Grant Development Document – **BRANCO WEISS AND JOINT ELKA** – Education in Arab Municipalities [draft, 1/9/22]

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| Internal Information | | Grant Information\* | |
| Area and Subarea | Mixed society, Arab society | Organization Name: | Joint ELKA |
| Leader: | Shmuli | Contact person and role: | Uri Gil, ELKA Director  Aviv King, CEO Branco Weiss |
| Type of grant: | A/B | Grant amount (write the amount in NIS and the dollar amount in brackets): | 25,000,000 ($7.5 million) |
| Type of goal: | Impact/general support/learning/relations | Percentage of the guaranteed budget that Schusterman is covering: (if it’s a multiyear grant, calculate according to the annual grant amount): | 25% of the project budget |
| 9.% of the organization's budget |
| Around 50% from philanthropic funding – but this still needs to be confirmed |
| Stage in the process: | A1/B1 or A2/B2 | Grant duration: | 5 years |
| Sub-portfolio budget | $8.5 million | Start date: | 9/22 |
| % of the budget that is still to be used (including the current grant on the assumption that it is approved): | 25% | Is the grant derived from the planning document – strategy implementation (A0/B0) | Yes/no (please circle) |
| Conflict of interests: | Are there any? If so, please explain. | Grant number: | R-22-21382 |

Part A – Grant Content

1. Goals

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| Foundation Goals |
| Impact (societal results):   * Advancing Arab society (see project goals). * Significant contact with Arab society, mainly local authorities, who are key players in any future strategy. |
| Project Goals |
| 1. Building capabilities in the area of education in 19 Arab municipalities – in the municipalities where we work there will be an optimized work routine with a holistic educational perspective that will result in the establishment of an active and initiative-taking educational division that effectively and strategically manages the municipal approachto education, and pools all the existing resources in the city. 2. Promoting direct impact on the area of education in 19 Arab municipalities – each will have an assessment/metrics program (after carrying out mapping) that will define specific goals in the following parameters:  * An increase in the number of participants in educational activities and informal education. * An increase in Ministry of Education metrics for every age group (school efficiency and growth metrics, eligibility for matriculation and quality matriculation, PISA (Program for International Assessment)). * An increase in the mobility metric in the local authorities where the program operates. * Actual development in at least 80% of the classrooms allocated in the municipalities where we will operate. |
| Assumptions |
| * The local authority is the institution with the greatest potential for impacting the lives of the residents. * Today the local authorities have a significant role in the potential for change, but the vast majority of Arab municipalities aren’t capable of carrying out their role in an optimal way. * There are Arab local authorities with the ability to create change. * A support process of three years makes it possible for the municipalities to generate changes that will continue after the end of the project. * Branco Weiss is a key player that can lead the process. * A joint initiative that includes the state as the owner but not as the operating body is a good way of managing this initiative. On the one hand, it possesses the state’s authority vis-à-vis the local authorities and on the other hand, it allows for the inclusion of other qualified and efficient contributors. |
| Success and Failure  Success – The municipalities that join the project will improve in the different metrics in comparison with the municipalities that don’t join.  More municipalities will want to join the project.  The Ministry of Education wants to expand the initiative and its methodology to additional municipalities and for a longer time.  Failure – The project shows no significant signs of success in the selected municipalities.  There is no demand to join the initiative and it closes as a result. |

1. The Project

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| Project Description |
| A joint initiative of the State of Israel and ELKA (Joint). The initiative is a five-year program with a cost of NIS100,000,00, with 75% of the funding to be provided by the state and 25% from philanthropic sources. Schusterman is providing the main philanthropic support for the initiative, with additional funds to be provided by Yad Hanadiv and Crown Family Philanthropies, who will fund Branco Weiss’s organizational infrastructure without formally becoming part of the initiative.  ELKA has chosen (with prior agreement) Branco Weiss as the initiative’s operating body. The initiative will be managed by Branco and will be supervised by a steering committee made up of representatives of the Ministry of Education, ELKA, the Schusterman Foundation, and the committee of local authority heads. Branco Weiss is establishing a unit that will specialize in working with a city and will work with the eight chosen municipalities (eight in the first year; this will increase over the years until there are a total of 19 municipalities).  The model’s areas of activity are:   1. Advancing a local authority policythat supports mobility. 2. Building infrastructures, management mechanisms, and capabilities at the municipal level. 3. Strengthening the municipalities’ ability to realize existing and external resources. 4. Nurturing and growing local educational leadership.   There are shared milestones for all the municipalities, but each municipality, after the mapping project, will have an individual project plan. It is important to note that, beyond capacity-building, following Government Resolution 550, the State of Israel will invest significant sums in Arab education. Capacity-building will be an effective way of increasing and effectively using the state’s resources that will be allocated to Arab society (with an emphasis on building, but not only).  Besides infrastructure investment and capacity building of the chosen municipalities in the area of development, services will be extended to additional municipalities. This means that close consultation will be provided only to the chosen municipalities but development services will also be offered to other municipalities. |
| Grant Renewal |
| The grant came out of Large B grants. The grant originated from a grant of a million dollars per year for three years that was supposed to be given to Branco Weiss for working with three Arab municipalities.  Based on the understanding that a joint initiative would be launched, we approved an initial grant of a million dollars, of which $160,000 has been paid. We approved the first payment in order to pave the way for the first municipality, and a small-scale pilot has begun with the Reineh local authority. Over the year we tried to reduce the transfer of the grant out of an understanding that the money would need to be given to ELKA for the joint initiative and not to Branco. Essentially, the renewed grant is for $7.5 million minus $840,000 left over from the original grant, i.e., this grant is “new” funds of $6,660,000. |
| Project Budget |
| Attached is the document that was approved by the Joint’s Board of Directors and the Accountant General. This is the initial document that will serve as the basis for changes both at the outset of the project and during its operation. This document has also already seen shifts in the placement of the original clauses.  The general outline:  Each municipality will have a full-time project manager.  Each municipality will receive around a million shekels per year for activities.  Groups of four municipalities will be accompanied by an expert in municipal education (former educational division director).  Each municipality will be accompanied by a staff team that will include a development director, an informal education director, and a data director.  Each municipality will be accompanied in the above manner for three years.  Three tables are attached:  Table 1 – the entire initiative, including ELKA’s costs.   |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Program Costs ( NIS) | | | | | | | | Number Of Municipalities | 8 | 11 | 15 | 19 | 19 |  | | Clause | 2022 | 2023 | 2024 | 2025 | 2026 | Total multiyear budget | | Program management and coordination (project manager for each municipality and ELKA staff managers) | 1,200,000 ₪ | 2,773,000 ₪ | 3,403,000 ₪ | 4,033,000 ₪ | 4,033,000 ₪ | 15,442,000 ₪ | | Activities – flexible funds. On average one million shekels following the preparatory year. | 3,363,000 ₪ | 12,558,000 ₪ | 16,078,000 ₪ | 20,772,000 ₪ | 25,465,000 ₪ | 78,236,000 ₪ | | Research, metrics, and evaluation | 350,000 ₪ | 350,000 ₪ | 350,000 ₪ | 350,000 ₪ | 350,000 ₪ | 1,750,000 ₪ | | 5% overhead | 246,000 ₪ | ₪784,000 | 992,000 ₪ | 1,258,000 ₪ | 1,492,000 ₪ | 4,772,000 ₪ | | Total | 5,159,000 ₪ | ₪16,465,000 | 20,823,000 ₪ | 26,413,000 ₪ | 31,340,000 ₪ | 100,200,000 ₪ | |

Table 2 – This shows the amounts that will be transferred to Branco. The overhead clause in this table is canceled and has been moved to the program management and coordination clause. (The Branco Weiss Foundation will give around one million shekels a year for the initiative’s operating costs. Beyond this, Branco Weiss’s operating costs and the costs of the general envelope will be from the Yad Hanadiv grant as explained in the following table).

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| Clause | 2022 | 2023 | 2024 | 2025 | 2026 | Total Multiyear Budget |
| Administration | 400,000 ₪ | 1,650,000 ₪ | 2,250,000 ₪ | 2,850,000 ₪ | 2,850,000 ₪ | 2,850,000 ₪ |
| Operations | 3,203,000 ₪ | 11,960,000 ₪ | 15m313m000 ₪ | 19,783,000 ₪ | 24,253,000 ₪ | 74,512,000 ₪ |
| Overhead | 180,000 ₪ | 681,000 ₪ | 878,000 ₪ | 1,132,000 ₪ | 1,355,000 ₪ | 4,226,000 ₪ |
| Total | 3,783,000 ₪ | 14,291,000 ₪ | 18,441,000 ₪ | 23,765,000 ₪ | 29,485,000 ₪ | 88,738,000 ₪ |

Table 3 – This table shows the Branco Weiss staff budget. The entire staff is funded by Yad Hanadiv. At the moment the grant is for two years with an option to be extended to five years if the project meets its targets.

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| Role | Number of Positions | Name of Position | Funding | Grant Budget |
| Senior staff positions | 1 | Initiative Director | Yad Hanadiv grant | 400,000 |
|  | 1 | Municipalities Coordinator | Yad Hanadiv grant | 400,000 |
|  | 1 | Informal | Informal initiative |  |
|  | 1 | Development | 75% the state/25% Schusterman |  |
| Experts on local authorities | 2.5 |  | Yad Hanadiv grant | 1,000,000 |
| Management |  |  | Yad Hanadiv grant | 100,000 |
| Administration |  |  | Yad Hanadiv grant | 350,000 |
| Management + BI system |  |  | Yad Hanadiv grant | 470,000 |
| Consultants + flexible funds |  |  | Yad Hanadiv grant | 605,000 |
| 5% overhead |  |  | Yad Hanadiv grant | 175,000 |
| Total |  |  |  | 3,500,000 |

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| Partners and leverage |
| A joint initiative with the state led the state to invest NIS 75 million, without reference to the capacity to leverage the funds of the five-year education program. In addition to the initiative, the Yad Hanadiv foundation is giving NIS 7 million with an option of an additional NIS10.5 million. For three years, Crown Family Philanthropies will also provide $1.5 million for excellence in cities. There are also discussions with other groups about joining the initiative. |
| Weaknesses |
| 1. Aviv initiated the project but will he be capable of developing a capacity-building project? 2. Branco Weiss doesn’t have any significant prior experience in working with local authorities. 3. Branco Weiss doesn’t have significant prior experience in working with Arab society, and there are reservations about these funds going to a Jewish organization. Currently, the number of Arab staff is relatively small. |

1. Milestones, Metrics, and Evaluation

**Initiative for Supporting Arab Municipalities in the Area of Education as Part of 550**

**Metrics for the First Two Years**

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| Area | Supervisor | Explanation | Metrics | Implementation Timetable | Base Line |
| Mapping the intra-municipality work. | Municipal project manager. | Mapping the municipality’s work method in between 10 and 13 areas that form the basis of the authority and responsibility of the director of the educational division and the educational division[[1]](#footnote-2) in the municipality. The mapping will find where every level of responsibility is located: authorized action, authorized action to advance policies, and unauthorized action to advance policies. | Full mapping of 90% of the municipalities. | Within four months of the initiative being taken up by the municipality. | The municipalities haven’t done any mapping of their capacity according to the areas of authority. |
| Mapping educational systems data and its results. | The municipal project manager with the help of the BI system. | All of the external data for municipal operations that relate to the quality and output of the education system that were measured continuously and externally: dropout rate, formal achievements, movement between schools and between municipalities, etc. | 100% of the municipalities. | Within four months of the initiative being taken up by the municipality. | In some of the municipalities the data is only partially available, some of them are based on the educational data from the PMO. None of the municipalities have a full and accessible picture that can form the basis of a work program and decision-making. |
| Use of the BI system that finds expression in the two mapping aspects (internal and external). | From the BI institute at Branco Weiss and Branco Weiss staff. | The BI institution develops a system that doesn’t currently exist that allows the local authorities to manage the education system using up-to-date and relevant data. | Using the system (including training) in 70% of the municipalities. | At the end of the first year the municipality joined the initiative. | This kind of system does not exist in Israel today. |
| Operational plan for strengthening the building of management infrastructure in the municipality. | Experts on local authorities, the municipal project managers, and the initiative’s head of administration (the master plan will be presented for approval by the head of administration). | The program will be built based on mapping the municipality’s capacity. This will be used to set the municipality’s metrics and targets for areas in its statutory areas of responsibility. | An operational plan will be built for 90% of the municipalities. | Within a year of the municipality joining the initiative. | There is no data-based regularized operational plan for strengthening the capacity of local authorities in the area of Arab education. |
| Building an operational plan (local authority masterplan for education). | Experts on local authorities, the municipal project managers, and the initiative’s head of administration (the master plan will be presented for approval by the head of administration). | Completing the local authorities masterplan from infancy to higher education, including informal education. The program is reliant on the results of the mapping, including the municipality’s targets – distributing funds according to priorities, planning main projects, etc. | A local authority master plan for education will be built for 90% of the municipalities. | At the end of the first year the municipality joined the initiative. | Some of the municipalities (according to our estimates a small minority) have comprehensive, strategic operational plans that don’t deal with implementation. |
| Implementation of the operational plan with flexible funds (unique component)[[2]](#footnote-3) | The project manager with close support from the experts on local authorities. | As derived from the master plan, flexible funds will be allocated for the implementation of the unique component in the master plan (for example, infancy, excellence, and guidance towards higher education). | For 100% of the municipalities (also for those where the master plan isn’t completed). | Until the end of the second year after the municipality has joined the initiative; use of the resources by the end of each work year. | This is a new resource that the municipalities don’t currently have access to. |
| Using state budgets in informal education | In municipalities where there is full involvement – the project manager is supported by the experts on local authorities. In the other municipalities – the local coordinator is supported by the area director in partnership with relevant figures from the municipalities. | Building an operational plan for informal education: providing a response and using budgets optimally and cohesively for the needs of the schools and the municipalities. | 50% of the municipalities will have an informal education operational plan. | By the end of November 2022. | It's not possible to make a comparison with the current situation because of the change in the way funds for this area are transferred. The estimate (in light of Conclusions 922) is that there will not be an informal education operational plan without this initiative. |
| Training core coordinators,[[3]](#footnote-4) school principals, and the director of informal education in the districts for building and implementing an operational plan. | The director of informal education and regional informal education directors, with relevant partners from the Ministry of Education. | 1. This is a new framework and new skills for all involved; therefore training is required for the educators.[[4]](#footnote-5) 2. All of the participants in the training will do a self-capability survey before and after the team training. | 1. Representatives from 70% of the municipalities will participate in around 70% of the training.  2. An increase in the capabilities of the different officials in carrying out their roles. | By the end of November 2022. | Before the start of the initiative, the Ministry of Education plans to train the core coordinators with a narrow scope featuring Injaz’s Education Sub-Committee and the Committee of Arab Local Municipality Heads who are active in this area. |
| Educational leadership | Director of the municipalities in the initiative administration. | 1. Every municipality will build a leadership group with figures from the municipality and the different educational institutions and will train them in order to nurture educational leadership in the city. 2. The training process will be accompanied by evaluation surveys for the program participants, before and after the training, dealing with professional issues and measuring self-capability. | 1. Currently a total of eight groups per year, every year, throughout the initiative. 2. An increase in perceptions, positions, and practices among the participants before and after the training program. | From the start of the 5783/2022 academic year and afterward. | Different training frameworks do not have a similar scope or similar content as this program. |
| Developing work tools. | All of those involved in the initiative’s administration. | Developing a work model to implement the initiative: internal mapping of the municipality to examine its capacity, mapping the education system, formatting an internal operational plan, formatting a masterplan for education in the municipalities, tools for qualitatively measuring the municipality’s operational plan, formatting operational plans for informal education, schools, and municipalities. | The work model will be developed fully. | To be developed until September 2022 and updated before the start of the 5784/2023 school year. | Apart from this initiative, this type of format does not exist. |
| Initiative administration - digitalization | Responsibility for teleprocessing at Branco Weiss. | Managing the initiative using a digital system that tracks the progress of the different municipalities in the different aspects of the initiative.[[5]](#footnote-6) | 100 percent implementation. | Development is to be completed by the end of December 2022 and to be implemented in 2023. | This kind of system does not exist. |

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| Evaluation and Metrics |
| There is currently a budget clause of NIS 350,000 per year that is assigned to ELKA. On the face of it, the fact that evaluation is the responsibility of ELKA isn’t problematic since ELKA isn’t the operating body. Yad Hanadiv also wants to be involved in evaluation – this is a condition for the grant’s continuation. This issue needs to be discussed more. This should be discussed in the steering committee in order to decide who will carry out the evaluation and how. |
| Milestones, Evaluation and Assessment |
| There are clear assessment objectives in terms of inputs for the first year. We will continue to develop inputs and outputs for the rest of the initiative. |

1. Grant Management:

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| Participation, Accompaniment, and Advising | |
| We will be on the initiative’s main steering committee and we are debating whether to also be part of the steering committee of every municipality or only some of the municipalities where the initiative is in operation. We will decide after clarifying the strategy.  If the municipalities will be chosen as a strategic area, we will be very involved with the initiative. In general, today, as part of the initiative, we have a significant role vis-à-vis ELKA, the Ministry of Education, and Branco Weiss, and we are very involved in decision-making and plan to continue to be involved. | |
| Risk Management | |
| Risk | How to Manage the Risk |
| Too much dependence on Aviv. | Establishing a separate quality mechanism. |
| Aiming for immediate results instead of capacity-building. | Work according to the operational plan and during the first year of work on infrastructure inputs. |
| Opposition from Arab political figures. | The committee should be part of the steering committee and should be involved in the choosing of municipalities. |
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| Exit Strategy | |
| A joint five-year initiative. Currently, there is no talk of continuation. It’s clear to everyone that this is a relationship of five years. | |

1. Main Questions:

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| * How strongly to insist that ELKA reduce overheads? * Is it our role to check the management of Branco’s mechanism which is funded by the Yad Hanadiv grant? * How to check that the steering committee will work effectively in all its aspects? * How to check that there will be few political obstacles from Arab society? |

Part B – Additional Details

1. The Organization

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| The Organization - General |
| JOINT ELKA works to maximize the ability of public systems in Israel to provide social services to the residents of the State of Israel in an efficient and effective manner.  Together with partners in government, local and regional authorities, and the civil and business sectors, ELKA works to identify system challenges and to drive change processes to improve them.  ELKA was founded in 1984 and focused initially on leadership development of senior public civil servants on the national and local levels and in civil society. As leadership development became commonplace, ELKA sought new ways to apply its assets and professional experience to strengthen Israel's ability to serve its residents. After a strategic planning process in 2017, it entered into a new government partnership focused on improving public system efficiency and effectiveness.  In 2021 the Israeli government signed a second 5-year contract with ELKA to continue its partnership for tackling system challenges. The new contract brings the total number of partner ministries up to 10. These are the Ministries of Finance; Interior; Economy; Social Affairs and Social Services; Health; Education; and Social Equality; the Prime Mi NISters Office; National Digital Authority, and the National Insurance Institute.  Staff:  Today JOINT ELKA employs more than 60 staff.  Ori Gil, CEO, JOINT ELKA  Ori Gil became CEO of ELKA in May 2021 after a two-year stint as Deputy CEO and serving as Head of Cross-Sector Collaboration. Through his nine years in JDC ELKA Ori has been responsible for initiating and leading diverse partnerships between government and civil society aimed at strengthening shared work capabilities, cultivating networks of change agents, leading innovation in the public sector, and more.  Prior to joining JOINT ELKA, Uri served as a strategic consultant to the BDO Group where he advised an array of private and public organizations.  Netta Rozenfeld, Head of Resource Utilization  Netta joined JOINT ELKA in 2016 after a five-year stint at JDC-TEVET, where she managed employment and infrastructure programs for Arab society. Netta has accrued considerable experience developing public service programs, promoting multisector partnerships, and working with senior national and local government officials through such initiatives as developing employment centers in East Jerusalem and training the staff that established the Western Negev regional cluster.  Netta was involved in the process of drafting Government Resolution 3790, a two-billion-shekel initiative to improve education, economic development, and infrastructure in East Jerusalem, and the creation of the procedures needed for its implementation. Prior to joining JOINT ELKA, Netta worked at Motorola South Israel where she was in charge of the company’s Division for Business Management, Skills Training, and Corporate Responsibility. |
| Organizational Budget and Income Sources |

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| **ELKA’s 2022 Budget** | |
| Government Funds | $10,750,000 |
| Philanthropic Funds | $5,112,000 |
| **Total Funds** | **$15,862,000\*** |

\*ELKA’s main donors: Russell Berrie Foundation, New York Federation, Wohl Foundation, Weimar Foundation, and other donors.

1. Prior Grants

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| Details of past grants that were awarded by the foundation | | |
| Grant Total | Approval Year | Project |
| $45,500 | 2021 | Support to students in schools for youth at risk to prevent dropout - COVID-19 |
| $1,000,000 (see above for an explanation and details of the actual figure) | 2022 | Education in Arab municipalities |
| Additional Comments | | |
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1. Statutorily, the local authority is responsible for education in the following 13 areas: registration and assignment of students to educational institutions, transporting students, recruiting and assigning management: secretariat, assistants, building maintenance, construction, equipment, security at educational institutions, opening and closing educational institutions etc. [↑](#footnote-ref-2)
2. The workplan will be measured qualitatively each year by a tool to be developed by the head of administration. [↑](#footnote-ref-3)
3. \*Please note – according to the original program we are only supposed to operate in the informal education arena with authorities who are a full part of the program; and to begin operating in September. This goal is based on widening the informal education arena to all the authorities and beginning work immediately. [↑](#footnote-ref-4)
4. The funds for informal education in the first year of 550 will be handled differently than they have been handled up to now. The funds that will be delivered in the grapevine system in informal education will require all of following to be realized in the system: mapping, presenting a workplan, meeting goals and metrics etc. Therefore, we intend to learn the Ministry of Education’s planned transfer mechanism and to base the training program upon it, so that it will support the mechanism. [↑](#footnote-ref-5)
5. The initiative administration will ask to examine the progress of the authorities in their internal and external workplans in relation to the metrics and the targets. [↑](#footnote-ref-6)