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Donna H. Friedman

University of Massachusetts Boston, donna.friedman@umb.edu

Jennifer Cohen

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Building Knowledge and Power with The Third Sector in Haifa Israel:



**A Report of the
Learning Exchange
Research Project**

The
CENTER for
SOCIAL
POLICY
McCormack Graduate School
at UMass BOSTON



Prepared by

***Donna Haig Friedman and Jennifer Cohen with
Yael Abada, Rula Deeb,
Riki Tegave, Daphna Ziv, Marina Zamsky,
and
Tiffany Bradley, Liron Peleg-Hadomi,
Eran Hadomi, Moran Ron***

February 2008

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25 Years for Social Change
25 שנה של עשייה לשינוי חברתי
٢٥ عام على العمل من أجل التغيير الاجتماعي

This report is the culmination of an extensive bi-national, multi-lingual and multi-cultural effort to learn from and strengthen the third sector in Haifa and in Boston. Many individuals invested time, energy, resources, creative thinking, hospitality and good humor to ensure the success of this endeavor. Collectively we engaged in this project because we believed that NGOs engaging in both service and social change work are the backbone and heart of a just civil society.

The authors deeply appreciate the wisdom, guidance, as well as material and emotional support we received along the way from Sheryl Adler, Cheri Andes, Shai Brown, Mary Coonan, Jessica Durrum, Zvi Eisikovits, Anat Freund, Yossi Gluzman, Patricia Hembrough, Nancy Kaufman, Irit Keynan, Judith King, Carl Nagy-Koechlin, Yossi Korazim, Debbie Kurinsky, Margaret Leonard, Elena Letona, Geoffrey Lewis, Yael Maizel, Fathi Marshood, Jane Matlaw, Kristen McCormack, Miriam Messinger, Debbie Mishor, Nahma Nadich, Amnon Reichman, Sari Revkin, Jona Rosenfeld, Stuart Rossman, Nitsa Shelef, Avi Shitzer, Ada Spitzer, Nancy Strichman, Jenna Toplin, Pini Vagman, and Eran Vigoda.



INTRODUCTION

This report presents a model of Participatory Action Research (PAR) focused on the development of the third sector in Israel. The PAR methodology, combined with a learning exchange, intentional reflection, and community building opportunities, was used as a tool for enhancing Haifa Non-Governmental Organizations' (NGO) capacities. The report describes the practical and conceptual impacts of this model's application in a pilot trial and discusses its possible use and importance for future participatory research and NGO capacity building work.

Developed as part of a year-long Fulbright research project and complemented by the Boston-Haifa Learning Exchange with a group of five Haifa NGOs, the model produced learnings that have significance for the social change and service communities in Israel and elsewhere. Central findings, to be expanded upon further below, relate to several issues

critical to the strength and effectiveness of NGOs, that is, leadership development, partnerships with government and with other NGOs, organizational learning, otherness in NGO work, and the dynamics of balancing social change and service in NGO work.

The Model – Theory Description

This consultative research model is the application of a hybrid of tools that, when combined in a particular way, serve to facilitate internal and external community building, learning, and change for NGOs and their leaders. The tools used are: Participatory Action Research (PAR), which aims to benefit research participants and promote social change through an intentionally collaborative decision making and exploratory research process; learning exchange opportunities (internal within organizations and community-wide among organizations); and planned individual and collective reflection experiences.

These tools and the model lead to the production of knowledge that Peter Park refers to as representational, relational, and reflective: "Knowledge is related to power, and people gain power of solidarity and confidence, as well as of control, in the process of pursuing these forms of knowledge".

Dialogue is central to this PAR process, as it creates a social space for sharing information and experience, creating common meanings and community ties, and sharpening the ability of leaders to think and act critically, all of which increase power. The model in theory and in practice increases "power with and power from within" as the three forms of knowledge are explored and joined:

- *Power of competence is grounded in learnings from experience and it parallels the representational knowledge that is explored, created, and applied through the process. This pillar includes the model's practical skill exploration and development that allow NGO leader participants to share and build practical knowledge individually and together.*
- *Power of solidarity relates to connections, empathy, and strengthening of individuals and communities and it parallels relational knowledge. This pillar is rooted in mutuality that can be found in and developed through non-competitive, mutually supportive peer learning processes.*
- *Power of moral courage is grounded in values and relates to NGO leaders' self-confidence to engage in social change work and to act on moral values. In many ways it parallels and is informed by reflective knowledge. This pillar includes issues of sustainability and the intentionality of partnering with others.*

THE PROJECT

Between June 2006 and May 2007 the model was developed, applied, and facilitated by Dr. Donna Haig Friedman, Fulbright Scholar, and Jennifer Cohen, Project Manager. The Fulbright Fellowship program and the University of Massachusetts Boston's Center for Social Policy within the McCormack Graduate School of Policy Studies were co-sponsors of the research, along with the Boston-Haifa Social Justice/Civil Society Committee, the Boston-Haifa Connection, the Council of Volunteer Organizations (CVO), the University of Haifa and Shatil, the New Israel Fund's Empowerment and Training Center for Social Change Organizations in Israel.

The Jewish Community Relation Council's (JCRC) Boston-Haifa Social Justice and Civil Society Committee proposed utilizing Dr. Friedman's Fulbright research opportunity to intensify its already existing learning exchange and strong connections between anti-poverty organizations in Haifa and anti-poverty organizations in Haifa and Boston. The matching of five Haifa and Boston organizations was the basis for documentation of learning exchange processes and outcomes which contributed greatly to both the project's process and learnings, and the shaping of the model.

**From Dr. Haig Friedman's
Fulbright 2005 application:**

The proposed research aims to examine the adaptive capacity of NGOs to respond to their changing roles in society on behalf of the people they serve. In Israel, the third sector has increasingly become the primary safety net for the poorest households. The response of these organizations to new challenges and to their evolving roles in society is of critical importance to national and municipal officials, planners, advocates, low income households and the Israeli public.

With 269,400 residents, Haifa is the third largest city in Israel and is a preferred destination for immigrants from the former Soviet Union and Ethiopia (25% of Haifa residents are immigrants). Economic hardship is a reality for many Haifa households; the city's unemployment rate is 11%. Haifa's third sector organizations serve immigrants and extremely low-income people from diverse religious, ethnic and linguistic traditions. Haifa NGOs are directly affected by new service demands resulting from increasing numbers of extremely poor Ethiopian immigrants moving into the city before 2008 and by Israel's welfare-to-work policies expected to be implemented in the future.

Within this social and economic context, not to mention Israel's ever-present political and public security challenges, the Haifa municipality, the Council of Volunteer Organizations, NGO leaders and University of Haifa partners are actively engaged in planning and sustaining the Boston-Haifa Social Justice and Civil Society partnership with a primary goal of fortifying both Haifa's and Boston's third sector. The specific focus for Haifa NGOs is strengthening their organizational infrastructures and their influence on public policy; for Boston's NGOs, the focus is reinforcing cross-cultural effectiveness.

The following is a time line of the project:

May-July 2006

Pool of 300+/- legally-recognized NGOs in Haifa identified. Eighty (80) met the initial selection criteria and were invited to apply in writing to participate in the research. The CVO and Shatil disseminated recruitment ads in English, Hebrew and Arabic, by postal mail and email. Thirty-two (32) NGOs applied and 20 that most closely met the selection criteria were invited to go to the next stage. Nineteen NGOs participated in five focus groups after which FOUR NGOs were chosen.

War in Haifa and research questions shift to reflect change in definition of crisis.

August 2006

Beginning of Boston Learning Exchange matching process.

Sept – Dec 2006

Research Meetings at NGOs in Haifa include defining of terms, group building, and background learning on PAR. The CVO was added as a research participant and JCRC was added as its Boston learning exchange partner.

January 2007

Learning Exchange Kick-Off: Video Conference and 1st face to face, four day, seminar – Boston. Haifa NGO leaders come to Boston.

February 2007

Donna Haig Friedman to Haifa and in-depth Haifa research begins. Continue to define terms and expectations.

March 2007

2nd face to face, three-day, Learning Exchange – Haifa. Boston partners come to Haifa.

Feb – May 2007

Research at Haifa NGOs with Haifa university student team and completion of NGO-specific projects; evaluation by Nancy Strichman from Shatil; in-person wrap-up sessions with Haifa NGOs.

Nov-Dec 2007

Follow-up phone interviews with leaders of the five Haifa NGOs.

LEARNING EXCHANGE PROCESSES

The Learning Exchange Research Project involved several levels of organizational learning and reflection. The most formal of these activities took place over a six-month period between the Haifa NGOs themselves as well as between the bi-national partners, through videoconferences and two in-person learning exchanges (in January 2007 in Boston and March 2007 in Haifa).

The goals of the Haifa-Boston Learning Exchange were defined in the initial grant proposal as:

- Development of relationships and partnerships between the two cities that will support each in their own work (especially in the social change/NGO worlds);
- Creation of products (tools, suggestions, models) that will serve a wider range of NGOs working for social change in each city and together;
- Support, empowerment and learning from each other to strengthen the NGOs and the third sector in Haifa and Boston

Criteria For Haifa NGO Site Selection

1. In existence prior to 2004.
2. Carry out both social change and service work.
3. Work in Haifa or carry out work which impacts the local community.
4. Anti-Poverty Work a major part of primary mission of organization.
5. Families (women) with children major part of constituency.
6. Some element of community-based work.
7. Capacity/commitment to process and an ability/commitment to make change in community.
8. At least one NGO serves Arab families; at least one NGO serves Ethiopian immigrants.

Organizational Learning Exchange Matches were made with attention to several factors: Haifa NGO site selection criteria; similarity in organizational mission and core values, and likelihood and capacity for mutual learning.

This project was defined as experiential and active: "*The organizations are looking to be engaged in conversation, activity and 'doing'.*" The in-person Learning Exchange seminars were planned and facilitated jointly by the NGO partners as well as by outside trainers. Sessions included a mix of learning methodologies, that is, formal and informal discussions, large and small group sessions including one-on-one conversations, as well as organizational visits, site-seeing and home hospitality.

Yeledenu B'Tnufa

Director: Daphna Ziv

Yeledenu Betnufa ("Our children in motion") was founded in 2002 by residents and volunteers, Arabs and Jews, working together for a common goal, that of a better future for the children of the Hadar neighborhood in Haifa. The organization reflects the diverse population of the neighborhood of Hadar Ha-Carmel which consists of Arabs (Moslems and Christians) and Jews (veteran Israelis and new immigrants, especially from the former Soviet Union) who are poor. Yeledenu B'Tnufa is special in that Jewish and Arab members work together to try to address the needs of at-risk children and work to defend their civil, educational, employment-related and other rights of concern to youth. The organization is unique in that residents of the neighborhood, many of whom are the parents of program participants, are the organizers and activists, working themselves for a better future for the children of their families and neighbors.

Yeledenu was matched with Miriam Messinger and Shai Brown of City School. The City School is a nonprofit organization and center for civic education that develops leaders for long-term action on social issues. The organization's programs unite high school students from the full range of society in an approach that combines creative education and critical thinking about social justice issues, hands-on learning, action, and reflection. The City School brings together young people ages 14-18 across race, class and community lines to explore their society, neighborhoods, and themselves -- and to form alliances to act on their observations and ideas. The organization's goals are to build a strong and diverse youth-adult community; to mentor and support youth participants; to deepen understanding of and critical thinking about social problems; and to increase leadership development and action.



Kayan

Director: Rula Deeb

Kayan, which means "Being" in Arabic, is a feminist organization established by Palestinian women living in Israel. Founded in 1998, Kayan is a capacity-building non-governmental organization devoted to women's development, and offers a wide array of courses, knowledge-based trainings, mentoring programs and activities with women's groups and associations, with non-profits, and with the public. As one of the first organizations set up by and for Palestinian-Israeli women, and focused solely on personal and collective empowerment, it is dedicated to strengthening women and women's initiatives, and to help gender-mainstream Palestinian women in Israel. Kayan's main goals are:

- *To bring feminism and feminist thinking to Palestinian society in Israel and affect a radical change in the way Palestinian women view themselves, and thereby catalyze independent thinking and action.*
- *To change the way Palestinian women are viewed and treated in Arab society and in Israeli society, and at the same time, advocate for their equal rights and status.*
- *To eliminate all forms of discrimination against Palestinian women, and work for achieving full and equal rights-legally, socially and economically.*

Kayan was matched with Mary Coonan and Patricia Hembrough of Project Hope. Project Hope is a multi-service agency at the forefront of efforts in Boston to move families beyond homelessness and poverty. Project Hope is a leader not only in efforts to end family homelessness, but to prevent it in the first place with a mission of partnering with families to move up and out of poverty. The multi-service agency provides low-income women with children access to education, jobs, housing and emergency services; fosters their personal transformation; and works for broader systems change.

The following are content areas for learning that were identified as important to the participants themselves during the planning stages of the project and became the focus of the learning exchanges within Haifa and with Boston learning partners:

advocacy and lobbying; volunteer engagement; multi-cultural work; immigration; learning from success; being a learning organization; working in times of crisis; handling the dynamics of doing both service vs. social change work; gender Issues (especially as this group of leaders was all women); organizational and personal sustainability; and leadership approaches, dilemmas and strategies.

The Council of Volunteer Organizations

Director: Yael Abada

The Council of Volunteer Organizations (CVO) is the umbrella organization for the third sector in Haifa. Haifa's volunteers and their organizations look to CVO for support, guidance and networking. As their united voice, the CVO works on behalf of all of the 150 organizations in Haifa to maintain and expand the place of volunteers in building a civil society in Haifa. The CVO serves its members by providing group and individual organizational consulting through courses and lectures, volunteer recognition activities, lobbying, and forum and coalition building for quality service provision and effective social change efforts with the public and private sectors. The CVO's primary areas of work are

- *Encouraging volunteerism and volunteer recognition;*
- *Developing the skills of and providing support to NGO leaders;*
- *Establishing forums and coalitions of non-profit organizations.*

The CVO was matched with Nommi Nadich of the Jewish Community Relations Council (JCRC). The JCRC promotes a society that reflects the best of American and Jewish values—in Greater Boston, Israel and around the world—by convening and mobilizing the Jewish community. Through advocacy, organizing, service and partnerships, JCRC pursues social justice, ensures a vibrant Jewish community, and builds a network of support for Israel. JCRC pursues social justice by taking action to build coalitions, develop leaders, advance organizing and promote volunteer service to effect change in the broader community.

The NGO partners in Haifa began meeting monthly in September 2006 and continued through May 2007. Group sessions included team building exercises, introductory learning on participatory action research and organizational learning models, site visits, program planning, and creative exploration

of tools and issues of importance to participants as organizational directors and activists. Topics included those from above as well as: cooperation and competition between NGOs; diversity in NGO work; public policy and NGO work; and resources of NGOs.

Hiyot

Director: Riki Tegave

Hiyot represents a unique phenomenon among immigrants in Israel and elsewhere. Having immigrated at young ages, many without families, from rural Ethiopia to the modern, fast-paced state of Israel, the founders of Hiyot have come together not only to help each other but also to dedicate themselves to helping their community cope with the difficult problems encountered in a new, unfamiliar environment. They understand the needs of the community and can therefore be most effective in dealing with the problems. The founders of Hiyot are professionally trained educators and community workers who use their skills to develop and operate programs, advocate for responsible public policies and provide services in an effort to resolve the various problems within the community thereby improving the quality of life. The mission of Hiyot is to see immigrants from the Ethiopian community successfully integrated in modern Israeli society. The organization's main objectives are:

- To encourage and enlighten the Ethiopian community through projects it has designed and developed specifically to meet their needs;
- To empower women, with special attention toward single parents;
- To provide families with skills required for dealing with everyday life.

Hiyot was matched with Elena Letona and Jessica Durrum of Centro Presente. Centro Presente, established in 1981, is a member-driven, state-wide Latin American immigrant organization dedicated to the self-determination and self-sufficiency of the Latin American immigrant community of Massachusetts. Operated and led primarily by Central American immigrants, Centro Presente struggles for immigrant rights and for economic and social justice. Through the integration of community organizing, leadership development and basic services, Centro Presente strives to give our members voice and build community power.

Yedid in Haifa

Director: Marina Zamsky

Yedid ("friend" in Hebrew) was established in 1997 to promote social justice in Israel by operating Citizen Rights Centers in poor communities throughout Israel, and Yedid's Haifa Center was founded in April 1998. Through 20 Centers and Satellite offices, Yedid is changing the face of Israeli society by empowering individuals and communities to break the cycle of poverty in economically disadvantaged and disenfranchised areas. Yedid actively promotes the values of human dignity, individual and communal responsibility, equality, social action, voluntarism and tolerance in a multicultural society. Yedid's main goals and objectives are to:

- Empower low-income Israeli citizens from all backgrounds to realize their social and economic rights and obtain benefits to which they are entitled.
- Assist Israelis to break the cycle of poverty through community empowerment programming.
- Encourage voluntarism, community involvement and social action.
- Foster social cohesiveness by developing relationships between different sectors of Israeli society.

Yedid was matched with Cheri Andes of the Greater Boston Interfaith Organization. The Greater Boston Interfaith Organization (GBIO) was founded by a group of 45 clergy and community leaders who began meeting in January of 1996. What motivated this founding group to begin building GBIO was a common desire to transcend the historic divisions in Boston that existed between neighborhoods, particularly around race and class issues. These founders were motivated to build a new organization which could help build relationships across these divides and provide a new vehicle for different constituencies to act together on common interests in ways which would be powerful and effective. GBIO is a broad-based organization which works to coalesce, train, and organize the communities of Greater Boston across all religious, racial, ethnic, class and neighborhood lines for the public good. The organization's primary goal is to develop local leadership and organized power to fight for social justice. GBIO strives to hold both public and private power holders accountable for their public responsibilities, as well as to initiate actions and programs of its own to solve community and economic problems.

IN-DEPTH ON-SITE HAIFA RESEARCH

From February – May 2007 the Haifa organizations took part in on-site Participatory Action Research (PAR), involving four Haifa graduate students: Moran Ron, Liron Peleg Hadomi, Eran Hadomi and Tiffany Bradley. Led by Dr. Donna Haig Friedman and Jennifer Cohen, in teams of two, the researchers collaborated with the Haifa NGO leaders to build their organizations' internal capacities and strengthen their organizations' external connections. To determine the specific consultative, PAR focus for each NGO site, NGO leader participants were asked to respond to the following questions:

How would you describe an organizational accomplishment, related to building your internal and/or external capacities (especially those that help you respond effectively during ongoing or extraordinary crisis) that could be helpful to your organization? In other words, what would success at the end of these months look like for you?



The leaders' answers, which continued to be refined over the course of the four month field work, served as the basis for determining the final work plan, its goals and final products. The researchers anticipated that cross-cutting policy and practice themes would emerge through the work that could be the basis for learnings and research conclusions useful to the wider social change community.

ORGANIZATIONAL PRIORITIES AT THE START OF THE RESEARCH AND LEARNING EXCHANGE PROCESS:

Managing Organizational Growth.

Two of the five Haifa NGOs were in the midst of an organizational growth process which necessitated formalizing many organizational functions that previously had been managed informally. For Kayan, the use of volunteers was an area of planning and infrastructure building that needed attention. Many volunteers had been coming to the organization's door; engaging these volunteers was ad hoc, at times leading to mismatches in skills and interests of volunteers with organizational needs. For Hiyot, a new grant that involved establishing youth centers for Ethiopian youth in Haifa and the northern part of Israel necessitated building up all key dimensions of the organization's infrastructure.

Reassessing Organizational Mission and Realignment of Board and Staff.

Two of the five NGOs were in periods of organizational transition in which the core missions of the organizations were being reassessed. For the 20 year old CVO, the priority was to solidify its shift from being identified with the municipality to functioning as an independent vehicle for organizing and strengthening the third sector in Haifa. For Yeledenu B'Tnufa, a leadership change and city-wide policy shifts were the precipitant for the organization's reassessment of its way of balancing social change and service work.

Building Organizational Infrastructure and Capacities.

All five NGOs considered strengthening their internal organizational capacities as a priority. Two of them focused on their infrastructure - for engagement (Kayan) and empowerment of volunteers (Yedid). The CVO, Hiyot and Yeledenu B'Tnufa focused their energies on mission clarification, financial sustainability, staffing and team building.

Expanding and Strengthening External Partnerships.

While all five NGOs focused to some degree on their external partnerships with government and with other NGOs throughout the research process, this focus was a top priority for Hiyot. In addition, Yeledenu B'Tnufa chose to address the summer employment needs of youth through the development of a pilot project; this project development idea became a research focus and involved engaging youth and their parents from the Hadar community.



Research Work Plan – by Organization			
NGO	Research Goals	Main Methods	Products
Hiyot	Increase the organization’s influence with policy makers and other key stakeholders for the ultimate benefit of the Haifa community, most particularly Ethiopian families.	Stakeholder analysis and strategic planning sessions with key staff and board members. Interviews with several external stakeholders.	A stakeholder (staff, board, volunteers, “clients”, other community members) analysis of the topic of external relationships and community development. A practical 6-12 month workplan for implementing a range of strategies for increasing Hiyot’s influence in the external community.
CVO	In preparation for future strategic planning for the CVO, identify organizational model options for consideration by the CVO leadership and board.	Individual and joint interviews. Documentation and analysis of board meetings.	An organizational model including definition of the ideological and practical place of volunteers and paid staff in the organization.
Yedid	To develop a new Yedid-Haifa volunteer committee to: - improve the conditions of volunteers in the center; - define and identify new areas of work on local and national policy levels.	Documentation of key stakeholder brainstorming session. Interviews. Models analysis.	A chapter outline for manual describing this project (a volunteer group that “uses internal resources to increase external resources” and creates internal organizational policy) that could be used for replicating the model at other Yedid sites in Israel and at other NGOs in Israel and abroad. An evaluation plan for the project.
Yeledenu B'Tnufa	To create a model for addressing the urgent need of Hadar teenagers who need and want to work during the summer months but are unable to secure appropriate employment.	Models analysis. Focus group with Haifa youth and their parents. Interviews. Documentation and analysis of board meetings.	A guide to the legal rules and rights of teenage employees in Haifa. A project proposal including goals, objectives, partners, job descriptions, concrete work plan and model design.
Kayan	To create a model and strategic plan for sustaining volunteers as the organization grows fairly rapidly from a small, grassroots agency to a large organization with paid program directors.	Models analysis. Interviews. Documentation and analysis of stakeholder community meeting and staff meetings.	A strategic plan, including goals, objectives, partners, job descriptions and concrete work plan, for how Kayan can implement this model (for working with volunteers as the organization moves from small and grassroots to larger and more professionalized) over the next year. An evaluation plan for the pilot year of the project.

IMPACTS OF THE RESEARCH AND LEARNING EXCHANGE PROCESS

From September 2006 to the present, six main domains of growth and insight have emerged through the learning exchange research: **leadership growth; NGO partnerships with government; NGO partnerships with other organizations; learning organizations; otherness in NGO work** and the **dynamics of social change and service** in NGO work. Practical findings are connected to the theoretical underpinnings of knowledge and power referred to in the model section of this report. That is, the multi-dimensional learning exchanges and site-specific collaborative consultations generated representational, relational and reflective knowledge, leading to organizational and collective power and strength – the power of competence, the power of solidarity, and the power of moral courage. The following summary provides illustrative examples of key learnings.

Leadership Growth

All five NGO leaders reflected upon the ways in which they had grown as leaders through their participation in the learning exchange research process.

Sense of self as leader. In some instances, directors' self-confidence grew through coming to know that other leaders experience similar kinds of dilemmas and that other organizations go through similar developmental stages and challenging periods. The sense of 'not being alone' is crucial. A safe space and trusting, non-competitive relationships among the NGO leaders was a foundation for their being able to share such vulnerabilities with each other without worry or shame.

Strategic use of leadership attention. Given that all of the NGOs were either

experiencing fast organizational growth spurts or fundamental reassessments of mission, the NGO leaders also reflected upon effective and strategic use of their energies and skills as directors. For some, a shift in thinking led to increased delegation of responsibilities to others in the organization so that the director could hold and lead from a 'big picture' perspective; for others, reflective processes led to leaders' initiating more participatory planning and decision making within their organizations.

Planned, regular organizational reflection.

All five leaders identified the need to develop ways for herself and her staff to invest intentionally and regularly in protected periods of organizational reflection – to document and learn from their experiences and to tie future directions and actions to these learnings.

Moral courage. With every NGO leader, moral courage was evident from the start. Early in the research and learning exchange dialogues, no one shied away from posing hard questions to herself or to her colleagues. For example, in the context of discussing organizational effectiveness, one leader shared her strong resistance to simply keeping an organization going for its own sake, even if it has outlived its usefulness. "Does this organization need to exist?" is, in her mind, a question of utmost importance for all organizational leaders to periodically ask themselves and reflect upon with their staff, board and communities. In follow-up interviews, several leaders cited instances in which the solidarity with the other NGO leaders and insights they gained through the process enabled them to deal boldly with very difficult challenges, including personnel issues, financial crises and management of conflicts among the organizations' stakeholders.

Partnerships with Government

Subtleties in relationships with national and municipal governments were topics of primary importance to all the NGO leaders. By design, each of these organizations had a mission to provide a direct service to their constituencies (the immediate solutions) as well as push for policy changes that would address the root causes of families' social and/or economic hardships (the long term and structural solutions).

Organizational flexibility.

At times, these organizations' advocacy actions put them in direct opposition to the national or municipal government. At other times, they received government funds to carry out direct services which created a level of dependency and potentially constrained their opposition to government policies or actions that they believed would be harmful to their communities. Across the board, these five NGO leaders had come to believe in organizational adaptability and models of partnership that are effective, "for specific purposes at specific times and of greatest benefit to their communities".

Mutuality and respect in partnerships.

The NGO leaders were in agreement that in strong partnerships, both parties bring value to the table and respect the contributions of the other party. Government brings funds, policies and clout to partnerships with NGOs; NGOs bring other resources, particularly community connections and community knowledge. When all of these pieces of the puzzle are working together, communities benefit.

Strategic investment in partnerships with government.

Identifying and analyzing the centers of power that impact NGOs' constituencies was a focus for several leaders. This analysis activity became a foundation for directors' networking and partnership strategies --- investing time and energy in building strategic partnerships or connections came to be seen as a way to produce a big payoff for the organization and the communities being served.

Partnerships during crises.

During the summer 2006 Lebanon War, local NGOs and the Haifa municipality responded to the emergency needs of Haifa households in an extraordinary, but largely ad hoc fashion. While many of these responses were effective, attention to critical needs of the most disenfranchised and fragile Haifa residents was lacking in some crucial aspects. For example, outreach to NGO volunteers was not coordinated and some volunteers were ready to help others in greater need than themselves, but were unsure as to how their help might be used. Some Haifa NGOs with non-emergency service missions closed their doors during the war; however, directors and staff of these organizations, to the extent feasible, advocated to secure emergency assistance for their communities. Considerable organizational soul-searching and collective planning followed

once the war ended. Resulting changes in the dynamics between Haifa NGOs and the Haifa municipality are apparent and bound up in the way a comprehensive emergency planning project is currently unfolding cooperatively between the CVO and the municipality.

A Story of Organizational Evolution on Partnerships

One NGO's approach to partnership has evolved substantially through the life of the organization. Although the NGO has very definite ideological underpinnings, it has developed a pragmatic use of partnerships. The stated goal of addressing inequalities in society remains, but the tools have changed. The director described the fervor of staff in the NGO's early days who spread "like ants" all over the countryside to conduct empowerment and community organizing workshops. At that stage in the organization's development, staff rejected any partnership with governmental agencies. "We were grassroots, naïve, thought we were radical, didn't want to think about the institutional (powers)." After seeing the formidable problems that their communities were facing, staff applied lessons learned from their constituents about creative sustainability, such as that households who don't have resources to change their situation are open to help from any source, and the organization moved away from the "arrogance" of its initial approach. They left behind an approach that assumed the organization could work completely apart from government structures to effect social change. The push for social change now includes many methods and alliances....with a variety of governmental and NGO agencies.

Partnerships among NGOs

Partnerships among NGOs were a constant focus in the learning exchanges, with bi-national partners and within Haifa, and in the organization-specific research. While competitiveness among NGOs was recognized as a day-to-day reality for all the NGO leaders, they were open to and eager for connections with other NGO leaders. Building solidarity among the NGO participants became a hallmark of the learning exchange research project's impacts.

Successful partnerships. Some of the NGO leaders reflected upon what have been successful and unsuccessful partnerships with other NGOs. One leader described an experience that did not succeed; in her mind, the other organization's power, funds and human resources were inadequate for the tasks they were undertaking together. In contrast, a successful partnership effort involved diverse organizational members, multicultural NGOs in Hadar---Russian, Arab, Hebrew, and mixed ethnicities--- whose organizations' missions were not in competition with each other. While not easy, after two years, the group of NGOs together built a successful collaboration. This leader reflected that, in her opinion, short term coalitions work best. Also, she said, having an external precipitant, such as a public policy that is potentially harmful to poor people, galvanizes the creation of coalitions and partnerships among NGOs.

Power of collective reflection and learning processes. Non-competitive, mutually supportive, trust-building experiences, through the bi-national in-person seminars and long distance videoconferences, as well as the

Haifa-based peer support reflective sessions, have led to solidarity among the NGO participants. *"It is not just working together, it is also learning from one another. The work is not being done in a vacuum and partnerships are essential..... We see the whole world as one place because of our similar aims"*, said one NGO leader. Women leaders of NGOs expressed that belonging to a group like this "a sisterhood" (could) give them strength and help them sustain themselves in this work. *"The best learning is really internal and personal"*, reflected one participant. *"For me too the personal was most important,"* said another.

Strong foundation for cohesion and trust among NGOs in Haifa and Boston. The five partner NGOs were thirsty for connections and cooperation with each other and other local organizations. They suspended competitive urges and allowed a deep level of trust to develop among themselves and the research team. As a result, during fall 2007, in partnership with the Boston-Haifa Social Justice/Civil Society Committee, these five leaders have recruited other social change and service NGOs to an expanded learning exchange network that includes both Boston and Haifa-based NGOs. In addition, the Haifa-based NGOs have together created a Haifa social change forum, housed at the CVO. *"The new work with the CVO is so much easier now that trust has been built...it would have been harder without the learning exchange research project—it's much easier to get to common ground between the leaders. There's no barrier that the other organization will be trying to steal credit for successes,"* said one of the NGO research participants in a follow-up phone interview.

Learning Organizations

The Learning Exchange Research Project served to generate knowledge and power related to the NGOs as learning organizations. The project is itself an example of an activity that learning organizations might choose to engage in, including partnership building, reflection, and evaluation of organizational programs and processes. A learning organization is one that allows itself to look upon its daily functioning, one which identifies its own weak and strong points, and that allows itself to grow as a result of learning from past experiences, and to gather knowledge, and new skills.

Benefits of being learning organizations.

The topic of learning organizations was explicit (the topic of a specific session) and implicit in that participation in a learning exchange (the setting) is something that a learning organization would see as a worthwhile investment, as a tool for building organizational capacity including promoting sustainability and defining and prioritizing effectiveness and efficiency. One participant stated that the power of being a learning organization for her lies in *“making the intuitive into something we know and*

use...some of our successes are dependent on me and my personal connections and I want to make these into a system, a model, not just a personal tool or random achievement.”

Strategies for ongoing organizational learning. Learning exchange participants expressed an interest in and commitment to being learning organizations despite the barriers that exist to doing so. They shared examples of how they already function in this way, even though they may not have specifically named it as such: *collecting knowledge from the field and from the voices of people who might not otherwise be heard; consciously investing and applying what they learn in their organizations; being flexible in working with diverse and shifting partners; and engaging in reflective and evaluation processes, although many partners reported that these were done in part as fulfillment of external expectations (for funders, for example) as opposed to being a proactive and intentional choice.* As part of the final evaluation and interview process, participants consistently identified ongoing organizational learning as being one of the places they expect to see significant and long-lasting change.

Criteria of Learning Organizations as identified by the learning exchange partners are those activities and attitudes that contribute to energy, commitment, desire, and capacity to work for individual and collective good in organizations and in society in general:

- *Individual transformation by employees and volunteers as well as "clients"*
- *Recognition that real learning is a process that takes time*
- *Mutuality*
- *Openness to change and vulnerability*
- *Reflection processes part of organizational culture*
- *Democracy, dialogue, and equality*
- *Honesty*
- *Inviting debate by many voices*
- *Thinking in the "wider, global" sense, not just getting stuck in our own day-to-day problems*
- *Creativity*
- *Risk*
- *Courage*
- *Challenging the comfort zone*
- *Be open to learning from other organizations (who some might see as in competition with us)*
- *Constructive criticism*
- *Nourishing the whole person*

Otherness in NGO work

Themes of "Otherness" from this study relate to concretely dealing with diversity in NGO work and to the diversity issues that came up through the course of the Learning Exchange Research Project itself. Participants expressed the desire and hope for continued cooperative work in this area. For example, *"I would like as a next step to examine some universals to tease out that can ground us. This experience has sensitized us to the diversity we each deal with in the relationships we're in, in our home communities."*

Multi-level dimensions of diversity.

Participants identified common parallel phenomenon and strategies for dealing with diversity between themselves as leaders, their organizations, and the communities within which they function. These included complexities of working as or with minority populations; dealing with culture, class, gender, and ethnic diversity conflicts; challenges and opportunities related to multi-lingual and multi-cultural dynamics; and the role of power in all of these. Participants also voiced that the need to deal with discrimination comes up not only between one group and "the other", but also within their own communities and organizations. For example, *"Even within the organization we aren't all the same. For me it's all about if the other accepts me as equal - then I don't have a problem. All of us in the organization need guidance here...I try to make my staff aware of this - of course there are also discriminated people who discriminate against others. I feel that if each person knows her/himself, this would help so I try to work with them on this"*. One leader described dealing with tensions internal to a particular community, factors which can be just as detrimental and challenging as external discrimination and which can split a

community, seemingly united by a common identity characteristic, but actually highly sensitive when it comes to lines of religion, class or sexual orientation.

The global and the local. That participants wanted to deal with these issues was seen through their choice of topics for sessions and the directions the conversations took within the various workshops. Several leaders spoke of "otherness" in a global context and saw the learning exchange as an opportunity to learn from others *"by moving back and forth between the global and the local."* Another participant stated explicitly, *"it would also be wonderful if we could get into more depth when talking about the challenges and opportunities of working cross culturally in each society - where the opportunities lie, what the barriers are, what the intersection of class and culture looks like..."*.

Power inequities. The group explored power inequities related to culture, gender, race, and/or class issues in NGO work in specific sessions and informal conversations. Some questions and issues that leaders raised included:

- *How can one lead a community if one is not a member of that community?*
- *How do "realities of prejudice and identity appear globally in different forms? You sort of know this, but it still strikes me when you talk about the concrete experience."*
- *What are our contrasting realities and how can we learn from them? How does the system's response shape the reality of the "problem" or "challenge"? How is that different in different cultures and communities?*

The Dynamics of Social Change and Service Work

How to negotiate between social change and service was of central concern to both Boston and Haifa NGO leaders. NGO leaders spoke to the tension between these dimensions of their work in terms of their personal values, the organizational missions, and contradictory calls from different stakeholders, some of whom prioritize service, while others prioritize social change.

Commonalities of experience between Haifa and Boston NGOs. Often repeated during research and learning exchange sessions were questions and musings on how to maneuver this balance well and an expressed interest to further learn about and explore this topic from actual field case studies. For example, a written reflection collected after the first in-person learning exchange seminar read: *"I was surprised by how quickly the group came together and how we were able to speak the same language around both the tension and the positive relationship between social change and service. This made me feel like we have a lot to build on together."*

Organizational flexibility. Haifa NGOs find themselves needing to be intentionally flexible in their positioning on the social change/service spectrum. In the past, some of these leaders worked from one particular position on the continuum. If they did vary from their usual stance, that is, providing some direct service rather than engaging solely in social change

work (or the opposite), it was in reaction to an external force and possibly even in opposition to the organization's central mission or values. These leaders have recently adopted a more flexible and functional stance on whether and how to combine service and social change activities in their organizational work.

Service and social change work as complementary. Participant leaders gave concrete examples from their work on how balancing service and social change goals and activities actually enhances, practically and ideologically, their organization's ability to do both of these well, even when at times these may seem to be at odds. They expressed a sense that service and social change activities are complementary and that doing both strengthens the organizations, the activists themselves, and their organizations' potential for achieving their fundamental objectives.

"We have to give services in the community to really make change there. What the proportion should be should be decided by each organization and be dependent on outside circumstances.... On the other hand, only providing service can be frustrating to people, leading to burn-out in organizations and so we need a social change/big picture message to support that work. Also, more and more funders want to know what the change element in work is, they are no longer satisfied only to give charity and we as directors need to address those goals."

CONCLUSIONS

The pilot project of Participatory Action Research methodology, combined with a learning exchange, intentional reflection, and community building opportunities, as described in this report, offers a powerful model for engagement between the third sector and academia, locally and internationally. Such partnerships have the potential to be mutually beneficial. That is, academic partners can facilitate documentation of valuable learnings from NGO practice and leadership experiences; such grounded learnings can lead to knowledge generation relevant for public policy and for strengthening the third sector. The project also demonstrated the power of the connection between academia and the non-profit sector through the contributions of graduate students who, while providing valuable services to the NGO participants, developed research skills via hands-on learning, apprenticing with their professor and the project manager.

Several limitations of the research are evident to the research team and NGO leader participants. First, while the research included organizations that work with some of the populations most affected by poverty policy in Haifa, organizations serving ultra-orthodox and some members of the Arab minority were underrepresented in the study. A second limitation was that the project engaged a relatively small number of organizations and

leaders, for a relatively short period of time. Linguistic variations and distance were also challenges to the effectiveness of the learning exchange and to the depth and ease of communication among participants. Deliberative attention to devising strategies for overcoming these barriers, such as cultural and linguistic translation and use of video and internet technologies, was needed and utilized throughout the project.

The success of the model appears to be related to the combination of in-depth organization-specific consultative research, in concert with the bi-national and Haifa-based peer-learning exchange project components. Given that organizational change takes time, consultative follow-up with individual organizations and the group, as a collective, are important for ensuring lasting change. In this regard, the five organizations' involvement in the next phase of the bi-national learning exchange, as well as the social change forum being facilitated by the CVO, will be of great value. Clear evidence of the effectiveness of this model remains to be seen as the NGO participants move forward in their leadership roles and as they join with additional NGO, government, business, academic and community colleagues to ameliorate Haifa households' social and economic hardships.

Background resources:

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