that bridging is a style of leadership that holds great promise for contributing to the resolution of complex problems such as conflict and poverty.

What is urgently needed is more analysis of case studies on bridging leadership, broader availability of training programs for bridging leaders and greater awareness worldwide of the utility of this approach for solving complex societal problems.

Global Philanthropists Circle

“The Global Philanthropists Circle is an outgrowth of Peggy Dulany’s remarkable networking capacity. The Circle is bringing donors together and really adding enormous value.”
— Adele Simmons

The idea of a peer network of private philanthropists interested in playing a strategic role in reducing poverty had been percolating at Synergos for a number of years, but it wasn’t until 2001 that the idea became reality with the creation of the Global Philanthropists Circle.

Through a series of dinners for families of wealth convened by David Rockefeller and Peggy Dulany that began in 2000, Synergos discovered an even greater hunger for such interaction and peer learning than had been anticipated.

Synergos expected that a majority of the members of the emergent Global Philanthropists Circle would be Americans interested in giving outside US borders and looking to Synergos to help them connect with effective organizations in other countries. In fact, more than half the 65 member families today come from more than 20 other countries. Almost a third of these are from the Southern hemisphere.

Increasingly, this dynamic and diverse peer learning network has attracted other private philanthropists who wish to collaborate and to be more effective in their roles as agents of change. The Circle has also provided them the opportunity for deep personal reflection.

Participants at Pocantico who are active in the Circle observed that the friendships and bonding that have developed from learning journeys, dinners, retreats and seminars have become the glue that holds its members together.

Now that the network is firmly established, they said, a central goal should be to expand the Circle and deepen the relationships among its members in order to help them be more effective in addressing poverty and inequity. This is already happening, as members share knowledge and experience with other members across the Southern hemisphere.

For individuals who are just becoming active in philanthropy, the Circle can play a supportive role. For more experienced donors, Synergos should explore ways to help them be more systematic and systemic in their giving. Greater use could be made of the Circle's publication, *Global Giving Matters*, in promoting ideas about how donors can leverage change with their giving.

The next step is to encourage and facilitate greater connection among Circle members and other Synergos partners and networks. This latter task is complicated, however, by the distance and mutual lack of understanding that often prevail between wealthy philanthropists and the constituencies with whom they seek to collaborate.

A major challenge for Synergos is to increase meaningful opportunities for human connections between those with wealth and other resources and the individuals and communities who lack financial resources and access.

"Synergos' capacity as a convener is enormous. It can identify who is who, who needs what and connect the needer with the provider. Because of that convening capacity, we in Colombia were able to put together an important peace-making initiative for the country."

— Oscar Rojas

"A continuity of interests has been organic to the work of Synergos. Networks have been maintained; we can see the new pieces coming in and out, but they never get lost, they just get pulled back in different roles."

— Emmett Carson

Return to Participatory Partnerships

Although its earlier efforts to promote bridging leadership were terminated, Synergos has remained committed to combine what was learned about bridging with its demonstrated experience in strengthening grantmaking foundations, key intermediary organizations of civil society.

“Synergos was founded on a very simple idea — what the world needed was more collaboration. Now it’s the gold standard in international development. Today, with its emphasis on whole systems change and personal transformation, Synergos is a pioneer again.”
— S. Bruce Schearer⁸

In 2003, the time was deemed right to reengage with the original mission of Synergos – to work on new approaches to build and support participatory partnerships to reduce poverty. This decision was based on the growing strength of the Senior Fellows and Global Philanthropists Circle peer networks, the continuing relationships with partners across four continents and a span of nearly 20 years and the recognition that such collaborative approaches were vital to take innovation to scale.

To continue this renewed commitment, Synergos required a special kind of expertise to move it forward. In 2004, Synergos examined a number of innovative approaches to do this and entered into partnership with Generon Consulting, an organization with extensive experience in this field.

Synergos was attracted by the problem-solving methodology developed by Generon’s Joseph Jaworski and Adam Kahane in partnership with Otto Scharmer and Peter Senge of Massachusetts Institute of Technology and the Society for Organizational Learning.

At the center of this “U-Process” methodology was the conviction that innovative and sustainable solutions required a shift in thinking from an exclusively mind-centered approach to a holistic, mind- heart- and spirit-centered approach.⁹

With sustainable, system-wide change as its aim, Synergos began to experiment with an application of the U-Process to bring a broad and inclusive group of stakeholders together for a carefully structured learning experience. In this approach, the

⁸ From 1987 to 2005 S. Bruce Schearer served at Synergos, first as Executive Director and then as President.

⁹ For a more detailed explanation of the U-Process, see Senge, Peter, Scharmer, C. Otto, Jaworski, Joseph and Flowers, Betty Sue (2004) *Presence: Human Purpose and the Field of the Future*; and Kahane, Adam (2004) *Solving Tough Problems: An Open Way of Talking, Listening, and Creating New Realities*.

group considers the current reality of the problem it wishes to address in all its complexity, after which individual members retreat into a wilderness setting for a time of solitary reflection.

Informed by their personal experiences during their time alone, participants reconvene in the group and brainstorm solutions to the problem at hand. Consensus is sought on one or more prototype initiatives to be brought to the pilot stage, with the help of committed external sponsors.

At the time of this writing, two such partnerships to address problems of poverty and inequity are underway:

The Sustainable Food Lab was launched by Generon in 2004 and was joined by Synergos shortly thereafter. Led by the Vermont-based Sustainability Institute, it seeks to change the global food system to create greater economic equity for local producers, healthier food for consumers and environmentally sustainable agricultural practices. To date, a new Business Coalition for Sustainable Food is developing sustainability standards for members and a model supply chain project has been formed to connect small Latin American producers to major buyers.

The Partnership for Child Nutrition was established by Synergos, Unilever and UNICEF-India in 2005 to address the underlying causes of child under-nutrition in India. Piloted in several urban and rural communities in Maharashtra state, the aim is to reach up to 10 million undernourished children in that state and expand to other states and countries in the future. To lead the project, the Partnership established the Bhavishya Alliance, the first trisectoral child nutrition partnership in India. It is joined by a powerful group of over 30 Indian institutions, including major Indian companies, leading civil society organizations, such as Self Employed Women's Association, CARE-India and Aga Khan Health Services, and key government agencies in the state of Maharashtra.

Two additional projects are currently being explored. The Aboriginal Leadership Initiative seeks to improve the ability of aboriginal communities, government agencies, business and nonprofits to collaborate on projects that improve the quality of life for indigenous people in Canada. And the African Public Health Leadership and Systems Innovation Initiative would

“It’s much more definite now, what Synergos wants to be measured by. It’s going to be a little hard — you’re a couple of layers up from social justice and equity issues, from working on the ground. How will Synergos be measured? How do you measure your effect versus that of your partners?”
— Aurora Tolentino

develop a replicable model for improving public health leadership and system performance in Africa, starting in Namibia.

This multisector partnership work is still so new that Synergos has fewer conclusions to glean from it than from its other programs, which have six- to twenty-year track records. Nevertheless, a number of preliminary observations can be made based on experience to date.

The challenges of applying the principles of the U-Process in different cultural settings have been greater than anticipated and have required more flexibility than expected. Experience on the ground has underlined the importance of scoping the project properly, involving the right participants, building trust and ownership of the process among participants, ensuring the capacity of local facilitators to employ the U-Process, striking the right balance between support for the generation and implementation of innovations and addressing the cost and time required to use the current applications of this methodology.

What is also apparent, however, is the potential of the U-Process and similar methodologies to promote innovation and achieve sustainable systems change. By helping people to suspend judgment, immerse themselves in the system to be changed, reflect on their deepest purpose and tap the collective wisdom of stakeholders, these processes hold great promise for building better partnerships and potentially, for achieving more sustainable systems change.

Strategic Plan and Feedback On Future Challenges

The Twentieth Anniversary Reflection presented a valuable opportunity to gather broad input from participants on the main elements of a new strategic plan for Synergos that sets out an ambitious framework for social change while keeping the mission and values of Synergos front and center.

Peggy Dulany kicked off a day of discussion on the future direction of Synergos by sharing her perspective on some of the key long-term challenges ahead.

A central task is to help grantmaking organizations to become better at bridging divides, facilitating partnerships and gaining financial sustainability. Dulany suggested that Synergos play a role in supporting the foundation community at all levels in such efforts.

To re-enter the bridging leadership field, Synergos should examine a range of options, including new research, a review of existing case studies and working through a network of organizations to disseminate the bridging leadership framework more widely. Finding ways to integrate bridging leadership and partnership methodologies is also desirable.

As Synergos moves forward in its work with inclusive partnerships, another issue raised concerns the best way of systematizing the learnings from the experience of Synergos and others in this arena either through building in-house capacity for research or knowledge management and dissemination.

Another important issue is how to integrate the entrepreneurial capacity of the business sector into the practices of civil

“The challenge now is, ‘What’s next?’ What to do with all these assets of trust and networks that were constructed over the last 20 years? How can we invest them to make our world a sustainable world?”

— Oded Grajew

“We come to these meetings, listen to people’s stories, and take their ideas back home but it stops there, and it’s difficult for others to access these ideas. What’s needed is better use of technology to create a repository of these stories.”

— Rose Mazula

“We need to start conversations and interactions with people with whom we don’t normally work, but in the context of our values. We’re not looking for people who give money, but share values.”

— Marissa Camacho-Reyes

“Our definition of inclusive involves bringing all stakeholders to the table. The belief is that when we don’t have some people at the table, we fail to benefit from their wisdom.”

— Robert H. Dunn

society without sacrificing the values of affected communities. Synergos has a growing experience base to draw on, thanks to many enterprising members of its community, and could be in a position to serve as a broker between business and civil society in proposed partnerships involving these constituencies.

While civil society organizations have been the primary partners in Synergos’ work historically, opportunities also exist for Synergos to work more closely with government to help bring initiatives to scale. Both the risks and benefits of this approach bear further examination in the future.

Dulany concluded that a more concerted effort should be made by Synergos to communicate about its work with all constituencies.

Synergos President Bob Dunn next presented the broad outlines of the strategic planning process, a work still in progress at the time of the conference.

The strategic planning process now underway has included stakeholder interviews and surveys, and takes into consideration who Synergos wishes to serve, how it can best add unique value, where it wishes to do its work and what competencies and resources it would need to be successful. The current thinking involves shaping the organization to focus its attention on networks, partnerships and knowledge dissemination.

Dunn spoke about the streams of work Synergos is considering to inspire, build and facilitate inclusive partnerships and collaborations that address the underlying causes of poverty and inequity globally leading to sustainable systems change.

A major element of these activities would involve strengthening and linking the networks already in place at Synergos – the Senior Fellows and the Global Philanthropists Circle. It would also involve drawing closer to the leaders and leading institutions in the development field who are natural collaborators with Synergos and its network members.

The second line of work involves the creation and advancement of broad-based collaborations that include as participants the communities most adversely affected by the challenge the partners seek to address. Synergos would be directly engaged in a limited number of such partnerships where it felt it could have the greatest impact, test innovative ideas and advance organiza-

tional learning. It would seek to contribute to the success of a larger number of initiatives by providing advisory services to those seeking to form or carry out such partnerships.

A third line of work calls for the creation of a Global Knowledge Center to serve as an interactive, open-source knowledge transmission resource to provide information, case studies, tools, trainings, social networks and convenings about inclusive partnerships.

Participants expressed broad general support for the framework while offering a wide range of comments on the plan and the future role of Synergos.

- While collaboration has always been at the heart of Synergos' work, a number of participants cautioned against focusing on the process of partnerships that require any compromise of core values. Rather than aligning with any particular model of collaboration, the Pocantico participants thought Synergos should remain flexible in its approach to collaboration and be guided by the specific context of place, culture and circumstance.
- In choosing its future involvements in partnerships, Synergos must be more aware than ever before of the global context in which it operates. Better criteria are also needed for selecting the places where multi-sector partnerships represent the most effective and efficient way to achieve the desired systems change. Promoting effective partnerships requires investigating, bridging, brokering, designing, facilitating, planning, executing and evaluating. Is Synergos prepared to do all of these?
- In terms of building partnerships and supporting and connecting networks, some participants stressed the need to include government, the assumption being that without the scale and power of government, the eradication of poverty is impossible. Greater integration of business was seen as essential as well to problem solving, but with the caution that there is a need to find the place where business and public interests align. In addition, corporations may require a network similar to the Global Philanthropists Circle to develop peer learning and leadership.

"We in civil society don't do a very good job of learning from our experiences and what can be extrapolated from them to benefit global society. Not only do we need a place to store knowledge, but to make sure that it gets out to others. Some of the things we're doing are very important, but there is a lot of duplication and waste."
— Elkanah Odembo

"We have to make sure we understand the changing global context over the next decade — how to ensure that we're really good at networking in completely different cultures and contexts."
— Adele S. Simmons

“It’s important to keep an open mind about bringing corporate partners to the table to leverage resources. The process of social change has to include the whole world. Synergos has to be a champion for a different kind of thinking — a kind that is creative about who can contribute what to a discussion.”

— Nili Gilbert

“How do we know what we’re achieving? We need to measure, but we also need a new capacity for measurement.”

— Javier Vargas

- Strong support was expressed by the group for the concept of an open-source Global Knowledge Center that would capture and disseminate information about collaborative processes impacting on poverty and inequity. Further study is needed to determine the best technologies to employ to maintain this database, the knowledge currently available through other sources and whether Synergos is prepared to engage in original research to provide new content.
- While there was a widespread call for better methods of measuring the impact of Synergos’ work, few concrete solutions were offered by participants, beyond a recommendation for greater rigor in data collection and analysis. Synergos expects specific proposals to emerge on this issue, and on the financing and organization of its work, as the strategic plan evolves in the coming months.

Participants in the Pocantico conference, all of whom have given generously of their time and energy to Synergos in past years, indicated their willingness to serve as a sounding board as Synergos moves forward in its planning process. Synergos looks forward to continuing to benefit from the wisdom of this trusted group of advisors.

Over the course of the conference, a number of other themes emerged with relevance for Synergos strategy going forward.

- Efforts must be made to move toward a better integration of Synergos’ programs. Existing formal networks such as the Global Philanthropists Circle and Senior Fellows could both benefit from more cross-cutting work.
- Synergos must re-focus and re-prioritize its work. To make the best use of limited resources, Synergos must identify its distinctive niche and the unique value of its work. Also, there is a need to acknowledge the tensions that arise from reconciling an far-reaching vision with the reality that Synergos cannot be all things to all people.
- A diverse “toolkit” of methodologies is needed for partnership building. In addition to the U-Process, Synergos needs a range of methodologies for building and supporting partnerships in different settings. Synergos should be able to draw on its extensive experience to create such a toolbox of approaches.

- Synergos can play a continuing role in promoting bridging leadership. AIM has developed the work and incorporated the U-Process in its framework. Synergos can build on this work and that of Fundación Esquel Ecuador to help disseminate the skills of bridging leadership more widely.
- Synergos can make better use of technology to connect people and organizations to ideas, resources and other people around the globe. Technology does not replace face-to-face contact, but supplements it and also saves time and money.
- Advocacy and communication should play a larger role in the work of Synergos. Some participants thought Synergos should explore ways to serve as a more powerful voice for social justice in US society through advocacy and communications with the government and media.

“If we want to be serious about technology, it’s becoming more and more available even in a developing country like Namibia. There is still a need for people to sit together and brainstorm, but there are so many savings and efficiencies with even simple uses of technology.”

— Len le Roux

Conclusion

“The challenge for Synergos is to draw on its 20-year history of experience, relationship building and learning in a way that has an even greater impact on issues of poverty, equity and social justice.”

— Robert H. Dunn

On the final day of the conference, at a 20th anniversary celebration at the International Center for Tolerance Education, key insights emerging from the first two days of reflection and discussion were shared with a broader audience that included virtually all the constituencies of Synergos: its partners, Senior Fellows, members of the Global Philanthropists Circle, donors, board members and current and former staff.

Based on its first two decades of experience, Synergos remains convinced that partnerships, when done properly, are powerful forces for bridging societal divides.

The ambitious agenda Synergos put forward in its strategic plan is designed to address those divides by building networks of bridging leaders, promoting and supporting inclusive partnerships and widely sharing its learnings via virtual, open-source networks.

Synergos enters this process with an open heart and open mind, confident that it has the kind of vigor needed (exemplified by Twentieth Anniversary Reflection participants) to co-create something of lasting value.

The touchstone for Synergos is a commitment to a path that allows us to be of even greater service over the next 20 years than we have been in the past in addressing poverty and social injustice.

Participants at Pocantico

Positions listed are those held at time of the Reflection.

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