



Bellagio
Initiative

Human Wellbeing in the 21st Century: Meeting Challenges, Seizing Opportunities

A report from the Bellagio Initiative: A six-month exploration into the future of philanthropy and international development in the pursuit of human wellbeing



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partners: Institute of
Development Studies (IDS),
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“The [Bellagio] discussion is long overdue. We are all doing this because we passionately believe that we all deserve a better chance in life.”

Participant, Bellagio Initiative¹

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Introduction

As we move into the twenty-first century, the challenges facing international development practitioners and policymakers are changing and so too are the opportunities for change. The global crises of finance, food and fuel in 2008 and 2009 provided a sharp stimulus for rethinking international development policy and practice. Alongside these shocks, other challenges such as resource scarcity, climate change, democratic breakdown, rapid urbanisation, disaffected youth and growing inequality all contribute to a gloomy backdrop for debates about the future of global development.

At the same time, there are new opportunities for increasing the effectiveness of development policy and practice. The cast of organisations operating at the intersection of philanthropy and international development is changing and with the emergence of new economic powers, this creates an era of new ideas, new approaches and new values in global development debates. When harnessed alongside new technologies and social innovation these changes provide a moment of opportunity to be seized.

In 2011, over a period of six months, a number of leading figures came together in an ambitious exploration of the major challenges to and opportunities for protecting and promoting human wellbeing in the twenty-first century. A diverse group of policymakers, academics, opinion leaders, social entrepreneurs, activists, donors and practitioners from over 30 countries took part in a series of deliberations collectively called the ‘Bellagio Initiative’. Its aim: to generate discussions and stimulate innovative thinking on how philanthropies and international development organisations might find ways to move forward together to better protect and promote human wellbeing in the twenty-first century.

During the six months of the deliberations, established regimes in North Africa and the Middle East were overthrown by popular uprisings; a major famine gripped populations in the Horn of Africa; a new country came on to the world stage; and the financial crisis continued to wreak havoc on developed and developing economies alike. Global events during this time illustrated vividly the twin premises of the Initiative: that humanity is indeed experiencing major challenges; but, also, that there are opportunities for change that can, and must, be grasped urgently.

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Focusing on human wellbeing

The focus on protecting and promoting human wellbeing distinguished the Bellagio discussions from other debates on the future of international development, from other philanthropic conferences, and from summits on the global environment. Though the importance of a focus on human wellbeing in development has been long recognised (from the UN Declaration on the Right to Development² 25 years ago, to the recent Sarkozy Commission Report) the real challenge is to move from it being a rhetorical device, to using it as an idea that changes international development policy and practice and yields answers that make a difference in the reality of peoples' lives.

The Bellagio Initiative was commissioned by the Rockefeller Foundation, whose philanthropic mission since its founding nearly a century ago, in 1913, has been to promote the wellbeing of humanity. The Foundation engaged the Institute of Development Studies, and philanthropy experts at the Resource Alliance, in this effort. Together, the three partners convened a diverse cast of participants to focus on the following concerns:

- ▣ Describing the changing context in which international development and philanthropy operate.
- ▣ Identifying the major challenges to protecting and promoting human wellbeing, and uncovering new opportunities and innovations to address them.
- ▣ Identifying how philanthropy and international development organisations might engage constructively with these challenges and opportunities.

The Bellagio Initiative was comprised of three components: a series of *Commissioned Papers* that explored key challenges to human wellbeing and their significance for international development and philanthropy; a programme of *Global Dialogues* that saw these and other challenges debated in locations from Accra to Amsterdam and from Delhi to Sao Paulo; and finally, a two-week rolling workshop, the *Bellagio Summit*, that took place at the Rockefeller Foundation Bellagio Center in Bellagio, Italy, to explore further those challenges and opportunities already raised and to consider what ideas for change would have traction in international development and philanthropic circles.

Beyond 'the usual suspects'

The Initiative made a deliberate effort to move away from standard ways of framing these challenges and opportunities and to go beyond consultations with 'the usual suspects'. It sought out voices seldom heard in global forums, and engaged in a process of deliberation with them. As an example, the Dialogues saw representatives of indigenous peoples sitting down with UN advisers to discuss sustainability and growth, as well as refugees and pastoralists exploring migration issues with ministers of state. Beyond those who participated in person, the Initiative also used its website and social media platforms to gather ideas and opinions from many people who have been equally passionate about protecting and promoting human wellbeing at this critical moment in time.

The aim of this document is to share key findings on what needs to change in order to better protect and promote human wellbeing. It offers ideas for further thought and discussion and indicates broad areas where clear commitments to action from those working in philanthropy and development can be made.

The Bellagio Initiative was designed to stimulate a process of deliberation and debate. It was a call for practical engagement on how international development and philanthropy policy and practice must change in order to meet the challenges to human wellbeing in the coming years.







“One of the biggest wellbeing concerns is security ... Threats to personal security are greater because of the breakdown of community norms, and threats to economic security are higher because rapid change in cities means that people have no certainty about their livelihoods and evictions are common.”

Participant in the Urbanisation International Development Global Dialogue, Delhi

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Towards a new ecosystem of philanthropy and international development

The Bellagio Initiative was instituted because the number and diversity of actors and agencies involved in both international development and philanthropy is changing as never before. The Global Dialogues, Commissioned Papers and Summit all confirmed that a previously narrow body of professionals in a well-established set of organisations is being augmented by new faces and new ideas.

But this is not just about changes in personnel. It is about a radically different cast of players who are informed by different value systems, have different priorities and who bring with them new rules of engagement. These shifts, driven by changes in the global political economy, create a new ecosystem for international development and philanthropic efforts.

An interconnected system

The dynamics of change make us appreciate the complexity of the development challenges of the twenty-first century. Current development models no longer appear adequate to comprehend this change and there has been a groundswell of argument that development thinking can draw more on recent complexity thinking than it previously has.

Recognition of the complexity of the challenges to human wellbeing was integral to the Bellagio Initiative from its outset. The process was designed to capture a plurality of perspectives, through wide representation at meetings and the geographical diversity of locations. It has sought to engage voices from people in different parts of the development and philanthropy ecosystem. This institutional ecosystem embraces all development players, from the very smallest, community-driven organisations to the largest multilateral agencies.

Values and relationships

Seeing this multiplicity of organisations as parts of an ecosystem encourages a multilevel approach to change (considering the interconnections from organisational to systems levels). It also enables us to consider not just the network of relationships but also explore the qualities of those relationships. It recognises that the dynamics of change in this ecosystem are shaped by values and that value interactions underpin the ability of the system and component organisations to be effective.

“... differing value systems are often viewed as a threat in international development thinking, as opposed to a reality with which international development agencies must operate.”

A major criticism of the current international development orthodoxy, made explicitly during the Bellagio discussions, is that differing value systems are often viewed as a threat in international development thinking, as opposed to a reality with which international development agencies must operate. An ecosystem approach argues that *different value positions are likely to be important* for the effectiveness of future global development efforts. This recognition is a necessary first step in enabling constructive engagement between different value positions.

The ecosystem model focuses an agenda for change on the *relationships in international development and philanthropy that need to be created, (re)built and strengthened* if human wellbeing is to be protected and promoted. One of the most powerful observations throughout the Bellagio Initiative was that there are numerous 'gulfs' in the current international development ecosystem: a gulf between development organisations and the people they are notionally working for; a gulf between governments and citizens; and gulfs between different development organisations who notionally are working for the same outcome. Many agencies and people need to have more effective relationships with each other if development efforts are to have the desired outcomes.

"If the focus on human wellbeing is to move from rhetoric to reality, then it is vital that we continue to ask, 'where are the people?' This maintains our focus on the relationships that are important for human wellbeing."

The focus of the Bellagio Initiative on human wellbeing is consistent with this ecosystem approach. There are many ways in which an ecosystem can be represented but not all representations place human beings at their centre. By keeping the protection and promotion of human wellbeing in focus as the primary motive for development efforts, a discipline was introduced to efforts to map out the new ecosystem. The focus on human wellbeing stimulates the critical question, 'But where are the people?' This requires us to consider what relationships are important to people for them to be able to protect and promote their own wellbeing. It is vital that it continues to be asked if the focus on human wellbeing is to move from rhetoric to reality for development organisations and for the system as a whole.

Framing the discussion

To help frame its discussions, the Bellagio Initiative used two key ideas:

An international development ecosystem.

This helped us to conceptualise the landscape and complex interplay of philanthropy and international development. Using it, we could understand the wide and diverse range of development and philanthropic actors as interconnected components in a system, each subject to the same processes and pressures, albeit affected in different ways. The ecosystem approach allowed us to consider not only the 'who, what and where' of the development landscape, but also the relationships between the players and the different values enjoyed by them.

Human wellbeing. This was central to all of the deliberations throughout the Initiative. At times it was expressed in terms of 'social justice', at others as 'dignity' or 'rights'. Although the terms used differed, there was broad agreement that the focus on wellbeing helped address some major shortcomings in orthodox development thinking. It engages with human values and the concept keeps the real people: the women, men, the boys and the girls of all shapes and sizes and in all locations at the centre of the development debate. As the understanding of the new global development and philanthropy ecosystem is built, it will remain important to keep people, as the intended beneficiaries of development and philanthropic efforts, at the centre of the picture in ways that concepts such as economic growth or poverty lines do not necessarily do.

The Bellagio Initiative began an exploration and mapping of recent changes in development and philanthropy. It has begun to build a picture of a new international development ecosystem. A necessary next step will be to invest further in understanding the qualities and dynamics of this new ecosystem.

"What sparked this movement [the Arab Spring] was not the lack of one of the basic human needs as considered by philanthropy and development traditionally. It was the lack of dignity of the people."

Barbara Ibrahim, American University in Cairo, Bellagio Summit panellist



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Rebuilding trust, taking on risk – the big challenges for the 21st century

There is little doubt that the status quo is unsustainable. If the collective international development effort is to be more effective in protecting human wellbeing in the twenty-first century, then someone, somewhere in this complex and evolving ecosystem has to risk changing what they currently do. What was less apparent throughout this deliberation was who was prepared to change and how they should change.

The analysis suggests two big themes that surfaced throughout the discussions: trust and risk.

Trust: making governance relationships work

A persistent theme across the Initiative's deliberations was the corrosive loss of trust in those agencies and organisations charged with protecting and promoting human wellbeing. To have such a clear finding from such a broad range of places around the world and from different sectors of society was striking.

This mistrust is widespread across relationships with governance organisations and actors.³ Those who are supposed to contribute to good governance are not seen to be doing so and those that are supposed to regulate the global system are seen as ineffectual or untrustworthy.

Trust is one of the most basic of qualities on which good and solid human relationships are founded, but mistrust spreads indiscriminately in the development ecosystem. It was reported that many development 'beneficiaries,' do not distinguish philanthropy and non-governmental development organisations (NGOs), including charities and trusts, from government agencies and from Official Development Assistance organisations (such as the UK's Department for International Development (DFID) or the United States Agency for International Development (USAID)).

No organisation, be it governmental, non-governmental or philanthropic, can 'give' people wellbeing: people achieve wellbeing themselves – through their relationships with others – whether those relationships are face-to-face or are structured through national polities and a global order. But these organisations are responsible for providing the conditions in which people might reasonably strive for and achieve their wellbeing. If relationships with governments, aid agencies, charitable trusts or with regulators are mistrusted, then the legitimacy of governance arrangements breaks down. Without sound relationships of trust, governments and development organisations cannot hope to have a sound platform from which other developmental issues, including political and economic exclusion and material deprivation, can be addressed.

“A persistent theme across the Initiative's deliberations was the corrosive loss of trust in those agencies and organisations charged with protecting and promoting human wellbeing.”

Risk: who will take the risk for change?

Risk was another recurring theme throughout the Bellagio discussions. The different attitudes and capacities for risk in the different organisations engaged in international development efforts were identified as a key aspect of efforts to change at both organisational and systems levels.

The Bellagio discussions highlighted a high degree of risk-aversion amongst philanthropies. Although they are not subject to the rigours of political cycles (as politicians and publicly-funded bodies are), the challenges of constant fundraising (as NGOs are), or the vicissitudes of the market (as private organisations are), the Bellagio discussion suggested that philanthropies tend to be inhibited in their risk-taking by factors which include narrow evaluation approaches, limited time horizons for projects and a pressure to be seen not to fail.

“People in the street are taking risk ... but for a foundation, I don't know what risk means.”

Participant, Bellagio Summit

From technocracy to human-centred development

At the heart of both of these major problems lies the 'technocratic' character of the current development approach – in which solutions to development 'problems' are considered to lie in the hands of development 'experts'. This was seen as contributing to the growth of mistrust in major development agencies and as fuelling the perceived remoteness and irrelevance of many development organisations.

Trust and risk are closely interrelated. Evidence from the recent food, fuel and financial crises has shown that it is poorer people who are left to cope with great risks and vulnerabilities generated by failures of governance in the global system. The Bellagio Initiative exposed the need to push the risk discussion further by asking to what extent philanthropies and development organisations are willing to share the burden with poor and vulnerable people both of reforming governance and coping with the shocks that impact upon them. This would require a move away from technocratic fixes to a more solidaristic approach to development. This challenges development organisations of all shapes and sizes to invest in forms of change that are vital to deal with today's and tomorrow's challenges to wellbeing, but which are too risky for either poor people or poor governments to take.

The Bellagio discussions resonated with repeated calls for more 'human-centred' models for development. More inclusivity, connectedness and greater levels of transparency and accountability were time and again highlighted as key characteristics of a new, positive approach to developing the trust that is fundamental to protecting and promoting human wellbeing.

The failure of trust can be tackled at many different levels and in a range of different ways. The essence of the challenge, however, is to make governance relationships at all levels more effective.

“The Bellagio discussions highlighted a high degree of risk-aversion amongst philanthropies. They tend to be inhibited in their risk-taking by factors which include narrow evaluation approaches, limited time horizons for projects and a pressure to be seen not to fail.”



**“People do not have a voice ...
People become bystanders in
development, where they are
isolated and not engaged.”**

Participant, Bellagio Summit

Five challenges to change

The Bellagio Initiative did not aspire to be a comprehensive or prescriptive exercise. Rather, it helped to provide a first sketch of the evolving philanthropy and development ecosystem and to debate how international development and philanthropy efforts might need to change over the coming years. The aim was to generate some ways forward for future collaboration and action.

What follows is a set of challenges and opportunities for change that emerged from discussions. These have been distilled into five broad areas that are offered as an agenda for specific organisations and for the global development system as a whole. There are no hard and fast solutions offered here, but the challenges provide a basis for building momentum from Bellagio.

1. Change the ideas: new ways of thinking about what development is and should be

Recent global events have led us to question what we mean by good development. This question was raised throughout the Bellagio Initiative and it makes us critically interrogate many of the assumptions that continue to be embedded in the current international development orthodoxy. It has been generally agreed that development that destroys the planet is not a good thing for humanity; similarly development that greatly increases the wealth of some while not reducing destructive poverty of others is also not good. But it is not just about good and bad, it is about what is sustainable. Neither of these pathways of development is sustainable in global environmental or global political terms.

The Bellagio discussions focused around what forms of development can be conducive to improvements of future human wellbeing. In order to make these a reality there is a need for a change from the current orthodoxy of development thinking towards a more human-centred development paradigm.

The discussions wrestled with how to become more precise about what a human-centred development direction would consist of. They also explored what this would mean in a practical sense for those working on a day-to-day basis in development and philanthropy organisations.

For the Bellagio Initiative to ultimately bear fruit – to bring about changes in international development and philanthropy that place people and their wellbeing at the centre – it will be necessary to build and embrace a strong foundation of new development theory.

The foundations of this new theory are well established. Over the past two decades there has been considerable progress in this direction, much of it inspired by economist and Nobel Prize winner Amartya Sen but also by the increasing numbers who have been inspired by his work. But there is a need to make this sometimes high-level conceptual work more relevant and more widely accessible for those making development policy choices and practices.

The key challenge here is to complete the transformation of our theories of development. This involves more openly challenging accepted assumptions (for example that economic growth is always good), or reorienting existing positions (for example, considering how economic growth can be oriented towards human wellbeing). One way forward will be to invest in these new ideas and their dissemination among key audiences.



“We will not solve the basic problem with poverty and inequality ... unless and until the people who are experiencing these problems effectively participate in producing solutions.”

Participant, Bellagio Summit

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Importantly, this process must mobilise diverse contributions from voices in all corners of the world and it must embrace the fact that there are a range of different value positions. For a human-centred development paradigm to become sustainable it will be necessary for it to have global ownership and not to be seen as just the next project of a beneficent development elite.

The more voices that contribute to a debate to construct a new human-centred development paradigm, and the greater the diversity of those voices, the better it will be for achieving Bellagio’s ambitious goal of shifting the development policy agenda.

2. Change the agenda: reorient the development policy agenda to address current threats to human wellbeing

It may be a case of chicken and egg: the international development policy agenda will only change when policymakers and practitioners are confident they have a sound foundation of ideas to base changes upon, but new thinking will not take hold until policymakers begin to accept that we urgently need to change some of the most basic features of the current development policy agenda. The discussions in the Bellagio process found major gaps in that agenda. There was widespread agreement that there needed to be important changes if we are to address present and immediate assaults on human wellbeing. There are new issues that need to be tackled and new policy positions that require further development. There is a need to review existing policy priorities.

The essence of this challenge for change is for development and philanthropic organisations to accept the political nature of the development policy process and to get involved in it. It calls for a move away from a technocratic development agenda to one which recognises that the challenges of protecting and promoting human wellbeing on a global scale will inevitably entail difficult political debates and challenging political trade-offs, rooted in the realities of current economic, social and environmental change.

This is a big challenge, but it is not one of which philanthropy organisations in particular should be shy. There was a strong sense that there is a lack of visionary leadership for a new global development agenda. Few people or organisations globally are making any significant headway at the highest level in defining what a new policy agenda should consist of, let alone shaping it in any detail.

The Bellagio discussions drew attention to some of the areas to which a new development policy agenda would give emphasis.

We have already discussed the foundational nature of the challenges around building trust and in sharing risk, but as we drill down into the policy agenda further focal issues are revealed. For example, giving greater formal recognition to care work (caring for children, for the elderly, for families and for the community) receives lip-service but has no real universal policy traction. This work, often undertaken by women, is systematically undervalued and overlooked in the current development agenda. One way that the negative consequences of this have been illustrated is that the burden of coping with the day-to-day challenges of the global economic crisis has unequally fallen on the shoulders of women in many different societies around the globe. This means that in times of crisis because of their neglect of the care agenda, international development and philanthropy organisations are complicit in processes of disinvestment in the raising of children, in building good families and communities and in creating the social contexts in which people can thrive.

“If we don’t understand politics as the central challenge and obstacle to delivering human wellbeing then we’re missing the plot. That is the big issue that confronts us.”

Jay Naidoo, Global Alliance for Improved Nutrition (GAIN), Bellagio Summit panellist

This is only one illustration of the type of policy issue that is currently underdeveloped in the development policy agenda but which a human wellbeing perspective would give a much higher priority to. Other illustrative policy areas were discussed at various stages of the Bellagio discussions and each encourages a similar rethinking of development policy priorities. Issues covered included the consequences of rapid and unplanned urbanisation as both threat and opportunity for human wellbeing; the question of the role of the natural environment in protecting and promoting the wellbeing of poor people who are dependent upon it; and how wellbeing is to be considered for people who are increasingly mobile in their search for livelihoods and security.

Analysis of Initiative discussion suggests four inter-related steps for action to tackle agenda change:

- 1. Build on momentum.** The organisations and individuals that came together in Bellagio need to continue to build the coalitions initiated there. They also must build on initiatives that are already underway at the grass-roots level. The next phases of work on this should add to the momentum at all levels by building further alliances and adding new voices and organisations to campaigns.
- 2. Embrace local levels.** While it is vital that there is a push for policy agenda change at the highest global levels this cannot stand on its own. Development agencies and philanthropies can support and stimulate the demand for change at national and community levels. It need not be philanthropy and development agencies that drive the agenda change, but there was a call for philanthropies in particular to reconnect with their advocacy tradition and to work with civil society and grass-roots organisations lobbying for change in particular societies and cultures. To make this global momentum there needs to be stronger collaboration and mutual learning not only between those in the global South and the global North, but between different locations in the global South.

3. Listen to people. More than lip service needs to be paid to the voices and values of those who until now have been marginal to development debates. Working towards the protection and promotion of the wellbeing of the many different and diverse peoples in the global context requires development agencies to engage more effectively with what people themselves are demanding and saying that they need. What people demand cannot always be given, but their voices must contribute to deliberations over policy direction.

4. Harness new and existing resources. The changes in the global development ecosystem indicate that there are many new kinds of resources that are becoming available for international development efforts. These take obvious forms such as new communications technologies and innovative forms of development financing (social bonds, diaspora funding etc.) but new resources also include the new ideas and new ways of doing things that new actors bring to the effort. At the same time it is important not to overlook the fact that we need to make more effective use of the resources that sometimes have been neglected by development organisations – the resources of people, their organisations and their ideas.

In the past, philanthropies have been willing and able to take a critical perspective in global development debates and to add their voice to calls for change in global and national policy debates. Many people throughout the Bellagio process called for philanthropies in particular to rediscover their lost advocacy position.

Development is political. Not everyone can be a winner at the same time, but if no one amongst the winners is prepared to give up just a little in order to reach politically sustainable solutions then we will all lose out. The real wellbeing challenge is not just to find ways to live well, but for us to find ways to live well together. This is a focal point for a new international development agenda. The Bellagio process was necessarily time- and participant-limited, but the struggle from here on will involve those interested and motivated in philanthropy and development organisations building alliances for policy change at all levels.

3. Change the measurements: to make measurements of development more meaningful for human wellbeing

There is a third part to this triangle of interlocked considerations: the changes of ideas and of policy priorities must be supported by changes in what we measure and how we assess societal progress. In both international development and philanthropy there is an increasing focus on measuring policy effects and impacts. When we change what we measure, we begin to change how we think and we also begin to change the policy agenda.

It is important for the legitimacy of international development organisations that they are able to show that resources are being well used, but if the results approach is narrow and restrictive then it will constrain the necessary changes in development thinking and policy agenda. A narrow results approach will represent a threat to the human wellbeing focus and the diversity of approaches that this deliberation process has exemplified.

Participants in the Bellagio Summit recognised this tension and debated *what* exactly it was that should be measured in a more human-centred development approach. There was, though, widespread acceptance that it needs to capture better what is important for people's lives, while recognising that there was limited awareness of methodologies for doing this.

The conclusion of the Sarkozy Commission⁴, that those organisations concerned with authentic human-centred development need to shift their focus from narrow measures of economic progress to broader measures of human wellbeing, were borne out in the Bellagio deliberations. But while the need for new metrics was accepted, there was recognition that there was much work to be done on deciding what those new metrics should be.


Terms such as 'dignity', 'social justice' and 'rights' surfaced continually throughout the debate. Capturing what lies behind these terms – all of which stress the quality of development in terms of what is important in people's day-to-day lives – will be key in shaping a new approach to metrics and how development organisations measure. Although less familiar and less tangible than proxies such as the 'dollar-a-day', getting measures of

how these qualities of peoples' lives are changing is no less important.

The key challenge of change here is to accelerate efforts to develop new measures of the impacts of development efforts on human wellbeing. An incremental way forward will be to supplement existing metrics with discrete sets of new metrics that are human-centred and which tell us about peoples' experiences of development. This would allow those working in development organisations to better understand the impact of development efforts on people's sense of what is just and what constitutes a dignified form of life.

This change involves international development and philanthropy organisations first clarifying the conceptual basis for new measures and then developing appropriate and cost-effective methodologies. There are already significant advances in this area at different levels, from national statistics to individual measures of wellbeing, quality of life or life satisfaction. Significant work, for example has been done by the OECD and the governments of Canada, Australia, Bolivia and Bhutan (to name but a few leading the way on this), and more recently the adoption of real alternatives has been endorsed by many parts of the UN system, including the Secretary General himself. Can these be tailored to the needs of development and philanthropy organisations to increase the relevance of evaluation and monitoring?

In order to protect and promote human wellbeing it will be necessary to increase awareness of alternative, human-centred measures as development indicators, find out where and how they are being used, and consider how they can be adapted by development and philanthropic organisations. New evaluation measures and lessons learned, on successes and failures, must be shared widely to the benefit of all participants in the development ecosystem. Fundamentally, we need to find ways to make these new alternative measures of development effectiveness work in practice.

A photograph of a man with dark skin, wearing a white lab coat, looking through a microscope. He is positioned on the left side of the frame, looking towards the right. The microscope is on a wooden table. The background is a plain, light-colored wall. The lighting is soft, highlighting the man's profile and the details of the microscope.

“If those of us in philanthropy spent more time arguing about a broader range of outcomes and less time debating how to measure the small number we’ve already selected, maybe we could become a more creative force in society.”

Michael Edwards, writer and activist, from the Bellagio blog

4. Change how we work: to embed change at all levels of development work

The need for change was a constant theme throughout the six months of Bellagio's wide-ranging deliberations. Returning to our ecosystem analysis, for this change to be possible requires people to be champions of change at many different levels in the international development and philanthropy ecosystem. All three of the types of change discussed above require changes at three levels:

Systems-level change

There has been recent progress at the infrastructure level of international development efforts. The Paris Declaration⁵ provides one important starting point for the next round of discussions. This lays out a practical, action-oriented roadmap to improve the quality of aid and its impact on development. It does not, however, distinctively embrace a human-centred approach to development, and while it can be seen to represent one starting point for future change, it also can be perceived as part of an historic technocratic approach that has alienated the development agencies from the people it is intended to serve. The OECD and its Development Aid Committee (DAC) has been active in laying out common agreements for coordinating aid efforts. We need to continue to work towards developing agreements and understandings about the principles of working together for the common good. Systems level changes should include:

- ▣ **Improve communications:** developing specific agreements and understandings between development and philanthropic organisations about the principles of working together for the protection and promotion of human wellbeing.
- ▣ **Share knowledge:** establishing more effective means for sharing successes and failures. (This may present a challenge for those of us who have historically preferred to keep lesson-learning internal to organisations, but the World Bank and USAID have both recently taken policy decisions to make all of their evaluation reports publicly available and they provide helpful exemplars for others.)
- ▣ **Establish common indicators:** developing methodologies for indicators that constitute appropriate measures of development success in terms of human wellbeing and that can be used as sound evidence in support of policy and investment decisions.

Organisational change

In order to achieve progress across the span of changes discussed above, philanthropy and development organisations must reform. They need to reconsider their organisational practices and procedures.

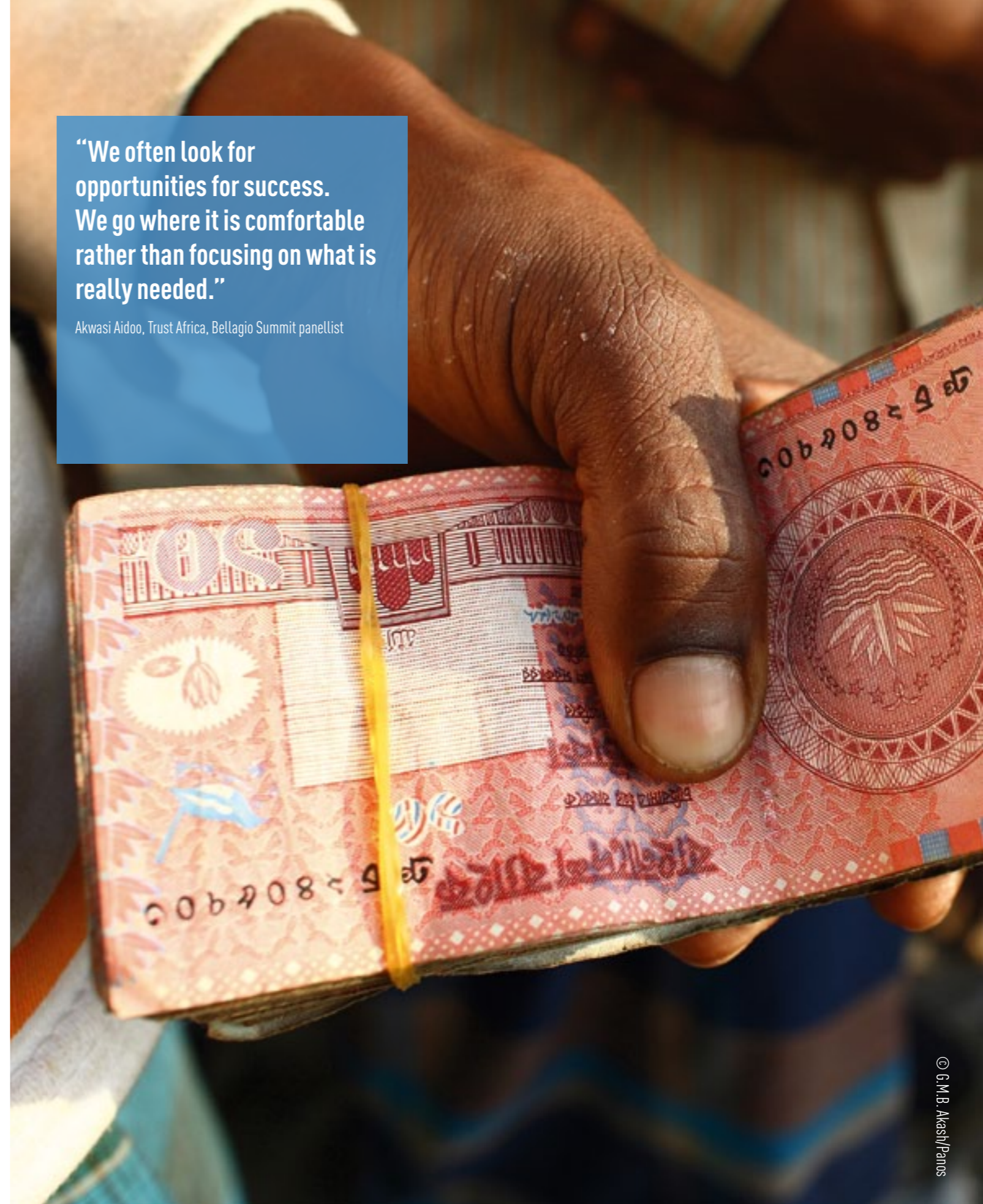
In particular, it is necessary for organisations to better *understand their comparative advantage* – where they sit in the evolving ecosystem and importantly, what distinctive contribution to the protection and promotion of human wellbeing they can make. For this to happen it will be necessary to put ambition, over-optimism and vanity aside. No one organisation is able to do everything and the funding, constitution, history or strategic position of a particular organisation may mean it is better placed to contribute to development efforts in a specific way, which may militate against trying to play other roles.

This recognises that future development efforts will require organisations to *find and form partnerships* – either horizontally (with collaborators) or vertically (downwards, with implementing organisations or grass-roots bodies, and upwards, with coordinating or regulating organisations). These partnerships will need to be founded on the basis of mutual understanding, respect and improved levels of trust.

“We need to continue to work towards developing agreements and understandings about the principles of working together for the common good.”

“We often look for opportunities for success. We go where it is comfortable rather than focusing on what is really needed.”

Akwasi Aidoo, Trust Africa, Bellagio Summit panellist



Development and philanthropic organisations also need to *be more open to innovation*. Too often, Bellagio revealed instances of innovation for wellbeing taking place, without support from international development organisations or philanthropies. Organisations concerned with promoting and protecting human wellbeing must work to improve their contribution to identifying, supporting, fostering and expanding the reach of pro-wellbeing innovations. This could range from making specific innovation appointments to creating innovation funds, or to simply creating space in routines for identifying and sharing information about innovation.

“Organisations concerned with promoting and protecting human wellbeing must work to improve their contribution to identifying, supporting, fostering and expanding the reach of pro-wellbeing innovations.”

Such an approach demands that there is a more deliberate rethink about *risk taking* in organisations. Earlier in this report we noted that, against the run of expectations, philanthropies tend to be risk averse. Where development agencies fail to take risks in an effort to meet global challenges, it can be the poor and most vulnerable who are left to take the risks of changing in an effort to cope with these challenges. It is necessary to reflect on organisational willingness to invest in risky change that would support the poor and vulnerable in making the changes they need to protect and promote their own wellbeing.

The call for a more human-centred development demands that we repeatedly ask within organisations and consider whether their procedures and practices, at all levels, are congruent with the aims of protecting and promoting human wellbeing.

Individual change

The systemic and organisational changes discussed above will only be possible if they are backed by changes at the individual level. There is a need for all of us to reconsider how we view and contribute to development. Beyond this, we need to explore the role of human values in development more generally. How do values matter for how development is conducted? What values do development efforts propagate?

This is uncertain terrain for many in development and philanthropy organisations. It is complex and controversial. But value systems and their effects – for example, the debate over how the spread of materialist values can be regarded as a threat in itself to the future of human wellbeing – are crucial areas for further inquiry. The challenge in doing this will be to approach it in a way that is neither experienced as top-down nor culturally imperialistic. Throughout this process it has been important to recognise that human diversity is a strength that will enable us to meet unpredictable challenges and that, at times, will involve compromise with other world views and value systems.

“Substantial empirical and theoretical work demonstrates that to the extent individuals prioritise values and goals for wealth, status and image, they report lower levels of personal wellbeing and engage in social and ecological behaviours that can reduce other people’s wellbeing.”

Tim Kasser, Professor of Psychology, in Bellagio Commissioned Paper ‘Values and Human Wellbeing’

5. Change who is involved: to create space for a new cast of actors

A key message from the Bellagio process is that no single actor or agency can operate comprehensively to meet the enormous challenges that human beings face today and in the near future. While all workers in philanthropy and development organisations may have a role to play in terms of the strategic contribution at the systems level, and direct action at project or programme level, it is clear that to achieve our goals we need to collaborate with others – with existing, established development agencies and organisations but also with a much wider cast of players.

“We seem to be continually chasing the next big idea, then the next big idea. Things come into then go out of vogue and we don’t seem to stick with anything quite long enough to achieve systemic change.”

Participant, Bellagio Summit

The Bellagio deliberations accepted the essentially political nature of the struggle to protect and promote human wellbeing. The problems of people will not be solved without the participation of the people themselves. To meet complex challenges, it will be necessary to draw on the skills, ingenuity, innovative capacities and aspirations of all global citizens. In particular, it will be necessary to give greater voice to marginal people such as youth, women, and migrants. This means making system changes that make people themselves players with an integral part of development processes.


“I work with a lot of young people. They don’t feel they are part of this country, or part of this society.”

Participant in the Urbanisation International Development Global Dialogue, Delhi

This will require development organisations to be more transparent and to act to empower citizens to hold them to account for their actions. It is important that development and philanthropy organisations reflect on the extent to which they are willing to allow themselves to be held to account by the people that they claim to be working for.

In this it will be necessary to negotiate the difficult pathways between conflicting demands and to engage in processes of deliberation that explore competing views of environmental, economic, social and political sustainability. There will be incommensurable views, demands and expressed needs but as we have noted, the real development challenge is to find ways to live well together.

“The Bellagio deliberations accepted the essentially political nature of the struggle to protect and promote human wellbeing. The problems of people will not be solved without the participation of the people themselves.”

A young boy and girl are looking at a globe in a classroom. The boy is pointing at the globe with a pen, and the girl is looking at it with interest. The globe shows the continents and oceans. The background is slightly blurred, showing other students in the classroom.

A focus on human wellbeing provided a resonant rallying call for the Bellagio Initiative and began building new partnerships. To be more effective in their efforts to protect and promote human wellbeing in the twenty-first century, international development and philanthropy organisations will need to stand up for the types of change outlined here and welcome a new cast of actors on to the development stage.

Appendix

The Partners

The Bellagio Initiative was led by the Institute of Development Studies (IDS), the Resource Alliance and The Rockefeller Foundation.

- ▶ The **Institute of Development Studies (IDS)** is a leading global charity for research, teaching and information on international development. Its vision is a world in which poverty does not exist, social justice prevails and economic growth is focused on improving human wellbeing.
- ▶ The **Resource Alliance** aims to help achieve its vision of a strong and sustainable civil society through building skills and knowledge, and promoting excellence.
- ▶ The **Rockefeller Foundation**'s mission to promote the wellbeing of people throughout the world has remained unchanged since its founding in 1913. Its vision is that this century will be one in which globalisation's benefits are more widely shared and its challenges are more easily weathered.

The Global Dialogues

The Bellagio Initiative was built from a series of Global Dialogues.

Development and Wellbeing Global Dialogues

Organised by IDS, each Global Dialogue was designed to stimulate discussion around a theme among diverse leaders and to develop a regional perspective on the global challenges to wellbeing. To ensure a robust exchange of ideas, participants included a mix of academics, thought leaders, activists, practitioners and young leaders.

The themes were:

- ▶ **The Inclusive Economy** facilitated by The Broker
- ▶ **Urbanisation** Delhi, India
- ▶ **Global Governance and Regulation** London, UK
- ▶ **Information Communication Technologies** facilitated by IDS Knowledge Services
- ▶ **Sustainability and Growth** São Paulo, Brazil
- ▶ **Living on the Move** Kinna, Kenya

Philanthropy Global Dialogues

Organised by Resource Alliance, these comprised a series of meetings which looked at trends, opportunities and issues in philanthropy, mobilising new resources for promoting wellbeing and frameworks for philanthropic innovation and action in a changing world. Participants were drawn from government, the corporate sector, foundations and international non-governmental organisations (INGOs), as well as individual philanthropists, including 'new players'.

The themes were:

- ▶ **BRICS (the emerging economies of Brazil, Russia, India, China and South Africa)** Delhi, India
- ▶ **New Emerging Markets** Accra, Ghana
- ▶ **Middle-Income Countries** Budapest, Hungary
- ▶ **Cross-market INGOs**, at the International Fundraising Congress, Amsterdam, Netherlands

The Commissioned Papers

The Bellagio Initiative commissioned the following papers to feed into the debate about the future of philanthropy and international development in the pursuit of human wellbeing:

- ▶ **The Role and Limitations of Philanthropy**, Michael Edwards
- ▶ **Islamic Philanthropy: Innovations, Development and the Implications for Wellbeing**, Mariz Tadros
- ▶ **Corporate Philanthropy and the 'Education for All' Agenda**, Kevin Watkins
- ▶ **Caring for Wellbeing**, Marzia Fontana and Rosalind Eyben
- ▶ **Poverty in Middle-Income Countries**, Andy Sumner
- ▶ **Resource Scarcity, Wellbeing and Development**, Alex Evans and Jules Evans
- ▶ **Values and Human Wellbeing**, Tim Kasser
- ▶ **Transformative Innovations in African Philanthropy**, Bhekinkosi Moyo
- ▶ **Evaluating Development Philanthropy in a Changing World**, Robert Picciotto
- ▶ **Urbanisation as a Threat or Opportunity in the Promotion of Human Wellbeing in the 21st Century**, David Satterthwaite and Diana Mitlin
- ▶ **The Changing Ecosystem of Philanthropies in International Development**, Noshua Watson

The Bellagio Initiative Summit

The Bellagio Initiative Summit took place from 8–22 November 2011 at the Rockefeller Bellagio Center in Italy. It engaged a select group of international development practitioners, opinion leaders, social entrepreneurs, donors and philanthropic organisations chosen for their collective capacity to advance thinking and action on the future of international development and the role of philanthropy. Driven by participatory small-group discussion sessions and highlighted by panel debates, the Summit was organised around three broad thematic areas:

- ▶ Trends and opportunities in development and philanthropy in the twenty-first century
- ▶ Mobilising new resources for promoting wellbeing
- ▶ New frameworks for philanthropic innovation and action in a changing world.

Endnotes

¹ The format of the Global Dialogues and Bellagio Summit was that most of the discussion was non-attributable to enable frank discussion. Where quotes are given from particular sources, these were speakers in public plenary sessions or other public debating channels including blogs.

² UN Declaration on the Right to Development 1986. Available from: www.un.org/documents/ga/res/41/a41r128.htm

³ Governance organisations defined in the broadest of terms to include organisations beyond formal government institutions.

⁴ www.stiglitz-sen-fitoussi.fr/en/index.htm

⁵ www.oecd.org/dataoecd/11/41/34428351.pdf



www.bellagioinitiative.org