OAK
FOUNDATION

Global Oak Retreat
Report

Global Retreat

Thun, Switzerland

19 to 23 June 2016

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FOREWORD

This report provides some of the many highlights of the Global Oak Retreat held in Thun, Switzerland, from 19-23 June 2016, which was attended by Trustees, staff and guests.

The retreat was the result of over a year of planning. Led by Virginia Ruan (Head of Communications) and Presiana Manolova (Programme Officer, Child Abuse Programme), a group of staff from across Oak and Trustees worked together to choose the venue, develop the agenda and plan the special events. During the course of the year-long lead up to the retreat, staff was consulted on every aspect of the meeting, including issues for plenary sessions, working groups, speakers and internal learning sessions. The result was a gathering about which all staff felt enthusiastic and in which everyone was engaged. According to the evaluation survey done shortly after the retreat, we lived up to the four key words used in the meeting's objectives: reflect, learn, explore and inspire.

- We **reflected** on who we are as a family-led international grant-making foundation, thereby reaffirming our identity.

- We **learned** more about how to work as a rights-based foundation committed to social justice issues, thereby reaffirming our approach.

- We **explored** the role of philanthropy in addressing some of the most complex challenges of our time, thereby reaffirming our ambition.

- We **inspired** each other to do even more with Oak's resources, to take risks when potential gains are great, to promote innovation and to address challenges head on, thereby re-affirming our values.

We also agreed on the importance of learning from both our successes and failures and to continue to share experience and knowledge across our offices and programmes, as well as with our grantees.

We hope that this report will remind us of these commitments in the months and years ahead. While we only hold global retreats every five years, we will continue the dialogue and remain connected in many other ways.

Despite our spread across six offices and our various programme areas, Oak is connected by common values and a determination to make the world a safer, fairer place for all.

Caroline Turner
Chair, Oak Foundation
Board of Trustees

and

Kathleen Cravero
President of Oak Foundation

INTRODUCTION

This report is divided into two sections (thematic sessions and internal sessions). The first section explores the thematic issues that were covered during the retreat. These issues include the following:

- Geoffrey Canada: finding a balance between risk and accountability;

- reinventing activism: the power and limitations of emerging social movements;

- people on the move: changing the narrative on migration;

- new economies: sustaining solidarity as the base of new economic models; and

- Vu Le the role of philanthropy as viewed by grantees.

The second section explores the topics covered during the retreat that were internal to Oak. These sessions helped us understand the work of the foundation better and give us opportunities to learn from each other. The topics included:

- a human rights-based approach to grant-making;

- Grantee Perception Survey follow-up;

- measuring impact;

- joint programmes; and

- strategic litigation for change.

The report also includes an annex with articles that Guy Oliver, a special reporter, wrote at the retreat. The articles covered some of the issues in the main sessions above. In addition, links to videos taken during the retreat are included at the end of some sections.

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"The success of Oak Foundation reflects the quality of its staff as well as the importance of the mission."

Alan Parker

Section one:
thematic sessions

GEOFFREY CANADA:
Finding a balance between risk and accountability

Geoffrey Canada is the current president and former chief executive officer of the Harlem Children's Zone (HCZ) in New York City. He is internationally renowned for his work in assisting impoverished and at-risk youth beat the odds. Canada was named to TIME's 100 list of most influential people in the world and, in March 2014, was named one of Fortune's 50 greatest leaders in the world.

His work has inspired many, among them Oak's Trustees. Harlem Children's Zone has been an Oak Special Interest Programme grantee since 2004. Geoffrey Canada was invited to provide the keynote address to share his thoughts on philanthropy and the lessons learned from the Harlem Children's Zone.

What can we do

The inherent challenge associated with philanthropy, Geoffrey Canada cautioned, is the unequal power relationship between providers and recipients. This, he says, leads to an unhealthy scenario where grantees do not question donors, as the grantees' interest lies in securing a grant. Such a relationship can lead to tensions and irresponsible decisions that are not conducive for positive or desired outcomes.

"Understanding the power of relationships is key."

There can be an inflexibility, Canada says, among many large foundations in how they view or approach the world's challenges. To counter this inflexibility requires introspection among donors on how to approach negotiations with grantees and ensure a level playing field between both parties in the interest of best outcomes. Grantees should be given equal say and be permitted to raise issues about

what is not working. A foundation's role implies an unequal power relationship. "We need to think about our own biases."

"Dialogue is essential for change," says Canada. Creating an emotional connection is often a more effective way to influence opinion. This requires the courage to ask questions and accept that you might not be the smartest person in the room. "But you are not as dumb as you think you are either."

"Do not be intimidated by the scale of the problem," he warns, even though at first blush it may appear overwhelming. The first response by grantors for the proposed Harlem Children's Zone was that the challenges were insurmountable. "Harlem was a slum," he said, referring to the poverty levels in the city when he began his project.

Philanthropists choose what they fund. It is easier to fund an art museum than it is to try and change society by abolishing child abuse,

for example. But the same rule of thumb applies: "If a grant is not going to make a difference, it is not a good investment."

Creative thinking is key to effective resolution of the issues. The grantor needs to be convinced the contribution will generate innovative action. Living philanthropists, rather than institutional funders, are more willing to take risks and/or fund innovation.

People often do the same thing even if it is not working and then expect different results. In this work there will be forces pushing you to do things that you do not want to do. This might be as a consequence of developing personal relationships with a particular leader or group at the expense of the work at hand. "The mission is not to support a person, but to get a job done."

The funding of the Harlem Children's Zone was not without its risks. The project sailed into the headwinds of education's status quo and recognised radical changes to education were required. The project challenged sacred cows. This included personnel, as not all teachers are competent. "Teachers who cannot teach, must be asked to do something else."

It is generally acknowledged an absence of education can lead to delinquency. But rather than address the cause, society chooses to treat the symptoms. As an example of this, the average cost to incarcerate a person in New York City is USD 167,000 a year and yields zero results. Yet society hesitates to invest USD 5,000 to educate a 13-year old child. These systems must be pressured to change. "Big risks equals big rewards."

Continuity planning for an organisation is critical and has to be confronted years ahead of the departure of a strong and effective leader. This gives potential candidates the opportunity to compete and train for the position. It is better to step down when an organisation is on an upward curve, but few leaders heed this advice.

> "It is important to ensure that the grantee has an equal say at the table and that the mission of the organisation is not undercut. Give permission to grantees to say what is not working well. The role of the foundation is one that implies an un-equal power relationship. We need to think about our own biases."

Geoffrey Canada

Replicating a successful project does not guarantee success. There are around 50 similar projects, funded in part by the US federal government, in various stages. One third are on track, one third have potential and one third are failing. Failures are attributed to under-capitalisation and the lack of a strong board and infrastructure. "Oak has the opportunity to take learnings from one area and leverage them elsewhere."

Questions and answers session with Geoffrey Canada

Some of the main points that were discussed include the following:

- *On how to promote change within a sector or area:* there are at least two strategies to consider: (1) through the larger groups who are well established and get regular funding; and (2) through smaller organisations that need to leverage action to reach their full potential. Some foundations prefer to focus on a few big, solid organisations,

rather than a larger number of smaller ones. A healthy combination of both is preferable. Sustaining support is also important.

• *On how to ensure sustainability of a project:* it is critical to plan for the departure of strong and effective leader years ahead. This gives good candidates the opportunity to compete and train for the position. It is also advisable to step down when the organisation is on an upward trend. Few leaders apply this strategy, which is very detrimental to the field.

• *On how to safeguard abused children who live in institutions or residential foster care:* efforts need to focus more on rebuilding families and providing education on appropriate parenting methods.

Breakout groups: takeaways

• Be prepared to take risks and fail

• Work backwards from the problem

• Invest in successful work

• Use qualitative and quantitative data

• Monitor, evaluate and learn from failure

• Be creative, accountable and build trust

• Hold an objective ten-year review of each grant

• Listen and question

Watch the movie

Session Series #1: Geoffrey Canada
Password: oakretreat

REINVENTING ACTIVISM: The power and limitations of emerging social movement

This session was a reflection on how technology is influencing new social movements and the role of philanthropy in financing these new forms of activism. "Rosa Parks sits so Martin Luther King can walk so Obama can run." These events were all the result of social change and movement building. They happened at different times and in different contexts - yet one can argue that each achievement made the other ones more possible. In addition, they were all carefully planned and collective efforts.

- **Leah Hunt-Hendrix** is a social activist and co-founder and executive director of Solidaire, a network of philanthropists founded in 2013 to provide resources for progressive social movements.

- **Payal Parekh** is the programme director for 350.org, which uses off and online platforms to create awareness about and effect action on climate change; she is also actively involved in social movements in India, Switzerland and the US.

- **Santiago Siri** is the founder of Democracy Earth Foundation and founding peer for the Net Party, a political party dedicated to online democracy. He also assists not-for-profit organisations in the use of the Internet and Bitcoin currency.

- **Zeynep Tufekci** is an associate professor at the University of North Carolina at Chapel Hill and a contributing opinion writer for the New York Times, who chronicles various social movements including through social media.

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"We are the first generation to feel the impact of climate change and the last generation that can make a difference."

Payal Parekh

Explaining social movements

Zeynep Tufekci has reflected on the boom bust cycles of social media-fuelled protests that have mushroomed in the past three years from Turkey to Hong Kong. The protests tend to be leaderless and digitally coordinated, mobilising large numbers within short timeframes, but the sudden momentum and subsequent burnout are handicaps for the nurturing of capacity. Compare that to the 1959 US civil rights movement boycott which involved 66 organisations working for six months to a year to organise logistics and protesters. This sent a profound signal to the government of the movement's capacity.

The Internet is a very useful tool to "change the narrative" around issues, such as climate change, but it has limited leverage over political power, Tufekci said. The global Occupy Movement protests against social and economic inequality demonstrated the potential of these protests and effectiveness of this method when supporting the US presidential candidacy of Bernie Sanders.

Using technology to effect change

"There is a need to incorporate tactical thinking, especially among youth, to create an infrastructure of people. Foundations should be encouraged to explore these processes," said Tufecki. Leah Hunt-Hendrix, a Princeton University alumnus in Religion, Ethics and Politics who funds progressive social movements, including Black Lives Matter, agrees.

Other organisations like 350.org, an Oak grantee, use mass mobilisation, both on and offline, to raise awareness and campaign for sustainable new directions for the global community. Payal Parekh said its campaigns use creative communications to shift the narrative around climate change and provide training, online platforms, micro-grants and strategy support to field organisers.

The urgency of the message — given that 350 parts per million (PPM) of CO_2 is the highest level possible if we are to preserve a habitable planet, but has already surged to 400 ppm — has reached a global audience through new communication technologies, allowing for coordinated mass actions across six continents.

"We are the first generation to feel the impact of climate change and the last generation that can make a difference," Parekh noted. The collision of new economies and new technologies are spurring each other towards accommodating growing demands for an equitable future. Parekh, however, sees the limitations associated with Internet platforms in deepening, as well as widening, networks. "Challenges include the closing of democratised space, control vs. open-source and reaching those with little Internet connectivity."

In tandem with technological innovation is the emergence of new economies in different guises.

"Confidence and transparency are lynchpins of new economies emerging from an opaque and politically cynical environment," said Santiago Siri. "With the rise of open source software and peer-to-peer networks, political intermediation is becoming redundant."

The Democracy Earth Foundation has built protocols with smart contracts that allow for decentralised governance. The development of new software with "an incorruptible, decentralised public ledger and built-in encryption checks and balances, or blockchain," is seen as a new dawn for digital democracy.

The biggest challenge is reaching all populations, but the increasing use of smartphones is bridging this gap, even among the poorest communities.

Funding progressive movements

"Social-media campaigns, like Black Lives Matter, require backroom support to maintain momentum," said Leah Hunt-Hendrix, whose foundation, Solidaire, engages in three types of giving for these progressive on-line social explosions. "We engage in rapid response mechanisms for creative disruption, pooled funds for innovative organising, and aligned giving for movement and network infrastructure," she explained. "Challenges for funders include acting fast enough, bridging gaps and avoiding nepotism."

PEOPLE ON THE MOVE:
Changing the narrative on migration

In 2015 one out of every 122 people of the world's population were either a refugee, an internally displaced person or seeking asylum. The mass migrations from the wars of Syria and Iraq as well as the turbulence and conflicts in north and sub-Saharan Africa have seen unprecedented levels of forced displacement to Europe. The impact of these migrations to European Union (EU) countries is an upwelling of resentment in some quarters among host populations, further complicating an already complex and dire humanitarian situation.
This session sought to address the work of Oak grantees in the field and the complexity of the issue.

- **Marijana Savić** (Oak grantee) is founder and director of Atina, an organisation that supports women and children who have fallen victim to human trafficking and other forms of gender-based violence. Her work also includes analysing policies and advocacy for legal changes in the field of human rights, especially those affecting the rights of women and children.

- **Gábor Gyulai** (Oak grantee) is director of the refugee programme at the Hungarian Helsinki Committee (a leading human rights organisation in Central Europe) and president of the European Network on Statelessness. He is mainly specialised in evidentiary, interdisciplinary and educational issues related to asylum cases and nationality and statelessness.

- **Ignacio Packer** (Oak grantee) is secretary-general of the Terres Des Hommes International Federation, a child-rights organisation working in 68 countries and Oak grantee. Previously he was with Médecins sans Frontières among other humanitarian organisations.

- **Kathleen Newland** is a senior fellow and co-founder of the Migration Policy Institute. Her focus is on the relationship between migration and development, the governance of international migration and refugee protection. She is also the founding director of the International diaspora Engagement Alliance (IdEA).

The background

The UN reported that in 2014 there were 59.5 million people displaced, as a consequence of "persecution, conflict, generalised violence, or human rights violations". This compared to 51.2 million displaced people in 2013, also a sharp increase from the 37.5 million displaced persons a decade earlier. "Today's refugees are mostly victims of war but there is no protection system in place," said Kathleen Newland who was the moderator for the People on the Move panel.

Newland identified the complexities and differences in vulnerability for migrants and refugees, from women being exposed to gender-based violence to young males being forcibly recruited by armed groups through to displaced persons not having access to legal identity documents.

The challenges of accommodating migrants and refugees reflect are generating risk aversion among governments and underfunded international organisations, said Newland. "This provides philanthropic organisations the space to explore a number of neglected areas, such as ensuring services for vulnerable populations, changing public opinion and discourse on migration and the improvement of policies and other issues pertaining to migrant rights."

Oak grantees: the challenges and opportunities

Three Oak grantees, reporting on their work and the challenges existing in their fields, agree.

The Common European Asylum System (CEAS) is only common in name, Gábor Gyulai noted, and has resulted in improvised solutions that fail to tackle the problem. The Dublin system has failed. Under this system, asylum seekers

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"Today's refugees are mostly victims of war but there is no protection system in place."

Kathleen Newland

must apply for asylum in the first EU country entered. Should they then travel to another EU state they can be repatriated to the EU country they first sought refuge in. Gyulai says there are three over-arching characteristics of migration to European states: the scale of the influx is unprecedented; the broad region of origin is the Middle East and North Africa; and this is all playing out within close proximity to Europe. However, the hosting of refugees is unevenly shared by EU member states, with Germany accommodating the majority of migrants with more than one million arrivals in 2015 alone.

In 2015 Hungary's capacity to accept asylum applications became overburdened. It resulted in the country's refusal to accept migrants returning after they had crossed into neighbouring states. With less financial clout and the provision of basic services already heavily reliant on civil society, the Balkans and Visegrad Four (Czech Republic, Hungary, Poland and Slovakia) are displaying increasingly negative attitudes towards hosting migrants and refugees.

"Under these circumstances, the risks of exploitation and gender-based violence grow exponentially," said Marijana Savić. Other specific challenges encountered by women and children include family separation, psychosocial stress and trauma and physical harm and injury. These challenges are compounded by language barriers and cultural practices that hinder humanitarian workers in delivering essential services to

displaced women and children.
Services and protection are not yet sufficient to meet the needs of women and girls who are only receiving very basic support, such as food and accommodation in camps. There needs to be creation of women-only spaces, protection for women against gender-based violence, and the provision of psychosocial support and trauma counselling.

The use and impact of language around Europe's migrant crisis, which is consistently negative and uses metaphors that are often dehumanising and simplistic, aggravates the problem, says Ignacio Packer. Migrants and refugees have become prejudices rather than people. Packer cited examples of disparaging language associated with migrants and refugees such as "threat", "marauding", "burden" and "masses", instead of "individuals". This has led to perspectives of racism and xenophobia within host EU countries.

Breakout groups: takeaways

- Migrants deserve a human face. There needs to be an awareness of the purpose and use of language and metaphors regarding migrants and refugees. The voices of migrants and refugees must be heard.

- There needs to be mobilisation both on community level and among national decision makers. Media organisations should be engaged to assist in the eradication of racism and xenophobia towards migrants and refugees. Celebrities can also spread positive messages. Awareness of the crisis should also target school children where prejudice towards migrants and refugees is not yet entrenched.

- The provision of humanitarian aid should be multi-faceted and include private sector fund-raising, education, healing processes for children and psychosocial support. A

range of funding services can and should be mobilised from governments, private foundations and wealthy individuals, among others.

- Funding for NGOs operating in central eastern European states is particularly scarce; it should be increased to address language barriers, develop more positive messages about migrants, share best practices, identify gaps and strengthen networking.

- We need more replication of small and successful initiatives that have emerged around the migrant issue throughout Europe.

The importance and usefulness of new technologies, such as smart phones, should be recognised for greater coordination and communication.

Watch the movie

People on the Move - Marijana Savic
People on the Move - Ignacio Packer
People on the Move - Gabor Gyulai
People on the Move - Kathleen Newland
Password: oakretreat

NEW ECONOMIES: Sustaining solidarity as the base of new economic models

The growth of corporations and discontent among populations are seen by many to be driving environmental unsustainability and economic instability. This is generating social inequality and civil unrest and there is very little faith in business or government. The larger the corporations, the more they are in a position to make demands and exert influence on governments. Minimum wages and regulations to protect the environment are becoming more difficult to enforce as corporations become more powerful. Solutions to these issues will involve new economic systems and relationships.

- **Dr Tim Jenkins** manages the Great Transition Initiative at the NEF. He previously held the position of policy director at Friends of the Earth and head of Sustainable Economies at the Sustainable Development Commission.

- **Marc Stears** is the chief executive officer of the New Economics Foundation (NEF). The foundation is dedicated to understanding how to build a more just, democratic and inclusive economy.

- **Narmada Ramakrishna** is an active participant in new economy initiatives. She co-founded Trade School Genève, an open-source offline skill-share platform that uses a barter economy.

- **Sanchita Mitra** is a national coordinator of the Self-Employed Women's Association (SEWA) in India. She was instrumental in establishing community women-led micro-finance enterprises both in rural and urban areas.

- **Stephen Clarke** is a Green Party councillor for Southville, Bristol, England. He is a founding member and financial director of the Bristol Pound, the largest community currency network in Europe.

- **Ted Howard** is the co-founder and president of the US-based Democracy Collaborative. He has been intimately involved in establishing effective new economy models and engaging youth in combatting poverty in urban areas.

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"Going from knowing that something is not working to coming up with a solution is a long journey. How do we become agents of change? Almost every programme in Oak operates at local and global levels. Oak could try to bridge this gap. As part of the one per cent, Oak must be part of the solution or part of the problem. There is no middle ground. By refusing to take a stand, we are part of the problem. How do we do a job that requires solidarity, love and sharing in a world where division and suspicion are increasing?"

Kathleen Cravero

What is a new economy?

Growing inequality, climate change, economic boom and bust cycles and other factors are leading to alternative forms of economies emerging and accompanied by unheralded technological innovation.

"The redundancy of the current economic system is being replaced by a movement towards an alternative economic system aiming to achieve well-being for all within the limits of the world's resource capabilities and is termed the new economy," Tim Jenkins says.

Marc Stears acknowledged the world's current socio-economic malaise and asked if society was at the tipping point towards a new economic and political system.

"The power of multi-national corporations and their influence over national governments are mirrored by disenchanted and discontented populations buckling under the stresses of climate change, economic instability, social unrest, and a loss of faith in the prevailing political economic system," Stears says.

The transition from the world's current economic system to a new economy is seen as embracing equity, inclusion, economic stability and resilience.

"Much of this opportunity stems from increasing numbers of people recognising that the current dominant economic approach is incapable of addressing the interlinked crisis of environmental unsustainability, economic instability and social inequality. Indeed there is growing recognition that it is a root cause of these problems."

Community wealth building

Ted Howard presented on two initiatives of the Democracy Collaborative, both of which aim to build wealth within communities.

The Pine Ridge Indian Reservation in South Dakota is in the backwaters of the US economy. A community-led housing development, with support of local, regional and national partners, will create 32 single family homes, apartments, local food production, grocery stores, a youth shelter and artist studios among other infrastructure. The vision is for marginalised communities to become sustainable. When completed the project will serve as a model for rural communities nationally, said Ted Howard.

The Cleveland, Ohio, Evergreen Cooperatives comprises a network of the like-minded committed to local, worker-owned job creation and environmentally sustainable

democratic workplaces for community economic development. Evergreen is one of a number of worker-owned cooperatives pioneering an alternative model for US economic enterprise. Howard identified new economy drivers as community wealth building, collaborations among multiple stakeholders, inclusion and the use of multipliers to retain cash spend within communities. The current globalised economic model results in 80 per cent or more of cash immediately flowing out of local economies.

The solidarity economy

Narmada Ramakrishna has advocated new economies that include the sharing and solidarity since 2009. "The four principles of the solidarity economy are that it is organic, has no overriding theory, emerges through practice and challenges the status quo. To qualify as a new economy a system must be transparent, fair and self-sustaining and emerge from resilient communities able to offer a sense of independence and belonging," she said.

Her advice is to not reinvent the wheel, but to: use open source platforms; treat the cause not the symptom; educate; exercise patience, courage and openness; look at the deeper complexity; and be mindful.

Fellow panelist Sanchita Mitra is also supporting a network of solidarity businesses. SEWA registered in 1972, is a trade union of women whose livelihoods depend on their own labour or small businesses, as more than 94 per cent of Indian women do.

SEWA has two main pillars. The first pillar is a solidarity network in the form of a Union of 1.5 million women working in the informal sector in India. They have to organize themselves to address the constraints imposed by society and economy. The other pillar is the women's collectives where they are managers and owners of their own trade like the 106 cooperatives , producer

companies and SEWA Bank. SEWA organises women workers to achieve their goals of full employment and self reliance based on the Gandhian principles of satya (truth), ahimsa (non-violence), sarvadharma (integrating all faiths, all people) and khadi (propagation of local employment and self reliance).

Local currencies

Circulating cash within a locale has immediate benefits through the stimulation of local enterprise, while new technologies allow for local, independent, renewable energy sources, among other innovations. Stephen Clarke, founding director of the Bristol Pound, a local community-based currency launched in the English port city in 2012, is implementing such a model to encourage local spend among businesses, retain cash within the community and thereby reduce carbon footprints. The Bristol Pound is the United Kingdom's (UK) largest parallel currency and is backed by the official sterling currency.

It is a joint not-for-profit enterprise between the Bristol Pound Community Interest Company and the Bristol Credit Union. Germany has about 200 of these currencies in circulation. The initiative demonstrates that radical change is possible; it has been accepted within the UK's financial corridors that a decade ago would have prohibited its use.

The real change towards new economies, however, is "below ground" with the development of common principles, a unifying narrative, strong leadership, diversity, shared strategies and community action.

Watch the movie
New Economies - Marc Stears
New Economies - Sanchita Mitra
New Economies - Narmada Ramakrishna
New Economies - Stephen Clarke
New Economies - Ted Howard
Password: oakretreat

VU LE: The role of philanthropy as viewed by grantees

Vu Le is the writer behind the popular blog non-profitwithballs.com and executive director of US Seattle-based non-profit Rainier Valley Corps.

As a grantee and activist, Vu Le posed the challenges facing the non-profit sector; bad habits perpetuated by both funders and charities, and what needs or ought to happen to strengthen the sector. His keynote address was by most accounts, unconventional.

The relationship

Vu Le provided a salient, and at times somewhat caustic view from the ground, of the relationship between philanthropists and those they fund. "We (grantees) lie to you funders all the time," may not be what donors want to hear, but there is logic to it.

Discussing an environment that is seldom broached, Vu Le identified "trust" and "fear" as some of the prevailing dynamics defining the relationships between donors and recipients. Suffice to say that although both parties are reading from the same book, they might not necessarily be on the same page.

There is an innate clash of culture between philanthropic and for-profit organisations, and there is a need for both to understand that what holds true for one, does not necessarily resonate for the other. Vu Le points out that although "the two sectors can learn from each other, they are completely different and it is a mistake to try and emulate each other."

Vu Le, describing the divide between the two sectors and the almost dysfunctional symbiosis that exists, says "if a non-profit is catering for 50 disadvantaged children and then triples its intake to 150 children the next year, funders will not triple the donations."

The sustainability myth

As non-profits become more successful at what they do, they might also become less sustainable. Non-profits will not turn away those that require assistance and by doing so they increase their liabilities. So as non-profits become more successful, both their work load and funding challenges increase. It quickly becomes unsustainable.

This feeds into the sustainability myth plaguing non-profits. The challenge and responsibility for donors is to support organisations that are doing good work and sustain them. This is best achieved through multi-year core support rather than short-term project grants.

The non-profit sector is also not without its flaws and the martyrdom complex is pervasive within it.

There are puritanical origins to the non-profit sector that lead to those working within it not necessarily thinking about social justice but operating on the level of guilt. "This day-to-day penance, within an environment of restricted funding, affects the whole sector and it is a philosophy that needs to change; it is not effective and handicaps greater vision. People are the solution and it is very dangerous to believe that people don't have the solutions for their own challenges."

There has to be an appreciation of who we are as a sector. In the US 1 out of every 10 people are employed by the non-profit sector and contribute USD 800 billion annually to the country's gross domestic product. This is excluding those assisted by the work of the non-profit sector.

The scarcity issue

Capacity building is critical for non-profit organisations, but donors fund "nails and blue prints" and not the carpenters. The high burnout rate among non-profit workers is not caused by the work itself but by constantly having to justify and convince others why their work is important.

Scarcity within the non-profit sector has created a survival mindset akin to the "Hunger Games" Hollywood movie. Everyone sees each other as rivals rather than allies. This leads to a dystopian situation within the sector where other non-profits are viewed as competitors and "donor hoarding" is the order of the day. "It creates a disconnect where no one is

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"This day-to-day penance, within an environment of restricted funding, affects the whole sector and it is a philosophy that needs to change; it is not effective and handicaps greater vision. People are the solution and it is very dangerous to believe that people don't have the solutions for their own challenges."

Vu Le

talking. There may be crosscutting issues where different not-for-profit could coordinate, such as poverty and youth development to achieve greater impact. However, organisations may be tentative about engaging with others because they fear their donors will be poached. This results in a retreat into silos."

The question of "accolades" also plagues donor-run and for-profit relationships. Watchdog organisations measure spending; they do not measure the work of grantees, so it is not an accurate or worthwhile barometer. "Obtaining a 'merit badge' from one of these watchdog organisations can cost as much as USD 30,000. Is that money wisely spent?"

The need for trust

While non-profit staff try to please their funders, it is often out of fear rather than a sense of partnership.

There needs to be greater trust between funders and recipients. "A lot of problems can be solved by having a beer together. To converse with each other as individuals rather than a perspective of here is someone begging me for money."

Questions and answers with Vu Le

- *On what non-profits need to do:* We need to be better at telling the world what we do. We need to articulate the work we do and what it takes to do it. Stop saying "100 per cent goes to programming". Report full costs including administration. Provide honest feedback to grant-makers.

- *On what philanthropy needs to do:* Funders need to cover the full costs of the programmes they support. Administration, decent infrastructure, reasonable salaries -- these are not extravagant luxeries. Funders need to act like partners and listen to those who have on-the-ground experience. Stay with issues for long enough to make a difference. Adopt practices that facilitate collaboration and discourages donor hoarding.

Watch the movie

Session Series #5 Vu Le
Password: oakretreat

Section two:
internal sessions

A HUMAN RIGHTS-BASED APPROACH TO GRANT-MAKING

There are many different lenses for approaching grant-making. A right-based approach to grant-making does not replace existing practices, but does provide another dimension for it. The usefulness of a rights-based approach to grant-making resides in its promotion of inclusion, empowerment, ownership, participation, accountability, transparency, dignity and autonomy and it leads to more sustainable solutions because it addresses root causes, rather than "quick fixes".

- The session was facilitated by **Jo Andrews**, a human-rights expert and former director of Ariadne, established in 2009 to assist grantors in networking, leveraging funds, improving skills and to increase effectiveness for social change and human rights.

- **Neil Crowther**, an independent specialist on equality and human rights with an emphasis on the rights of persons with disabilities, participated in the discussion via videoconferencing.

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"It (the rights-based approach) is part of our (the human right's programme) DNA, but (the workshop) made us take a step back and distill it."

Adrian Arena

What is a rights-based approach?

A rights-based approach to grant-making is a methodology empowering people to realise and claim their rights. It holds individuals and institutions accountable and responsible for respecting, protecting and fulfilling these rights.

The Scottish Human Rights Commission identified five underlying principles of fundamental importance in applying a rights-based approach. It is known as the Panel Principles and is an acronym for Participation, Accountability, Non-discrimination and equality, Empowerment and Legality of rights.

Jo Andrews outlined the principles enshrined in the UN's basic human rights instruments. These include, the 1948 Universal Declaration of Human Rights; the 1966 International Covenant on Economic, Social and Cultural Rights; the 1966 International Covenant on Civil and Political Rights; the 1979 Convention on the Elimination of All Forms of Discrimination against Women and the 1989 Convention on the Rights of the Child (1989).

Several other instruments have recently been added: The 2005 International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families; the 2006 Convention on the Rights of Persons with Disabilities; and the 2010 International

Convention for the Protection of All Persons from Enforced Disappearance.

A rights-based approach gives an additional lens or dimension to grant-making processes. There are circumstances, however, in which it may not be effective, such as conflicts, where security considerations dominate. In addition, in situations where it is not apparent who has a legitimate voice in the process, privilege might be conferred on (the wrong) individuals at the expense of communities.

Examples of using a rights-based approach

Neil Crowther noted that persons with disabilities encounter many physical and social obstacles that prevent them from receiving: an education; employment; health care; transport; and acceptance within wider society.

The civil rights movements of the 1960s and 1970s invigorated action for disability advocates and demands for equal treatment. After decades of campaigning and lobbying, disability rights' movements have seen the discourse move from disability classifications to a deeper appreciation of diversity.

Citing examples of how a rights-based approach can create positive outcomes, Crowther cited the impact of people living with intellectual disabilities being stripped of their legal responsibilities, such as parenting. A rights-based approach challenged these regimes and replaced them with supportive mechanisms for parenting.

Many examples were cited of Oak's use of rights-based approaches.

- The Climate Justice and Resilient Communities Initiative (CJRCI), which focuses on women, youth and indigenous groups affected by climate change, seeks to ensure that the rights of these groups are recognised and that they are empowered to claim them.

- The Joint Brazil Programme (JBP), which focuses on the Recife metropolitan area, supports civil society-led movements to yield tangible results in the areas of public security, freedom of expression, gender-based violence, sexual orientation, labour rights and other pertinent issues.

- The Joint India Programme (JIP), covering the states of Jharkhand and West Bengal, strives, among other objectives, to ensure that India has strong national laws. In India, poverty is the most common cause of the infringement of people's rights. Oak grants focus mainly on building bridges and creating access to justice and services -- despite the increasingly difficult environment for adopting a rights-based approach.

- The Issues Affecting Women Programme (IAWP) in the Balkans -- in collaboration with grantees -- has learned through experience that domestic violence drives women into trafficking and other exploitative situations. These issues are linked; thus IAWP grant-making in the Balkans seeks to eradicate domestic violence as a root cause of trafficking.

But rights-based approaches are not a panacea. For example in Britain the issue of bus transportation facilities for persons with disabilities because of a legal wrangle between the rights of those with disabilities and the "rights" of people who have babies in prams.

In addition, while the Convention on the Rights of the Child has been ratified by every country except the US, there remains little practical progress in terms of protecting the rights of children worldwide.

These examples indicate the importance of understanding context, prioritising action and ensuring implementation of rights and entitlements.

GRANTEE PERCEPTION SURVEY FOLLOW-UP

The Grantee Perception Survey, conducted by the Center for Effective Philanthropy, provided Oak with feedback from grantees and highlighted the challenges and complexities for the Foundation in its continuing work to effect progressive social change.

The 2015 Survey highlighted three areas to be addressed: the grant-making processes; the quality and consistency of communications with grantees; and maintaining momentum in the areas of capacity-building; and organisational sustainability.

A number of points were raised during the group work on the three main areas for follow-up.

Grant-making processes

- Oak programmes do not all follow the same procedures. Variations are dependent primarily on the preferences of different Trustees, which is the nature of a family-led model. In reviewing processes, we should keep this in mind and encourage programmes to learn from others.

- The application summary is an example of a process that is interpreted differently across Oak. Some programmes submit short summaries that are designed to help Trustees decide if they want to see full recommendations; others have the recommendations almost completed by the time summaries are submitted. The latter practice is contrary to the rationale for summaries, which serve no real purpose if the recommendation is already prepared when they are submitted.

- We should consider having a less linear due diligence process, e.g., external reviews could be done at the same time as financial reviews instead of one following the other.

- External reviews cause delays and do not always add value. We should explore if these reviews are needed in all cases and/or if a different type of review would be more useful (e.g., interviews with clients or partners of the grantee).

- We have too many layers in our approval process. Is there value added in having multiple Trustees approve the same grant?

- Joint Programmes have transaction costs (e.g., group discussion or circulation of summaries, etc) that take time. We should examine if these delays are reasonable as well as inform grantees that the approval process for joint programmes might be longer.

Capacity building

- In the latest survey, grantees indicated a desire for more fund-raising support. While this is not surprising, we need to be realistic and manage expectations regarding what they can expect from Oak. We also need to understand the reasons for these requests. In some cases it is due to under-funding of an entire field or sector; in others the grantee might have weaknesses that are hindering fund-raising efforts (e.g., poor governance or financial reporting).

- Grantees also raised the issue of co-funding, with many citing difficulties in meeting Oak's expectations in this area. It was noted that the rationale for this rule is to avoid

over reliance on Oak and to build the financial sustainability of our partners. The rule should be – and is – applied in this spirit. There are cases in which a full 50 per cent of co-funding is not feasible; there are others in which tapered funding over the course of a multi-year grant and/or a matching condition makes more sense. There are also situations in which Oak will cover all or most of the costs of a project or organisational budget for a limited amount of time. The follow-up group on capacity building will explore to what extent co-funding conditions have been set and enforced in recent years.

Communications

- We care deeply about our relationships with our partners. Although our ratings on communications were the same, and higher in some parts, than our cohort, we are committed to finding additional ways to improve our communications. We want to have deliberate and thoughtful communication plans for our programmes and across the foundation.

- We understand through the survey that our partners want more consistent and frequent communications from Oak. We need to find better ways to communicate with partners about grant-making processes and lessons learned.

- Grantees also want to know more about how they fit in within programme strategies. We are committed to finding the right mechanisms to communicate this with our partners.

- Staff also discussed issues regarding internal communications. Some of the ideas included: developing elevator pitches on programme strategies to put on our website and use as internal training for staff; and creating more opportunities to share across programmes on programme practices.

Conclusion

For all these areas, follow up will be pursued in the coming months by the respective staff groups, in consultation with Trustees and Heads of Programme. Staff will be kept informed via email messages and Oak's intranet, among other ways. We will also keep our partners informed through email and website posts.

MEASURING IMPACT

Oak programmes are based on strategies with goals, approaches and outcomes. Progress against these strategies needs regular measurement, which is not easy given the complexity of the social justice issues in which we are involved. Because of the cross-foundation emphasis put on measurement and learning during the last couple of years, the retreat featured a session on how others are approaching this challenging area of work.

Two experts presented during this section. The highlights of their interventions are summarised below.

Lee Alexander Risby

Lee Alexander Risby is head of impact & communications for C&A Foundation. He leads the Foundation's results measurement, evaluation and communication functions, working closely with grant management teams and partners in the design and implementation of initiatives, as well as building partner capabilities in monitoring and evaluation.

He made the following key points:

- Evaluation aims to improve performance and achieve results by strengthening the management of outcomes and impact. It is used to assess the performance of projects, programmes and – in the case of Oak – progress against strategic goals.

- Evaluation is best done using a range of methods. The choice of an evaluation method depends upon the issues that need evaluating, their level of complexity and the audience of the evaluation.

- Complex evaluations are often based on a "theory of change", i.e., a statement of what needs to happen to achieve a goal or outcome. First the goal needs to be identified and then the steps to achieve it are articulated. The evaluation will look at whether and how those steps were taken and whether they worked to achieve the goal.

- Good practice has shown that it is best to have a central evaluation function for strategic and programme evaluations at the foundation (or programme) level. Funding for project evaluations can be included within individual grants. Evaluating clusters of grants is more complicated but would usually be managed at the programme level.

- In terms of what one evaluates, Risby highlighted relevance, efficiency, impact and sustainability. He outlined the key elements of each and how evaluations would change depending on what is being measured.

- Impact investing focuses on generating social and environmental returns. There are several aspects of this that make it difficult to evaluate, e.g., determining the value of "non-financial returns". Figuring out how to do this is a work in progress.

Nic Marks

Nic Marks is a 'statistician with soul' known for his work in happiness and wellbeing research methodology. His love of using applied statistics to ground wellbeing and happiness in hard evidence has led to the realisation that happiness is a serious business.

There are five approaches to measuring happiness and wellbeing. These include:

- **preference satisfaction** (e.g., to choose to earn less in order to safeguard other aspects of wellbeing);

- **objective lists** (e.g., identifying a priority list of underlying conditions that need to be met);

- **functional accounts** (e.g., live well, reach your potential and meet your psychosocial needs);

- **emotional accounts** (e.g., achieve a balance between positive and negative elements in your life); and

- **evaluative accounts** (e.g., an appraisal of lives and judgements about our emotions).

"

"Much of modern life is based upon a false logic, a logic that assumes that happiness and wellbeing come from financial prosperity. "

Nick Marks

He advises five guidelines in the attainment of wellbeing:

- **Connect.** Invest time in loved ones and friends. Meet and talk to people. Knowing that you mean something to someone is one of the most powerful positive forces.

- **Be active.** All forms of exercise provide a powerful feeling of wellbeing.

- **Take notice.** Keeping an eye on what is going on around you helps your brain function.

- **Keep learning.** Human's relentless curiosity is behind every major accomplishment.

- **Give.** Be generous. People who give have significantly higher spirits than those who do not. If you do not have cash, give your time, your attention or your expertise instead.

JOINT PROGRAMMES

Various forms of joint programming − or joint working − are gaining traction at Oak, but they remain challenging. Experience suggests that, while joint working has many advantages, it is not the answer to all questions or the solution to all problems.

This session of the retreat provided staff with the opportunity to share lessons learned and to explore the many ways that Oak staff are working together across themes and geographies. Amanda Beswick (Director of the Housing and Homelessness Programme) led this session. She moderated a panel consisting of Paromita Chowdhury (Programme Officer, Joint India Programme), Andrea Florence (Programme Officer, Joint Brazil Programme) and Anne Henshaw (Leader of the Climate Justice and Resilient Communities Initiative).

Overview

The session began with an overview of Oak's three formal joint programmes, i.e., the Joint India Programme (JIP), the Joint Brazil Programme (JIB) and the Climate Justice and Resilient Communities Initiative (CJRCI).

Each of these efforts involves five Oak Programmes. They differ in funding modalities (separate budgets vs. internal pooled funds vs. use of a fiscal sponsor), staffing structures (full-time staff based in country vs. part-time staff working from Geneva or other locations) and grant-making modalities (approval through individual programmes vs. cluster-based summaries and GRFs). The differences were explained and discussed by the staff most directly involved in these efforts.

Of equal interest, however, are the similarities of joint programmes. These include:

- a focus on particular geographies in order to maximise impact and establish more meaningful relationships with partners;

- common strategies that bring different programmes together around holistic, cross-sectoral themes (e.g., ending violence against women and children; greater access to rights and entitlements; wider access to public transportation; and safe public spaces);

- commitment to strengthening civil society actors and networks that can drive the work forward; and

- sharing of views and perspectives across sectors and specialties, which allows for a deeper analysis of problems and potential solutions.

The discussion during the two sessions on joint programming also encouraged participants to think of the many ways Oak staff collaborates – many of which happen outside formal structures. A number of suggestions were made about how we could do more of this, with minimal transaction costs.

Finally, it was recognised that Oak's procedures are not designed to facilitate cross-programme work. Adjustments are being made on an ad hoc basis (e.g., the internal pooled fund developed for the Joint Brazil Programme) but we may need to initiate more systematic changes to encourage collaboration. This could be done as we pursue follow-up to the Grantee Perception Survey. Systems for monitoring, evaluation and learning within joint programmes are at the beginning stages of development. It would be good for the staff engaged in these programmes to share experiences as this work evolves.

STRATEGIC LITIGATION FOR CHANGE

The use of strategic litigation, with specific reference to a case in Belize to decriminalise consensual same-sex relations, was reviewed in a session led by **Aviva Argote**, a former executive director of the Hauser Center for Nonprofit Organizations at Harvard University and a current faculty member at Tisch College of Citizenship and Public Service at Tufts University. The purpose of this session was to help programme officers in the due diligence of strategic litigation grants.

Andrew Wyatt, a principal consultant at Oxford Policy Management, a UK-based international development consultancy, and lead author of the case study for lesbian, gay, bisexual and transgender (LGBT) rights, also supported the session.

Summary of the case

The legal action served as a case study for the strengths and weaknesses of strategic litigation as an instrument to bring about policy and social change. In this regard Oak's International Human Rights Programme (IHRP) supported the Human Dignity Trust (HDT), which uses international human rights laws as a vehicle for the decriminalisation of same-sex relationships in nation states.

Strategic litigation is a powerful instrument

Strategic litigation can change a law if a court finds a statute or part of that law is unconstitutional. This results in the issuing of a declaratory order finding the legislation either void or requiring modification. It can force policy-makers to amend legislation or influence the way existing provisions are understood and implemented.

It can be used not only to safeguard the fundamental human rights of minority groups in matters such as personal relationships, but also ensure communities secure their socio-economic rights, such as housing, health care, land access and basic education. The goal of strategic litigation is more than just winning a legal argument. It should be part of a strategy to create awareness and

publicity for an issue, establish legal precedent and adjust the law's application for people in similar circumstance.

Brian Kearney-Grieve, a specialist in strategic litigation funding and previously with Atlantic Philanthropies, outlined some of the considerations necessary for embarking on litigation:

- An understanding of the broader context and to ensure the case is linked to a social campaign and a wider movement or community of interest.

- Any case requires extensive and exhaustive research and the litigants must have access to the required legal expertise.

- Legal action should be a last resort because of uncertainties associated with court decisions.

Group takeaways:

Six key questions programme officers should consider when supporting litigation:

- What is your specific role in the case? For example is it as counsel or co-counsel, as legal advisers or for the filing of a brief in support of an action?

- What is the law, and what are the legal merits of the case?

- Are the courts independent and is government likely to contest or appeal a favourable judgment?

- What is the remedy being sought? Is it for a financial reward, for example, or for the quashing of an existing law or the reversal of an administrative decision?

- Does the court being approached have jurisdiction?

- What is the litigation path? For example, to which higher courts is there a right of appeal and what risks are entertained for an adverse award of costs by a court?

ANNEX: ARTICLES

The articles in this section were written by Guy Oliver during the Global Oak Retreat.

Common sense is the new radical

Geoffrey Canada is cast as a radical for his ambitions to eliminate generational poverty. Polite company may view him as an outlier and the not so polite pepper their critique of the founder of the Harlem Children's Zone with varying descriptions from unbalanced to mad as a March Hare.

For Canada the solution to generational poverty is a simple choice between common sense and the accepted prevailing status quo. He recognised at an early age on the then rough streets of the South Bronx in New York that a system that chooses incarceration over education as a salve for society's ills "is broken".

Ethics and morality aside, the economics that argues investing USD 5,000 a year on a deprived child's education as an extravagance, while accepting the almost inevitable consequences of an annual cost of USD 167,000 for a prison inmate in New York City, is for Canada "illogical".

"The failure to ask questions is at the core of why people end up doing things that don't make a lot of sense," Canada told the Oak Foundation's Global Retreat in Thun, Switzerland.

Unlike many of his contemporaries on Union Avenue that are either dead or in jail, Canada says in an interview "there is no explainable reason why I was not (a casualty of the system). Maybe it was an accident or fate, whatever you want to call it."

"I was slated to go to the worst high school in the South Bronx, in the worst borough of

New York City, so this was like the worst of the worst," he says. By chance his grandmother had moved to Long Island and "I asked if I could stay with them and go to high school there… Yes I had academic skills and yes I took advantage of it, but the truth of the matter is, if that one thing had not have happened, my life would have changed forever. It turned out well for me, it did not turn out well for a bunch of other people."

He avoided what was called the "dropout factories (sub-standard schooling)" but also recognised that he had "smarter" friends and that their life chances were extinguished at a very early age by a system of educational tracking.

"Someone made a determination that you were smart or you were not so smart and that happened by the third grade and once it happened it was almost impossible to move out of the lower class into the high class… what a crazy thing to do to a bunch of nine year olds." "I didn't have an answer for an 18 year-old with no job. So what I decided to do was take a 12 year-old and stop that 12 year-old from becoming that 18 year-old and going to jail or getting killed. My theory was to draw a line in the sand. I had to be very clear what I was going to do and how I was going to do it and that this will take time," he says.

There is more than a touch of the evangelical to Canada when it comes to education and although unsure exactly what prompted his Damascene vision he recalls a conversation with his mother when he was 12- years-old. "She said to me 'Geoff you have a gift. If you just use it for yourself or evil I will never speak to you again,' and I knew she was not kidding. It made me confront who I was at a very early age and as much as I valued things like money and other stuff, this idea that you had to make the world a better place is something that came at a very early age. I have known what I wanted to do since I was about 13 or 14 years-old. I wanted to become an educator."

The 30 year journey of Canada setting up and running the Harlem Children's Zone, which the

New York Times labelled "one of the most ambitious social-policy experiments of our time," saw him foster relations with political opponents and alienate teacher unions. "I spent the first part of my career trying to patch up kids and send them back into places that would just chew them up and destroy them. Everyone was looking for the silver bullet. What is that we could do to inoculate this child, even though they are growing up in conditions which would destroy most kids," he says. His single-minded approach to get the resources to provide education from pre-school to the end of high school to the "most disadvantage kids" was a horizon view provoked by the question "Am I solving the problem or just doing what I can?"

Harlem was a disaster zone when he started the project. "What is the point of community? It is to make life better, not to make life worse. Where communities are failing life gets worse. You could educate a few kids and define success by getting them out of Harlem. But you want to build a community that defines success as staying in Harlem and creating the next generation - that is how you end generational poverty."

"Success for us was our kids were educated and not poor and for their kids not to be poor. The drug dealers were a big challenge, but we did not take them on. We stopped the next generation from becoming them." Canada stepped down as CEO in July 2014. 13,000 children now benefit from the educational programmes in Harlem. "We are in this work for a reason."

The hashtag era

Before the internet and smart phones there was the hashtag (#). Its only function for fixed line phones, that millennials regard as museum pieces, was to provide symmetry for the number keys on the dialling pad. Its entry into the world may have been a design aesthetic, but it has become a 21st century symbol that the revolution will be digital.

The hashtag transcends language and has become as synonymous to social protest movements as the AK-47 assault rifle was to the 20th century anti-colonial struggles - although it has yet to grace a national flag. From Hong Kong's umbrella revolution to Egypt's Tahrir Square it has come to define protest in the digital age.

It is used to mount mass protests within hours, which could take the likes of the 1960s US civil rights movement years to coordinate. It has changed the nature of protest and the very dynamics of it. Zeynep Tufekci, of the University of North Carolina, told the Oak Foundation's Global Retreat in Thun, Switzerland, that the style of these protests is typically leaderless, digitally coordinated and suffers from a boom bust cycle.

"It is a great power if you are trying to stop something, if you are just trying to say no. If you are trying to move past the no, it is a weakness because you have really not built coalitions and capacities. You just came together to say no," Tufecki says. As fast as digital protest has emerged as a distress signal from those on the wrong side of the inequality divide, the authorities are quickly becoming adept in dealing and adapting to the new norm.

During the Hong Kong protests, China's reputation for the 1989 heavy handiness of Tiananmin Square was transformed into a light touch. The authorities learnt from similar protests that oppressive measures were counter-productive, serving only to create greater cohesiveness and comradeship among protesters often drawn together by numerous and diverse grievances. Tufecki, who has studied and documented the digital protest phenomenon, says China did exactly what she would have advised to defuse the protest.

"They (China's security forces) held back. They learnt that teargassing makes it last longer. They let them be. Because they came together so quickly, the odds are they will run out of energy. Rather than antagonise them, they targeted second level people, and not

the high level people to prevent publicity and as soon as there was some waning of energy in the movement, they made it very easy for them to pull back. And then they waited a year and came down on them like a ton of rocks on the people seen as instrumental."

The science and understanding of protest in the digital age is yet to be completely understood. Providing donor support for such fluid and unpredictable social movements is a new paradigm. Apart from the need for a better understanding of this phenomenon, there are such challenges for donors of how to nurture rather than shape these movements.

Leah Hunt-Hendrix of Solidaire, is tailoring support for rapid response initiatives providing bail and logistical support through to developing piggy-back initiatives using previous internet infrastructure, such as Occupy and Black Lives Matter, for new protests.

The internet remains contested ground between governments trying to maintain control and social movements trying to prise it from their grip, says Santiago Siri, of Democracy Earth Foundation.

Siri has little doubt that the internet's coming of age is fast tracking democratic reforms and social justice across the world and the deal breaker will be the increasing use and availability of encryption tools for civil society. Three billion people have access to the internet from the slums of Mumbai to the barrios of South America and this number will only grow with the increasingly widespread use of smartphones.

For Payal Parekh, of the environmental NGO 350.org, the internet is an unsurpassed communication tool for generating awareness, messaging and campaigning among the generation that is the first to experience the impact of climate change and the last generation that will be able prevent its worst effects.

Rights rather than pity

If there was an international humanitarian award ceremony called "The Road to Hell is paved with good intentions," the now defunct Los Angeles-based NGO Invisible Children would probably have waltzed away with the dubious accolade.

Invisible Children provided a spectacular lesson for the consequences of hubris, ignorance and patronising attitudes, albeit among some stiff competition, that failed to heed the simple mantra: "Nothing about us, without us."

Invisible Children's internet video entitled Kony 2012 called for, among other things, US troops on the ground to hunt down the leader of the Lord's Resistance Army (LRA) - when American troops were already deployed. The NGO's video went viral and raised the ire of the Ugandan government for inaccurately reporting the LRA was still at war in the country. The NGO was dismissed by respected analysts as "self-aggrandising foreigners" and "do gooders" whose aims threatened to ramp up violence against civilians in the northern reaches of the Democratic Republic of Congo (DRC).

If Invisible Children staff had stepped out of their office in the DRC town of Dungu and asked the local residents affected by LRA violence what they needed, they might have been surprised to learn that topping their priorities was improved road infrastructure and an end to harassment by the DRC's national army.

Invisible Children subsequently self-immolated and has become an abject lesson on how not to approach humanitarian action. It remains a prescient reminder of the high stakes at play.

Jo Andrews, a facilitator at the Oak Foundation's Global Retreat workshop on human rights-based approaches to grant-making, said on the sidelines "deciding what is best without asking the community leads to a much higher level of failure (for donors)."

"It leads to money being misspent. It leads to you not achieving what you want to achieve and in the worst situations it can lead to the givers doing a great deal of harm."

The use of a set of principles devised by the Scottish Human Rights Commission and known by its acronym PANEL is a useful, but not fail-safe, lens to avoid the myriad of pitfalls associated with grant provision.

"I don't think you can avoid unintended consequences. It (PANEL) is not going to save you from every mistake but it will help avoid some really serious failures and it will help you get close to the source of the problem rather than dealing with the symptoms of it," Andrews says.

PANEL provides a checklist for participation, accountability, non-discrimination and equality, empowerment of rights holders and legality of rights.

Applying these tenants "will get you much further up the line and gets you away from thinking of people as objects of charity or objects of your moral conscience," she said. It's fair to say a rights-based approach to grant-making chooses emancipation above pity.

People with disabilities may "pull at our heartstrings," Andrew says, but "a rights-based approach has enabled them (the people with disabilities) to say, it is my right to vote, to be viewed as a human being, to have an education, to have a legal personality, to be housed. To have things explained to me in a way I can understand… to say I am disabled and this is what I want. It has enabled them to be much more than just simply passive receivers by abled bodied people."

Adrian Arena, director of the Oak Foundation's human rights programme and a co-facilitator at the workshop, said "It (the rights-based approach) is part of our (the human right's programme) DNA, but (the workshop) made us take a step back and distill it. Feeding it to the rest of the foundation was more of a challenge."

"Our (human rights programme) comfort levels of the (PANEL) principles and terminology are so great that I realised for others they are not great at all, which was a bit of a shock as I assumed it would be."

"There isn't a foundation-wide understanding of it. What I would say is the (foundation's programmes) general ethos is we empower communities, challenge authorities, focused on the disadvantaged, all of which of course is consistent with a rights-based approach, even if you don't articulate it in that way."

Arena, citing a hypothetical case in an interview involving the needs of education for the Roma minority in Eastern Europe, explained that disregarding the precepts of PANEL can quickly lead to the metaphorical minefield that makes it difficult to retrace your steps.

Donors just building a school for the Roma because there is a need, Arena says, "is great at some level, but it is not sustainable," as it would reinforce the segregation of the community.

Implementing PANEL would see it take on a different hue, he says. "You want the Roma to participate in the decision and they probably don't want a separate school. They want the state to be held to account to educate their children. So we would make a grant to empower the community, we would make a grant to challenge the legality of the segregation of classes. That would be the difference in approach."

A case study by Andrews during the workshop drew on the poor academic performance of Britain's white working class boys and the obstacles of remedial action to improve their education. For some the solution is just to provide more books, money and trips, rather than asking "what's the matter? Why don't you want an education? You have a right to free education of a decent quality."

However, if you were to apply PANEL to this conundrum, "there is a wonderful trap…it will fall foul of race discrimination legislation and it will create an entirely new group of people

discriminated against, except white working class boys who are now the beneficiaries of this programme.

So you have to design your programme so it looks at children who are not performing well in schools (regardless of race and gender)."

The old is dying, the new is yet to be born

As Stephen Clarke and his other directors were on the cusp of launching a local currency, pegged to British Sterling, in the country's western port city of Bristol a letter arrived from the Bank of England asking them to attend a meeting at their London offices.

"It was terrifying. We had spent two years planning it and we wanted it to be in line with all the regulations and because it was something new, we fell between a lot of the regulations," he said.

On the day of the appointment they all trooped up to one of the world's leading financial cities and to the austere and grand Bank of England building and were ushered into a cavernous room.

Still not knowing what to expect they were seated around a large table with Bank of England representatives and "they were looking at us and then one said 'come on then, lets have a look at one of these Bristol Pounds'," Clarke said.

"And of course they are all currency geeks. They were all looking at the watermarks and saying tell us about the micro writing, tell us about this and that and then one said 'can we keep one?'"

"I thought maybe they just wanted to see what kind of people we were, but really they just wanted to see a Bristol Pound. They were fascinated by the whole concept."

The bank notes, which are legal tender and printed by a company that produces national currencies, has nine security devices on the notes and was introduced in 2012 to the city of 500,000 people. The local currency also has a digital component to compliment the about 2 million in equivalent British Sterling of cash in circulation.

At the launch people were queuing around the block, it was overwhelming Clarke says. "It gave us great strength how enthusiastic they were and how proud they were of the city."

Clarke was unable to say if the local currency would have received the same reception had it been launched prior to 2008 global crash, the reverberations of which have yet to subside.

"I think there was something about a loss of trust (with the 2008 crash). The idea that people could not trust some of the institutions perhaps they had trusted before. We were not for profit and we made it very clear that we were not for profit."

The theory of local currencies is that money circulates within communities and prevents up to 90 percent of it leaving the locale, as occurs within the current global economic system, and through it reduces the carbon footprint of products and stimulates local economies.

"We are not trying to replace Sterling that would be a mad thing to try and do. We have about 900 businesses signed up to the Bristol Pounds. I will walk into a pub that is not connected to the scheme and ask 'will you take Bristol Pounds? And they say 'yeah sure, why not?' In a way we have launched the ship and lost control of part of it. That's sort of what we wanted."

"It (the Bristol Pound) is having an impact on the way people think and raising lots of questions in people minds, which in part is what we want to do. We are trying to nudge people towards a certain behaviour. It's a social project disguised as an economic project," Clarke said.

The 1989 fall of the Berlin Wall signalled the demise of the Soviet style central command economies, while 2008 is seen as a watershed year for neo-liberal global capitalism. However, unlike the former Soviet bloc countries embrace of capitalism, there is not as yet another economic system to latch onto.

The redundancy and malaise of the current economic system is being replaced by a movement towards an alternative economic system. This system aims to achieve well-being for all within the limits of the world's resource capabilities and is termed the new economy, Tim Jenkins, head of the Great Transition Initiatives at the British-based think-tank the New Economic Forum, says.

"Much of this opportunity stems from increasing numbers of people recognising that the current dominant economic approach is incapable of addressing the interlinked crisis of environmental unsustainability, economic instability and social inequality. Indeed there is growing recognition that it is a root cause of these problems," a NEF paper says.

Ted Howard, co-founder and president of the US based Democracy Collaborative and a panellist at the Oak's Foundation workshop on new economies, said on the sidelines "I am astonished about the number of people I meet in banks and corporations that realise what they are doing is unsustainable." "I think there are leaders in these institutions looking for a new way. They still believe in global capitalism but they see the limitations," he said, while at the same time there are voices within the US senate that "believe that climate change is a farce."

Both Jenkins and Howard do not foresee the transformation towards a new economic system in terms of a violent overthrow akin to the demise of Tsarist Russia, but more of a gradualist event led by growing numbers of community-based initiatives and innovations.

"We use the term evolutionary reconstruction as those inside the system start to lose allegiance from the system and it becomes less and less workable with a build up of a new

set of policies and vision. I think the system we have now will persist, but the patient is dying and the key is how to erect a new system at the same time," Howard said.

What form such a new economy will take is still being devised, but it is likely to include devices such as a Universal Basic Incomes Scheme and take advantage of new technologies from renewable energy and automation through to the use of artificial intelligence (AI) for the benefits of all, rather than a few.

But the transformation will be contested, Jenkins and Howard both say, and may be accompanied by increasingly repressive governments, including the US, clinging to the old economy.

"The issue with all technological advances and AI is no different, is about who owns and controls it," Jenkins said. "Our (new economy proponents) advantage is in numbers. Their advantage is highly concentrated power and money."

A crisis of language

"Does language change the way we think?" Terms used by some media in the coverage of refugees and migrants include "waves", "flood", "illegal" "marauding" and many other loaded terms," says Ignacio Packer.
"It shouldn't need pointing out, but a plague of insects destroys crops and spoils food. Marauding armies burn down towns and commit acts of genocide. Floods wreck property and drown people. Migrants don't do any of these things."

In an age of unprecedented information and access, the media's use of language in the coverage of migrants and refugees is what the University of Lyon professor Gregory Lee terms the "inundation metaphor."

The world's displaced population is estimated at 65 million people, a population about the size of Britain. Of this number 86 percent are not hosted by rich countries.

The Ethical Journalism Network highlighted in a report that the shortcomings of some outlets in their coverage of migration and refugees. "In Europe, where migration and refugee issues have shaken the tree of European unity, media struggle to provide balanced coverage when political leaders respond with a mix of bigotry and panic," the report said. "The refugee crisis is not going to go away and there has never been a greater need for useful and reliable intelligence on the complexities of migration. But if that is to happen…we must strengthen the craft of journalism."

"We need to be more self-critical and aware of our own use of language and metaphors. This is a call for a less dehumanising depiction of reality. A call for acknowledgement that people are actually entering, not flooding territories, and they are crossing, not bursting through borders," Packer says.

Kathleen Newland, co-founder of the Migration Policy Institute, said on the sidelines of the session that she views the media's coverage "in three different buckets. There is the inaccurate analysis where reporters and editorials call what is happening in Europe a migration crisis instead of a refugee crisis, which is what it is. Then there is deliberate negative use of imagery of the swarms and inundations and things like that. These words are weapons in the anti-migrant campaign." And then there are those "thoughtful and sensitive to the images presented. I very often talk about 'flows of migrants'. That, does not sound insidious to me. So I think there is some honest disagreement about what is the misuse of language and what isn't."

The picture of the drowned and lifeless body of the two-year-old Syrian refugee Alan Kurdi washed up on a Turkish beach in September 2015 resulted in an outpouring of sympathy and grief. In spite of "short attention spans" Newland said the "residual" of that image remains.

"People still talk about the child on the beach. Certain things do stay in the conscious and it does reframe people's way of thinking… it could be my child, he is a human being, he has

not done anything wrong. Simple images and metaphors are very powerful in the way people think. The dehumanising language stops people thinking of migrants as humans."

Does philanthropy make you happy?

If the founder of Happiness Works Nic Marks has a copy of the 19th century German philosopher Arthur Schopenhauer's Essays and Aphorisms on his bookshelf, it is unlikely to be well-thumbed.

Schopenhauer, although not a headline Western philosopher, had influenced many who are, from Friedrich Nietzsche through to Sigmund Freud and Carl Jung.

Schopenhauer's view of life was bleak. "If the immediate and direct purpose of our life is not suffering then our existence is the most ill-adapted to its purpose in the world…Each individual misfortune, to be sure, seems an exceptional occurrence; but misfortune in general is the rule."

"It's bullshit," Marks said on the sidelines of the Oak Foundation's Global Retreat in Thun, Switzerland. "There is an intellectual snobbery around happiness. Effectively saying misery is more important."

The "tortured artist", Marks says, did not create when they were "drinking or suicidal. They created when they were on their way up and drew on their experience. Someone like (Edvard) Munch was drawing on his extreme emotional experience when he drew The Scream. It is such an archetypal image as we all connect with that experience….if they (artists) were always down and miserable they would not have done it."

"You can talk about the effects of it (happiness). People who are happier do tend to be more productive and creative and more resilient. But I don't think that is why we do it. We do it because that is what life is about.

People want to feel purposeful in what they do. Others can be more hedonic in what they do. Pleasure seeking can become a bit meaningless. So there are different nuances and tensions underneath the overall idea that we want to live a good life as part of the overall experience of human life."

Marks is billed as "serious about happiness" and the human experience. "I talk about intelligent happiness. I don't talk about stupid happiness. I am not interested in dumb happiness, like the shallow smiley face."

"I remember I sent a picture to my daughter with the words follow you heart and she replied 'and take your brain with you'."

"As humans we are not just purely rational beings, we are also emotional beings. It is this interaction between thinking and feeling that is so interesting about us. For me the goal is to be intelligently happy, where we can draw on our emotional experience and make wise choices about how we interact with the world. Others might call this wisdom," he says.

"Evolution does not give a monkey for our happiness or love. Its about passing on genes to the next generation. But they (emotions) have become a very useful mechanism for us thriving and surviving as a species. Our conscious experience is that they are everything. It is the way we are made up and that is our human experience."

Marks has developed a five part formula for happiness and well-being. The cornerstone is connecting with people and loved ones, followed by physical activity, appreciating your environment, maintaining learning and giving.

In a TED Talk, Marks highlighted the dysfunction of society that uses barometers of wealth and thereby excludes the very essence of human life. He quotes Robert Kennedy, assassinated in 1968 on the campaign trail for the US presidency: "The Gross National Product measures everything except that which makes life worthwhile."

"How crazy is that? That our measure of progress is measuring everything, apart from what makes life worthwhile," Marks, a statistician by training, says.

Marks is a fellow of the New Economic Foundation, a British think-tank investigating new economies and draws corollaries between happiness and environmental sustainability, among other themes.

In his TED Talk, Costa Rica came out on top on the Planet Happiness Index and does so by using 25 percent of the resources per capita as those used by most Western states.

Costa Rica derives 99 percent of energy from renewable resources. The army was abolished in 1949. Successive governments have invested in social programmes, such as health and education, and as a consequence the central American state enjoys one of the highest literacy rates in the world.

But wellbeing is not a new concept, it is just its implementation as a priority has lagged. The right to "Life, Liberty and the pursuit of happiness" was affirmed in the US Declaration of Independence. "I think wisely chosen those words," Marks say. "It is not the right to happiness."

"The pursuing is the happiest thing. Happiness is not a beach you lie on. Its nice for a few days, but that's recuperation. But if you go and lie on a beach for a few months, you become bored and jaded. We are evolved to engage with our environment and when we engage with our environment that is when we are the happiest."

Thank you