IN THE BUSINESS OF DOING GOOD

EFFECTIVE RETURN ON DONATION (ROD) MECHANISMS IN PHILANTHROPY AND IMPACT INVESTING

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Submitted by: Molly Globus, Student Number: 2239984

Prof. David Adams

Prof. Jonathan Garnett

Middlesex University – Institute for Work Based Learning

Hendon Campus, The Burroughs, London NW4 4BT, U.K.

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Executive Summary

The Business of Doing Good is not made up of organizations but people. People bring change, substantial change to society as a whole as well as individuals.

I was born in India and saw severe injustice that affected me profoundly. I vowed to myself that a day would come and I would do my share to contribute and leave behind a world that is a little bit better than I found it.

After a few good years in the business world, I received the opportunity to establish and run two philanthropic foundations that operated in a large variety of areas like science and medical research, K-12 and higher education, leadership, environment and social issues and managed over $10M a year with philanthropists that preferred to enjoy the fruits of their giving by seeing actual bottom line results and change rather than having their names on a plaque.

In the work that follows, I would like to demonstrate to you that it is possible as well as highly recommended and essential to run effective philanthropic organizations with tools from the world of business and just as businesses are profit oriented through Return on Investment (ROI), philanthropies can be impact oriented. Just as the investor in the world of business looks for the ROI, the donor can look for the unconventional bottom line, and measure impact of his giving through Return on Donation (ROD). ROD is a phrase I coined to represent measurable impact just as ROI in businesses.

I also realized that just the tools from the business world would not suffice. Something additional was missing and needed to be an integral part in order to succeed in impactful giving.

Since I entered the philanthropic world, this Business of Doing Good, as I term it, I have gradually evolved with an understanding how successful philanthropy and impact investing should look like. This paper is centered upon my journey, my successes and failures and my insights after eighteen years of constantly evaluating and reflecting on this question.

This search warranted that I develop proper research methodologies within my own organizations that would lead us to achieve objectivity, reliability and validity for our work processes, so we could learn and grow from it. All this while understanding that in philanthropy we act as change agents and as such we affect people's lives. Therefore, the most important rule to follow is to – Do no harm. The second rule is to – Do your best and in order to be objective as possible the third rule is – Practice Humility.

As a believer in leading by example, and embracing my role as a First Person Action Researcher in the process, I set to explore if business practices that led to ROI could be incorporated in the Business of Doing Good by means of ROD and to understand what ROD mechanisms needed to be put in place for successful impact and sustainability. In the scope of my work, although I have vast experience in a variety of fields, I have chosen to concentrate on two main examples which are in the fields of leadership and education.

During my years of practice, I was on a quest to seek counsel of philosophers like Spinoza and Aristotle, psychologists and social influencers like Maslow and Tom Friedman and many other authors, who have given us management models in the field of business. I have studied a wide range of research methodologies that have developed over the years. All this together with my own inner compass and my personal experience, have led me to build effective mechanisms for ROD in philanthropy and impact investing.

Based on a solid intention over the years to find a mechanism for effective giving, there has been a process of knowing, and I have developed a model which I call the Goodness Factor

Model, which has been tested and proven to be the most effective tool for practicing effective philanthropy and impact investing.

To all philanthropist, donors and managers in the third sector, I invite you to benefit from this paper so you may utilize the resources that you have in a distilled and refined way and achieve the quantum impact toward your vision and goals.

Chapter 1: Introduction

Since I entered the philanthropic world I have been debating this one question: How is it possible to bring impact with every dollar spent, building an effective, impactful and sustainable organization. This has been my struggle for the past 18 years. Coming from the business world, where success and failure are well defined and measured by a very clear bottom line of profit and loss, I realized that there were no equivalent tools in the philanthropic world. As I struggled to define and advance the philanthropic endeavors under my leadership, it became apparent that there are similarities between the two worlds, the business world and the philanthropic world. Yet, the measurement and the bottom line needed to be determined in a totally different way. This has been an ongoing process, where alongside the philanthropic giving, I, too, have evolved with an understanding of what success for philanthropy and impact investing should look like and what are the mechanisms that will lead to success. This paper describes my journey into the Business of Doing Good, my success, my failures, and my insights after 18 years of constantly evaluating and reflecting upon this question.

"A musician must make music, an artist must paint, a poet must write, if he is to be ultimately at peace with himself. What a man can be, he must be". (Maslow and Frager, 1987, p.46)

As discussed by Maslow, self - actualization is the highest drive in the hierarchy of motivation, in a person's life. But, before a person can reach this stage, he or she much satisfy other lower motivations, like hunger, safety and belonging.

I was born in India and witnessed severe injustice, poverty, and inequality, and vowed to myself that a time would come, and I would be part of changing this injustice in this world, even if the life of one person be changed; my life would be meaningful. As written in the Talmud "He who saves a life is as if he saved an entire world" (Misnahe Sanhedrin). When I entered the world of philanthropy and impact investing, I realized that just like Maslow's pyramid, I had taken care of all my basic needs and was now being given the opportunity to enter the self-actualization stage.

At the age of 18 years, I embarked on a personal journey, leaving India and landing in Israel. I came to Israel with seven dollars in my pocket and a desire in my heart to lead a life of freedom and achieve my dreams, personal and professional. I knew that in India I will be restricted by our tradition and way of life. Since childhood, I heard about Israel, as my parents always talked about it as a land of our forefathers. Arriving to Israel, I started building my career and my personal life, first as human resources manager overseeing the employment of over 800 employees. After a few years, I switched to a leading company, a pioneer in its industry, in the field of communication and information technology. My position as the right-hand person of the owners of the company enabled me to gain experience in multiple areas, including: business strategies, human resources, business development, project management, and the like. At that time, I also achieved my bachelor's degree in hospitality and business administration. Within the next few years, I was able to grow as a leader, bringing together my formal education and my business experience. These were very challenging, yet rewarding years. I made Israel my home. I sought to increase my knowledge and experience and was able to venture to new projects. When the opportunity to head the philanthropic organizations of the owners presented itself, I was thrilled.

I started going back to the basics, drawing on my business experience, and using its well defined and proven tools, restructuring the way philanthropy operated. As I explored the philanthropic and impact investing world, I realized that something was missing. A basic foundation for measurement and accountability, which was fundamental in the business world, was almost non-existent in the philanthropic and impact investing world, as a tool for growth and success. This happened at a time when technological changes, as well as life style changes, were beginning to redefine the world as we know it. These changes were impacting all areas, including the business world, as well as the philanthropic and impact investing world, and the world was really moving forward.

I entered this new world of philanthropy with a lot of excitement and felt that I had received a true blessing in the opportunity to be an agent for change to make this world a better place, as I vowed to do in my childhood. But, this was not a dream come true. Despite wanting and dreaming of being in this position, with the ability to advance goodness, this has proven to be a challenging journey. I faced many obstacles and hardships, navigating my work between the feeling of blessing and joy at success versus the daily struggles, while trying to do my very best at any given time, multiplying our impact and spreading the impact of doing good throughout the organization and its operations. One of my biggest struggles was to bring effective and impactful results. It was evident to me that most resources must be allocated and made accessible to facilitate Maslow's insights for those, who are less fortunate. The challenge was how to distribute funds in the most effective way, ensuring that most of the money goes to the cause and not on ineffective expenses, while driving change through society.

The eighties and the nineties were a period of abundance in management theories worldwide, and I found that I had evolved with great managerial capacities as I adopted these theories over time. Using my experience and knowledge, which evolved over these years, I started to shape my management and leadership philosophy as tools to build successful foundations for philanthropic and social impact programs, by intertwining my managerial experience from the business world. To do so, since I believe in leadership by example, I incorporated business' strategies and philosophies in my management style and led the organizations by personal example.

Throughout my career, I led organizations and people, encouraging and rewarding employees to step out of their comfort zone, be proactive and open minded and always setting the next bar for excellence and personal example. This strategy was proven successful time and again, as employees took ownership and paved the way to success of philanthropic and impact investing projects by embracing changes and stepping away from the traditional models of philanthropic giving. We were able to create a change and impact.

I was very committed and passionate about the causes, and it was clear to me that this was a lifetime commitment. Drawing on my business experience, I knew that to realize my vision, I need the right people to be partners in this journey and to drive success. I chose people of high intellect and passion. I chose them very carefully, making sure that they took their roles seriously and were self-motivated and committed to the vision and the cause.

My main task in the organizations in order to achieve the desired social impact was providing vision, decision-making, delegation and follow-up on action items, as we kept the eye on the ball at all times and over a long time (eighteen years so far). I watched myself become a developer of people, focusing mainly on people's strengths, while making stringent demands and taking the time to review performance. All of this, "through a paradoxical blend of humility and professional will" (Collins, 2001, p.13). It is my belief that when a person serves something higher than himself, it gives his life value and meaning. Shifting my focus by leading through humility and professionalism and becoming a mentor and developer of people under my leadership, helped me become a better and an impactful leader.

I would always tell myself, that philanthropy is about doing the right things well but first one needs to know what is the right thing to do.

Under my leadership, we embarked on impactful projects, as I directed a budget of over $100 million, and have led numerous philanthropic initiatives in education, environmental protection, medical research and more, which include:

- LEADERS – Co-founder of a program developing Israel’s next generation of leaders,
- ACADEMICS - Co-founder of a program that promotes higher education as a change agent for students from disadvantaged backgrounds.
- Time to Know - Co-founder and Director of Time to Know, the first comprehensive digital teaching platform, aiming at revolutionizing the classroom of the 21st century.
- Zalul – Co-founder of Zalul - amongst Israel's leading environmental NGOs dedicated to protecting the seas and rivers of Israel. Zalul accomplishes its mission through conservation, activism, research, awareness-raising, and education.
- As President of the two foundations, I planted the seeds for the establishment of:
    - Center for System Biology at Weizmann Institute of Science
    - Center for Stem Cell Research at Tel Hashomer Hospital
    - NIBN: National Institute for Biotechnology in the Negev

Further initiatives, amongst other, include: Save a Child's Heart, First, The Movement for Quality Government in Israel, The Therapeutic Riding Center of Israel and more. In addition, I led the establishment of: The Prostate Cancer Foundation (PCF) and FasterCures in Israel.

Following my years of experience in the philanthropic world, I was presented with the opportunity to act as the chairperson of the Milken Institute in Israel, a founding committee member of the Israel – Korea Chamber of Commerce and on the management committee of "Yecholot" an organization founded by the Rashi Foundation to reduce the gaps in education within the Israeli society. My work led to me becoming a recipient of the honorary "Ometz Prize" 2008, from the Movement for Quality Government in Israel.

As head of two philanthropic organizations in Israel, when Israel evolved as a world leader in science, medicine, new technologies and software solutions, the idea of managing a philanthropy with a passion to do good and yet with a business-like approach, was almost non-existent. For me, there was clearly no other option. For someone like me, who came from the business world, I could not fathom how it was possible to measure impact and success in the philanthropic and impact investing world, without the metrics of good practice. I realized that although the philanthropic world did not have standard measurement of ROI as in business world, there needed to be another mechanism for measurement of success and achievement of goals. I saw the answer in achieving a nonconventional bottom line of ROI, incorporating the business metrics with the philanthropic and impact investing world, under one roof as the Business of Doing Good. I realized that the Business of Doing Good for it to be effective, must develop some type of nonconventional bottom lines to measure impact, just as in the business world, there are measurable bottom lines of profit and loss. I was one of the first philanthropic managers to introduce the concept of leverage and impact. As a pioneer in this field, in Israel, I introduced the concept of ROD (return on donation) that is similar to the concept of ROI (return on investment) as in a business world.

I started by introducing the concept of ROD within my own organization and organizations that I donated to. My style of work and assessing ROD was ahead of time and made projects and institutions feel great un-ease, whether they were in-house projects or whether it was the Weizmann Institute of Science, for example. This was not accepted easily and there were even some cases, where organizations refused to receive our donation, if it meant being transparent or measuring their success against their own predetermined goals and milestones. Some organizations took the money, but did not come up with measurable results, which resulted in our decision to pull out of the projects and stop the funding. Some organizations were willing to cooperate with our request. It was only after they became transparent and measured impact, that they themselves realized, in many cases, that they had actually done very well in view of their own milestones, and knew where their challenges lay and what they needed to change in order to focus on their desired goals and impact. It most cases, as projects continued, the ROD mechanisms that I put in place, started to bring good results and the organizations started using them as a marketing tool to receive additional funding from other organizations.

Soon enough, other donors, who previously would have settled just for a plaque, no questions asked, started to adopt these mechanisms for measuring impact of their giving. In time, it became the gold standard in any form of giving to a large number of donors and organizations that are in the Business of Doing Good. Until then, philanthropy was mostly about philanthropist's writing checks and getting a plaque in return with no transparency or accountability on part of the receiver of the funds.

As I progressed in the Business of Doing Good, I was constantly searching for tools and ways to enhance the effectiveness of our giving. I started diving into our practices and researching for ways to achieve this. I found myself in the position of a First Person Action Researcher, bringing these insights into my day to day conduct. At first, my focus was on practical rather than theoretical objectives. I was able to view my work and the work of others with reflection, humility and professionalism, thereby bringing about transformation and improvement in the way we practiced in view of our mission. My work led to unexpected paths and insights and at the same time came up with challenges. As one of the first in Israel, to introduce the concept of transparency and measurement in the non-profit sector, I was treading unknown waters, and I came up with a lot of resistance, sometimes implicit and sometimes explicit. My core character of ethical behavior and seeking the truth with humility, were the basic characteristics that enabled me to make progress in-spite of the resistance. I was not always successful, but overall, I was very happy with the results and my achievements.

As ROD became the gold standard for philanthropic projects, review and assessment of projects became essential to their success and the continuous process of innovation became part of the Business of Doing Good.

Based on my experience, I also witnessed that insider information and hands-on knowledge, as Carol Costley et al (2010) have addressed, have facilitated in-depth understanding of all the challenges, while providing the opportunity to introduce and exercise innovation and change wherever necessary whereby leveraging dollars donated vs measurable success. In my case, the donors of the foundations I led, who were savvy business men, encouraged transparency and accountability and hoped to see measurable results in their Business of Doing Good, just as they did in their for-profit businesses.

To achieve my goals, I had to practice leadership by example and develop alternative approaches and generate workable solutions to problems. I had to generate effective dialogue among the different levels of the organizations in order to advance solutions. At all junctions, I was involved in self-appraisal and reflective and critical thinking, while accepting support from relevant bodies as needed, to make sure that I was on track. This was crucial, as all the projects that I promoted, impacted people's lives.

As a First Person Action Researcher, I wanted to be sure we were doing the right thing. Since research skills did not exist in our organization, I insisted on developing proper research methodologies within our own organization, and I was a major driver of independent research processes, making sure that we achieved objectivity, reliability and validity in our work processes, while making sure that no unintended harm was done. As ethical dilemmas came up, I made sure they were resolved through dialogue with superiors, peers, subordinates, mentors or other relevant professionals, whose guidance I sought.

I was directly responsible for a budget of over $10M per year, and I directly as well as indirectly impacted lives and careers of thousands of people. I needed to make sure that these funds would be put to good use in such a way that they would reap dividends a few folds to achieve the unconventional bottom line, as I refer to it. This practice was relevant, whether the funding was made in the field of science or medicine, education or environment or any other social impact fields. In the scope of this paper, I would like to explore two main programs, Youth Leadership Development Program, which hereinafter referred to as LEADERS and a Program for Higher Education, which I hereinafter referred to as ACADEMICS, which I led for over ten years.

LEADERS was founded with the aim to locate the youth with leadership potential and to educate them and to give them tools so as to develop in them a leadership of critical, moral and courageous thinking, along with public and communal responsibility and a vision that commends the values of democracy. LEADERS believes that every person is entitled to equal opportunity, irrespective of religion, origin, political standing or gender and seeks that nothing will stand between this goal and its achievement, including economic status.

ACADEMICS is a unique program that promotes education as a change agent for at-risk students from disadvantaged backgrounds, who lives in the peripheral cities of Israel. The program was established in 2001 with the aim of enabling equality for these students in attaining an academic degree. The program accompanies students through high school, military/national service and their BA studies until attaining their degree. In the last decade, ACADEMICS has transformed the lives of its 2,350 students and their families in the peripheral cities of Israel. At ACADEMICS the belief is that education is the greatest equalizer and given the opportunity, every child can succeed regardless of their socioeconomic background. The program seeks to improve society as a whole by leveling the educational playfield and empowering at-risk students to earn an academic degree.

I developed tools so the organizations, under my management and impact, would have a clear mission, vision and set of values to make sure that we stay true to the organization's goals. I made sure to incorporate effective ethics because I believe that ethics strengthen performance and help uphold the image and reputation of an organization in the long term. Effective ethics also strengthen employees' loyalty, limit vulnerability and limit litigation or damage to reputation that can be associated with ethical lapses.

It would not be an overstatement to say, that a decade ago, I was a pioneer at running the Business of Doing Good as if they were for-profits, but without the conventional bottom line, so I could measure impact versus investment. I believed that philanthropic organizations are human agents for change and as such they change and affect human lives. Therefore, we had to make sure to do exceptionally well and be committed to our cause and our code of ethics.

In time, it has become evident that many tools for measuring and promoting impact investing for social good have been developed. Starting with NGO performance assessment, lifting barriers caused by government and decision makers, establishing social enterprise investment funds with government involvement, impact investing based on sector approaches such as health or education to attract new capital through mission investing (supplementing grants by using a portion of the endowments for loans and investments that support their charitable missions), microfinance as a tool to alleviate world poverty by creating a favorable policy environment and financial regulatory infrastructure and use of technology, financial inclusion by increasing financial access to underserved populations, and promoting, amongst other, concepts like the B-Corporations that use business as a force for good.

Throughout my work, I realized that all these new approaches have some vital significant components to ascertain success and sustainable impact in the Business of Doing Good. Yet, additional components need to be at play in order to bring true and sustainable impact to the Business of Doing Good and to the lives of people we are impacting. These components became clear and crystalized into a model as I evolved in my journey as a First Person Action Researcher. Please join me in my journey in defining and building the Business of Doing Good and help bring impact and goodness to our world.

Chapter 2: Literature Review

After almost twenty years in the field of human resource and business administration, when I was exposed to the Business of Doing Good, it felt but natural to bring transparency and accountability into our giving, so that the giving would be impactful as possible. Transparency to me is about being open, frank and honest in all communications, transactions and operations, while accountability is about being responsible for actions taken. Philanthropies affect human lives and as such have a moral obligation and must be accountable and be able to justify their actions. In addition to complying with the law, they must be moral, honest and truthful. This understanding is strengthen in *Reshaping Accounting and Management Control Systems* by Corsi et al., 2017

> Transparency is often used as synonymous to accountability; However, Bovens considers this definition a reductionist approach because he believes that transparency “is not enough to qualify as a genuine form of accountability”. Accountability is a complex concept composed of five different dimensions: Transparency, liability, controllability, responsibility and responsiveness. According to this broader conceptualization transparency appears to represent only one element of accountability that is instrumental for the success of the accountability process.” (Corsi et al., 2017, p.252)

Yet, as the years went by as I practiced the Business of Doing Good, I also realized that unlike the business world, for philanthropy to be successful there must be additional factors that will make giving meaningful and impactful. I embarked on a quest to find and define what these factors might be. I came across a few leaders, who discussed relevant theories in business management that were applicable to the Business of Doing Good.

Peters & Waterman (2004) discussed basic principles, which made American companies stay on top: A bias for action; staying close to the customer; encouraging employees to go the extra mile and taking ownership and fostering entrepreneurship skills; productivity through people; being hands-on and value driven; and having a lean staff. I felt these are crucial to the success of the Business of Doing Good as much as for the for-profit organizations.

Jim Collins (2001) in his book, *Good to Great*, presents in his Flywheel Concept that good to great transformation does not happen in one swoop. He says, sustainable transformation, happens with consistent pushing, as the flywheel gains momentum, eventually hitting a point of breakthrough, so do businesses. According to Collins, this breakthrough can be facilitated through committed and disciplined people, with disciplined thought and disciplined action. It was clear for me that results in the Business of Doing Good will not come instantly, and there is a need to hang in there and stay committed to the cause with constant pushing until we reach a point of breakthrough. This was significant concept to realize and implement as all projects required patience and time, while consistently pushing for success.

As I continued my journey in the Business of Doing Good, it became very clear to me that a good manager was not necessarily a good leader. John P Kotter (2012) in his book, *Leading Change*, found that, amongst other, firms fail when you: allow too much complacency; underestimate the power of vision; permit obstacles to block the new vision (in case of change); fail to create short term wins; declare victory too soon; and neglect to anchor changes firmly into the corporate structure. The consequences of which, amongst other are: new strategies are not implemented well; downsizing doesn’t get costs under control; and quality programs don’t deliver the hoped-for results.

Kotter also refers to mental habits that support leadership, including: lifelong learning; risk taking and pushing oneself out of comfort zones; humble self-reflection; aggressive collection of information and new ideas from others; and open-ness to new ideas. Using these elements became crucial in all my programs. Especially, in one program where I felt the senior management were eager to declare victory too soon, and by doing so jeopardizing the chances for a change and growth process for the program. Despite me engaging is self-reflection and emphasizing the need to stay true to the vision, in order to bring bigger impact. Vision to me is the north-star, the optimal desire of what the organization wishes to achieve. Therefore, in my perspective, I was not successful in leading a significant change. This failure emphasized the importance of Kotter's insights.

Vision and Mission usually go hand in hand, while vision is the north star, mission is the inner compass, the present state of fulfilling the vision (the what, the who and the how). Bain & Company (2017) incorporate these terms as building blocks of the company, where they address the definition and meaning of the organization's vision and mission statements.

> A Mission Statement defines the company's business, its objectives and its approach to reach those objectives. A Vision Statement describes the desired future position of the company. Elements of Mission and Vision Statements are often combined to provide a statement of the company's purposes, goals and values. However, sometimes the two terms are used interchangeably.
>
> (Bain.com, 2017)

As I continued to operate in The Business of Doing Good, I reflected on Abraham Maslow (1943) in his book, *A Theory of Human Motivation*, where he speaks about actualization as the person's highest drive, but before a person can turn to it, he must satisfy lower motivations like hunger, safety, belonging and esteem needs. When I was offered the position to lead the philanthropic activities of the owners of our business group, I felt that I was given the opportunity to reach the self-actualization stage as Maslow termed it. I wished to make this theory accessible to the less fortunate and this was one of my biggest drives and motivation.

In *Maslow on Management* (1998), Maslow quotes Peter Drucker and has thirty-six assumptions in what he believes is enlightened economics and management. Amongst other, he sets out some policies and assumptions, including: assume everyone is to be trusted; assume everyone is to be informed and completely as possible of as many facts as possible; assume in all your people the impulse to achieve; assume there is no dominance – subordination hierarchy; assume everyone will have the same managerial objectives and will identify with them no matter where they are in the organization's hierarchy; enlightened economics must assume good-will among all members of the organization rather than rivalry or jealousy; assume the ability to admire (to be objective and detached); assume that people in organizations are not fixated at the safety need level; assume an active trend to self-actualization; assume everyone can enjoy teamwork; assume hostility to be primarily reactive than character-based; assume people can take it (people are stronger than most people give them credit for); enlightened management assumes that people are improvable. Initially, as I paved my way in the Business of Doing good, I did try to accept and adopt all the above, only to be disillusioned that this was not the rules of the game in the real world.

According to Drucker:

> Management is about human beings. Its task is to make people capable of joint performance, to make their strengths effective and their weaknesses irrelevant. This is what an organization is about, and it is the reason that management is the determining factor.
> (Drucker, 2003, p.221).

I agree with this completely and believe that management is all about leadership by example. Remembering this and incorporating it in my leadership style and daily actions helped me strengthen the Business of Doing Good in my organization. Learning to counter weaknesses with the strengths of other employees and collaboration helped me pave the way to impactful giving.

With technology becoming a major player in people's life, either at the business level or in their private life, self-actualization and individual empowerment have become significant factors in implementation of traditional theories of management, forcing managers to address these needs. Reflecting on our programs and goals, I saw that empowerment and leadership are also crucial to bring about impact to all people. Tom Friedman wrote about “becoming untouchable” in the *World is Flat* (2005). In India untouchables may be the lowest social class, but in a flat world, everyone should want to be untouchable. Untouchable in Friedman's lexicon are people whose jobs cannot be out-sourced. This opened my critical eye to reflect and understand what is our mission with the youth we are working with and how to empower them and make them relevant to our present ever-changing world of uncertainty. I realized that for them to sustain in the changing world around us, they must become untouchable! They must gain effective skills and become life-long learners with the ability to feel comfortable in an ever-changing environment.

In 1958, Leonard Reed wrote about the future in “I Pencil”. I Pencil is a lead pencil, an ordinary wooden pencil, familiar to all of us. Simple as it may be, it symbolizes miraculous-ness and simplicity. The essay describes a cedar from California and Oregon, saws and trucks and gear carting logs to the railroad, the numerous persons and skills that go into fabrication: the millworks, the slats, the tint, the heat, the light, the power, the motors, the belts, the lead graphite that is mined in Sri Lanka, the shipping of the graphite, the six coats of lacquer the cedar receives, the eraser made by reacting rap-seed oil from Indonesia with Sulphur Chloride. No single person on the face of this earth knows how to make a pencil by himself. Millions of people have a hand in its creation. There is no master-mind. Instead, there is an invisible hand at work. I pencil is a complex combination of miracles. I Pencil teaches us to leave all creative energies uninhibited. Merely organize society to act in harmony. Have faith that free men and women will respond to the Invisible Hand. I realized that since we were in the Business of Doing Good, and affecting human lives, it was our duty, first to do no harm and ultimately to bring change and impact for a better and enlightened society. This by allowing creative energies to act in harmony and lead to impactful giving, as in I Pencil. I have witnessed this magical hand in action, during the last 18 years. I have witnessed time and again how 16 years old potential drop-outs from high school turned their life around and the lives of their family and community by taking charge of their own life, finishing their higher education and becoming contributing members to society. I have witnessed young leaders follow their dreams and with little support from us move mountains and lead social enterprises, transforming the lives of hundreds of people in their community. The work of our organization, combined with the work of the teachers, mentors, social workers, municipal employees, university counselors, academic advisors, professors, commanders, family members, and the community intertwined with complex systems, which require the students and young adults to follow the track, all of these act as agents of change in a similar way to the mechanism of producing one single pencil.

As I started my journey in the Business of Doing Good, I was quite shocked to discover that the field was quite opaque. There was almost no accountability or transparency and worse, the managers of philanthropic projects had little knowledge of what balance sheets looked like and had no consciousness of how to be lean and efficient. They had an idea about bringing about some social good; they found a donor or a group of donors to fund their idea; yet no thought was given to how the goals are met, with respect to impact versus investment. The donor usually got a plaque or a letter of appreciation and that was basically the modus operendi. There was no transparency or accountability, regarding the use of funds or the impact it achieved.

I was among one of the first donors to request accountability and transparency. No such system existed in philanthropy, and I had to create these tools on the go. In time, assessment was introduced into social organizations and metrics started to be implemented worldwide. Amongst them were:

BBB - Wise-Giving Alliance: "The BBB Wise Giving Alliance helps donors make informed giving decisions and promotes high standards of conduct among organizations that solicit contributions from the public. It produces reports about national charities, evaluating them against comprehensive Standards for Charity Accountability" (Give.org, 2013.) This organization evaluates organization's standards in 20 parameters in management, finance, governance and oversight, effectiveness, fund raising and informational materials.

SROI: An economic analysis, featuring cost-benefit analysis. SROI focuses on listening to stakeholders, identifying the outcomes that are important to the stakeholders, and translating it to a financial value based on outcomes, as reviewed in its Social Return on Investment position paper (2010).

GIIN: "The Global Impact Investing Network is a nonprofit organization dedicated to increasing the scale and effectiveness of impact investing. The GIIN builds critical infrastructure and supports activities, education, and research that help accelerate the development of a coherent impact investing industry." (Thegiin.org, 2009)

INGO: The international Non-Governmental Organization Accountability Charter:

"The INGO Accountability Charter is an initiative of international NGOs demonstrating their commitment to transparency, accountability and effectiveness. The Charter provides the only global, cross-sectoral accountability framework for NGOs. The Charter defines commitments towards which members report annually. This triggers organizational developments which significantly improved the effectiveness of NGOs." (Accountable Now, 2008)

GIIRS: "A comprehensive rating of social and environmental performance, The GIIRS Impact Assessment includes a comprehensive set of required fields that span a range of aspects of an organization's work and that are specific to the organization's size, sector, and region." (GIIRS, 2011)

Slowly, as social impact organizations started to implement transparency and accountability metrics in their organizations, they were able to use their funding more wisely and were also able to market their achievements in a very impactful way, thereby receiving additional funding. These subjects became important enough and started being discussed at conferences and were on the agenda of think-tanks world-wide. It was also a time when billionaires and industry leaders like Bill Gates, Warren Buffet and Mark Zuckerberg started investing in the Business of Doing Good, and brought in their for-profit practices into the philanthropic world.

Notwithstanding, although helpful, these tools fall short of making any major sustainable impact in the Business of Doing Good. These organizations focus only on one or two aspects of the overall picture and by doing so miss the opportunity to bring a sustainable change. As philanthropy still continues to be a closed sector of ego, power and ineffective practices, there is no doubt that there is a need to ground philanthropy in such a way that it promotes sustainable results and impact. This too cannot be achieved with short term investment. It is important to realize that when one becomes a change agent in people’s lives, it is mandatory, first to do no harm, and in most cases, it requires long term commitment to the cause. Long term commitment to the cause is facilitating the infrastructure and support needed to find a continuous and unrelenting way to push for attainment of the goal. Commitment to the cause is knowing that the option to opt out does not exist. When one is committed to the cause, you surprisingly receive a gift. Every success, failure or interaction becomes an opportunity to grow and develop. It reinforces our sense of resilience, esteem and toughness that is needed to see things through until the end.

The Bill and Melinda Gates Foundation was founded in 1994 and at first focused on global health and then also on extreme poverty worldwide and in the US they concentrate on expanding education opportunity and access to information technology. Based on the Foundation’s 2014 annual report, it had an endowment fund of $44.3B; The Foundation aims to apply business techniques to giving and is one of the leaders in venture philanthropy though the foundation itself notes that the philanthropic role has limitations.

In 2012, *Improving Our Work with Grantees: A Progress Report of 2011*, issued by the Gates Foundation, the survey that they conducted found that many believed the foundation did not make its goals and strategies clear, as well as did not fully understand the goals of the grantees. It also found that the foundation's decision- and grant making processes were too opaque. Warren Buffett pledged to give ten million Berkshire Hathaway Class B shares spread over multiple years to the Bill & Melinda Gates Foundation, in 2006. It is important to note that Buffett set conditions for his pledge. These conditions stipulate that Bill and Melinda Gates must be alive and active in its administration, it must continue to qualify as charity and each year it must give away an amount equal to the previous years’ Berkshire gift plus an additional equal to five percent of net assets. This is an example of shift in the thought processes of donors, who are taking an active and responsible role to ascertain that the vision of the Gates Foundation would be maintained and it plays a crucial role in the donor's decision to contribute. It emphasizes that Buffet takes an active role and makes Bill and Melinda Gates personally accountable by ensuring the foundation's founders meet the organization's goals.

> In 2006, I made a commitment to gradually give all of my Berkshire Hathaway stock to philanthropic foundations. I couldn't be happier with that decision…Now, Bill and Melinda Gates and I are asking hundreds of rich Americans to pledge at least fifty percent of their wealth to charity…This pledge will leave my life-style untouched and that of my children as well. They have already received significant sums for their personal use and will receive more in the future. They live comfortable and productive lives. I will continue to live in a manner that gives me everything I could possibly want in life.
> (Buffett, 2010.)

Buffett and Gates also made an effort to leverage their philanthropic giving by inviting additional donors to join and pledge half of their wealth to the Business of Doing Good. Buffet is one of the voices of the new philanthropists. He bridges the two worlds of business and philanthropy, demanding such values as: ethics, accountability, transparency and impact in his philanthropic giving as well as in businesses. This has also facilitated that he chose the Gates Foundation and specifically Bill and Melinda Gates as active partners in executing his legacy. Bill Gates, who has been dealing with the issue of ethics in organizations, governments and philanthropies, said

> How could the world let these children die? The answer is simple. The markets did not reward saving the lives of these children and governments did not subsidize it. So children died because their mothers and fathers had no power in the market and no voice in the system. But you and I can have both. We can make market forces work better for the poor if we can develop a more creative capitalism – if we can stretch the reach of market forces so that more people can make a profit or at least make a living, serving people who are suffering from the worst inequities. We can press governments around the world to spend tax payer money in ways that better reflect the values of the people who pay taxes. If we can find approaches that meet the needs of the poor in ways that generate profits for business and votes for politicians, we will have found a sustainable way to reduce inequities in the world.
> (Gates, 2007)

Despite understanding the gist of philanthropic giving and impact, no one points out what is specifically necessary of the manager in the Business of Doing Good, because ultimately, he or she is responsible as the captain of the ship to steer it through storms and hardships, and bring it to safe shores.

Joel Fleishman in *The Foundation* says

> Foundations play three roles. The first is that of a Driver – of directing the change effort… The second role is that of a Partner- where it makes crucial decisions together with other partner organizations making grants to support those organizations or other to implement strategy…The third role is that of Catalyst… a Foundation may make grants to organizations that generally deal with the problem without specifying or expecting particular outcomes, knowing that most grants are unlikely to produce lasting change but hoping a few will at least take root and grow. (Fleishman, 2007, p.60)

Fleishman believes that

> there are clear limits to what Foundations are capable of doing – whether in the education system, the health system or poverty... that poverty is a problem that only governments can completely remedy by somehow putting more money in pockets of poor people – and this can be done by governments only if the American citizenry is willing to engage in large-scale redistribution of wealth. By comparison, Foundations can only tinker at the margins.
>
> (Fleishman, 2007, p.67)

Fleishman discusses why they give and lists several reasons, such as: some business people give to repay the debt to society; others out of religious obligation; some for ego satisfaction derived from fame, admiration and praise; a desire to redeem negative reputation gained in the world of business competition." (Fleishman, 2007) He says that Bill Gates invited this interpretation when he created the Bill and Melinda Gates Foundation in the midst of the Federal Antitrust case against Microsoft. He also mentions that Andrew Carnegie and John Rockefeller had more money than they knew what to do with.

Rockefeller articulated this sense of urgency when asking his assistant in philanthropy

> I am in trouble Mr. Gates. The pressure of appeals for gifts has become too great for endurance. I haven't the time or strength, with all my heavy business responsibilities to deal with these demands properly. I am so constituted as to be unable to give away money with any satisfaction until I have made careful inquiry as to the worthiness of the cause. These investigations are now

> taking more of my time and energy than Standard Oil itself. Either I must shift part of the burden or stop giving entirely. And I cannot do the latter.
>
> (Nevins, 1955, p.2)

Rockefeller was ahead of his time in articulating a feeling many new philanthropists voice today. The gap between the business world and the philanthropic world has yet to be bridged, emphasizing that even in the Business of Doing Good, in order to bring impact there must be mechanisms and tools to measure the impact of giving, while staying true to the vision and mission of the donors. Fifteen years later Gates explained to Rockefeller: “Your fortune is rolling up, rolling up like an avalanche. You must distribute it faster than it grows. If you do not, it will crush you and your children and your children’s children” (Fleishman, 2007). It was at least in part this plea that led Rockefeller to create the Rockefeller Foundation, three years later in June 29, 1909 “Necessity had won out” (Fleishman, 2007). There was a real opportunity to bring change to the world that was never fulfilled, because the tools and foundations for impactful philanthropy were not mature at that time.

The New Philanthropists by Charles and Elizabeth Handy (2007) is also an interesting portrait of a new generation of practical philanthropists. These are inspiring stories of men and women, who have made their own fortunes and decided to move from financial success to help those in need. These stories show a shift from the traditional philanthropy to a new type of philanthropy, where they are making an effort to address and evaluate the impact of their giving, aligned with their missions and values. Reading this book strengthens the notion that without the right tools, philanthropy will never play an impactful role in the Business of Doing Good. One can only do so much, without the proper tools. This sharpened my understanding of my role in the philanthropic world, emphasizing the importance of building the right toolbox to support and facilitate the advancement of impactful giving.

J. Gregory Dees, Jed Emerson and Peter Economy were pioneers in 2001, when they discussed the idea of *Enterprising Nonprofits*. In their book, they provide a tool-kit for social entrepreneurs. Jed Emerson discusses why accountability is important to non-profit organizations: He quotes Regine Herzlinger who has presented three basic accountability mechanisms that non-profits lack but businesses have: "The self-interest that comes with ownership; the competition that would force efficiency; the ultimate barometer of business success, the profit measure." (Dees, Economy and Emerson, 2001, p.105) To achieve mission and vision Dees believes that without direct feedback loops social entrepreneurs are at a loss to know if they are truly fulfilling their own mission and vision.

Thomas Tierney and Joel Fleishman in their book *Give Smart* (2012) talk about the intricacy of achieving results. They believe that achieving results demands clarity about how decisions are made. It means being honest about who gets to decide what and building the right structure for the organization, otherwise good people get frustrated, results are diminished and the odds of making poor decisions multiply. They say

> Decision processes are messy and imperfect in every organization. People lobby behind the scenes. Politics comes into play and personal power is exercised. But if results are your goal, you can't allow the confusion or disarray around accountability for decisions, to persist.
> (Tierney and Fleishman, 2012, p.38)

Tierney and Fleishman emphasize the importance of accountability, yet it is still not a fundamental part despite ever-growing evidence that only through accountability and transparency, organizations can do good. As I paved my way to create impactful giving and structuring the foundations I managed with effective and sustainable practices, I was reassured of the importance of doing good in the right way, and that I was not alone in my struggle to redefine the way philanthropy was being practiced.

Peter Drucker in *Managing the Nonprofit Organization* believes that the task of the non-profit manager is to try to convert the organization's mission statement into specifics. According to him, the most important task of the organization's leader is to anticipate crisis. He says

> One has to make the organization capable of anticipating the storm, weathering it and in fact, being ahead of it. That is called innovation, constant renewal…Nonprofit organizations have no 'bottom line'. They are prone to consider everything they do to be righteous and moral and to serve a cause, so they are not willing to say, if it doesn't produce results then maybe we should direct our resources elsewhere. Non-profit organizations need the discipline of organized abandonment, perhaps even more than a business does. They need to face up to critical choices…Don't be afraid of strengths in your organization… Of course people are ambitious. But you run far less risk of having able people around who want to push you out than you risk being served by mediocrity… Keep your eye on the task, not on yourself. The task matters and you are a servant.
> (Drucker, 2005, pp. 9-11, 26-27).

Drucker continues and says, "Developing yourself begins by serving, by striving toward an idea outside of yourself – not by leading. Leaders are not born, nor are they made – they are self-made" (Drucker, 2005, p.222). Drucker here introduces a new perspective, when looking at impactful giving. He goes beyond the need for measurement, transparency and accountability, and introduces the role of the philanthropic leader as a servant of a cause, not for selfish needs but a goodness factor that exists within one self and is directed toward the better good that is crucial to the success of philanthropic giving. Plato describes goodness as "the Good is Measure, which is the cause of goodness to everything that instantiates it" (Barney, n.d., p. 15). In retrospect of Plato's insights, I find his line of thinking valid even today as we examine the concept of goodness in our life. By goodness, I mean, a quality a person has of being good. A person who is kind and generous. A person who has integrity and benevolence and in-spite of temptations upholds the highest morality of the right conduct. Philanthropy for it to be impactful requires good leaders that through repeated actions of goodness will promote philanthropy for the good of all concerned.

In Drucker's famous words, if you can't measure it, you can't manage it. This has been a fundamental component in my journey because I believe that the only way we can quantify progress is by measurement of goals vs. actual achievements. Measurement includes, but is not limited to, tangible goals, as well as objective data collected throughout the various cycles of the project at hand. Especially in the philanthropic realm, when discussing measurement, it goes hand-in-hand with self-appraisal. Self-appraisal is the ability to objectively evaluate oneself honestly, including strengths and weaknesses, in order to pinpoint areas that need improvement and change to bring about greater impact in objective terms. This is crucial because in many instances philanthropic managers are change agents and affect people's lives and as such must take great care to do no harm and to keep intact that fabric of trust between all stakeholders.

In my business experience, I was used to measuring success and impact by measuring ROI. "Return on investment (ROI) is the ratio of profit made in a financial year as a percentage of an investment. In other words, ROI reveals the overall benefit (return) of an investment using the gain or loss from the investment along with the cost of the investment." (Wilkinson, 2016). One of my first steps in the philanthropic world was to bridge the gap between the business world and the philanthropic world, and I adopted business world practices and embedded them into the fabric of our philanthropic activities. I realized that ROI offers me an opportunity to measure impact, yet I had to take into consideration how the ROI can be calculated in view of a non-conventional bottom line. This is when I coined the term ROD, which evolved from my work experience in driving impact and results within the world of philanthropy. That is to say ROD reveals the overall impact of donation taking into consideration impact achieved vs usage of resources in light of the amount donated. Low ROD signifies inefficiency, while high ROD paves the way to greater impact and good outcomes. At the Milken Institute Global Conference in 2012, which held a panel with amongst others: David Chen – CEO of Equilibrium Capital Group; En Lee Director of Impact Investment Exchange Asia; and Sari Miller- CEO of Sarjay Inc.- Angel Investor at Leapfrog Investments. It was very interesting to hear these participants at this panel and their views. It gave me important insights as to where the philanthropic impact investing field was heading toward.

Chen (2012) believes that structurally, in impact investing, one needs to think about how the complete set of benefits in a transaction or deal are aligned to the right investors. Investors have very different agendas and have different ways they want to “get paid” and they may not always want to "get paid" in monetary mechanisms. How do we work on the ROI tradeoff so everyone gets what they need? According to Chen (2012), authenticity and trust are differentiating factors of a social fund verses a regular fund. A lot of social impact deals are multi-stakeholder. They involve getting support of government, regulators or a different set of investors and can be a very complex structure together. And what keeps it together is the fabric of trust.

Sari Miller of Leapfrog (2012), the world’s first micro insurance fund that was launched at the Clinton Global Initiative, in 2008 presented a unique perspective. Leapfrog raised $135M and had a plan to help 25M poor vulnerable people in the world. They founded Leapfrog because they found a need. They looked at who was financially not included and found a market opportunity to serve emerging consumers in Africa and Asia to rise to the middle class. They found that the market was growing exponentially. They narrowed in to the micro-insurance field and found that between 1.5 – 3.0B people were underserved in insurance in developing economies in a $40B total market size and a total impact investment opportunity between the years 2011-2021 of about 400B-1Trillion USD. Today they have reached over 21.9M people, 70% + women and children are covered. 13.7+ M low income and financially excluded people have been included and 39000 + jobs and livelihoods are being supported and medical, disability, life, property, motor, crop, savings, pension and other core products are being offered. All more affordable and relevant products provided and aligned to low income consumer needs.

Their company ALL-LIFE is the only company in the world that sells insurance to HIV positive people. Their policies cover over 30,000 people so far. Seventy percent of policy holders are female. Eighteen percent of South Africans are HIV positive. Leapfrog invested $11M in this and products are offered at as little as $16 a month. It employs 173 people and 73% are female. It provides adherence management system for its clients. ALL LIFE requires regular medical visits, periodic testing and compliance of treatment protocol. Clients receive anti-viral treatment for free in South Africa. Clients experience an average of 150% improvement in their immune health, six months after buying ALL-LIFE policy. Leapforg introduced a new model that showed how targeting underserved communities in developing countries and enabling them to invest small amounts of money to receive services, which are considered elementary in other developed communities, one company can reach new markets and foster development in services, health and wealth in these developing communities, where governments and traditional businesses failed.

En Lee of Asiaiix (2012) focuses on facilitating impact investments in Asia. Asiaiix covers 15 countries in seven impact sectors, anything from healthcare, to finance to education, clean-tech, renewable energy, affordable housing etc. He works with individuals, family offices, funds and institutions. They do a combination of match-making between the investors and the sector of interest or philanthropic motive. Asiaiix are like a social investment bank that facilitates the match and makes the deal happen. Lee (2012) says that over the last 5-10 years a lot of significant developments have taken place in the sphere of impact investing measurement. E.g. IRIS (impact reporting investment standard) GIIRS, SROI (social return on investment), which is used in the UK. There are a lot of methodologies out there today and there is no one shoe fits all, especially when you cover 15 countries in Asia. The impact on a rural school that helps women in India versus one in China is very different.

Philanthropy can write checks for grants, put the money out and its done. But philanthropies can also put up a loan loss reserve, so you can get loans that would not be made otherwise. Loan structures, where investors are coming in and saying, we will guarantee up-to an "n" amount of risk, so that you de-risk or free up for other commercially minded investors to come in. The social impact bond is another product of innovation in the markets. Asiaiix has developed the concept of SSE (Social Stock Exchange), where the funds or private equity or direct investments are restricted to private investors, using a stock exchange mechanism, but trying to target two categories of investors that typically cannot access this space – retail and institutional. The Social Exchange opens a door to them, which otherwise would not. According to them, if you start speaking to an institutional investor, they like the story but their investment manager does not allow them to go to this space because they don't have liquidity, uncertainty exists and the list goes on. SSE tries to open up access to capital and this is a form of innovation.

These innovative models drove me to search and find additional players in the field of impactful giving that is still a small, growing field. These showcase new ways and where traditional philanthropy can venture to new areas and really bring impact to society.

Kimbal Musk founded a non-profit organization called Kitchen Community, which has a project called Learning Gardens, to deal with obesity issues by reversing trends set in childhood.

Kimbal reached out to schools and got kids connected to Learning Gardens. He wanted to give back in a way he really understood and could see the impact. Learning Gardens are in the schoolyard, on the playground, accessible to the students and made out of long lasting equipment. Kimbal has seen that the impact of Learning Gardens is such that, literally kids had doubled their vegetable intake, when they had a Learning Garden in their schoolyard, from 2.5 portions a day to 5 portions a day (The Kitchen Community, 2011). The challenge was then scaling it in order to deal with child obesity and Kimbal has since built capacity, so he can grow from 200 schools to 100,000 schools and was seeking the political will to drive it forward. By unique form of disruptive innovation, Kimbal Musk is creating the future by holding fast to ideals of family, teamwork and service of humanity. Learning Gardens is an example of impact investing, while preserving core values.

Another example of a new model of giving in the Business of Doing Good is The B Team. In October 2012, Richard Branson cofounded The B Team, a global non-profit initiative that brings together international CEO's and business leaders to make business work better. The B in the B team represents the need for a Plan B for business. Branson stated that business has had many positive impacts on the world but needs to move away from focus on immediate profit to one where it invests for long term good of people and the planet. The B Team was incubated by Virgin Unite, the charitable arm of the Virgin group. Upon formation, the group assembled a collection of young influencers and gathered feedback on where and how the B Team could have the most impact and pinpoint the roadblocks that prevent business from contributing to the greater good. Among B Team Leaders, amongst others, were Shari Arison from Israel, Sir Richard Branson, Dr. Gro Harlem Brundtland – Deputy Chair of the Elders, Ariana Huffington of the Huffington Media Group, Strive Masiyiwa – Founder of Econet Wireless, Ratan Tata of the Tata Group, Prof. Muammad Yunus – Chair of the Yunus Center; Jochen Zeitz – Chair of the Board of the Sustainable Development committee of Kering and Co-Chair of the B Team. (The B Team, 2014)

As participant in the forum of the B Team group, I have been partaking in conversations on many subjects that have come up and have been exposed to many of the initiatives.

e.g.

- "India announced the planting of 2 billion trees along its highways, creating 300,000 jobs." (Tomorrow, 2014)
- Phillip Haid from Toronto Sustainability Speaker Series published an article titled: Want to Beat Your Competitors? Embrace Profitability Good. In his article, he writes:

  > Because most companies still believe that charitable activity should not be connected to bottom line growth and see it as unseemly to link social purpose and profit. It is time to get over that.
  > (Haid, 2014)

- Oxfams – behind the brand initiative motto is "Change the way the food companies that make your favorite brands do business." (Behind the Brands, 2014)

These initiatives pave the way to an understanding and consciousness toward the idea that business can and should embrace a social purpose, which will change the way businesses are done, thereby enhancing their brand name and trust of their customer. Aligning of interests by embracing the goodness factor will be profitable for all sides.

Corporations are probably the most influential institutions today and yet many people do not believe they can be trusted. In a Forbes article by Tim Harford in 2010, The Economics of Trust, Hartford argues that trust is about more than whether you can leave your house unlocked; it is responsible for the difference between the richest countries and the poorest.

> Economists distinguish between personal, informal trust that comes from being friendly with your neighbors and the impersonal institutionalized trust that lets you give your credit card number out over the internet.
> (Harford, 2010)

Michael Porter and Mark Kramer in their article from December 2006 in Harvard Business Review: Strategy and Society: The Link between Competitive Advantage and Corporate Social Responsibility, propose a new way to look at the relationship between business and society that does not treat corporate success and social welfare as a zero-sum game. They introduce a framework that companies can use to identify all the effects – positive and negative, they have on society; determine which ones to address and suggest effective ways to do so. "When looked at strategically Corporate Social Responsibility can become a source of tremendous social progress, as the business applies its considerable resources, expertise and insights to activities that benefit society" (Porter and Kramer, 2006). This trend shows that businesses realize that nurturing social responsibility is the ultimate path to long term competitive advantage.

Corporate Social Responsibility relates to the notion that a company's actions to further social goods beyond what is required by law to achieve positive impact on their stakeholders as well as society as a whole.

As defined by International Organization for Standardization

> Social responsibility is the responsibility of an organisation for the impacts of its decisions and activities on society and the environment, through transparent and ethical behaviour that:
>
> - Contributes to sustainable development, including the health and the welfare of society
> - Takes into account the expectations of stakeholders

- Is in compliance with applicable law and consistent with international norms of behavior, and
- Is integrated throughout the organization and practised in its relationships.
  (ISO, 2010, pp.3-4)

In 2002, Roger Martin, wrote an article for Harvard Business Review called: The Virtue Matrix – Calculating the Return on Corporate Responsibility. In his article, Martin addresses the effect and role corporate responsibility plays in businesses' success and failure. According to Martin (2002), The Virtue Matrix supplies a conceptual framework for addressing questions about corporate responsibility including: what drives the market for responsible corporate behavior; what creates public demand for greater corporate responsibility; why does globalization heighten the anxiety about corporate responsibility; what are the barriers to increasing responsible corporate behavior; what forces can add to the supply of corporate responsibility. In a global world, when a corporation from an advanced economy does business with a developing country, it may instead establish a level of corporate virtue consistent with the host countries civil foundation. For example, Nike, by running its south-east Asian athletic footwear plants and paying its workers in accordance to local customs, opened itself to charges of operating sweat shops.

> It was accused of averaging down its level of corporate responsibility… angry U.S. consumers made it clear that they expected Nike to conform to the U.S. civil foundation … Public demands that businesses show a conscience as well as a profit.
> (Martin, 2002)

In January 2011, Michael Porter and Mark Kramer wrote an article in Harvard Business Review titled: Creating Shared Value, where they discuss that in the recent years

> The capitalist system is under siege. In recent years business increasingly has been viewed as a major cause of social, environmental and economic problems. Companies are widely perceived as prospering at the expense of the broader community.
> (Porter and Kramer, 2011)

Porter and Kramer have come up with the concept of "Shared Value", which can be defined as policies and operating practices that enhance the competition of a company, while simultaneously advancing the economic and social conditions of the communities in which it operates. "Shared value creation focuses on identifying and expanding the connections between societal and economic progress. The concept rests on the premise that both economic and social progress must be addressed using value principles." (Brown and Steen Knudsen, 2013)

In terms of shared value, the social sector and the government sector, still look at value in terms of benefits achieved or money expended. As their collaboration with the business sector grows, they will have to redefine value and incorporate the concept of achieving impact through shared value. In the Business of Doing Good, innovation in the field of impact investing lies in applying the tools and techniques that we have developed in the classic main stream finance area and applying them to achieve social impact, while looking for stabilized yield and cash flow.

All the above are incomplete without the basic understanding and acceptance that the Business of Doing Good is a business, where the operators are change agents in lives of people and as such, they must be first and foremost present, committed, and leaders by example. They need to have qualities of patience, grit and personal humility that go hand in hand with a passion to achieve their goals in spite of the difficulties. They need to understand that in The Business of Doing Good, good intentions are just not enough. They need to work with a strict set of values and ethics – First and foremost- Do not harm.

To me, values represent the personal standards of the individual. According to the International Encyclopedia of Ethics, Value is the "relative level of worth goodness, significance, or utility possessed by an entity, attribute, or event or an intangible quality or attribute that has intrinsic worth in itself". (LaFollette, 2013, p. 5291) To emphasize the importance of values, I want to quote the Dalai Lama:

> We will never solve our problems simply by instituting new laws and regulations. Ultimately, the source of our problems lies at the level of the individual. If people lack moral values and integrity, no system of laws and regulations will be adequate. So long as people give priority to material values, then injustice, inequity, intolerance and greed - all the outward manifestations of neglect of inner values - will persist. ." (Lama, 2011, pp. 12-13)

By ethics, I mean the generally accepted code of moral principles where morals describe the right and wrong of action. When an organization writes up its code of ethics, it is making clear to their employees what values and morals it upholds, whereby making sure that their employees adhere to and act in-line with the same values and have the same morals and that there is no dissonance between the two.

As James Madison wrote: "If men were angels, no government would be necessary. If angels were to govern men neither external nor internal controls on government would be necessary." However, ethics codes can have a demonstrable impact on the behavior of bad people in organizations. When everyone clearly knows the ethical standards of an organization they are more likely to recognize wrongdoing; and do something about it. Second, miscreants are often hesitant to commit an unethical act if they believe that everyone else around them knows it is wrong. And, finally corrupt individuals believe that they are more likely to get caught in environments that emphasize ethical behavior. (Gilman, 2005, pp 7-8)When I first started my way in the Business of Doing Good, I brought with me from the world of business, the foundations laid by Peters & Waterman, *In Search of Excellence*, 2004: A bias for action, autonomy and entrepreneurship, encouraging employees to go the extra mile, pushing for productivity through employees, being hands on and value driven and working in a simplified way with a lean staff.

- A bias for action: for an organization to succeed, it must always act proactively, rather than react. This is true in the business world, but also in the philanthropic arena. As a proactive Leader, you are able to build stronger partnerships and advance your fund's goals and contributions, becoming a significant player and influencer in your field.
- Staying close to the customer: By understanding your customers and their needs, you align your company in a favorable position, giving you the possibility to provide the proper solutions to their actual needs, which facilitate not only stronger impact, but also creates "brand" recognition and good reputation, which translates to additional funds and collaborations.
- Autonomy and entrepreneurship: encouraging your employees to go the extra mile and take ownership and foster entrepreneurship skills, benefits the whole organization, advocating innovation and creativity, while developing responsibility and engagement, which leads to employees' satisfaction, reducing turnover and increasing productivity and loyalty.
- Productivity through people: your representatives in the field are your heart and soul of the company. To gain high levels of productivity, employees must feel empowered and safe, which will translate to higher levels of productivity. Especially in the philanthropic world, where wages and benefits are significantly lower than in pure for profit businesses, it is of significance to provide employees with a sense of meaning and contribution, allowing them to reach to Maslow's higher levels of hierarchy and achieve self-actualization.

- Hands-on, value-driven: your representatives in the field are your change agents. A clear value system that trickles down to all employees, give each and every one of them the tools to act, inform and report back to HQ, while allowing minimal ethical lapses. This is especially significant when examining the work of philanthropic organizations.
- Stick to the knitting: focus. First, do no harm. When you touch people and their lives and not pure products, it is important that people will deal with what they know best and not venture out to other fields, losing focus and rolling the ball into dangerous alleys.
- Simple form, lean staff: It is utmost importance to work in a simplified way, with lean staff, as the donors' funds should be allocated to the greater good of the foundation and not to overly complicated, with high overhead and waste of resources and funds.
- It is the responsibility of the fund manager to ensure the organization works in a productive and lean way.
- These simultaneous loose-tight principles lead the way to an organization, which has sound value system and the ability to bring true impact through external resources as well as the work, dedication, and innovation of its employees, which play a vital role in the success of the organization's mission. Dedication to central values of the companies' mission combined with tolerance for all employees, who accept those values, is the base for the organization's success.

Leadership is key element in driving successful companies. Jim Collins in his book, *Good to Great* (2001), came up with the concept of a Level V Leader. His triangle, like Maslow's, has five stages of personal development of a manager, as the manager develops into a Level V Executive.

Level I – A highly capable individual

Level II – Contributing team member

Level III – Competent manager

Level IV – Effective manager (that catalyzes commitment to vigorous pursuit of clear and compelling vision, stimulating higher performance standards)

Level V Executive - Builds enduring greatness through a paradoxical blend of personal humility and professional will.

As I evolved in my journey on the path of the Business of Doing Good, I saw these stages come into play, and lay the foundation for my success as an effective leader within the organization. As I progressed and dealt with failures and successes, I developed a critical eye and reflected on Kolb's experiential learning cycle model (2005). Kolb's discussion on how experience leads to reflection, which leads to conceptualization as to what this experience means, leading to experimentation by putting it into practice, which take a person to a new cycle of learning and a new cycle of experience, led me to the understanding that research capabilities were not existent in our organization. I started to examine how I could promote and integrate effective research through a process of self-reflective practice and inquiry and presentation of research experience as a First Person Action Researcher as described by Judi Marshall in *First Person Action Research Living Life as Inquiry,* thereby building upon spirals of knowledge and experience, as they develop, while being an insider researcher. As Carol Costley et al write,

> Insider-led work based projects are approached from the perspectives of bringing about contribution to practice that are informed by underpinning knowledge. The purpose of the project is to bring about actual change, either during or at the end of the research project and constitutes a particular constraint to researchers as they are working within systems, where there are limits to research practice and change. You need to access particular insider information, inform and bring about significant changes to practice. This is usually the right time and place for innovation to be introduced. The success of projects may be in some parts due to insider researchers' ability to negotiate around systems and practice with creativity and ingenuity. You are the primary agent of control and exercise of this agency within critical academic and professional environment is the basis of the impact that the project can have upon you and your workplace or professional area… Your challenges are, to some extent, set in the demanding context of having to justify achievement and progress to which critical partners in the wider profession and the less familiar world of academe.
> (Costley, Elliott and Gibbs, 2010, pp. 6-7)

Understanding the value of insider information in a facilitating and empowering environment, only further authenticates the importance and role of the leader, who himself should embody the values of goodness, proper ethics, critical thinking and self- appraisal, into the fabric of the organization.

The concept of the reflective practitioner by Donald Schon (1987), whereby as a result of "reflection-in-action", which contributed to "knowing-in-action", helped reshape what we were doing, when we were in the midst of our operations, was significant. Schon's reflective model contributed both during and after the research process, helping build new tools and perspectives, while evaluating our actions and our future paths. In his work, Schon (1987) addresses the role of the practitioner and emphasizes the importance of using daily practice to become a reflective practitioner, building on real world experience and on the ground professional practice. Schon recognizes "knowing-in-action" as important to the reflective process and introduces what he terms as "reflection-in-action…reshaping of what we are doing while we are doing it" (Schon,1987, p.26).

"Out of that knowing, we can act appropriately in the present moment to meet whatever requires being met, outwardly and inwardly. We speak of this as letting our doing come out of being." (Kabat-Zinn, 2013, p. 48)

Since research capabilities were nonexistent in the first phase of operations, I reached out to external research institutes, relying on *How to Research* (2010) as my guidance and as a tool to navigate and structure the research and relationship with all parties. I believe that thanks to their exercises on organizing your argument and how to criticize, I was able to focus and able to successfully evaluate the research process.

Reigeluth and Frick present formative research in *Instructional-design Theories and Models* (1999). Formative research due to its emphasis on effectiveness, efficiency and appeal was one of the most suitable methodologies because "it entails asking such questions as "What is working?", "What needs to be improved?", and "How it can be improved" (Worthen & Sanders, 1987. p.36)" (Reigeluth, 1999, p.636). Formative research is holistic and allowed to surface useful data that was highly insightful. Formative research facilitates pinpointing strengths and weaknesses of the program, and what steps were necessary to bring impactful and sustainable change.

I have also adopted the Flywheel Concept as Jim Collins (2001) also discusses. He believes that Good to Great transformation does not happen in one swoop. Sustainable transformations follow a predictable pattern of build-up and breakthrough. In the Flywheel Concept, he believes that with consistent pushing, the flywheel gains momentum, eventually hitting a point of breakthrough. For companies to succeed, it is not possible to skip build-up and jump immediately to breakthrough. This build-up and breakthrough can be facilitated through committed, disciplined people, with disciplined thought and disciplined action. Just as in the business world, in the Business of Doing Good, there is a need to hang in there and persist until one achieves the build-up and breakthrough, thereby leveraging on lessons learnt.

John Kotter in *Leading Change* refers to lifelong learning, leadership skills and the capacity to succeed in the future. Kotter believes that mental habits that support lifelong learning are:

- Risk taking (willingness to push oneself out of comfort zones)
- Humble self-reflection (honest assessment of successes and failures, especially the latter)
- Solicitation of opinions (aggressive collection of information and ideas from others)
- Careful listening – propensity to listen to others
- Openness to new ideas – willingness to view life with an open mind

(Kotter, 2012, p.191)

Leading by example, I tried to instill these values in my work and the work of others in the organization. Though, I succeeded in many cases, I also was faced with failures and challenges, and upon retrospection realized that in most cases these failures originated, when I had failed to integrate within the organization some important values, such as goodness and ethics, that were the basis of my character and helped me to continue to navigate each and every day, in-spite of the challenges. These, if present within the core characteristics of the organization, they act as stabilizers and contribute to the strength of the organization. Through the years, I found that these core values have become more important to practice and maintain. As technology both benefits us as well as spirals us into the fast lane at a dizzying pace. Yet, we need to hold on to our basic values so they can be our north star, guiding us at all times.

Tom Friedman in his book, *The World is Flat*, refers to the fact that due to the development of technology, the global playing field is being leveled. He quotes Nilekani CEO of Infosys India

> India is now able to compete for global knowledge work as never before and Americans had better get ready for this. America is going to be challenged, but he insists, the challenge would be good for America, because we always are at our best, when we are challenged.

(Friedman, 2007, p.7)

This shift in Globalization 3.0 as Friedman terms it is shrinking and flattening the world and is different in how it is empowering individuals.

> Globalization 3.0 makes it possible for so many more people to plug in and play and you are going to see every color of the human rainbow take part…Change is hard. Change is hardest on those caught by surprise. Change is hardest on those, who have difficulty changing too. But change is natural; change is not new. Change is important…The world is changing from command and control to collaborate and connect, from globalizing industries to globalizing individuals and a new middle class is developing, where the key to thrive as an individual in a flat world is to figure out how to make yourself an "untouchable", people whose jobs cannot be outsourced, digitized or automated.
> (Friedman, 2007, p.11)

There is no doubt today that investment in human capital has become one of the most important factors in the today's world economy. This is also evident in my day-to-day management and decision making processes, where I am observing that many of the successes and failures of organizations are influenced by the quality and values of the human capital. Michael Milken, the founder of the Milken Institute, in his article *Where is Sputnik?* concludes:

> Today we have to stop tinkering at the margins of big problems and start attacking their cores with conviction. In politics, it means transcending excessive negativism and partisan one-upmanship for the sake of broader social good. In education, it means putting the classroom teacher at the center of the process and expecting greater professional accountability. In business, it means unshackling small and medium-size enterprises so they grow and create jobs. In medical research, it means allocating more resources to young investigators more likely to develop scientific breakthroughs. It means living within our household, state and national budgets and welcoming the best and the brightest from the rest of the world. There is no time to waste in shoring up the institutions that develop human capital. If we summon the political will, we can leave the world's children a lasting legacy of a clean environment, stable democracy, robust health and universal access to knowledge. We know how to do this – we have done it before. Let's do it again. Now.
> (Milken, 2011, p.20)

Despite the optimistic words of Milken, this is not an easy task to achieve. The world has changed. In the past, the power was in the hand of the leaders, today the power shifted to the hands of the individuals. Each one can become a player. Therefore, organizing individuals into active groups for a specific cause becomes a challenge. Although there is great intention, money and talent is brought in to solve problems, yet not many problems are solved and philanthropy needs transformation. It needs an entrepreneurial business-like approach on the one hand, and a values centric approach that brings out the goodness as a core and important value, on the other hand. People engage in philanthropy for several emotional reasons:

- It is selfish. People feel better. Some feel it will help them live longer. It satisfies their ego and they feel good.
- It is a natural human instinct to want to help other people that are not family.
- Some feel it will get them to heaven.
- It is part of the tax structure in the U.S and is part of the tax planning. Such a system does not exist in most other countries in the world, and it is necessary to teach the world to give. For example: As one of the promoters for cancer research in Chinaby Chinese physician scientists, it has been extremely difficult to find and engage Chinese businessmen or philanthropists that will match the funding for research. Philanthropic giving does not as yet exist in the Chinese culture as it does in the western culture.

There are dysfunctionalities in the Business of Doing Good. Human capital, the goodness factor, and money are not stand alone agents of change. They need to come together in synergy to produce sustainable change. The money is asking for good people to join in. It is easy to give money and get a plaque but to achieve measurable sustainable results, one needs to work hard. But, change is coming. The young people today – the millenniums, are a generation that can impact. They have cell phones, social networks, technology, crowd sourcing, crowd funding and so on. In the past, you made money in your fifties and sixties and figured out what to do with it in your seventies. At Silicon Valley today, the thing now is to start giving very early and they are paving the way for other people. Yuri Milner, Mark Zuckerberg and Sergei Brinn became extremly wealthy in their twenties and thirties and are looking to make a difference, to make the world a better place. However, it is not enough to give money. If their activities are not set in structured, accountable, measurable mechanisms, all those millions of dollars will not achieve the desired impact.

At Prostate Cancer Foundation we found that, the largest source of raising funds is through the cashiers at Safeway, as between 2001- 2013, $83M were raised by this campaign (Pcf.org, 2015). Movember is the second largest source of income, “donating $44M so far, funding 33 research awards in the U.S., Canada and Great Britain” (Pcf.org, 2016). In today’s technological world and the world of crowd funding, when you recruit a crowd for a cause, it is amazing how much they will cooperate, especially if they are given the opportunity to tap into their creative skills for a good cause. Other avenues to capital should focus on encouraging people to donate. Instead of just for tax deduction, people should be encouraged to donate because they care.

Reflecting on my successes and failures, I realized that innovation comes from risk-taking. People don’t talk about their failures. I believe it is important to talk about the failures and not push them under the rug. If everything is successful and easy, I believe we are not innovative enough.

Mike Milken has an equation for worldwide prosperity

P = FT * (HC + SC + RA)

P = Prosperity; FT = Financial Technology; HC = Human Capital; SC = Social Capital; RA = Real Assets.

(NASDAQ.com, 2010)

In his article, Creating Value, Mike Milken says:

> Even before going to Wharton and then joining a Wall Street firm in 1969, I'd developed a formula that says prosperity in any society depends on the leveraging effect of financial technology on the sum of human capital, social capital and real assets. Real assets are typical balance sheet items: cash, receivables land, buildings, etc. Social capital includes educational, cultural, religious and medical institutions and such intangibles as the rule of law and enforceable property rights. Human capital – the largest, most-important asset – is the ability and productivity of people. As for financial technology, much of it would be developed and expanded over the next two decades: things like collateralized loan and bond obligations, securitized mortgages and credit cards, and derivatives.… As financial technology is deployed around the world, it has the potential to reduce poverty and the kinds of tensions that breed terrorism. But in order to create prosperity, financial technology has to act on the other factors in the equation; and none of these is more important than human capital.
> (Milken, 2016)

According to Milken, human value, which does not appear on the balance sheet, is crucial to the success of growing companies. This is true in the non-profit sector as it is in business world.

> Empower the most talented people in each field and encourage them to pursue their passions… In medical research one of our most successful efforts, has searched out brilliant young physician scientists and providing them with the wherewithal to stay in their labs despite the financial pressures, of raising families and paying mortgages. We've also created an environment that has brought people in disparate organization and disciplines together - industry, academic and government researchers for example, to accelerate the process of discovery. The goal in every case is to create value, whether measured in lives saved, students inspired or jobs created. It always involves more than just writing checks. It takes an entrepreneurial approach that seeks out best practices and empowers people to change the world.
> (Milken, 2016)

In his article, The Importance of Ethics in Organizations, by Luanne Kelchner, 2015, he discusses the importance of ethics.

> Ethics are the principles and values an individual uses to govern his activities and decisions… The ethical philosophy an organization uses to conduct business can affect the reputation, productivity and bottom line of the business…The ethics that leaders in an organization use to manage employees may have an effect on the morale and loyalty of workers. The code of ethics leaders use determines discipline procedures and the acceptable behavior for all workers in an organization…Ethical behavior among workers in an organization ensures that employees complete work with honesty and integrity… Leaders and employees adhering to a code of ethics create an ethical organizational culture.
> (Luanne Kelchner, 2015, p.1)

As with parents and children, I have noticed that when it comes to ethics and values, children learn most from the example of their parents. Leading by example still remains the most powerful and effective tool. On the subject of leading change, Kotter says:

> I think I can say with some authority that people, who are making an effort to embrace the future, are a happier lot than those, who are clinging to the past... But people who are attempting to grow, to become more comfortable with change, to develop leadership skills – these men and women are typically driven by a sense that they are doing what is right for themselves, their families, and their organizations. That sense of purpose spurs them on and inspires them during rough periods.
> (Kotter, 2012, p.194)

Throughout this journey, as a First Person Action Researcher, I implemented the insights from *How to Research* on criticizing. I believe that thanks to the exercises on organizing your argument and how to criticize, I was able to focus and able to successfully evaluate the research processes throughout the years. When I criticized someone's work, I made it clear that I was not criticizing them personally. I asked questions about if they could describe why they had offered the options they had; had their opinions been based on reading and accepting similar approaches that had been successfully implemented in the past. I referred them to further reading so they would be explicit about the values and theories they wished be incorporated. I encouraged them to, together, evaluate a number of possible alternative approaches before deciding on which technique to use. I made sure that my criticism was always careful and justified, while publicly recognizing the fact that I too am capable of error and could change my mind from time to time. I made sure that whoever participated in the research process will build up a context for the research, exemplify and justify the methodology they decided to adopt and to present it in a convincing way thereby establishing their voice so it be adopted and incorporated and accepted by all into the research process.

The belief that criticism is about joining a wider debate with others and steering the dialogue in this direction, helped bring the various stages of these researches to their successful completion. Criticism is part of an ongoing process of evaluation, which is crucial in measuring effectiveness and creating sustainability within the organization. Donald Kirkpatrick addresses the four levels of evaluation which are: reaction, learning, behavior, and results (Kirkpatrick and Kirkpatrick, 2006). Research and criticism without evaluation of the outcomes is not efficient. I believe, as a First Person Action Researcher, that to promote effective outcomes, one must define what good results that the organization aims to achieve are. Incorporating elements from Kirkpatrick model create a clear path toward achieving the desired outcome. Having an open channel of communication with the organization's stakeholders ultimately leads to increased employee loyalty, effective ethics, and commitment to the cause.

In spite of all these developments, the Business of Doing Good is still in its infancy, to achieve maturity and quantum impact, additional elements must be integrated into the whole process. One crucial element that stands out that makes the Business of Doing Good unique, impactful and sustainable, while integrating good business practice methods, is the element of goodness, which does not play a part in the business world.

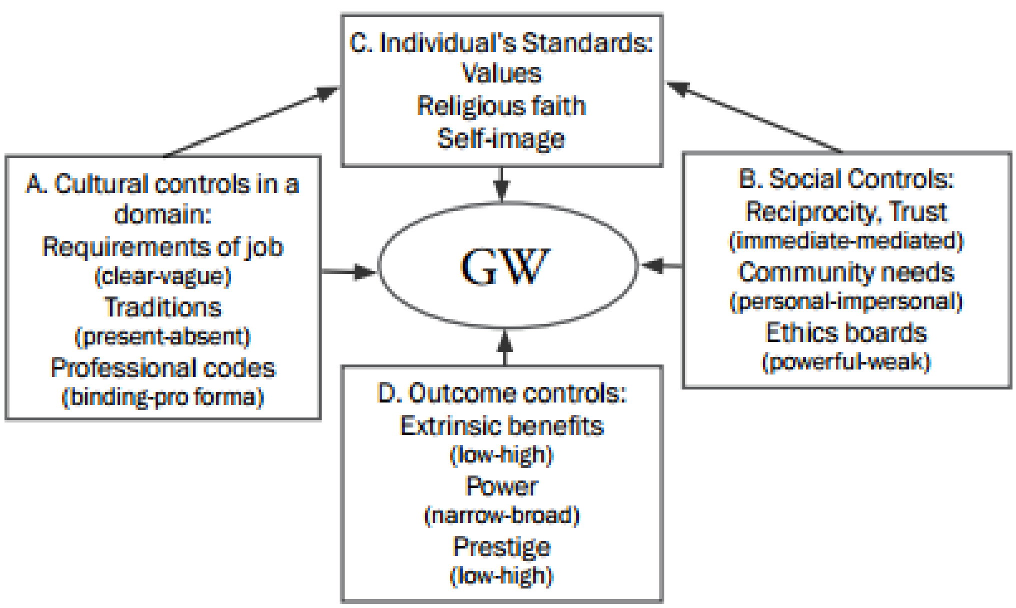
In the words of Aristotle:

The work of man is achieved only in accordance with practical wisdom as well as with moral virtue; for virtue makes us aim at the right mark and practical wisdom makes us take the right means…that it is not possible to be good in the strict sense without practical wisdom, nor practically wise without moral virtue…Practical wisdom too is linked to virtue of character, and this to practical wisdom, since the principles of practical wisdom are in accordance with the moral virtues and the rightness in morals is in accordance with practical wisdom.
(Aristotle and Ross, 1999, pp. 103,105,175)

As to goodness of character in general, Aristotle says that we start by having a capacity for it, but that it has to be developed by practice. How is it developed? By doing virtuous acts... Aristotle answers that we begin by doing acts which are objectively virtuous, without having a reflex knowledge of the acts and a deliberate choice of the acts as good, a choice resulting from a habitual disposition.
(Copleston, 2003, p.335)

This emphasizes the importance of choosing goodness as a core asset and as a necessity for the Business of Doing Good to be successful and sustainable.

This comes into play when considering Gardner's four crucial factors of good work:



(Gardner, 2010, p.117)

Choosing the right people to be involved in the Business of Doing Good is critical. This includes having a clear idea of the requirements of the job, including goodness of character, having values of virtuous nature, someone who is trustworthy and ethical and has empathy for community needs, and a person who cares to do good acts to make society a better place. This must co-exist with the other factors of Good Work, as presented by Gardner, to produce the right outcomes. Any organization will benefit from integrating the model into its practices and employees' recruitment, a few times fold, especially organizations in the Business of Doing Good.

The world of philanthropic giving and management, which I term as the Business of Doing Good, is structured from essential components that surfaced from my research work and hands on experience. These components when come together build the foundation for best practices and impact for stakeholders as well as society. As a First Person Action Researcher, the process of reflection affects knowing and choices made. Throughout these chapters, I will investigate the components that create and sustain the Business of Doing Good.

Chapter 3 Methodology

My Role as Worker and Researcher

Starting my way in the Business of Doing Good, I was eager to make a change in this world and bring quantum impact to the communities we operated in. I started by establishing our foundation and developing collaboration with municipals, academic institutions, hospitals and research centers, other organizations and people. In spite of general satisfaction at doing a lot of good, I felt that results were slow to come and I understood that to create change, I must evaluate what was not working to create the right tools and guidance to bring about growth and success. At first, I went back to the basics that worked in the business world: reporting, data collection, conferences, board meetings and so on. I realized that this did not yield the desired results because I was dealing with people not from the corporate world. They had no experience in this field and did not understand the terminology of business metrics. So, I turned to the academic world to find a bridge between the two. As I progressed in this field, I found I must acquire the right tools to develop a critical eye that will enable me and the organization growth and success. Hand in hand with the academic research and counselors, I started to develop my own skills and management style that will be effective in bringing impact and success. Through this journey, I started learning and integrating the knowledge to become a First Person Action Researcher.

Reading McNiff and Whitehead’s ideas on how to improve my work, I found his action researcher approach suitable to my needs and my work-based aspirations, as presented:

> I reach a critical point in my practice;
> I feel the need to act;
> I act in a chosen direction;
> I monitor and evaluate my actions;
> I change the direction of my actions in the light of my evaluations
> (McNiff and Whitehead, 2002, p.202)

“First-person research/practice skills and methods address the ability of the researcher to foster an inquiring approach to his or her own life, to act awarely and choicefully, and to assess effects in the outside world while acting” (Reason & Torbert, 2001, p.17). The development of practice to reflect on issues critically became a permanent part of the journey and enabled me to adopt a mindful way of being, reflecting and responding based on my present moment awareness in situations that were part of the wide spectrum, whether in my personal life or in my professional life.

"To understand the human mind Augustine wrote – Do not go outward, return to yourself, truth dwells within." (Coghlan and Brydon-Miller, 2014, p.349) Over the years, I found that the practice of First Person Action Research was beneficial to me and the organization, and enabled growth and sustainability, as well as being suitable to my style of leadership and management as a practitioner of mindfulness myself. As addressed in the *Sage Encyclopedia of Action Research*, First Person Action Research has no one set of methodology. This in turn enabled me to freely choose and adopt the proper tools and matter of research and inquiry that was needed in each particular case, where the needs were different, yet in each case, there was iterative interplay between action and reflection that led to critical inquiry and knowing. As a First Person Action Researcher, I knew that I would be influenced and would be influencing those people that I was interacting with. I therefore knew that I needed to be capable of the ability to critically reflect on values and actions, and be as objective as possible. In all cases, I made sure that proper research ethics were exercised, including addressing issues related to confidentiality, anonymity and legality and other moral implications. I also emphasized the importance of reliable, valid data as basis for operation in all researches, with all research partners. This was imperative to ensure trustworthiness of research, by implementing credibility, reliability and authenticity tests. As part of the process, I tried to fully capitalize on existing skills and knowledge.

In First Person Action Research, where we come to experience ourselves as subjects as well as objects, brings us in direct awareness of our actions and knowing, which in turn enables developing spirals of knowledge. This enabled me to foster alternative ways of perceiving situations and developing critical understanding of issues, while bringing about transformation and improvement of practice and results. This was all reviewed under the moral purpose of what is good, which is a unique element especially of First Person Action Research. This was evident throughout my practice as a First Person Action Researcher, and played a major role in directing my successes, while presenting professional dilemmas and moral conflicts, at various stages, leading and pushing me to make critical judgements constantly. One specific example comes to mind regarding one of the organizations under my leadership, dealing with leadership development for youth. Based on the qualitative research that I initiated, I wanted to determine whether the activity of the organization was in-line with its goals and mission. After the results of this research came out, it became clear that the participants felt that some of the activities in which we invested large sums of money were not related to the goals and mission of our organization. The decision to insist and address this question in the qualitative research was based on years of experience. What I was able to see and feel in the field, was not clear to my peers. The qualitative research identified and clarified, where the gaps between our perceptions are and the actual implementation in the field lay. It showed us in which direction we must advance in order to stay close to our vision and mission.

Almost since the very beginning that I got involved in the Business of Doing Good, I was profoundly shocked at the wastage of resources on all levels. I found myself becoming a

First Person Action Researcher, so I could get to the bottom of the truth as to how this field can be effectively managed, thereby helping more people and bringing quantum impact.

As a First Person Action Researcher, I found myself employing various research techniques as was suitable to the particular needs of the organization. These included, but not limited to:

- Survey research qualitative approaches, where LEADERS Ambassadors and Alumni were asked qualitative questions, and in ACADEMICS we asked ourselves questions that were quantitative in nature.
- Data Collection: I insisted on data collection being trustworthy, valid, reliable and as objective as possible. This was not an easy task to accomplish in real life situations. I used techniques of interviews, observations, as well as designing and administering questionnaires. I also made sure all knowledge and practices were anchored and supported with the appropriate documents and literature, as well as best practices, while suitable to the organizations' missions and goals.
- Interviews: some researches involved collection qualitative data by interviews over the phone or group meetings as well as one-on-one interviews. Part of the interview was structured, and part of it was un-structured to allow qualitative information that may otherwise not surface.
- In case of quantitative research, it was necessary to ask precise questions to receive valuable answers and lead to a critical review of the issues at hand. This meant that a lot of background study was done to generate impactful questions that would still give precise statistical answers, such as in percentages or absolute numbers. This required raw data to be recoded precisely and create a realistic picture of the data.

All through the process as First Person Action Researcher, I had to maintain the fine line between objectivity and subjectivity, finding my role in the process, as an ongoing reflective practitioner

I embarked on a journey to explore and research the way philanthropic organizations operate and discover how to implement the knowledge gained into our daily activities in the foundations I was leading. Over a period of more than ten years, I initiated three major researches in the field of impact investing.

Ever since 1999, when I was presented with the opportunity to run the philanthropic foundations of both of our business group's founders, I knew that I had been presented with an opportunity to bring true impact and to make a difference. The donors, who had been businessmen all their lives, were used to speaking the language of ROI and when it came to measuring results, only the bottom line was what counted. So, when it came to giving out funding for various projects that we either initiated or we were stakeholders in, it was natural for them that there would be transparency and accountability as well as measurement, just as in their businesses.

In the beginning, when I approached the various organizations that we donated to, I presented our conditions for collaboration, which were accountability, transparency and impact measurement. In most cases, this was a challenge, and we had to work out and invent the solutions jointly. This was many times a best-case scenario. However, in many cases, the organizations or projects that received funding felt very uncomfortable. They regarded our requests as rude. They were used to receive funding and giving a plaque and much honor in return. They did not understand this new type of donor that demanded results, transparency and impact measurement. In many organizations, we felt like the “unwanted donor”. It was an uncomfortable feeling. We felt as if they wanted our money, but did not want our direct or in-direct involvement and supervision. We were a new and unfamiliar type of donor. In the past, donors were mostly families of generations of wealth. We represented a new generation of self-made millionaires, who made their fortune in the new wave of the information age, and wanted to create a better future for the next generations.

My role in this process was critical. It was very important for me to bring my donors proof of results as they desired and demanded, yet I had to make sure not to dampen the spirits of the innovative and talented people that I engaged with. There was no one size fits all solution. As I evolved into a First Person Action Researcher, I learnt to reflect upon each case and developed tailored approaches and generate workable solutions, as a First Person Action Researcher. Sometimes ethical dilemmas came up, and I resolved them through dialogues with relevant parties and professionals, as necessary. Most projects affected people’s lives. My main concern first, was to do no harm. In contrast to the business world, our intervention in the philanthropic space had a direct impact on people’s lives and futures. It was not about acquiring a new product or enjoying a new service. It was about transforming lives. My other main concern was to facilitate bringing the most impact per dollar spent in the most transparent, accountable and measurable way, while maintaining the values and ethics that concern people’s lives.

In relation to the in-house projects that I initiated, it was, in some ways, easier, because I laid down the rules of the game and made sure that organizations under my direct management would have a clear mission and set of values, as well as, measurable bottom lines. I made sure to incorporate effective ethics. From the start, I insisted on transparency, accountability and measurement and developed in most instances independent research methodology, to make sure that we achieved objectivity, reliability, validity and impact in our work.

These effective methodologies ultimately strengthened employees' loyalty and limited damage to reputation, associated with ethical issues.

In this paper, I am presenting three different types of research that I commissioned within my in-house projects.

- A qualitative research of LEADERS, which I initiated through a renowned research institute in Israel, which I hereinafter refer to as LRI. The research examined whether we were succeeding in achieving impact according to the vision of paving the way to developing the future leaders of Israel, by giving the tools and the empowerment in order for them to be able to reach leadership positions and bring impact. The research answered most of the questions presented; however, we were not able to implement all the necessary changes to the program, due to the organizational culture at that time.
- A formative research, for the ACADEMICS program, which I commissioned to the one of the leading universities in Beer Sheva with a reputed School of Education. I will hereinafter refer to it as BSE. Building on the knowledge accumulated, the formative research examined the success and difficulties of the program and what needed to be done to improve the process and impact of its operation. The findings enabled us to move ahead and make changes to the programs that were beneficial to the ACADEMICS's students throughout the program. The research led to a breakthrough approach whereby emphasis was centered on each and every student

throughout the program. This shift from seeing the big picture to knowing the individual himself and tailoring the program to his or her needs, yielded not only individual success of more and more students, but also transformation in their levels of competence, caring and confidence, which was the basis of our pilot study that we attempted to carry out at TSE. Before launching on the formative research for ACADEMICS with BSE

- A quantitative research for the ACADEMICS program. The research examined in actual terms the economic efficiency and impact of every dollar spent per student in absolute terms. One significant difference regarding this research compared to the qualitative and the formative research discussed was that this was an in-house research project, as we had access to all the data related, and failed to receive the right cooperation and reporting from an external research institute we commissioned the research to, in the beginning. Carrying out an in-house research, enabled us to understand in depth our strengths and weaknesses and draw upon it.

As the person, who was ultimately responsible for the research, whether conducted in house or commissioned out, I faced several ethical dilemmas, which required me to incorporate guidelines and parameters throughout the researches to facilitate transparency and measure impact. Some of the researches included personal information of the participants in the programs and their immediate families. It was imperative that the use of such information will be dealt with care and confidentiality. Yet, the information was gathered to be presented to stakeholders and investors. To mitigate these contradicting sides, I made sure that all information gathered will be secured. Only those engaged in the research had access to the information. Information was presented in a qualitative way and maintained anonymity. Strict procedures were put in place to secure digital and non-digital information, including consent forms from students and their parents regarding the information provided.

Another concern was misuse of personal information by people related to the projects and researchers. To address this concern, I put in place mechanisms that ensured the information will be protected and secure. I also made it a point to choose the right people for these positions and voice my ethical principles and discuss my concerns and guidelines with all the people involved in these projects. Some guidelines, such as recoding information without the names and identifying features and an open-door policy to whomever felt that his or her information was at risk, were put in place and monitored.

One of the issues concerning these researches was bias towards the desired outcome. To address this issue, I made sure not to divulge information regarding expected results, in a way that will compromise and shift the conclusions of the research, by providing support and encouraging the researchers and people involved in the programs to expose problems and concerns. By not directing the results to the "right" path, I was able to receive genuine results and examine the results in an objective way. Upon reflecting, I came to the understanding that one way to achieve objectivism and reduce interference with results was to commission the researches to independent organizations, which had no stake in the success of the program. This combined with the collaboration of the program managers enabled us to get a clear picture of the success and impact of each program and allowed us to grow and repave the way to success.

Finally, I had to reflect upon my dual role and understand the ethical dilemmas I was facing as the leader of these programs on one hand, and as the presenter of their success, on the other hand. Learning to use the information and feedback received from these researchs as a tool for improving success and foundation for growth helped me mitigate these conflicting roles. Understanding that research is a crucial way of thinking of practice, regardless of the methodology chosen to advance this practice, helped me use these research results in an effective way and grow as a First Person Action Researcher. In part, this was possible as my ability to absorb without drawing conclusion, led me to considering alternative ways of pursuing the situations, doing critical appraisal, and coming up with new insights. This was made possible only because of a moral understanding that philanthropy is about doing the right things well and involves a change process in human lives. The number one rule was "do no harm". The second rule was "do your best". In order to be as objective as possible, the third rule was "practice humility".

Carrying out these researches and seeing their successful completion was exhausting. Many times I felt lonely. I felt the loneliness of a long-distance runner. The dual roles of manager and colleague, insider and outsider were strenuous to manage and sustain psychologically. Getting the ship to steer in the course that you want, while nurturing the egos and demands of all the partied involved was not an easy task. I realized that the best way to handle this was not to take ownership over the research but to delegate the feeling of ownership and responsibility of the research to all parties involved. The moment they felt involved and equally responsible; the moment they felt that I trusted them; they wanted very much to be worthy of this trust and this facilitated, in most cases, cooperation between all parties until the successful completion of the researches and their implementation in order to bring the desired impact.

What helped me navigate through these challenging times was my ability as a First Person Action Reseacher to integrate reflective practices into my work, and by doing so set the course to rebuilding and reshaping the practice of the Business of Doing Good, based on the cycles of new knowledge that developed from the reflective processes. I particularly found Kolb's model of experiential learning cycle (2005) to fit my particular style of reflection and its analysis, and thereby learning from it. Kolb addresses the four learning stages: experience, reflection, conceptualization, and experimentation, as milestones in the learning cycle, which provide tools for practice in the real world, and act as a basis for a new cycle of learning, experience and reflection.

As a reflective practitioner, a lot of knowledge was developed out of the experience of work in the field. In these cases, I, also, found Schon (1987) concept of the reflective practitioner suitable to my core character and working style. Schon refers to "knowing-in-action" and recognizes it as important. He describes "knowing-in-action" as what we draw on in dealing with routine problems of practice. This was crucial in dealing with the ACADEMICS formative research, as it had direct impact and allowed us to change some of our practices to suit the specific needs of the participants of ACADEMICS program.

All researches that I undertook were cyclic, spiraling and evolving processes. As a First Person Action Researcher, it caused me to reconsider our practice and reach conclusions that brought me to a different place and warranted action and change. Each program that I examined needed different research approaches. LEADERS needed a qualitative approach so we could improve our program to achieve our vision and mission. In the case of ACADEMICS I followed a hunch. I felt we were on the right path, but there was something that needed to change at the core. I did not know to give it a name. When I described the program to the head of education school at TSE, she said that we might benefit if we evaluate the levels of competence, confidence and caring of the participants in the program. As a First Person Action Researcher, I reflected upon her suggestion and felt it is admirable that these school drop-outs will finish tertiary education and obtain a B.A. degree, but, as part of the reflective process, I felt we should examine if there was anything basic at the core of their character changing? Were they feeling more confident? Did they feel more competent? Could they cope with challenges and failures better? Were they able to reach out for help, when needed? Did they care for themselves and others? Was their self-perception more positive? Did they have a higher self-esteem?

The quantitative research for ACADEMICS aimed to evaluate the objective impact of the program vs. dollars invested. I wanted to measure the impact, short and long term, as well as the social mobility of these young people and the effect the program had on the communities in an objective way, using financial indicators to understand how the program transforms lives and communities and adds value to all. Examining the impact vs. dollars invested enabled me to fully comprehend the scope and direct results of the program. It was an essential tool to drive more resources and better utilize existing resources to create impact. While reviewing the data and comparing it to national data, it became clear to me that not only that the program was a paradigm shift and a tool for social mobility, it was also one of a kind program, providing long term investment, unmatched by anyone, walking step by step with these young students, until it assured success of the program by obtaining tertiary education, and by doing so, it did much more. It was transforming lives, families and whole communities, situating these students at a new social level, increasing productivity and income to the country.

To be able to successfully evaluate the research processes, I understood that criticism is part of the process and my evolvement as a First Person Action Researcher allowed me to access it from an angle of a critical thinking process. I took steps to integrate it into the day-to-day operation as an effective tool of action and reflection, where the end result was growing from this knowledge and experience, personally as well as for the people whose lives we touched. In the Business of Doing Good we are human agents for change that affect and change human lives and as such, we have to do exceptionally well, since we are committed to a cause. It is therefore a moral responsibility that these agents will consider the effect of their activities with utmost care and responsibility. To do the right thing, one must evaluate and understand the effectiveness and impact of our activities.

LEADERS – A Case for Qualitative Research

LEADERS was established in 1998 with a vision of changing Israel's leadership culture, ideologically and morally, by encouraging, motivating and nourishing the future generation that has the basic potential to become leaders. The vision of LEADERS was that twenty years down the road, we would have developed future leaders, who would be in leadership positions; leaders with leadership skills, on the one hand, and a social conscience, on the other hand. An enlightened leadership with critical, moral, and courageous thinking that upholds the values of democracy.

LEADERS is a nonprofit organization, which was established eight years before the research was conducted. Every year, LEADERS identifies a group of 150 (out of 3,500 candidates) high potential and highly motivated youth leaders from all over the country, and offers them to join a very unique leadership development program. During these two years of training program, LEADERS's ambassadors participate in many seminars, workshops and other leadership development activities. In between, they acquire some significant leadership skills like project planning, project management, conflict resolution and teamwork and many others, while initiating, planning and conducting various community projects. LEADERS's program is being conducted and coached by a group of outstanding and very experienced consultants. All of them have at least a second academic degree (M.A.) and they are all experts in the field of leadership development. LEADERS’s training program is being based on three main courses of action: leadership seminars, training in regional teams and community projects.

As co-founder of the organization and holding the overall responsibility over the program, I decided to initiate an independent research to examine if the program is yielding the desired outcome, to ensure that LEADERS is and would continue to be a high-quality program for its ambassadors and alumni to attain our key goal of developing a different kind of leadership for the State of Israel. The initial thought was to examine and understand that we are advancing in line with our goals, in order to achieve the desired social impact. The main focus areas were:

1. Does LEADERS recruit the right candidates for the program?
2. Does LEADERS's program encourage these candidates to evolve and foster change in their lives and actions?
3. Do LEADERS's alumni foster leadership roles?

I felt that the advantages of employing a qualitative research in the case of LEADERS were that within a short period of time I would receive dynamic, real life qualitative information that would help me develop my understanding of the issues at hand and give me the confidence, thereby making me better equipped to carry out the changes necessary in the program. I was determined to receive objective and meaningful qualitative data about the activities and processes of LEADERS, and not to try and showcase just the successful metrics and numbers.

My idea was to have an independent professional body analyze and synthesize the information received based on questions presented. I believed this would then lead to critical evaluation and contribute to existing knowledge, whereby empowering the senior management to learn from the target audience and implement the necessary changes required so the program can evolve into higher levels of success metrics, according to LEADERS's vision and mission.

"LRI" a well-established and known research institute was hired to independently assess LEADERS. I met with the manager of LRI to design and build the research. As part of the process and to ensure success of the research, I requested that the senior management will be actively involved in the planning and designing of the research, so that they would later be able to take ownership on the results and cooperate and carry out the necessary recommended changes to allow LEADERS to evolve.

Over a period of six months, in depth interviews (see Appendix I & II) took place in person and over the phone. The questionnaires included 25 questions, mostly open ended questions, yet some questions were in a scale of 1-10, where 1 stands for extremely not satisfied and 10 stands for extremely satisfied, with additional option to add verbal remarks.

These questions were examining four main issues related to the program:

1. Retrospective overview
2. Personal experience
3. Reasons for abandoning participation in the program
4. A look into the future

All in all, about 320 ambassadors were interviewed, including first, second year ambassadors, alumni, and dropouts. Data was collected and processed by LRI and the findings were presented to LEADERS's management and to the donors. I made sure that we achieved validity by asking appropriate research questions and cross-checking the findings by reviewing similar aspects from different angles. It was important for me to gain reliable results, which I did by using in-depth personal interviews to get qualitative data that will shed light on the rest of the data that was achieved.

As the research was under a limited budget, I had to decide upon the most effective way to collect data and get to the source of the necessary information, while still maintaining the budget restraints. To address this issue, we decided together with LRI to interview a limited amount of people face to face, while the rest were interviewed by phone. Only 20 ambassadors and alumni from all the different categories were interviewed face to face. The rest of the ambassadors and alumni from all the different categories were interviewed by phone. While effective, phone interview limits the ability of the interviewer to pursue more in depth understanding of different situations. However, I still believe that we gained substantial and important information from all the interviews conducted, by phone and face to face. The decision to use in depth interviews as the research method was based on the understanding that to receive effective information, we need to receive qualitative information. I felt that only qualitative research can reflect the strengths and weaknesses of the program, and direct our future steps. I believed that, if we intended to succeed and achieve our aim and mission of developing a future leadership for Israel, a leadership with critical, moral and courageous thinking, along with public and communal responsibility and a vision that commends the values of democracy, there was a need to develop within LEADERS a culture that forever embraces change in order to stay relevant, sustainable and successful at our mission. The qualitative research enabled us to examine if LEADERS in its current state had the potential to lead the way or if changes were needed to be implemented in the program to achieve our mission and vision.

I oversaw the whole process of the evolving research in detail, from designing the questions relevant to the research, to taking an active role in advancing the research in the field.. I was making sure it did not get out of hand or became ineffective. I requested that the research be presented to the donors so we can learn from it and evolve. After the research was presented, we started to move to the next steps of implementing its insights. However, this was not an easy task! In fact, it was one of the more challenging processes I had ever led in organizations, due to the conservative nature of the organization. I decided in advance to forgo any questions that would surface conflicts and concentrated only on whether the program was achieving its vision and mission and what additional insights could be implemented to take the program to the next level to achieve the desired impact. I was hoping that the research conducted by an independent organization will help raise flags, which in turn will direct change from top to bottom.

The research brought to the surface many challenges, highlighted many insights and highlighted to us the path to make additional leaps in the program.. However, it failed in leading the senior management to implement any major changes in the program.

ACADEMICS – A Case for Formative Research and Quantitative Research

ACADEMICS is a unique program that promotes education as a change agent for at-risk students from disadvantaged backgrounds, who reside in the peripheral communities of Israel. I co-founded this program in 2001 with the aim of enabling equality for these students in attaining an academic degree. The program accompanies students through high school, military/national service and their tertiary education until attaining their degree. This is a very unique program, whether in Israel or world-wide. I personally have not come across another such philanthropic organization that puts each and every student in the center of its commitment and accompanies and hand holds them for a period of over ten years, until they have achieved tertiary education. In the last decade, ACADEMICS has transformed the lives of a total of 2,350 students and their families in the peripheral communities of Israel.

At ACADEMICS our belief is that education is the greatest equalizer and given the opportunity, every child can succeed in school regardless of their socioeconomic background. The program seeks to improve society as a whole by leveling the educational playing field and empowering at-risk students to earn an academic degree.

The commitment made by ACADEMICS to its students is unmatched. ACADEMICS makes a 10-year personal commitment to each at-risk student, providing a comprehensive unique program tailored to support the student, beginning in the 10th grade and continuing until students achieve the ultimate goal of tertiary education. Although education is the primary focus of ACADEMICS, simply providing access to education is not in itself enough. Thus, along with academic support, the program provides students with the financial, emotional, motivational, and general life support they may need to flourish in their educational pursuits.

ACADEMICS Formative Research

After a few years into the ACADEMICS program, I decided to commission a formative research to evaluate the activities and impact of the program and pave the way to the changes as necessary in order to take the program to the next level and bring greater impact to those involved. The decision to integrate formative research was done to answer the specific needs of the program and making necessary adaptation, while the program is ongoing and to refine and improve the program as it evolves.

The decision to use formative research as research tool was based on formative research benefits and active approach, as:

> Formative evaluation (sometimes called field testing or usability testing) is a methodology for improving instructional resources and curricula (Bloom, Hastings & Madaus, 1971; Cronbach, 1963; Scriven, 1967; Thiagarajan, Semmel & Semmel, 1974). It entails asking such questions as “What is working?”, “What needs to be improved?”, and “How can it be improved?” (Worthen & Sanders, 1987, p. 36). Using it as the basis for a developmental or "action" research methodology for improving instructional-design theories is a natural evolution from its use to improve particular instructional systems. It is also useful to develop and test design theory on other aspects of education, including curriculum development, counseling, administration, finance, and governance.
> (Reigeluth, 1999, p.636)

The objectives of the ACADEMICS formative research were to look at the development of the students, during their participation in the program, as part of our mission to be change agents in the lives of under-privileged students in an impactful, measurable way, until they successfully completed tertiary education. The sub objectives were promoting schools' achievements, motivation, self-efficacy, emotional and behavioral adjustments, acknowledgement of success and coping with failure, confidence in the chance of getting help and the ability to get it, hope for a better future, as well as, what is needed to be integrated into the on-going program to facilitate these goals. The techniques for collecting formative data were: observation in the field, documents (grade-marks of the students) and interviews with the participants. The rest of the data was in form of questionnaires that were presented to the students. All the information was integrated and the relevant information was fed into the computer by the staff for the purpose of preparing a statistical analysis and a comprehensive report based on the guidelines that we agreed and decided upon. Emphasis on maintaining valid and reliable data collection was a core concern.

The formative research, which took three years, was commissioned to BSE, and included: 2,557 questionnaires (See Appendix III), in-depth interviews with students, teachers, principals, parents, mentors, housemasters, program coordinators at school and at the universities, comparison to control group, with over 500 questionnaires that were filled by this group, to ensure validity and credibility. It also included many hours of observations during different activities in and out of schools, such as: tutoring classes, personal mentoring, educational tours, and staff meetings. In addition, the research followed and observed students' grades throughout the program, following 20 students in depth, as well as providing questionnaires to pilot students from the program in the university phase.

I took an active role in designing, building and implementing the research, while making sure that data collection was sound and analysis procedures were thorough, and there was competence and accuracy of data. This facilitated encouraging and leading the way to the implementation of the necessary changes in the program. I decided to delegate the day to day research activity to the program manager. The decision to delegate the ongoing communication and supervision of the process to the program manager, while maintaining my involvement and guidance, was made to strengthen the responsibility of the program manager to the results and taking ownership of the process to follow. During the whole period of conducting the researches and before and after the conduction of each of these researches, I developed research skills that were like second nature to me. As a First Person Action Researcher, I was reading a lot of literature on specific subjects of relevance; I was writing, organizing, following up, delegating, monitoring, reflecting, questioning, listening to answers, reflecting some more and developing my critical understanding of the issues at hand and my knowledge and understanding evolved spirally as I arose from situations and saw objective results confirm or refute my theories and understandings.

Prior to the formative research of ACADEMICS in 2005 – 2008, which was commissioned to the BSE, we commissioned a pilot research with a leading research university in Tel-Aviv (TSE),, with 234 students in grades 10 and 11, who were participants in the ACADEMICS Program. The pilot research at TSE, flooded many issues related to working with academic institutes.

One main problem was establishing proper working schedule and communication channels including reporting, meeting timelines of the projects, stage by stage evolvement of the research and ongoing reporting by the academic staff. Another issue was the ability to shape the research in the desired direction, where the academic staff was interested in pursuing different angles rather than the actual needs of the program. In addition, I realized that working on formative research required all sides to see eye to eye and communicate freely. This was quite challenging in an environment of academic prestige and ego, leading to misalignment of interests between both sides – the academic aspirations versus the goals of the professional team, who were focused on finding the solution and answers to real life situations.

Having said that, the fact that I insisted on drawing up a research contract, kept the process going from its initial stage to the stage of completion, since expectations held by both sides in the relationship were made quite clear by the contract. Notwithstanding, this did not turn out to be successful partnership. Drawing on my experience with TSE, and wanting to evolve from this, I started to look for like-minded partners and found them in BSE. The decision to build the research with BSE rather than TSE was based on several factors:

1. Cost per benefit: The costs of structuring the research in TSE were much more expensive than BSE, without them giving in return the same level of engagement and activities expected.
2. Formative Research Structure: While BSE were willing to the take the research to the field and incorporate into the research field days, in depth interviews, and observations, TSE refused to incorporate these segments into their research because they were focused on the theoretic value of their findings, rather than the day to day application of it.

Working with BSE and drawing on my experience with TSE, I structured the formative research at BSE to be effective and applicative. This was another example of the reflective process that led to understanding of the need to make and act on different choices that came out of the reflection and understanding that the relationship with TSE would not yield the results that I was seeking. The reflective process enabled me to crystallize what I felt as a gut feeling and convert it to action based on knowing and understanding.

I made sure the relationship with BSE was sealed with a contract that addressed the relevant issues, including how the formative research will be conducted, reporting schedule, and deliverables. Framing the relationship with the university by a contract fostered clearness and removed complications, allowing each side to focus on the task ahead. At BSE, I found partners, who were motivated as ACADEMICS team to extract applicable information from the formative research. Based on the information gathered and analyzed we were able to implement changes and structure the program to yield better results and impact.

Ethical issues such as confidentiality, anonymity and legality were also addressed before the onset of the research process. Informed consent of interviewees was gained in writing. The students were advised that the research was done to improve their success and the results of the research would be gradually implemented into the ACADEMICS program. It was made clear that the beneficiaries from the research would be the students themselves and the upcoming future generations of the students in the ACADEMICS program. I also made sure that only people directly related to the research itself would have access to the data. The managerial staff of ACADEMICS, the university staff and myself – who was managing and overseeing the research - were the only people that had full access to the data and the questionnaires. The full results were available only to the six of us. The rest of the people related to the ACADEMICS program (teachers, tutors, headmasters etc.) were shown only bottom line results, after making sure that confidentiality, anonymity, non-identifiability and non-traceability had been guaranteed.

Presenting the results by a well-respected authority as the BSE allowed the recommendations of the research to be accepted by the whole group, including cooperation to implement them. Drawing on these findings, the BSE team suggested some applicable solutions, which were then implemented into the classes as a classic example of what formative research actually aims to achieve. Following the insights provided by the BSE team, we developed the ACADEMICS language of competence reinforcement among the adults (tutors, teachers), who worked with the students. We also developed the ACADEMICS language of reactions – when there is a decrease in achievements of the students and also building alertness to expressions of despair and encouragement to putting in more efforts during the difficult periods of decreased achievement. These tools of training were given to tutors and teachers and allowed the students to react instantly – before the gaps that are hard to overcome, settled in.

The formative research was a turning point in my practice and leadership of the research process. Following the research conducted in LEADERS, which did not materialize into actionable outcome, and the pilot research for ACADEMICS at TSE, which highlighted the importance of finding the right partner for the effective research, I went into this process with BSE with open eyes and mind. I used the knowledge and experience from the former researches to draw upon them to ensure success of this research, where success was measured in our ability to use the data to repave the way to success for the participants. After a reflective critical review of the failures associated with the former researches and my part in it, I was able to turn lemons into lemonade and build upon the lessons learnt to lead the research in harmony, with the full collaboration of all parties, while maintaining and protecting the main goals of the research, ensuring implementation in the field.

This formative research was the foundation that facilitated the next step of quantitative research, since we incorporated the findings of the formative research, and thus improved the impact of the program for the ACADEMICS students substantially, yielding high result per dollar invested.

ACADEMICS Quantitative Research

The goal of this research was to show the influence of education on the welfare of ACADEMICS's students and the community in general in economic and social terms and to analyze the ROD of such an investment.

ROD (as ROI in economic terms) is a phrase I coined to describe in measurable terms the impact of every dollar invested on the non-conventional bottom line i.e. social and economic benefits to the receiver and the community in general. The measurement of ROD has been very conservative. Only actual parameters of the ACADEMICS students that can be clearly measured have been included, yet intangible benefits such as confidence and self- esteem, developing leadership skills, becoming role-models to family members, etc., have not been evaluated or taken into consideration. Social contributions like education for volunteering and for relating to the weaker in society, social involvement, and decreased chances of deteriorating to crime have not been examined in the framework of this research since it is difficult, if not impossible, to translate such social contributions into measurable currency. It is clear though that there are additional benefits than those that have been measured in the framework of this research, meaning the impact of the program versus each dollar invested is much higher than 1:12 ratio as noted in the research.

Ten years into the program, I decided to initiate a research to examine the ROD of investment in students' education and to translate the impact of the program to numeric values, examining cost vs. benefits of the program. I had to consider what is the nature of the data that I was seeking? What are the questions I wish to clarify? And what type of results will structure the steps for future impact? By placing a numerical value of impact, I was able to compare and evaluate impact or its lack thereof, for steps taken in the program or similar programs. It also presented an objective tool for discussion and collaboration with strategic partners.

In the first stage, I commissioned out this research to a private research institute that was recommended to me, by an academic scholar. I met with them several times together with the program manager of ACADEMICS and commissioned the research to this research institute. However, the feedback from them continued to be unsatisfactory. Since the concept of measuring ROD was innovative and unfamiliar, the research institute struggled to implement and deliver the research analysis and results. After meeting with the research team several times to define and identify the proper research methods and diverting additional funds to the cause, I had to admit that it was not incorporating what I wished to measure.

I, then, decided to reinitiate this research in-house. Although not an easy decision to take, I was confident in pursuing this road, because I knew that the people that will execute the research in house were highly dedicated, loyal, professional, tech savvy team that also, on a personal level, believed in the goodness of the mission and held similar values and passion to those I prompted within the organization. Drawing on my experience and knowledge gained, I knew I could lead the in-house team to pursue the notion of ROD, relying on shared core characteristics of seeking truth and transparency for all who took part in this research. We had all the data stored digitally, so we brainstormed with the team about the process and build- up of the research. The research was based on digital information accumulated throughout the years on each student, who participated in the program. All students and their parents had signed approval upon entering the program, which allowed us to accumulate the relevant information and use it for research purposes. All the information was extracted and processed. In total, the data of 2,082 participants in the ongoing program as well as 158 participants in the pilot program were gathered and analyzed.

We checked several parameters, including:

- How many students achieved high school diploma?
- How many students joined the army and completed full army service?
- How many students pursued an academic degree?
- Parents' level of education and more.

In view of my previous research experience and the knowledge acquired, in order to allow the in-house researchers greater understanding of the program, we also incorporated field days and interviews with students, teachers, tutors and workers within the organization. We also investigated the information that existed in the academia about factors of success in education and measurement tools. The information processed from the ACADEMICS database was compared to national information, featuring the same parameters on national and municipal levels. Working on this statistical information and analyzing the relevant data from the internal database, surfaced several issues:

- Missing information: although all candidates must fill in questionnaires with background information, some information was not present in the digital system. To obtain full and comprehensive information for the research, we updated missing information.
- Inaccurate information: some of the information in the database was inaccurate. This in turn also made us review and authenticate the information, using the help of people working on this project.
- Changes in the software: as the database was planned several years ago, it did not match the current needs of the program and resulted in obstacles to the research – we went back to the programmer and over the course of three months updated the database to allow clearer, more accurate, storing and exporting of information.

While working on this research, we also evaluated some ethical dilemmas.

- Access to personal information: While working with the database, we found that some personal information of participants could be easily accessible by teachers and principals. To protect participants' information, we introduced higher level of protection and hierarchy in access to information to ensure no misuse of information.

- Exposure of confidential information: in several cases, the researchers were exposed to confidential information related to the students. It was imperative that this information will be dealt with respect and no misuse of information will occur. As I was guiding and mentoring these researchers, I made it a point to address this in a straight forward manner and discuss the guidelines, while providing a listening ear and guidance in these matters.
- Presentation of information: to maintain anonymity and confidentiality, all information was presented as numbers, and not on an individual level. The research was not published to all the partners and teachers, rather some results were discussed with the relevant parties.

Despite the research focus on ROD, we were able to learn and identify problems on the municipal level and incorporate changes to the program, based on that, such as building up a new program to foster higher level of English studies in high-school. The research also reminded us the importance of handling each case as stand- alone and investing in the individual as well as the group, as part of the way to foster success within the program.

Although, it took a few years from inception of the idea of measuring ROD until we actually had a real ROD value to examine our investment and the success of the program, it was a rewarding experience. Since the team was committed to the cause as highly as I was, we were actually able to see good quantitative results.

Reflection on the Methodologies Incorporated

As a First Person Action Researcher, as the projects evolved, I realized that the needed skills for research conduction were not existent in the organization.. I therefore decided to develop specification to have external research done in order to get across the message that objectivity was the main consideration and whatever we learnt from the research could be incorporated as a basis for further development in the right direction. I made it clear that first and foremost as the person responsible for all programs and funding, it was important for me to inquire into my own actions and to understand if our programs were effective and to navigate and make the changes necessary to stay or steer in the right course based on our vision and mission. It was imperative to me to incorporate “reflection-in-action” (Schon, 1987), as a critical evaluation of the way we incorporate change.

As a reflective practitioner, I was conducting First Person Action Research where “the focus is on the practical rather than theoretical objectives, and the researcher is both the subject and the instrument of research” (Coghlan and Brydon-Miller, 2014, p. 349)

Throughout the last fifteen years that I have been a First Person Action Researcher, in all major projects that I took upon myself, I did not seek to prove that I was doing the right thing, but I was rather seeking to learn from it and to reflect and understand how I could constantly improve on what I was doing and what was the right thing that I needed to do further as the projects evolved.

I set out to build the researches, drawing on my knowledge and concrete experience, building on Kolb’s Model of experiential learning cycle (2005), where I used the concrete experience to lead to meaning observation and reflection by setting proper mechanisms of research. This in turn, enabled developing program strategies and testing the new concepts and weighing their benefits to the programs and the participants, creating impactful bottom lines. I also turned to the experience and guiding hand of experts in the field, through literature, including:

Doing your Research Project by Judith Bell, 2010: a concise approach and guide to building up your research, while opening your view of how to construct and build the appropriate research, addressing issues such as: choice of methods, ethics, and structure of research. Bell notes that there is no one rigid set of appropriate way to conduct research, rather encourages the reader to design the research based on the actual needs of the organization;

Case Study Research – Design and Methods by Robert K. Yin, 2009: Yin, amongst other, emphasizes the importance of the characteristics of the good case study investigator.

- A good case study investigator should be able to ask good questions-and interpret the answers.
- An investigator should be a good "listener" and not be trapped by her or his own ideologies or preconceptions.
- An investigator should be adaptive and flexible, so that newly encountered situations can be seen as opportunities, not threats.
- An investigator must have a firm grasp of the issues being studied, even if in an exploratory mode. Such a grasp reduces the relevant events and information to be sought to manageable proportions.
- A person should be unbiased by preconceived notions, including those derived from theory. Thus, a person should be sensitive and responsive to contradictory evidence.

(Yin, 2009, p.69)

How to Research by Loraine Blaxter, Christina Hughes and Malcolm Tight, 2001: This book enables the reader to think innovatively on research methods and application.

> Researchers, particularly those with limited experience, often approach their chosen research topic with considerable enthusiasm, reading widely, checking sources and contacting experts as appropriate. But their focus can be almost exclusively upon the topic itself, rather narrowly defined, with little reference to how it relates to the broader field of research and study within which it is set. Their desire to thoroughly explore their growing interests in specific areas has to be reconciled with the need for each research project to be focused and contextualized within a more general framework.

(Blaxter, Hughes and Tight, 2010, p.37)

This illustrated the need to constantly seek balance between the specific research area to the general context and the broader field of study, so that neither is reconciled.

Doing Action Research in your own Organization by David Coghlan and Teresa Brannick, 2009: Since research was grounded into the organization's DNA from the start, this book enabled me to be aware of the undercurrents related to possible resistance to being measured. Being a First Person Action Researcher and understanding the duality of being an insider researcher as well as the object of research and accepting it as a means for growth and knowledge, led to building a more robust research with validity and reliability that could be implemented into the field.

I also reached out to my mentors and experts in the field and looked for their advice, including: Prof. Dan Ben David- A micro economist, specializing in economic growth, Head of the TAUB Center, Prof. Ami Vollanski- Chief Scientist of the Ministry of Education and faculty member of the Mandel School for Educational Leadership, Dr. Erika Landau – Founder of the Young Person Institute for the Promotion of Creativity and Excellence, and Loba Eliav – A teacher, Sociologist and Knesset Member, who was the founder of the city of ARAD and the NITZANA project – an educational community in the Negev Desert .

Throughout this process, I was able to take a reflective approach and examine the questions that needed to be asked and reflect on the best methods and methodology that would surface data and understanding of the issues at hand. All this needed to be incorporated in the ongoing, day-to-day activities of the organizations. I had to reflect on what was the purpose of my research and what I wished to achieve, what is the nature of the knowledge that I am seeking, what are the professional, ethical frameworks I need to consider, and what kind of methodologies will need to be implemented in order to get the best outcome.

It was also very important to me to differentiate outputs from outcomes, as I went about implementing lasting and sustainable changes based on the spirals of knowledge gained. It was clear to me that increasing the number of alumni or students in the programs as an output does not equal to a beneficial outcome. Because, outcomes are indicators of effectiveness and impact and serve the basis for measurement of impact achieved. It is very tempting to measure your success with outputs, such as a large number of students in the programs. However, I kept my eye on the goal of ascertaining that the outcome as to the level of performance and impact would not be harmed.

Knowing that different research methods and approaches, enabled me to devise and construct effective and authentic research that surfaced data that I could analyze and implement, the leading of change within the organization. The researches really painted a realistic picture of the various projects, pinpointing hurdles as well as highlighting success stories and achievements. It also provided us with tools to advance our activities and steer them in the right direction, increasing impact for all stakeholders. Over the course of these researches, I was also able to identify where changes needed to be implemented so as to achieve better outcomes and stronger impact.

Throughout the research processes, both in LEADERS and ACADEMICS, I was able to develop, evaluate and introduce change to the research processes and aim for valid insight, as a result of constantly practicing “reflection-in-action” (Schon, 1987) by improving what we were doing as knowledge developed. I found that Schon’s Model (1987) allowed me to be effective in addressing the day-to-day issues that came up during the research phase. This complimented Kolb’s Model (2005) and gave added value in transitioning from experience to reflection stage.

All methodologies have highlighted the importance of measurement, whether qualitative or quantitative. When one is a First Person Action Researcher, I believe that independent research is preferred to in-house research in order to obtain independent results for utmost possible objectivity and learning processes. However, it is crucial in any process to have the ability to reflect and evaluate on the successes and impact of the projects. With this in mind, I believe, that with the right people, guidance and monitoring, in-house research can, also, yield good and effective results and insights, which can be translated to actions.

As social impact organizations become the next stage of development in the Business of Doing Good, I believe that in addition to having a very clear vision and mission and making sure at all times that one does not steer away from it, research metrics should always be put in place as mandatory to all funding, to ascertain that the desired impact is in line with the organizations' vision and mission.

In the case of the researches that I have presented here, the LEADERS research pinpointed some problems but the rigidity of the organization did not allow to fully facilitate change processes within the organization.

In the research with TSE, I learnt a very good lesson. The experience with TSE showed me that in-spite of the good intentions; one must make sure that our interests are aligned before engaging with research partners. Although, I made it very clear to TSE that I was seeking to learn from our research in order to implement the insights, I was not aware enough and did not heed the warning signs enough to understand that the TSE had their own research interest in mind first and wanted to conduct the research “their way” based on their own interests and our needs as the “research field” and financier was secondary to their own goals.

The research with BSE was a corrective experience in relation to my interaction with research through universities. Here, I found a caring and committed group of people, who cared to promote their own research goals and funding, while making sure that these goals would be aligned to the needs of their customer. BSE staff iterated back and forth with us frequently and really cared to bring us the value that we were seeking.

After a failed attempt to do a quantitative research through an external organization and losing a lot of time, since I had the database in-house and the right people, I decided to carry out the quantitative research in-house. This led to many insights. For example, I discovered that the database was incomplete and not up-to-date as I was led to believe and as a result, we had to collect and complete the crucial information into the database first, before we could proceed and do the research. Notwithstanding, once the research was concluded and the results surfaced, I was able to critically review our expenses related to the program. One of the results was that at the tertiary education stage, I was successful in bringing down the expenses of the program by 50 percent, while increasing the participation and success of the students on the other.

CHAPTER 4 Project Activity

First and foremost as a First Person Action Researcher, who was in a continual process of reflection and inquiry, I always wanted to make sure that we took informed decisions and made changes as necessary to evolve in a spiraling process and at the same time stay in line with the vision and mission of the project, while bringing most impact possible on every dollar spent in a transparent, measurable and accountable manner. This required a constant interplay between action and reflection and continual inquiry as we evolved.

As a First Person Action Researcher, at all times, in all our major projects, I felt that due to the external stimulus of ongoing research at the various stations, I was gaining experience at “doing it right” and was fully immersed and present in it and was operating out of knowledge that resulted from practice and personal experience in William James words “knowledge by acquaintance” (Coghlan and Brydon-Miller, 2014, p.351), which led to further reflection and to a spiral process of new knowledge and growth. As a First Person Action Researcher and being so immersed into the projects, I was well aware of the potential of self-deception. That was one of the main reasons that I decided to engage with external resources for the various researches that I conducted throughout the years.

It was important for me to always remember – since we were affecting human lives – first to do no harm and second to do the right thing and the research processes at the various stations enabled me to know what is the right thing to do. Therefore, throughout my reflective inquiry as a First Person Action Researcher, I enlisted the support of objective professionals to advance and build the research needed to facilitate objectivity and guidance, while leading research to examine the impact of our philanthropic projects.

LEADERS – Developing the Leaders of the Next Generation - A Case for Qualitative Research

The year is 1998. The Israeli public is disillusioned. Every day, the media is full of articles on politicians, who have disappointed the public with unethical behavior, personal scandals and instances of seeking short term personal gains and corruption. The country feels that they have no leader to look up to. Therefore in 1998, there was a sense of urgency. Something needed to be done. That was the basis of the foundation of LEADERS. LEADERS was founded with the aim to locate the youth with leadership potential and to educate them and to give them tools so as to develop in them a leadership of critical, moral and courageous thinking, along with public and communal responsibility and a vision that commends the values of democracy. LEADERS believes that every person is entitled to equal opportunity, irrespective of religion, origin, political standing or gender and seeks that nothing will stand between this goal and its achievement, including economic status.

The basic program of LEADERS is a two-year program. The first year in LEADERS starts with an opening convention, where the Ambassadors (the LEADERS students that are chosen for the program) meet with key leaders of Israel. This is followed by work within their local teams. Within the first year of activity, the ambassadors participate and experience in four thematic seminars, addressing team work, creative and critical thinking, as well as, visional thinking and developing skills to execute visions into practical programs. In between the seminars, the ambassadors meet in local teams, once every two weeks for four hours, studying various subjects and issues such as influencing others, effective presentation, conflict resolution, project management, reflection and introspection and others. These skills are translated into action through community projects. As a result, many unique community projects are today, effectively running in the Israeli society and they have been a very empowering experience to those potential young leaders and their community. The second year is still dedicated to more work in local groups but the class of that year meets along the year in three additional seminars, strengthening planning, teamwork, decision making, resource allocation processes, leadership skills in ambiguous scenarios, leading through values, where the ambassadors map their value compass and investigate the relationship between their personal values and LEADERS's organizational values with regard to our leading social and national values.

The leadership process in LEADERS is developed through a change process. Over the years, we saw the success and impact of the program multiply. Every year we have over 3500 candidates out of which we choose 150. Parents, teachers, students, all have said, time and again, that there was no such program in existence and that LEADERS was an experience that was different from anything they had ever experienced. The community projects that the ambassadors undertook were so amazing that an incredible amount of these projects were getting prizes amongst others, the Harvard Wharton School of Graduates prize for volunteering, the Rotary prize, and the cherry on the cake was when LEADERS won the President of Israel Award for volunteerism. There was media coverage for some of these projects that were so powerful and meaningful that their exposure gained a lot of public acclaim and these social projects became very successful and financially self-sustained in a very short period of time.

And when everything is so successful, it is crucial to be able to effectively evaluate the road ahead and adjust activities and course of work to maintain and improve the impact of the organization and its activities. This was the point I chose to initiate a qualitative research, to ensure we are still on the path to build the new leadership of Israel as part of bringing impact in the Business of Doing Good.

LEADERS is a hands-on approach program, which through knowledge and awareness on the one hand and developing skills and personal growth on the other, aims at developing the leaders of the next generation. There is a saying – If it works, don't fix it! LEADERS was considered a very successful program. However, I believed that LEADERS should make sure it continues to be on the path of developing the future leaders of Israel, according to its mission. This, in turn, required reflection on current methods and exploration of effective changes within the organization. As a First Person Action Researcher, who was continually reflecting on the development of the organization, I believed that to develop LEADERS to the next stage, a critical research was needed. Considering the organizational culture, this was not an easy task.

Over a period of five years, I was pushing for a change. In the most successful years of LEADERS, I felt we had to develop a culture within the organization that embraced change in order to be relevant so as to achieve the goals and the vision of the program. Since we were receiving national acclaim, the people within the organization could not understand why I was interested in changing things that "obviously worked", in the organization. I explained to them that based on my reflection and analysis of what I was seeing, I had reached an understanding that the program that we had was good for developing good future citizens for the State of Israel but by no means were we going to achieve our mission and vision of developing the leaders of the next generation as the program has not yet reached a stage that would enable us to achieve these goals. In addition, as I met our alumni, year after year, and could see that they were lacking tools and mentorship for leadership roles that they were seeking as they became young adults, and I felt that we must develop a special program for the alumni to foster and facilitate this. I felt this was another tool that will bring us closer to our vision and goals.

To convince them that this was nothing personal and in order not to argue the facts, I requested to hold an independent survey- a qualitative research – of the LEADERS program. I started to examine the possibilities for independent research and found LRI most suitable to operate and advance the research considering the organizational culture of LEADERS. During this trying experience, I sought guidance and found it in Ron Heifetz and Marty Linsky book *Leadership on the Line*, 2002. In this book, the authors distinguish between technical and adaptive challenges.

> Technical challenges are situations where you apply current knowhow and authority to do the work. In adaptive challenges, one is required to learn new ways and it is the people themselves that are with the problem. In mobilizing adaptive work, leaders have to engage people in adjusting their unrealistic expectation. It takes an extraordinary presence, time and artful communication and it take more time and trust than one has. People rarely elect anyone to disturb their job or their lives. People expect managers to use their authority to provide answers, not to confront them with difficult questions. That is why the initial challenge of exercising Leadership is to go beyond your authority – to put your credibility and position on the line – in order to get people to tackle problems at hand… When exercising Leadership, there is a risk of getting marginalized, diverted, attacked or seduced. Regardless of form, the point is the same. Leadership also requires skills to be able to respond to these dangers.
> (Heifetz and Linsky, 2002, p.31)

Keeping this in mind, in 2007, I suggested that we do an independent qualitative research. The idea of a qualitative research was to ensure that LEADERS would continue be a high-quality program for its ambassadors and graduates to attain our key goal of developing a different kind of leadership for the State of Israel. This to ensure that of our achievements so far with LEADERS, we will continue to be an organization, which will be acceptable and reputed. I assured the senior management that the research will focus on the ambassadors and their achievements, as well as the different components of the program, but will not specifically ask questions on management leadership and activities within the organization. We agreed upon LRI, which is a leading research institute in Israel, to do this research with us.

All the same, the process of getting the research under way was not an easy task. The atmosphere was charged and not cooperative. I was reminded of Francis Bacon who wrote: "The Human Understanding when it has once adopted an opinion (either as being the received opinion or as being agreeable to itself) draws all things else to support and agree with it". (Francis Bacon 1561-1626). Even during the whole process of the research, when we went back and forth with the questions that needed to be asked, I came up with a lot of resistance. I met with the manager of LRI, briefed him on the process and possible hurdles and got the process into action. I also requested that the senior management be actively involved in the process of this research, because I wanted them to evolve and take responsibility over the results of this research. I oversaw the whole process and made sure that the right questions got asked and that the research did not get out of hand or become ineffective. In spite of the challenges, the research was good enough. It brought to surface many challenges, highlighted many insights and gave us the basis to make additional leaps in the program.

The survey included 25 questions, which were presented to 320 Ambassadors, as follows:

First Year Ambassadors –	71 interviews
Second Year Ambassadors –	51 interviews
First Year Dropouts –	48 interviews
Second Year Dropouts –	30 interviews

Alumni (2002-2004) –	73 interviews
Alumni (1999 – 2001) –	47 interviews

Ten percent of these Ambassadors from each category were interviewed face to face in-depth.

The whole process took about six months and started with a survey of 113 questions. After brainstorming with the research institute and in-house, we were able to present a survey of 25 questions. Involving the senior management in this process and delegating part of the responsibility to them, ensured a relatively smooth process and full cooperation of the professional staff of LEADERS with LRI Institute. The decision of how many Ambassadors to interview, how and to what extent, was a cost-effectiveness based decision. I wanted to receive a valid significant data, which will enable the team to take a quantum leap into the next stage, while staying on budget.

During these six months, I encountered several difficulties and found it imperative to the success of the research to keep an open line of communication with the research institute. Every other week, I made it a point to discuss the advancement of the research with the research institute manager to address ongoing questions and problems, ensure the team is meeting the deadlines set, and brainstorm regarding issues that were presented during these interviews. At the end of the research, we presented the findings to the donors as well as the professional team. Following this, we assembled a think tank to build upon the findings of the research and strengthen the activity of LEADERS and its impact. However, despite on-going cooperation of the senior management, the think tank activities did not fully materialized due to the rigid organizational culture.

ACADEMICS: A Unique Route to Higher Education

ACADEMICS is a unique program that promotes education as a change agent for at-risk students from disadvantaged backgrounds, who lives in the peripheral cities of Israel. The program was established in 2001 with the aim of enabling equality for these students in attaining an academic degree. The program accompanies students through high school, military/national service and their BA studies until attaining their degree. In the last decade, ACADEMICS has transformed the lives of its 2,350 students and their families in the peripheral cities of Israel.

At ACADEMICS we believed that education is the greatest equalizer and given the opportunity, every child can succeed regardless of their socioeconomic background. The program seeks to improve society as a whole by leveling the educational playfield and empowering at-risk students to earn an academic degree.

The commitment made by ACADEMICS to its students is unmatched by any other organization. ACADEMICS makes a 10-year commitment to each at-risk student, providing a comprehensive program of support, beginning in the 10th grade and continuing until students achieve the ultimate goal of tertiary education. Although education is the primary focus of ACADEMICS, simply providing access to education is not in itself enough. Thus, along with academic support, the program provides students with the financial, emotional, motivational, and general life support they may need to flourish in their educational pursuits.

The High School Phase Activity:

The program works by identifying the communities and schools in need of assistance through two main parameters:

- The extent of need for support within the education system according to statistical data.
- Communities and schools in the periphery with the highest chance for collaboration.

Schools' coordinators are responsible for the day-to-day operation of the program in their school. They act as second Home Class teachers in their school, allocating and addressing the needs of the students and teachers, while working in full collaboration with ACADEMICS's program manager of the high school phase, and consulting with the ACADEMICS's pedagogical counselor on significant issues.

Creating an ACADEMICS class (home room) for students recommended by the school, according to the following criteria:

- Students who have learning potential that has not been fulfilled
- Students with motivation and desire who make an effort to succeed
- Students coming from a lower socio-economic background
- Students who pass the interviews with representatives of ACADEMICS
- Prior low academic achievements (students with up to 4 failed grades).

Students are identified at the end of their 9th grade, before entering high school.

The operation of an ACADEMICS Class Activity:

The ACADEMICS class is a part of the overall school environment. However, it has special elements which differentiate it from the other classes:

- Individual tracks are formulated for each student according to his/her needs and progress.

- Intensive study aid according to the students' needs, are provided by the teachers and university students designated for the program.
- Individual tutoring and mentoring on a weekly basis are provided by designated university students.
    - The mentoring process has an added value by having students encounter “role-models” coming from a similar background that are currently enrolled in academic institutions.
- Building a “safety net,” a follow-up system for the students that provides timely solutions to needs and difficulties that emerge during the process.
- Visits in tertiary education institutions once a year.
- External workshops for students, tutors and parents.
- All ACADEMICS students are required to volunteer in the community throughout their high school years and participants in the program develop sensitivity towards society and the ability to “give” by contributing to the country and society.

The Military/National Service Phase Activity:

Social action is integrated throughout the entire program and reaches a peak in fulfilling the civic obligation of military or national service. Those who are unable to serve are asked to find an alternative framework for significant social action, to be approved by the program's management. During the course of military/national service, we continue to stay in touch with the students in order to pave the way to attaining a degree.

The Tertiary Education Phase Activity:

The ACADEMICS program maintains reciprocal relations with various academic institutions throughout the country. Graduates of the program are entitled to apply to any academic institution in Israel, as long as the institution is recognized by the Council for Higher Education and awards an Israeli academic degree. The ACADEMICS program offers scholarships only within institutions charging university tuition as approved by the Council for Higher Education. In the institutions, where the program operates, there is a contact person who guides the program's students. The program encourages studies in these institutions.

- Students of the program are entitled to a differential assistance package, which is determined according to the judgment of the program's steering committee.
- Each student is required to engage in social action throughout his/her undergraduate studies, at a minimum of 120 hours per academic year.
- At each academic institution of learning, a steering committee convenes bimonthly to closely monitor the students' progress in their studies, in their social action, and in their adjustment to the academic system. Letters of recognition are sent to excelling students, whereas those failing classes receive warning letters, which also offer the students to come forward to receive help if needed. The steering committee guides the students until they attain their degree.

Past and Current Numbers - Overview

ACADEMICS high school students: Over the course of the first nine cycles of the program (years 2001-2012), the ACADEMICS program had 1,701 high school graduates. As of 2012, there were 381 high school students enrolled in the program over two cycles.

ACADEMICS students in military/national service: An estimated number of ~540 ACADEMICS students were listed in military/national service as of 2012.

ACADEMICS tertiary education students: As of 2012, 540 of ACADEMICS participants have continued their studies beyond their high school diploma.

Pilot Trial - Tertiary education students' activity: In 2002, ACADEMICS's management decided to implement a pilot for the program's tertiary education phase. The rationale behind this pilot was that the first ACADEMICS students were to reach the tertiary education phase only in six years into the program. Therefore, to examine the program's sustainability, released army soldiers were selected for the pilot trial. All chosen participants were of similar profile (socio-economic, academic, etc.) as ACADEMICS's participants. They were chosen with the help of the local municipalities. Pilot participants were entitled to the benefits and counseling of the tertiary education phase as described above. 158 participants were selected and followed upon, until the completion of their BA degree. All 158 participants achieved a BA diploma.

ACADEMICS Formative Research

To start with, the objectives of the ACADEMICS program research were to look at the development of competence, confidence and caring of the students participating in the program, while the sub objectives were promoting school achievements, motivation, self-efficacy, emotional and behavioral adjustments, acknowledgement of success and coping with failure, confidence in the chance of getting help and the ability to get it, and hope for a better future.

It was but natural to me to approach one of the most reputed universities with a leading School of Education in Tel Aviv . I will hereinafter refer to as TSE (). We constructed an action based research together with their staff. Some of the data was incorporated from the marks of the students at the end of each semester. The rest of the data was in form of questionnaires that were presented to the students. All the information was integrated and the relevant information was fed into the database for the purpose of preparing a statistical analysis and we decided upon producing an annual report based on the guidelines that we agreed and decided upon, such as: grades shift, confidence at the ability to achieve the grades, self-perception, motivation, overall behavioral changes, and contentment. I delegated the task of overseeing and inspecting the process to the program manager of ACADEMICS, while receiving frequent updates and monitoring the process closely. This process was demanding and I took an active role both in guiding the program manager through the various steps, as well as mitigating and bridging the gaps between the ACADEMICS staff and the TSE staff. The process demanded close mentoring of the program manager. It was a shared journey, which required of me to develop a reflective view of ACADEMICS's actions and influences over the participants, as well as the community. Through this shared journey, I was able to see the importance of the research to the overall success of the program and its participants. Unfortunately, it also highlighted the areas where TSE fell short in joining us in this journey.

Managing the ACADEMICS research was challenging, I commissioned the research to a renowned group of professionals at the TSE. However, this proved to be complicated in some aspects, such as scheduling, regularity of work and reporting back. In addition, discrepancies between the university staff and the ACADEMICS staff in relation to the essence of the AR, created conflicts originating from different perspectives. Many times I found myself in the danger of going back to square one.

Since commissioning this research, I felt that it was an art and it required tremendous behavioral skills on my part, to get all the parties involved in the research process to focus, coordinate and produce the desired results. At the end of the first year, I realized that while it examines the correlation between student achievement and student self-perception, in spite of what was intended, the research does not reflect on the long-term effects on their sense of competence and self-esteem. The fact that I insisted on drawing up a research contract kept the process going from its initial stage to the stage of completion, since expectations held by both sides in the relationship were made quite clear by the contract. Notwithstanding it was close to impossible to align expectations of the research objectives and results. Realizing the gap between the TSE's perspective and ACADEMICS's perspective, and in view of the small numbers of participants in this initial study, I decided to move the research to another well-respected institute - BSE for a comprehensive formative research.

The comprehensive formative research at BSE took place in the years 2005-2008 and built upon the knowledge accumulated via the pilot research at TSE, and included the following elements:

- A longitudinal study, which followed ACADEMICS's students over that period of time, designed to test changes and development of students.
- Group test, which was a controlled experiment comparing two groups. One is the ACADEMICS's student group. This group which generated proactive and meaningful change. The second group was the control group. This group did not make any proactive change.
- Formative Evaluation Study to allow the program to learn from its successes and difficulties and thus improve the process and outcome of its operation.

Assessment tools:

- Questionnaires: Open and closed questions combination. Over a period of three years, 2,557 questionnaires were filled by ACADEMICS's students in schools and academic institutions and 500 questionnaires from the control group.
- In-depth interviews of several hundred students, teachers, mentors, coordinators, principals, educators, program coordinators at the academic institutes, parents, and academic counselors.
- Observations of classes, after school lessons and activities, academic tours and pedagogical meetings.
- In – depth examination of grades and academic achievements of twenty graduates.

Carrying out this research and seeing its successful first stage of completion was insightful. In spite of the challenges, the cooperation of the BSE staff was noteworthy. They were extremely responsive, open and flexible to changes as the research progressed. They were patient and helpful, creating a pleasant partnership that allowed an atmosphere, which fosters motivation, thinking out of the box, and caring. It felt as if they actually cared about making a difference for these students, their future and the future of their communities. They wanted to become part of the Business of Doing Good, by helping us build the infrastructure for sustainable and successful impact. This was also evident in the day-to-day working relationship between the program manager and myself. Finally, we were able to clear all the background noise and concentrate on the actual challenges that came up and needed to be addressed, either by fine tuning our daily activities in the educational institutions, or by reinforcing our staff's work and methodologies.

Following this formative research at BSE, one of the outcomes was developing the ACADEMICS language of competence reinforcement among the adults (tutors, teachers), who worked with the students. Another outcome was that we also developed the ACADEMICS language of reactions – when there is a decrease in achievements of the students and also building alertness to expressions of despair and encouragement to putting in more efforts during the difficult periods of decreased achievement.

These tools of training were given to tutors and teachers and allowed them to react to the students instantly – before the gaps that are hard to overcome, settled in.

ACADEMICS quantitative research

As a First Person Action Researcher, as I reflected on what we had achieved so far, I came to the conclusion that to fully measure the sustainable impact of the ACADEMICS program on the lives of individuals and the communities involved, I needed a currency by which I could measure the impact in absolute terms.

I coined the term “Return on Donation” (ROD) for the philanthropic scene as in “Return on Investment” (ROI) which is the acceptable term among the economic markets, to describe the economic efficiency and impact of the Business of Doing Good.

The goal of this research was to show the influence of education on the welfare of ACADEMICS participants in economic and social terms and to examine the correlation between education and other economic parameters, which are elaborated in this research. Some benefits, mainly the social ones, are not easy to measure. Even in the cases, where benefits can be measured in a comparative manner, between different populations or different geographical areas, there is a need to relate to additional parameters, which influence these benefits and qualities which are not related to education and its expansion only, but to different characters of the individuals or realization of the importance of community and social volunteering.

I will indicate that these social contributions, i.e. education for volunteering and for relating to weaker society, social involvement, improving motivation to serve in the army or other social service, decrease in chances of deteriorating to crime etc., are not examined in this framework, since it is difficult if not impossible to translate such social contribution into currency. It is clear though that there are additional benefits to those that I have measured in the framework of this research. All the same, the main contributing factors are the higher taxes and social contributions that flow from higher income levels of those with tertiary qualifications.

In Israel in 1998, a worker with over twelve years of schooling earned 66% more than a worker with up to twelve years of schooling. This gap has been widening, reaching 80% in 2009, as published by the Taub Center in the *State of the Nation Report 2010*. Furthermore, the only group of individuals that have experienced no drop in employment over the last fifteen years is that of individuals with sixteen or more years of education, who are for most part, people with tertiary education. It has been shown that the highly-educated people work more and also earn more. As a result, they enjoy better access to healthcare and medical services, their children's scholastic attainments are higher and their poverty rates are lower. (Taub Center, 2010)

I have presented the quantitative research that I conducted for this project and tried to establish in conservative terms, what is the "Return on Donation" that we can achieve for our potential high school drop-outs.

To calculate the ROD of ACADEMICS, a review of the database, which included all relevant information on the participants, was done. Information significant to the ROD was extracted and calculated, this included:

- Parents level of education
- Geographical location
- Success of the participant in high school
- Army Service or other social service
- Level of tertiary education
- Attitude toward higher education

This information was compared to the information from the National Bureau of Statistics and the ADVA center, which is a non-partisan policy analysis institute, focusing on the Israeli society from the perspective of equality and social justice.

To calculate ROD, a comparison of earning potential of high school dropout, high school graduate and tertiary education graduate was done. In addition, payments of income tax, social security and health insurance tax based on earning levels were added to the comparison. Using this comparison, an evaluation of the ROD was carried out. In addition, a reflective view of students' achievements vs national, as well as municipal, average was done.

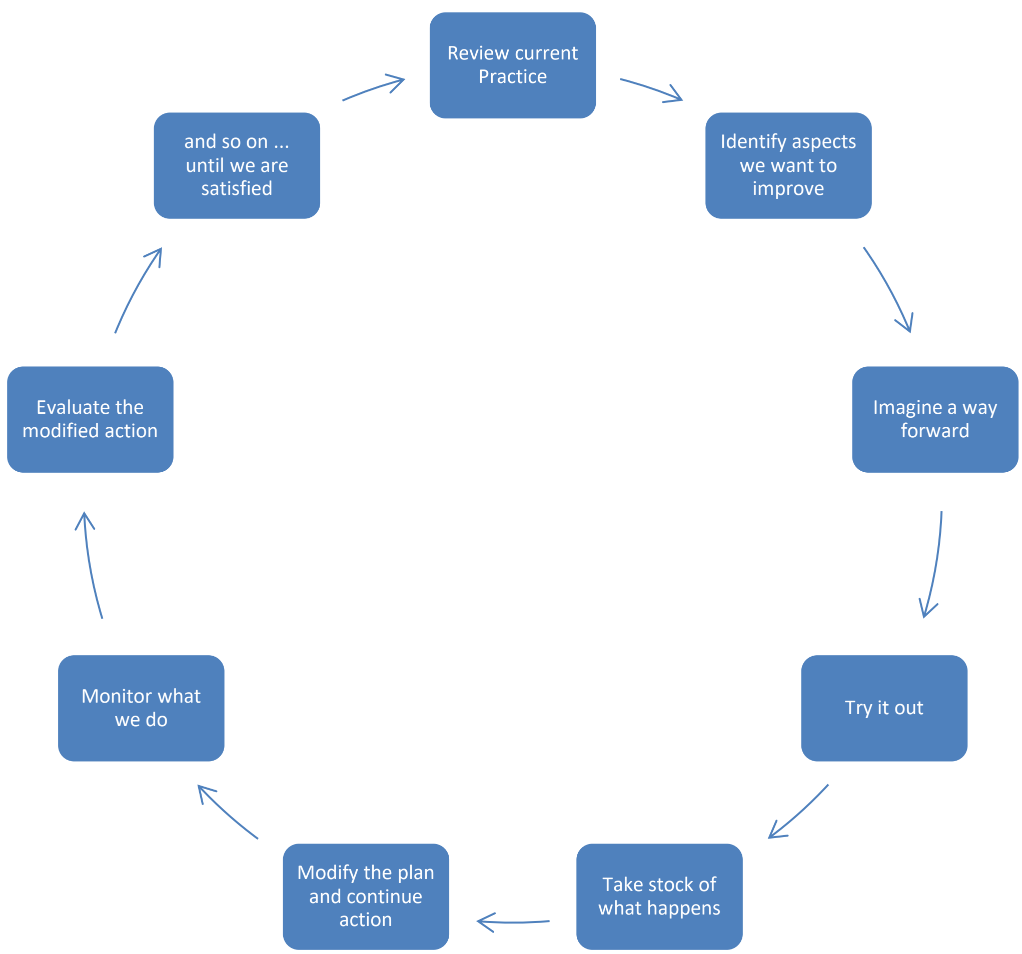
My Evolvement as a First Person Action Researcher

For me, making the world a better place is not just a cliché. This was the backbone and a motivating factor in my activities through these years. The basis of the philanthropic organization was bringing change and transformation, first in the Israeli society. Our first focus, as we started our philanthropic activities was the leadership of Israel. Either by establishing the operation of LEADERS and building the infrastructure for Israel’s future leadership, or by rebuilding the core and sustainable elements of the Movement for Quality Government activities in Israel, I was set to make a difference. However, from the first stages of activity, it became apparent to me that change will not come from focusing only on the leadership and government issues. As a reflective practitioner, I became aware of the understanding that to drive substantial change in the Israeli society, I must go deeper and venture to the field of education to develop more educated and enlightened citizens. The importance of driving change was clear to me, as I understood that the change that I was seeking will only be a dent in the Israeli society, on condition that we succeed. Therefore, failure was not even an option. I realized that to make this dent count, to bring change to society, our activities must be successful, sustainable and impactful. I set out on this journey and as I progressed, I collected tools essential to the success of the various endeavors. These included: reflection, critical thinking, seeking counsel of experts, masterminding with interdisciplinary group of people, and practicing mindfulness.

> Mindfulness is moment-to-moment, non-judgmental awareness, cultivated by paying attention. Mindfulness arises naturally from living. It can be strengthened through practice. This practice is sometimes called meditation. But meditation is not what you think. Meditation is really about paying attention, and the only way in which we can pay attention is through our senses, all of them, including the mind. Mindfulness is a way of befriending ourselves and our experience. Of course, our experience is vast, and includes our own body, our mind, our heart, and the entire world. (Kabat-Zinn, 2013, p. 9)

I also learnt the importance of harnessing the power of research to build spirals of knowledge and structure the philanthropic activities in an impactful and sustainable way, drawing upon the ability to reflect on my own work, integrating Kolb's Model (2005) into the work process, building on concrete experience to testing new strategies and concepts based on observations and reflections, either by self-appraisal or by incorporating measurement and accountability to the process.

In this journey, as a First Person Action Researcher , as I used the tools and insights to bring about change and impact. I was inspired by McNiff action research cycle, which can take the following form:



(McNiff and Whitehead, 2002, p. 204-205)

Seeking the truth was always my first concern, when initiating and taking part in these researches. I believe that no matter how hard the truth is, it is essential to the success of the programs, essential to steering toward the goal. This is always my guiding line. Having said that, seeking the truth is not an easy task. Through the years, programs, researches, activities, I had to face many challenges and difficulties, not only in obtaining the truth, but also in implementing the necessary steps that followed. The processes leading to this point were filled with challenges as I had to enlist the cooperation of the program managers, research institutions, employees in the field, participants of the program, other collaborating partners and the donors themselves. Like a dance, I had to choreograph my steps so they will lead me and the organization toward fulfilling our vision and mission, while still maintaining the core characteristics of the Business of Doing Good. At times, I had to lose some battles in order to win the war and bring about impactful, sustainable change.

As you enter the Business of Doing Good, contrary to pre-notion, it is not about spreading money, receiving thanks and smiles. The process might not be easy. To lead real change and create impact is hard work and at most times not personally rewarding. The reward lies in the knowing that one has transformed the world to be a better place by personally touching human lives.

In the words of Bob Garratt:

> Action learning is concerned with balancing risk and uncertainty,
> but its focus is not on the destructive aspects of negative criticism and buck passing often associated with them. It concentrates on managing risks and uncertainties and on learning from them for the benefit of the stakeholders of the organization. (Pedler, 2011, p.22)

CHAPTER 5: Project Findings

LEADERS Qualitative Research Findings:

The findings of the qualitative research showed that although there is a high appreciation of LEADERS among all Ambassadors, the vision and mission of LEADERS were vague with relation to the leadership development program. The Ambassadors found the framework of the program rigid and LEADERS instructors were considered professional yet not supportive. Although founding a community project was considered essential, the Ambassadors did not feel that the community project was emphasized as a means to development of their leadership skills, but a goal in itself, causing some frustration among the Ambassadors. Close to 40% of the active Ambassadors as well as the dropouts, believed that LEADERS was focused on promoting projects and less focused on building future leaders. Conventions that LEADERS spends a large part of our resources upon, were considered non-synchronized and not contributing enough to the vision and mission of LEADERS to develop the future leaders of Israel.

Facing with the results of the survey, highlighted the importance of significance of measurement to drive and advance sustainable and significant impact through philanthropic projects. Research, measurement and accountability, enabled us to see the gap between the vision and mission of LEADERS as determined by the stakeholders to the actual operation of the program. Using this research and the findings, I could build upon to reconstruct the path toward the desired change, which was the core and essence of the program. These findings gave the program the tools, which would lead us to realize the vision of the program.

Based on these findings, we brainstormed on restructuring the activities and realigning the program with its vision and mission. However, as in the business world, also the Business of Doing Good relies on collaboration and cooperation. To facilitate change and advocate success that is sustainable and impactful, all participants must be aligned to the organization's vision.

Unfortunately, I was unable to facilitate major changes in the organization as it required collaboration at all levels and it was difficult to implement, considering the organizational culture.

Major trends that the research highlighted: (See Appendix II for full results)

<u>In the world of content and values</u>

LEADERS's goal (only among the alumni):

- The alumni, both the new and the old, correlate LEADERS mainly with Leadership development (77%).
- At the second place, but with a substantial difference, lies the social aspect- "to educate youth to help the community" (29%).

LEADERS's advantages:

- The majority of the audiences examined, reported advantages of some kind (over other organizations), mainly:
    - "Level of professionalism/high quality of the organization- the mentors, contents, participants" (reported by 27%-45% among each of the audiences).
    - "Tools for personal coping/ empowerment" (12%-20%)
    - "Emphasis on doing/projects" (7%-24%)
    - "High level effort put in it" (2%-13%)

LEADERS's disadvantages:

- The majority of the audiences examined reported disadvantages of some kind, although in a small rate compared to the advantages rate (approximately 70%-80% compared to 90%).

- In addition, in general, no outstanding conceptual disadvantages appear- the disadvantages were reported in a somehow disoriented manner by a quarter of the interviewees in each audience and less:
    - "Rigidity", in the framework, the rules, the meetings, which appears as the main disadvantage among the drop outs (23%) and in a higher rate compared to the participants (11%) and the alumni (10%).
    - "Burden which produces difficulty to integrate LEADERS with other activities"- appears more among the drop outs (18%) and first year participants (18%) than among the others.
    - "Too thorough screening/good people are missed"- among the participants (19%), among the alumni (14%), among the drop outs (5%).
    - "Lack of sufficient advertising" appears as the main disadvantage among the new alumni (20%).

<u>LEADERS's contribution to the personal development as a Leader:</u>

- Most interviewees in each of the audiences reported that their participation in LEADERS contributed to their personal development as Leaders (except for the audience of the drop outs, among the rest of the audiences there are more who reported "contributed a lot" in contrast to "fairly contributed").
- The rate of those who believe so among the drop outs is the lowest, yet, relatively high (69% in contrast to above 90% among the rest of the audiences).
- The rate of those reported "contributed a lot" is higher among the participants in contrast to the alumni (71% of all participants in contrast to 58% of all alumni).

<u>LEADERS's influence on today's alumni</u>

Their Leadership aspect today:

- The absolute majority among the alumni, both the new and the old (89%, 98% respectively) reported that their Leadership skills is expressed in their daily lives, mainly:
    - In the army- "commanding positions"/ officers ranks" (32% of all alumni).
    - In general- "taking responsibility/being proactive" (16%).
    - "Managing and organizational skills" (11%).
- Most alumni (97%) reported that their expression of Leadership has a certain or meaningful connection to their experience in LEADERS:
    - Among the old alumni- 67% "certain connection", 33% "meaningful connection".
    - Among the new alumni- 42% "certain connection", 55% "meaningful connection".

<u>LEADERS's influence on decisions of various fields:</u>

- In the army:
    - Approximately half of all alumni (48%) and more among the new alumni compared to the old ones (53% compared to 40%) reported that the experience in LEADERS had an influence on the choices they made in the army, mainly:
    - "Reaching commanding positions" (48%)
    - "Ambition to reach farther" (10%)
    - "Being proactive" (9%)
- In academic studies:

  - Only 30% among all alumni (24% among the old ones and 34% among the new ones) reported on such an influence, mainly decisions related to:
  - Political field- political science, international relations, politics (72%)
  - Sociology/psychology (15%)
  - Social work (9%)
  - Aspiration to change/ influence (12%)
- At work:
  - Only 24% among all alumni (32% among the old ones and 19% among the new ones) reported on such an influence, mainly decisions related to:
  - Working with disabled population (24% of them, more among the old alumni).
  - Management positions- shift manager (more among the new alumni), assistant to program manager (only new alumni), and program manager (8%).
  - A year of service in LEADERS (only new alumni, 15%).
- Summarizing table:
  - One should notice a certain gap between perceptions and intentions and de facto decisions, since the rate of those reporting that the decisions they reached in the different frameworks they been to were influenced by LEADERS, is just half and less:

LEADERS experience had influence on…	New alumni	Old alumni	All alumni
Choices made in the army	53%	40%	48%
Choices made regarding academic studies	34%	24%	30%
Choices made regarding employment	19%	32%	24%

DO they bring abilities from LEADERS?

- Most of the alumni (above 90%) reported abilities they bring with them to the frameworks they are in and mainly:
- "being proactive/ initiation/ responsibility" (46% of the alumni)
- "Ability to listen/ hear people" (39%)
- "Ability to LEAD/ to influence people" (37%)

Perceptions and influence on the current situation of the Israeli society:

- Most alumni reported a high level of interest regarding what is currently going on in the Israeli society (96% of all alumni, and more of them reported "very interested" than "fairly interested").
- Most of them also reported their aspiration to be in an influencing position on the society and the life in Israel in the future (96% of all alumni, and more of them reported "would very much like so" than "would quite like so") and mainly in the following fields:
    - Society (45%)
    - Education (22%)
    - Communication and media (17%)

  - Politics and government (17%)
  - Economics (14%)
- A higher rate among the new alumni compared to the old ones reported "would very much like so" (74% compared to 54% respectively).
- Most alumni believe that they would reach an influencing position (85% of them, still more of them reported "quite believe" than "truly believe" and more among the new alumni compared to the old).
- Most alumni (79%) reported that it is very clear to them that they would live in Israel.
- Only 8% reported it is depended on the circumstances in their lives.

<u>Conclusions based on finding with relations to LEADERS's goals and vision</u>

- A high level of appreciation towards LEADERS among all audiences is evident in the research.
- However, in parallel, a perception of awareness problem and familiarity with LEADERS emerges. It is perceived as one of its disadvantages and raises the need of an intensive branding process.
- In the branding process it is first of all important to declare LEADERS's main goal, which currently tends to be vague:
  - In a theoretical way, many identify LEADERS with Leadership development.
  - Yet, from various data in the research a level of vagueness regarding the definition of Leadership is emerged, which increases the importance of providing a clearer content regarding the intent and the vision of LEADERS, with relation to Leadership development, both regarding participants of LEADERS (the

ambassadors) and the alumni (most of them have the misperception that LEADERS has a continuous effect on their lives).

Examples of vagueness can be observed while even though many think that LEADERS provides a range of tools to Leadership development, there are many different interpretations regarding its practical expressions, especially on the long run influence of LEADERS on its alumni:

- Some identify Leadership with management positions (even "a shift manager").
- Others, with "initiative and responsibility whenever they are".
- Others with characteristics such as "the ability to listen", "self-confidence", self-awareness"
- In addition, regarding different activities in LEADERS, there is a substantial amount of interviewees who do not find a direct and clear correlation between these activities and Leadership (for example, one third of the interviewees reported so regarding the regional team meetings).
- Along the branding process, a further emphasis and establishment of the intensities related to LEADERS today, which distinguish LEADERS from other frameworks meant for youth, should be continued:
    - Empowering/ developing/ investing in teenagers
    - Being qualitative in various aspects- high quality youth, high level instructors, and substantial contents.
    - Emphasis on doing, being active, involvement and influence on the society.
- At the same time, there is a place for examining and discussing 2 disadvantages related to the character of LEADERS:

- Rigid framework- this is one of the main disadvantages reported and in a higher rate among the drop outs (23%).
- A framework which creates burden and difficulty to integrate LEADERS with other additional activities (school for example)- this comes up more among the drop outs than the first year participants (18% among each audience).

<u>The continuation of the future relation with LEADERS</u>

- Continuation of the relation between LEADERS and its alumni should be created- the level of interest in continuing the relation is high.
- Continuation via informal and formal relation related to a defined goal should be established- Most of those reporting on a level of interest in the relation with LEADERS are interested in this kind of relation (89% and above).
- a discussion regarding the activities gaining the highest appreciation by the alumni (new and old) should be conducted:

<u>The process/considerations for leaving LEADERS</u>

- Three factors of dropping out from LEADERS should be noted:
  - Uncomfortable feeling/pressure regarding the foundation of a community project
  - No good relations/lack of support of the instructor
  - Workload and difficulty to integrate LEADERS with school and/or other activities
    - These factors were reported by the drop outs

  - In addition, one fourth of the first year participants reported on thought of leaving due to similar reasons.

- Eventually, it is important to continue and pay attention to a respectable parting from those who leave- there is certain rate (though it is low, 11%) who describes an offensive, cold and uncaring attitude.

My reflection as a First Person Action Researcher on LEADERS's qualitative research:

Reason and Torbert (2001) describe the practice of moment to moment mindfulness as "... an attention that spans and integrates the four territories of human experience. This attention is what sees, embraces, and correct incongruities among mission, strategy, operations, and outcomes" (Reason & Torbert, 2001, p.18)

As First Person Action Researcher and a practitioner of mindfulness, I tried to keep an open mind and be in a perpetual learning process with LEADERS program. The reason for that I wanted to make sure that we are staying true to the vision and mission of the program. For this, I felt, that it was necessary to develop spirals of knowledge that would cause us to reconsider certain practices, which will pave a course that will lead us to a higher starting point within the evolving spirals of knowledge gained.

Based on the initial feedback, I was gaining from the field, I considered implementing qualitative research, which I knew would be a subjective view of the Ambassadors and Alumni, yet I knew that it would be real, rich and deep data that would be an insider perspective and that would present dynamic, real life situations in a holistic way. I decided that this research would be in form of a survey, so I could get qualitative data from individual interviews. It was my intention that some of these questions will be repeated in future surveys and this information will also be the base for evaluation in future interviews and will supply insightful information to how the program is evolving.

I chose not to apply a quantitative paradigm because I was not seeking objective information or an outsider perspective and I was not seeking particular outcome. Rather, I was seeking rich, descriptive data that would allow us to develop the program and improve upon our spirals of knowledge in order to achieve our vision and goals. In this case, absolute numbers, as in quantitative research, would not tell a story. It was important for us to hear about the direct experiences that the Ambassadors and Alumni undergone, and to draw from this information our path to success.

Since the very beginning of my introduction to the field of philanthropy, I became very much aware that we were acting as change agents and changing people's lives. It emphasized to me the importance of implementing a reflective approach in my practice to ensure no harm was done. I found Schon's approach significant and contributing in expanding my knowledge and understanding of the importance and significance of the reflection process. In Schon's words - "Reflective practice is a dialogue of thinking and doing through which I become more skillful." (Schon, 1987, p.31).

This practice proved valuable as I was faced with the finding of LEADERS qualitative research. Following this research, I embarked on a reflective process with the senior management of LEADERS to understand and bridge the gap between the vision of LEADERS and where we were at the time of the research. Schon addressed this gap in "The reflective practitioner allows himself to experience surprise, puzzlement, or confusion in a situation which he finds uncertain or unique. He reflects on the phenomenon before him, and on the prior understandings which have been implicit in his behavior. He carries out an experiment which serves to generate both a new understanding of the phenomenon and a change in the situation." (Schon, 1987, p.68)

I received the results of the research. I accepted these findings as a stepping stone toward the learning process that will strengthen the organization and its cause. However, I needed to reflect on these finding and understand the gap in perception between the senior management, stakeholders, and the participants in the program. Through this reflective process, I chose to bring the finding to the senior management, making sure it was not perceived as fault findings but as a snapshot of where things stand today relative to our mission and how we can reflect on the steps we need to take in order to get closer to our vision. This was also a window of opportunity for me to reflect if I was getting my message across and if I was getting closer to successful implementation of the changes that the program warranted. All this time keeping in mind Schon's guidance to this situation and giving myself permission to feel surprise, puzzlement, or confusion. I aimed to channel this experience and evolve from it by reflecting on the process leading to the research as well as the findings after the research. This in turn gave me tools to approach the senior management in the hope that they too will reflect on the results and evolve.

Following the findings of the LEADERS qualitative research, I came to an understanding that commitment to the cause in itself is not sufficient or enough to sustain a successful program. If clear vision and mission are not strictly adhered to; if values and ethics are not strictly woven into the fabric of the day to day activities of the organization; if transparency and accountability are not strictly embraced by all partners and stakeholders of the organization; and if measurement and self-appraisal are not used as a tool for developing a stronger, impactful organization, commitment to the cause is not sufficient to sustain the organization to achieve its long-term goals.

Faced with all the outputs that came out of the research, it was evident that change would be necessary in order to achieve the desired outcome and goals. Yet, it became evident to me that we will not be able to achieve the desired outcome, due to the rigidity of the organization and their reluctance to accept the insights of the research as a spiraling process for further personal and organizational development. This opportunity was missed and the consequences were: stagnation, and the organization somewhat moving away from its original vision and mission. This was a very frustrating experience but the ability to identify emotional response using reflective view, as suggested by Gibbs (1992), enabled me to identify that it is possible that my reaction is subjective and emotional. I was able to stand back and evaluate the situation, one step removed.

ACADEMICS Formative Research Findings

The findings of the formative evaluation study that was conducted between 2005 – 2008 with the BSE came out with the following outputs:

1. The ACADEMICS program does reach its target audience
2. Families are supportive of their children's participation in the program and see this program as a route to social and economic mobility for their children
3. All children participating in the program joined the program they saw it as a facilitation platform for their success in high-school and higher education.

(See Appendix III for full results of the formative research at BSE)

In addition, all students report very high level of satisfaction from the program. 90% of the high school graduates are interested in continuing to higher education and 80% of the students already have a conception of their future timespan as well as future goals, and their path or profession in university.

Joining the ACADEMICS program facilitated change in the students' perception of school and they take responsibility on the process of learning and requesting help when needed, while experiencing higher self-confidence and the percentage of students that were afraid of exams was reduced. Participating in the program led to an increase in over 50% of the students in self-perceptions, self-efficacy, identity and belief in one self and one's abilities.

When reviewing the social impact of the program in light of the Business of Doing Good, there is a significant change in the students, whereby they have exchanged their social surroundings from negative to a consolidated and positive surrounding that encourages learning and collaboration between the students. The impact of the program goes beyond the walls of the high-school, as these students become contributing members of society, volunteering and impacting their communities and families. These changes and impact led me to further examine the correlation and the benefits of these social investments on the society as a whole as well as individual on a scale of investment versus impact.

One of the outcomes of the formative research findings was the ability to translate this information into actionable changes and steps toward development and progression of the

ACADEMICS program, including: implementing change in our work with the teachers, changes in the job description of the home class teacher, improving the work of the mentors guiding the students, and redefining their role not only as tutors but also as role models for the students. Sharing the results of the research with the teachers and mentors enabled them to reflect and to take responsibility and proactively implementing change in their daily interaction with the students, staff and mentors.

My reflection as a First Person Action Researcher on ACADEMICS's Formative research:

The process of initiating this research, taught me a lot about my role as a First Person Action Researcher and the place of reflective practice in seeking the goodness as a basis for any interaction. The failure to follow through with the research at TSE, highlighted the importance of absolute necessity of having all projects shielded by the roof of the goodness factor.

Upon reflecting as to what should be the next step for ACADEMICS and how we can fine tune our program for improving its long term success, it came to my consciousness that I could utilize McNiff's action research cycle, and with the help of that make informed decisions that would lead to proper and suitable change. Therefore, following the findings of the research, we reviewed on which aspects we could improve in our current practice. We reflected and decided upon a way forward. We decided to implement it as a pilot program for a small number of students, so we could study what kind of impact that will bring. After seeing the initial success of the pilot, we modified our actions and monitored and evaluated the effects of it until the change got implemented successfully across the board.

As a First Person Action Researcher, looking back in retrospect, it became clear to me that due to the process of introspection and the analysis of situations as a result of it, I was able to embrace the challenges as they emerged. I was able to modify our plans and continue to evaluate our modified actions, until we reached satisfaction with those aspects of our work. This project came a full circle, following all the nine stages of action research cycle as described by McNiff (2002).

It is this reflection that brought me to the clear understanding that when the goodness factor is disregarded, I have learnt that one may find a lack of synchronicity, which eventually harms the ultimate goals of what one is trying to achieve. Understanding this and seeking out the will to do good in this case with my research partners at BSE enabled me to move forward and reinitiate the research with them, thereby assuring success of the research and implementation of the results. Being a constant reflective practitioner (Schon, 1987), I was able to identify that action is necessary to lead to a meaningful and clear understanding of the best practice model for ACADEMICS program. Practicing “reflection-in-action” facilitated critical evaluation of the circumstances and the understanding that change was warranted. This experience with TSE clarified what are the important characteristics and soft-skills of the research organization I was seeking in addition to their professional ability. Reflection was a necessary tool to advance the research and later for the conceptualization of a new model of operation.

The results of BSE confirmed the strength of the Business of Doing Good model. Where strong sense of vision and mission, values and ethics, transparency and accountability, and measurement and self-appraisal are present together with the goodness factor that fosters collaboration, success is a guarantee. All participants are able to learn and grow from the process, paving the path toward success and actualization of the cause. By fostering these elements, all participants take an active role in shaping the success metrics of the project. As this was the case in ACADEMICS, the research proved impactful in highlighting the positive effects of the goodness factor on the rest of the components, while giving participants the tools and ability to change and improve performance, following the information that originated from the research findings.

ACADEMICS Quantitative Research Findings: RETURN ON DONATION

Following the formative research of ACADEMICS and it successful implementation in the field, I felt that I was now ready to drill down to another stage of accountability and measure the impact in more concrete terms, further exploring the impact of each dollar invested in the program in terms of return to the students and the society. The conclusions were significant although the research was very conservative and did not take into account intangible parameters.

We studied the ACADEMICS student's background, the student's profile and their parents' level of education. Fifty percent of the mothers and fathers of the students participating in the ACADEMICS program lack a high school diploma. ACADEMICS students were able to break their background ceiling and socio-economic profile and acquire tertiary education, regardless of the parent's level of education. Upon computing, the costs and benefits of the ACADEMICS program, with the ACADEMICS program cost estimated at a total of 20K$ per student and calculations based on average monthly gross income in Israel (Cbs.gov.il, 2013) the ROI of the ACADEMICS program to the State of Israel, according to the level of education and comparing the accumulated difference over a period of 40 years was an output at a ratio of 1:12.

However, if we calculate the non-monetary returns (not included in the scope of my work) which include – lower crime rates, better access to health-care, lower rate of suffering from chronic diseases as diabetes or obesity etc., mental issues, increased life expectancy, higher quality of life and purchasing power – we can say that the actual ROD yielded by the ACADEMICS program is higher than 1:12.

ACADEMICS students' background activity

We examined the program's students' profiles, and specifically their parents' level of education. The link between level of education and employment is well-established. It has been shown that raising educational levels can increase employment rates and narrow wage disparities, as a result, decreasing income inequality and poverty rates. People with higher education, benefit from higher chances of finding employment. Moreover, during a financial crisis, people with higher education have higher chances of staying employed. Also, higher education is positively linked with better health, higher ROIs to State's income, higher employment rates and higher personal wages resulting in a better growing economy. As research shows (Taub Center, 2010) there is a correlation between parents and children's level of education.

The following picture appears from observing the parents' level of education: over 50% of the mothers and fathers of the students participating in the ACADEMICS program lack a high school diploma. That is, before even looking at the tertiary education phase, it is clear that the ACADEMICS students exceeded their parents' academic achievements by, first and foremost, receiving a high school diploma. Further examination of the data, revealed a negative correlation between the parental level of education and the percentage of ACADEMICS participants in tertiary education. That is, ACADEMICS students are able to break their background ceiling and socioeconomic profile and acquire tertiary education regardless of their parents' level of education. Moreover, as shown in the graphs, the lower the parental level of education, the higher the percentage of ACADEMICS students in tertiary education. Based on the data accumulated in ACADEMICS's database, while comparing to the achievements of the students, 45% of those enrolled to tertiary education, 70% of their parents did not achieve high school diploma.

ACADEMICS's Impact findings

Since the inception of the program in 2001, significant impacts have been made, not only at the individual student level, but also on the community at large. The program's students earned degrees and entered colleges/universities at rates more than double the national average. In addition to the success demonstrated by numbers, ACADEMICS also affects students emotionally by increasing their motivation and self-esteem. By instilling in students the value of education, the program strives to positively change their attitudes toward the future and encourage socio-economic mobility.

Extracting the information from the existing students' database of ACADEMICS compared to national results of the Adva Center, Information on Equality and Social Justice in Israel, 2012 the following picture unveiled:

- In the years 2006 – 2009, 91% of ACADEMICS's students earned a high school diploma, versus 46% of national average and 47% of periphery average.
- 85% met university acceptance levels, versus 40% of national average and 6% of periphery average.
- 70% of these high-school graduates went on and enrolled to universities and colleges, versus 26% of national average and 34% of periphery average.
- Out of these universities / college students, 90% earned a degree compared with 62% of national average.

When examining the average percentage of high school graduates who passed the matriculation exams in the years 2001 to 2010, in Israel, the effect of the ACADEMICS Program is explicit. Whereas the national average in Israel is merely 47% and the periphery average in Israel is merely 54%, the ACADEMICS program average stems high above at 88%. When examining the average percentage of high school graduates who passed the matriculation exams, at peripheral communities, the effect of the ACADEMICS Program is apparent: In all communities (aside from one - Herzliya), ACADEMICS students exceeded their peers, which were not enrolled in the program, by 30%-50%., based on published information from Adva Center, Information on Equality and Social Justice in Israel, 2012

ACADEMICS Dropouts findings

When examining the number of students enrolled in the ACADEMICS program in comparison with the number of dropouts from the program, it is clear that the ratio of dropouts is very low. To be precise, except for the program's first cycle in which there was a 22% dropout rate (which can be accounted for the novelty of the program), throughout the program's cycles the dropout rate did not exceed 10%.

Out of over 2000 students, only 192 students dropped out of the ACADEMICS program along 11 years of activity. The three main reasons for dropping out of the ACADEMICS program are: lack of motivation (28%), lack of interest (21%) and incomplete military/national service (22%). The low levels of dropouts from the ACADEMICS program is directly as a result of the intervention of the ACADEMICS program with mentoring support' guidance and self-efficacy facilitation, which are the backbone of the program.

As reported in Education at a Glance 2011: Indicators, OECD Publishing (OECD, 2011) in all OECD countries, individuals with an academic degree have a greater chance of being employed than those without such a degree. Tertiary education improves job prospects and the likelihood of remaining employed in times of economic hardship. OECD countries' economies and labor markets depend upon a sufficient supply of well-educated workers.
On average across OECD countries, 84% of the population with a tertiary education is employed. Overall, employment rates are more than 27 percentage points higher for those with a tertiary education than for those who have not completed an upper secondary education. Adults with low educational attainment are both less likely to be participants in the labor force, and more likely to be unemployed. On average among OECD countries, men without an upper secondary education are almost twice as likely to be unemployed as men with an upper secondary education and almost three times as likely to be unemployed as men with a tertiary education.

On average across OECD countries, unemployment rates of those with a tertiary-level education have stayed at or below 4%, unemployment rates of those with an upper secondary education have stayed below 7%, while unemployment rates of those who have not attained an upper secondary education have reached 10% several times between 1997 and 2009. In 2009, average unemployment rates across OECD countries stood at 4.4% for those with a tertiary education, 6.8% for those with an upper secondary education, and 11.5% for those who have not attained an upper secondary education. In Israel, 82% of the population with a tertiary education is employed, whereas only 44% of the population with below upper secondary education is employed. The aforementioned data reflects the strong positive correlation between employment rates and the level of education. (Taub Center, 2010)

Tertiary education brings substantial economic benefits for individuals. The earnings premium for a tertiary education is substantial in most countries, and exceeds 50% in 17 of 32 OECD countries (OECD 2011). Earnings increase with each level of education. Those who have attained an upper secondary, a post-secondary non-tertiary education or a tertiary education enjoy substantial earnings advantages compared with individuals of the same gender who have not completed an upper secondary education. The relative earnings premium for those with a tertiary education has been rising in most countries over the past ten years, indicating that the demand for more educated individuals still exceeds supply. In most countries, a tertiary education not only improves the prospect of employment at an older age, but also is associated with greater earnings and productivity differentials throughout one's working life. The economic benefits of education affect not only individuals but also society as a whole. The public returns for investing in upper secondary or post-secondary non-tertiary education are positive in all countries. The public return for a tertiary education is substantially larger than the public return for an upper secondary or a post-secondary non-tertiary education. The reason for this difference is due in part to the larger share of investment costs that are borne by the individuals themselves. However, the main contributing factors are the higher taxes and social contributions that flow from the higher income levels of those with tertiary qualifications.

As reviewed above, when dividing schematically existing jobs into two types – those requiring a high level of skill and education and those not requiring a high level of skill and education – research shows that highly skilled workers earn more than those who are not highly skilled. The large wage gap in Israel is believed to serve as a sufficient incentive for workers to acquire skills through education. A relatively large increase in the number of highly skilled workers might narrow wage disparities. Wage gaps between highly-educated and less-well-educated workers are large: on average, in 1998 a worker with over 12 years of schooling earned 66% more than a worker with up to 12 years of schooling. This gap has been gradually widening, reaching 80% in 2009. (Taub Center, 2010) Moreover, research reveals (Taub Center, 2010) that the main attribute correlated with the high level of wage disparity and the widening of wage gaps in Israel over the years is – educational background. Education level enables workers to be admitted to sectors with higher demand and facilitates their mobility and adaptability to changes that may arise.

As presented by the Taub Center, based on data from the Central Bureau of Statistics, in 2008, the unemployment rate in Israel was 6.1% regardless of years of education. When considering the number of years of education, the following picture arises:

Unemployment Rate%	**Years of Education**
11.3	0-8
9.2	9-10
7.6	11-12
5.5	13-15
3.3	+16

As observed, there is a positive correlation between employment rates and the level of education. Furthermore, the only group of individuals that have not experienced a drop in employment over the last 15 years is that of individuals with 16 or more years of education, who are for the most part, people with tertiary education. It has been shown that the highly-educated work more and also earn more. As a result, they enjoy better access to healthcare and medical services, their children's scholastic attainments are higher and their poverty rates are lower.

Based on the above, it can be shown that the outcomes of the ACADEMICS program has a positive effect on Israel's society as a whole. ACADEMICS's cost is estimated at USD $20,000 per participant. This includes guidance and support throughout high school and military or national service, and financial and academic support until they complete their tertiary education. The Israeli population has a relatively high average level of educational attainment across all age groups. About 43% of the 25-34 year olds and 45% of the 45-54 year olds have completed tertiary education. Private returns on education are, on average, at a high level: in 2010 gross average income of academic professionals was USD $2,908 (NIS 11,631), compared with USD $1,531 (NIS 6,123) for those with 9-12 years of education. Every Israeli citizen is obligated to pay national security insurance, health insurance and income tax relative to his earnings. The lower the wage is, the lower the taxes are, thereby resulting in a greater loss in state's revenues. (Taub Center, 2010)

The following calculations were conducted based on the average monthly gross income in Israel as follows (according to data retrieved from the Central Bureau of Statistics, Israel, for the year 2010):

- The average monthly gross income per employee by level of education is:
  - High school dropout: USD $1,120 (NIS 4,478)
  - High school graduate: USD $1,531 (NIS 6,123)
  - Tertiary education: USD $2,908 (NIS 11,631)

The following table displays an employee's average payments on taxes and welfare by level of education:

(All numbers are in USD)	National Security (per month)	Health Insurance (per month)	Taxes (per month)	Sum	Annual Payment	40 Years Payment
High school dropout	5	35	0	40	480	19,200
High school graduate	22	52	38	112	1,344	53,760
Tertiary education	118	121	302	541	6,492	259,680

Taub Center 2010; Cbs.gov.il, 2010

*For the purpose of this report, the foreign exchange rate between the two currencies (NIS-USD) was set on its' average rate for the last couple of years (NIS 4 – USD 1).

**Numbers represent a rough estimate, disregarding possible wage changes over the years.

To calculate the return on investment (ROI) of the ACADEMICS program to the state of Israel, the difference in payments to the state, between employees according to their level of education was calculated as follows:

The difference in payments between a high school dropout and an academic graduate:

Monthly difference	USD $501
Difference over 40 years	USD $240,480
ROD	12

This means that over a period of 40 years, the State of Israel loses $240,480 in tax income for every high school dropout. Comparing the accumulated difference over a period of 40 years between a high school dropout and an academic graduate – the ROD for the ACADEMICS Program is **1:12**.

To conclude, based on the data extracted from the Central Bureau of Statistics (2010), examining the monthly State revenues, over a period of 40 years, according to the average monthly wages in the Israeli market and the level of education, it appears that the accumulated revenues for the State of Israel are as follows, on average: (1) high school dropout – USD $19,200, (2) high school graduate – USD $53,760, tertiary education – USD $259,680. Therefore, investing an estimated sum of USD $20,000 in higher education per citizen will yield an ROD of 1:12. However, when examining the ROD for higher education, we also need to include the non-monetary returns, (not included in the scope of this paper) which include the following: lower crime rates, better access to healthcare and medical services, lower rates of people suffering from chronic diseases (e.g., diabetes, obesity) and mental health issues, increased life expectancy, higher quality of life and higher purchasing power. In addition, the community as a whole benefits from: narrowing social gaps, higher level of education within the family and the community, higher social involvement and economic growth. Therefore, the actual ROD yielded by the ACADEMICS program is higher than 1:12.

Over fifteen years ago, ACADEMICS's ventured into the periphery, aiming to bring change to its residents and youth at risk via education. The outcomes are encouraging. During its operation, ACADEMICS has been able to reach and change the lives of, not only more than 2000 students, but also their families, communities, and the society as a whole. By doing so, it was able to meet its goal of creating a healthier and more equal society by minimizing disadvantages and empowering potential dropouts to earn an academic degree.

An important outcome: ACADEMICS's students are able to break the vicious cycle and pave the way to academic and financial success compared to their parents by achieving full high school diploma in more than twice the level of their parents. In addition, social action is integrated throughout the entire program and reaches a peak in fulfilling the civic obligation of military or national service. These activities benefit the whole community and the country, as well as help create a new generation with social awareness and activism, creating a ripple effect of the goodness factor.

My reflection as a First Person Action Researcher on ACADEMICS's Quantitative Research:

I embarked on this journey to define ROD with an open mind, involving myself in all stages of research, while reflecting upon my experiences, and building on to structure a reliable, valid research. Reflecting on the process, I identified issues that were of concern, and set about to rectify them, strengthening the validity and reliability of the research. ACADEMICS's quantitative research, when taken in-house, brought to the surface the importance of measurement and self-appraisal, and was a good lesson in humility. As much as I thought that I was good in transparency and accountability, I realized that due to the missing information in the students ' records, I had to go back and fill in all the missing information, before we could do any measurement. It also highlighted the importance of having the correct information to facilitate a well- structured research, which would shine light on the strengths and weaknesses of the program. By ensuring credibility, reliability, objectively and authenticity I was able to establish the trustworthiness of the research

Through humility and willingness to put the data in first place and ensure proper measurement and self-appraisal, I was able to strengthen the commitment to the cause, leading ACADEMICS to its next stage, while receiving the opportunity for personal growth in the process, emerging as a stronger researcher and leader. Kolb’s Model (2005) enabled me to reevaluate, correct and restructure, leading to learning cycles, which in-turn led to the crystallization of the ROD Mechanism.

After conducting the formative research in ACADEMICS, and seeing the benefits of the research translated to improved students’ achievements, I felt it would be very useful to adopt a quantitative stance, whereby I would be able to receive data that could be quantified in absolute numerical terms. Attributing a numerical value to the impact generated as a baseline for desired outcome, gave us a tool to quickly estimate the advantages and disadvantages of steps taken, as well as served as a point of reference to evaluate the project as well as similar projects. Numbers serve to illustrate the success of the project in clear, easy to understand and comparable method. Now that the bench mark figure was established, I was able to evaluate the future impact of steps taken in view of this benchmark.

Chapter 6: Conclusions and Recommendations

The Goodness Factor Model

In all my years of operation in the Business of Doing Good, I never stopped searching for the formula or model that will bring sustainable impact to this Business of Doing Good. As I ventured on this mission, the first steps I took were driven from my experience in the business world. Understanding this, I introduced the notion of ROD (Return on Donation) into the non-profit organizations that I managed, facilitated or impacted, about ten years ago, drawing on the notion of ROI, which is essential and key component in all successful businesses. I believe that ROD is critical to non-profit organizations for their long term strategic planning. Working based on the ROD related metrics, organizations are able to make informed decisions and implement a strategic approach to planning, budgeting, staffing and other key operational areas. Measuring ROD can also help plan future investments and provide benchmarks for understanding the overall cost versus impact achieved. As donors, board members and volunteers look for greater transparency into costs and outcomes, ROD provides an important indication of the overall effectiveness of the organization.

However, as I continued to pave the way to success in the philanthropic world, I slowly came to the realization that metrics, numbers and statistics are just not enough. The ongoing reflective practice facilitated that I evolve in my understanding that to bring about real, impactful, and sustainable change to society, research and experience have showed me that one must embrace additional core elements that are critical to the success of the Business of Doing Good. These core elements developed into a model, which is essential for sustainable organizations that promote a vision for a better world. I call it the Goodness Factor Model.

Through the years, I have encountered several colleagues, who addressed the importance of integrating fundamental human needs in our daily activities and work. These strengthen the necessity to integrate goodness, ethics and measurement as part of the process of developing innovative new solutions, especially for social causes. Deci &Ryan (2000) refer to the need that people have for warm, satisfying and trusting relationship with others. Sabini & Silver (2005) discuss the intention to do good, while Sternberg (1986) in his triangular love theory discusses the motivation to do good. Aquino & Reed (2002) discuss a loving person as someone, who uses every action of their life as an opportunity to feel compassionate toward others. These approaches have been crucial building blocks in understanding the mechanisms behind people's motivation, drive and actions and effective management, and even more so for philanthropy management.

Dees (2001) in his article *The Meaning of Social Entrepreneurship*, addresses the need for a model that "combines the passion of a social mission with an image of business-like discipline, innovation, and determination commonly associated with, for instance, the high-tech pioneers of Silicon Valley" (Dees, 2001, p.1). The Goodness Factor Model that I have developed recognizes this need and attempts to create a tool for managers, philanthropists, and social entrepreneurs for effective, impactful and sustainable philanthropy.

Salamon in *New Frontiers of Philanthropy* (2014) recognizes that the world of philanthropy is on the verge of a revolution, where social purpose initiatives are enjoying an array of new instruments, organizations and tools. As a central player in this field in the last 18 years, I have witnessed this revolution in action, and experience has shown me that for the benefit of the cause and sustainable impact, one must harness the power of these instruments and tools by encompassing them with a holistic model that merges all the values and tools to one model, the Goodness Factor Model.

As a First Person Action Researcher, out of my reflections and inquiry; out of the choices and decisions I made as a result; out of the research and attempts to build sustainable organizations for a better good; out of the successes and failures; out of the knowledge built over the years and the spiral build-up of understanding and knowing, I have come to the conclusions and recommendations in the form of the Goodness Factor Model.

The Goodness Factor Model in the Business of Doing Good relies on four essential pillars, and is supported by a secure floor of long-term commitment to the cause and is shielded and protected by the goodness factor.

The four pillars are:

Vision and Mission: Vision to me is the north-star, the optimal desire of what the organization wishes to achieve while mission is the inner compass, the present state of fulfilling the vision (the what, the who and the how).

Ethics and Values: To me, ethics is the generally accepted code of moral principles where morals describe the right and wrong of action. Values represent the personal standard of the individual. When an organization writes up its code of ethics, it is making clear to their employees what values and morals it upholds, whereby making sure that their employees adhere to and act in-line with the same values and have the same morals and that there is no dissonance between the two.

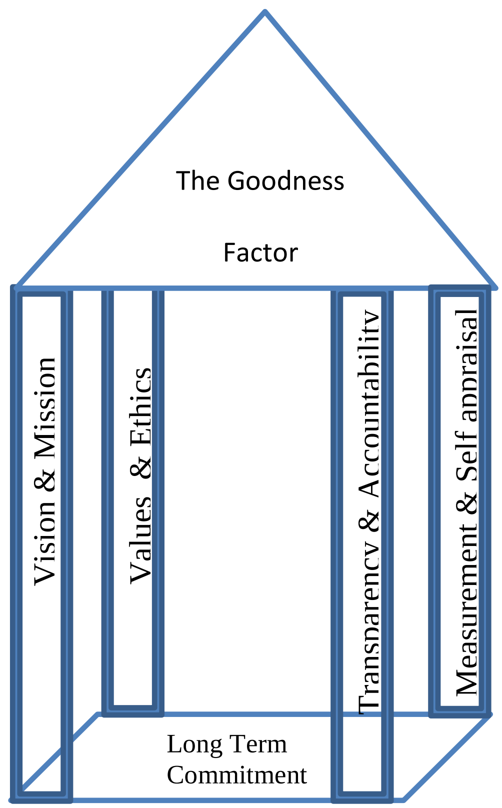
Transparency and Accountability: Transparency to me is about being open, frank and honest in all communications, transactions and operations, while Accountability is about being responsible for actions taken. Philanthropies affect human lives and as such have a moral obligation and must be accountable and be able to justify their actions. In addition to complying with the law, they must be moral, honest and truthful.

Measurement & Self Appraisal: Especially in the philanthropic setting, where we are change agents and affect human lives, whoever touches upon another life, it is important to be personally involved in measurement and self-appraisal. It is important because self-deception can lead to self-destruction. Engaging in measurement and honest self-appraisal allows the individual to stick to his goals and keep the fabric of trust with his stakeholders intact.

These four pillars will not be stable to withhold the Business of Doing Good without long-term commitment to the cause: This is the subtlest of them all. When one commits to something it is not simple. Sometimes our mind can resist because once we commit to a certain path we have to walk it and we cannot choose another path at the same time. When the going gets tough, one wants to opt out. Commitment to the cause is knowing that this option does not exist. When one is committed to the cause, every success, failure or interaction becomes an opportunity to grow and develop. It reinforces our sense of resilience, esteem and toughness that is needed to see things through until the end.

These elements are essential to any sustainable business. However, the Business of Doing Good demands that all activities must be shielded by the protective roof of the Goodness Factor: The Goodness Factor to me is a quality a person has of being good. A person who is kind and generous. A person who has integrity and benevolence and in-spite of temptations upholds the highest morality of the right conduct.

I cannot stress enough how important it is and how imperative it is for any organization that wishes to be a player in the Business of Doing Good, to work under the roof of the goodness factor, supported by the four pillars of vision and mission, values and ethics, transparency and accountability, and measurement and self-appraisal, standing on a secure floor, which is the long-term commitment to the cause itself. These should become the benchmarks for the gold standard of each organization, building upon it success to aim higher each year, refining their operation and long term impact for society as a whole.



The Goodness Factor Model was present in all my experiences and activities throughout the years, even before I could pinpoint to all its factors, especially the critical understanding of Goodness Factor being such an essential and critical component in bringing success and impact to all our actions out of right conduct. The Business of Doing Good is not made up from organizations, but from people. These people bring substantial change to society as a whole as well as to individuals.

Since in all the various programs that I have been involved in, whether in education, science, social or other, I noticed that well defined vision and mission, values and ethics, transparency and accountability, and measurement and self-appraisal, play an important role in determining the success or failure.

Yet, investigating further and embracing and evolving into my role as a First Person Action Researcher, I was able to see that the elements that distinguished successful programs from those that failed were long term commitment to the cause combined with the goodness factor. When these were not present, the program failed to yield the desired impact we were seeking. Yet, when all elements are present, the one factor that made the most impact in the Business of Doing Good was the Goodness Factor. The Goodness Factor must be present in any Business of Doing Good. If it does not exist, the soul of the organization is absent.

My awareness to this model has served me since so when I choose partners for future projects, the model acts as a tool for structuring my activities and relationships within the organization as well as with collaborators, employees, and peers.

Today I am able to venture into new projects with an open and critical eye. If the components of the Goodness Factor Model are not present, I rethink and seriously weigh the amount of resources I am willing to allocate before committing to the new project. I learnt this the hard way, when trying to ignore the absence of the Goodness Factor in some of the projects that I undertook. This was an important lesson and enabled me to clarify the significance of the Goodness Factor Model in the successful operation of the Business of Doing Good. Nonetheless, I was fortunate enough to witness how the Goodness Factor Model comes into play beautifully when all the components are expressed. This was the case in ACADEMICS. The combination of many individuals that all have within them the goodness factor, combined with determination to see transformation, which was translated to long-term commitment, drove ACADEMICS staff and participants toward the mission and vision of the program. Under my leadership, we fostered high standards of transparency and accountability, as well as measurement and self-appraisal, with clear values and ethics surrounding all our activities. In the years that followed, we slowly saw how these kids transform into accountable, contributing members of society, with the whole community enlisted toward the vision. I had the opportunity to meet the alumni of ACADEMICS students and see them go on to pursue educational and professional goals, and by doing so achieve social mobility.

When I now start a new project, I focus on establishing the Goodness Factor Model within the operation of the project. This is translated into putting in place mechanisms to facilitate that.

I ask myself first, is the goodness factor existent within the people and partners, who I intend to collaborate with throughout the project? Then I ask myself if all parties have the level of commitment required to see this project through its successful completion stage. Since understanding the importance of these elements, there have been many cases that I have chosen not to be part of the projects as it was clear to me that a lot of energy would be wasted on trying to infuse these elements into the DNA of the project. I learned that it is much more effective to invest time and money and other resources with partners, when they share this DNA.

If these two core elements of potential for the Goodness Factor and long term commitment exist, then I look for establishing a clear vision and mission that will guide the project into successful completion. Only then, I go further another step and establish clear mechanisms for operation which include: clarifying the values and ethics that govern this operation. Put in place transparency and accountability procedures, like: open channels of communication, weekly joint meetings, reporting to stakeholders, transparency in accounting and expenditures. I also make it a point to integrate from day one practices that foster measurement and self-appraisal, these include: ongoing research of activities and impact, including control group. I also put together mechanisms that will build spirals of knowledge and knowing that will improve the activity and collaboration through a process of self-appraisal. This is carried out on a personal level as well as within the teams and the whole organization. This is all fostered by an atmosphere and culture of learning, developing, and growing through the process. All of this is not significant without personal example. I made it a point to personally adopt these mechanisms and metrics, sharing the ups and downs of real life situation with my group as well as the stakeholders. I find that with each project, I grow as a person, leader, and educator.

This is not a quick fix. The processes require investing time, effort and thought. But this investment yields the best results for the individuals as well as the projects and the organizations that come together in pursuing the vision. The Business of Doing Good is not made for those who are impatient and look for quick glory. It is for those who want to make the world a better place, just like me, the young girl from Mumbai who dreamt to someday, somehow, somewhere touch people's life for the better.

Eighteen years ago, I had a dream. Today, I am realizing it. In the light of the research that I have undertaken and the struggles, challenges and the obstacles that I have encountered over the years, I have learnt that to do philanthropy well, one needs to be involved and committed in the long-term. Short term may look good but is truly a waste of resources.

The model of the right thing to do in the Business of Doing Good has changed me and the way that I practice giving. I was only when I looked within myself and went back to the basics, I found the answers within. The goodness factor model is evident in all my doing. It gives foundation and structure to best practices and enables me to focus resources and energy to impactful and sustainable giving.

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Appendices

Appendix I: LRI Qualitative Research questionnaire:

LRI – Research Institute – Market Research and Public Opinion Surveys

Q-7775

14.02.2007

In-depth interviews with participants in the "LEADERS" program

I: Background questions:

1. Age:

2. Gender: (*To check*) male/female

3. Are you presently taking part in "LEADERS"?

   a. Yes – *to ask*: How long have you been in the program? *and go to the beginning of the interview itself, point **A***

   b. No – *to continue to **4***

4. What is the reason you are not participating at present?

a. I have graduated

b. I have decided to quit – *To ask:* How far into the program were you when you left the program?

c. I was expelled – *To ask:* How far into the program were you when it happened?

A. "LEADERS" – the world of associative content

1. How would you describe the program to someone who has never heard of it? What is this program?

2. Try to delineate the "type" of person/ participant to whom this program would be most appropriate? Why?

3. What type of person this program would not be suitable for? Why?

4. Every program or project has advantages and disadvantages. Which, in your opinion, are the three most important advantages of "LEADERS"?

5. And which are, in your opinion, its three most significant drawbacks?

B. <u>The "LEADERS" program – recalling a personal experience:</u>

6. When you look back at your experience in "LEADERS", should you be required to evaluate your level of satisfaction on a scale from 1 to 10, while 1 is "totally dissatisfied" and 10 "extremely satisfied", which mark would you give?

What is the reason you give this mark?

7. Let's go back in time and try to recall your experience in "LEADERS":

First of all, let's start with the moment someone suggested you participate in "LEADERS" and invited you to come for the interview:

How did this happen exactly? Who contacted you?

Were you acquainted with / have you heard about "LEADERS" before being approached?

If Yes – What did you know/hear?

If No – What was it that they told you?

What was your impression about "LEADERS" based on what you already knew /was told?

How did you feel when you were contacted?

8. Regarding the interview and the selection process: which of the following phrases best describes your willingness to go take the interview?

a. I was willing to take the interview

b. I hesitated/ I was not sure I wanted to

c. I had no intention to go, but I was persuaded to.

Why were you willing to go / hesitated / did not feel like to? *(According to the interviewee' response)*

Who / what made you make up your mind?

9. What do you think about the process of singling out possible candidates and approaching them, and about the selection process itself? Is there anything you would improve or change? What?

1. It looks fine to me as it is

2. I would change/ improve the following:

10. And after you were accepted, did you have any doubts or hesitations about joining “LEADERS"?

If Yes – what were they?

11. Now, regarding your first year in "LEADERS" – Do you remember the beginnings? How was it? What were your feelings?

12. *(To ask only those who passed to the second year)*: And, later on, during your second year – how did you feel? Was it any different in comparison with the debut of the program? In what sense?

13. What were the reactions you got from your friends regarding your participation in "LEADERS"? To what extent, if any, did you talk with them about it? What is it in particular that you shared with them?

14. And regarding your parents – How did they react? Did you let them in on your interest in "LEADERS"? What was in particular that you shared with them?

15. And regarding the teachers at school – Were they involved? What was their reaction about your participating in "LEADERS"?

16. Now, I will read to you some attributes regarding your participation in "LEADERS" and I would like you to give me your opinion about each and every one of them. I will ask you to evaluate each of them on a scale between 1 to 10 and then explain your choice to me.

	Grade from 1 to 10 1 = totally unsatisfied 10 = extremely satisfied	Why did you give that mark?
The instructors of "LEADERS"		
Workshops/ contents		
Conferences		
Your assignment – the project you have been involved in		

17. When you look back on the trajectory you followed in "LEADERS" – what is the most important thing that happened to you as a consequence of your participation in the program?

18. Which of the following phrases describes best your feelings about "LEADERS"?

a. the participation in "LEADERS" was very valuable to me.

b. the participation in "LEADERS" was quite helpful to me.

c. the participation in "LEADERS" was not of much use to me.

d. the participation in "LEADERS" was rather worthless for me

Why did you give that answer?

19. If you look at the person you were before "LEADERS" and who you are today, do you feel that you have changed? If Yes – what has changed?

C. <u>Leaving the program before its completion</u> *(This part is relevant only for those who dropped out or were expelled)*:

20. I would like to talk to you about your leaving "LEADERS" – if you have to sum up in one phrase why did this happen – what would you say?

Try to explain what do you mean by that?

21. Do you have any regrets about not continuing with the program? Yes/ No? Why?

22. Today, in retrospective, is there anything you would do differently? What is that?

D. <u>Perspectives and expectations about the future</u>

23. In the end (*to ask only those who are presently taking part in the program, or the graduates, those who completed the program*) – which of the following phrases best describes your expectations regarding your relations with "LEADERS" in the future:

a. I would like to continue being in touch with "LEADERS" in the future

b. For me, "LEADERS" is just like the "old school days" – I have no special interest in keeping contact

c. I don't know/ I can't think about this at this moment.

Why did you answer that way?

24. (*To ask all of those who answered **a** to question 23*) What kind of relation would you like to have with "LEADERS" in the future?

Who would you like to be in touch with at "LEADERS"?

What channels of communications would you choose?

25. (*For all*) "LEADERS" sees itself as a long-lasting, ongoing program. "LEADERS" is presently devising means of keeping in contact with its graduates and goes along with them following their progress in life. What do you think about this, have you any ideas on the subject? Any suggestions? What would you advise "LEADERSs" to do?

Thank you for taking the time to participate in our survey!

Appendix II: LEADERS RESULTS

Infrastructure Survey among

Participants /Alumni/Drop outs

of LEADERS Program

Summary

Prepared for LEADERS by LRI Institute

October 2007

Background

- This document is based on data (report number R-5262)
- The document summarizes phase B of the feedback survey on LEADERS
  (A qualitative telephone survey among the participants- ambassadors, drop outs and alumni of the program).
- The document includes:
  - Executive summary
  - Summary and conclusions

Methodology

3 telephone surveys were conducted:

Survey number 1- among participants (ambassadors)- 122 participants were interviewed by the following distribution:

- First year participants- 71 interviews

- Second year participants- 51 interviews

Survey number 2- among drop outs- 78 drop outs were interviewed by the following distribution:

- Drop outs of first year- 48 interviews

- Drop outs of second year- 30 interviews

Survey number 3- among alumni- 120 alumni were interviewed by the following distribution:

- "New alumni" (from years 2002-2004)- 73 interviews

- "Old alumni" (from years 1999-2110)- 47 interviews

World of content and values

1. LEADERS's goal (only among the alumni):
   - The alumni, both the new and the old, correlate LEADERS mainly with leadership development (77%).

- At the second place, but with a substantial difference, lies the social aspect- "to educate youth to help the community" (29%).

2. LEADERS's advantages:
   - The majority of the audiences examined, reported advantages of some kind (over other organizations), mainly:
     - "Level of professionalism/high quality of the organization- the mentors, contents, participants" (reported by 27%-45% among each of the audiences).
     - "Tools for personal coping/ empowerment" (12%-20%)
     - "Emphasis on doing/projects" (7%-24%)
     - "High level effort put in it" (2%-13%)
3. LEADERS's disadvantages:
   - The majority of the audiences examined reported disadvantages of some kind, although in a small rate compared to the advantages rate (approximately 70%-80% compared to 90%).
   - In addition, in general, no outstanding conceptual disadvantages appear- the disadvantages were reported in a somehow disoriented manner by a quarter of the interviewees in each audience and less:
     - "Rigidity", in the framework, the rules, the meetings, which appears as the main disadvantage among the drop outs (23%) and in a higher rate compared to the participants (11%) and the alumni (10%).
     - "Burden which produces difficulty to integrate LEADERS with other activities"- appears more among the drop outs (18%) and first year participants (18%) than among the others.
     - "Too thorough screening/good people are missed"- among the participants (19%), among the alumni (14%), among the drop outs (5%).
     - "Lack of sufficient advertising" appears as the main disadvantage among the new alumni (20%).
4. LEADERS as an elite program:
   - About half, in each of the audiences, believes LEADERS to be an elite program.
   - More among the drop outs (64%) and first year participants (59%) than the rest believe so.
   - Although only a relative minority among those who reported this believes that LEADERS being an elite program is not a positive thing (between 5% and 23%), however there is a substantial rate among each of the audiences (between 39% and 57%) that believe that there are both positive and negative aspects.
   - Among those who believe LEADERS is an elite program:
     - A higher rate among the current participants in contrast to the drop outs and alumni, believes it is a positive thing (48% in contrast to 36%, 38% respectively).
     - Among the participants audience, there is a decrease of the rate of those who think it is a positive thing between first and second year (55% in contrast to 35%) and an increase among those who think it is not a positive thing (5% in contrast to 9%).
5. advantages and disadvantages of LEADERS being an elite program:
   - Main advantages (among those who believe it is "a positive thing")

	Alumni (38%)	Participants (48%)	Drop outs (36%)
High quality youth/the best	57%	23%	59%
Contributes to the motivation/ the pride of those who participate	14%	23%	12%

- Main disadvantages (among those who believe it is "not a positive thing")

	Alumni (21%)	Participants (6%)	Drop outs (18%)
Missing out on good people/no equal opportunity granted to everyone to participate	54%	75%	33%
develop feelings of arrogance towards others	23%	25%	33%

6. LEADERS as a program which builds future leaders- by reading (alumni):
    - 59% among the new alumni and 49% among the old ones believe so.
    - Nevertheless, a substantial rate also believes as well that LEADERS mainly provides practical tools such as: how to do and promote projects, and less focuses on building future leaders (37% among the new alumni, 40% among the old ones).
7. Characterization of LEADERS as an organization- by reading (participants and alumni):

- The absolute majority (above 90%) in each of the audiences believes that LEADERS is a unique organization- it doesn't resemble any other organization.
- Only a tiny minority (isolated percentage) believes LEADERS resembles a youth group or some kind of after-school activity.

8. Level of demands in LEADERS:
    - The majority of the participants of each of the audiences believes that the level of demands in LEADERS is appropriate and fitting (78%-84%).
9. Important attributes in order to succeed in LEADERS:
    - All attributes read to the interviewees are perceived as important in a medium up to high rate (all grades are between the range of 6.8 to 9.2)
    - The 3 attributes perceived as the most important (a grade of 8.4 and higher):
        - Ambitiousness
        - The desire to contribute to the community
        - Openness to learning
    - The attributes perceived as important in a medium level (7.3-8.4):
        - Self-awareness
        - Self confidence
        - The motivation to become a leader who influences the future of the nation.
        - Independence
    - The attribute perceived as the least important is mental strength (6.8-7.1).
    - There are no significant differences between the audiences, however it is interesting to notice that the drop outs ranked "self confidence" in a higher level compared to the rest of the audiences (8.4 in contrast to 6.9-7.9).

The recruitment and screening process

1. Method arriving to LEADERS (only among current participants):
    - The majority of the participants (89%) joined LEADERS following someone who approached them and proposed to join and not on their own initiative.
    - Out of the participants who were approached by someone it appears that:
        - Most of them (76%) haven't heard of LEADERS before.
        - The minority that has heard of LEADERS (24%) mainly heard that it is a program for developing leaders (73%).
        - They were mainly approached by: the class coordinator (30%), a friend/LEADERS ambassador (27%), other function in school (19%) or one of LEADERS's staff (an instructor or management) (17%).
    - Among all these functions, LEADERS's staff has the biggest impact on the participant's decision to go to an interview (83% of the participants whom the staff addressed, reported "it influenced me a lot + it fairly influenced me") and right after, a friend/ambassador of LEADERS has an influence (60% reported "influenced a lot + quite influenced").
    - Those who turned to LEADERS on their own initiative (not following someone addressing them) (11%), turned to LEADERS mainly because of a friend/acquaintance who participated in LEADERS or LEADERS presentation which they saw and were

impressed by (participants of the first year) or because of a staff member who recommended LEADERS to them (participants of second year).

2. Opinion on the recruitment and screening process of LEADERS (among the current participants only).
   Recruitment:
   - Only a minority (15%) believes that the recruitment process, as being done today, where a function in school addresses the students, is the best way.
   - Most of the participants (63%) believe that the most suitable process is to present a presentation (or send it via email) to all students and allow them all to try and be accepted.
   - Most participants reported that they had not seen such a presentation prior to the interview (69% among all participants and more of second year- 76% in contrast to first year 64%).
   - Nevertheless, it appears that the presentation has a great impact on the decision to join LEADERS (the majority of those who saw the presentation reported "influenced a lot + fairly influenced).

   Screening:
   - A higher number believes that additional phases should be added to the screening process in contrast to those who believe that the current screening process is sufficient enough (53% in contrast to 37%)
   - This perception is more outstanding among second year participants, in comparison to first year participants (63% in contrast to 45% respectively).
3. Team members which are not fitting for LEADERS (only among the participants):
   - Close to half of the interviewees, both first year (47%) and second year (46%) believe that some of the members in their team are not appropriate for LEADERS. (All the rest believe that everybody in the team is suitable).
   - The average number of team members, perceived as unfit, is 2.2 among all participants (2.6- average among participants of first year, 1.7- average among second year).
   - Nevertheless, out of those who believe that there are team members who are not fit, only a minority (11%) believe they should be forced to leave, all the rest believe:
     - They should stay on probation for a limited period of time to examine if they improve (43%).
     - A lower rate believes they should be allowed to stay and they need to be more supported (29%).
     - An even lower rate believes that nothing should be done and to wait maybe they will leave on their own (16%).

LEADERS's contribution to its participants

1. The activities that contributed the most to the personal development as a leader:
   - There is no one activity which is categorically perceived among all audiences as the most contributing. The activity which is perceived as the most contributing changes among the audiences examined.

- Among the alumni:
    - Working on the project is perceived as the most contributing activity, more than the rest of the audiences (47% in contrast to 33% among the participants and 18% among the drop outs).
    - This perception is more outstanding among the old alumni in contrast to the new alumni (61% in contrast to 38%).
- Among the participants:
    - Team meetings are perceived as the most contributing activity, more than the rest of the audiences (36% in contrast to 29% among the alumni and 19% among the drop outs).
    - There is an increase in the perception of the team meetings contribution between the participants of the first and second year (29% in contrast to 45% respectively), on the account of a decrease in the perception of the contribution of working on projects (39% among the first year in contrast to 26% in the second).
- Among the drop outs:
    - The conventions are perceived as the most contributing activity, more than the rest of the audiences (69% in contrast to 26% among the participants and 19% among the alumni).

2. Arguments regarding the most contributing activities:
    - Working on the project- main arguments reported:
        - Practical implementation of the theory (reported by most of the audiences)
        - Personal development (by a substantial difference)
    - The team meetings- main arguments reported:
        - The feedbacks/ development of self-awareness
        - Environment which enables collaboration and intimacy
    - The conventions- main arguments reported:
        - Practical implementation of the theory
        - Contributing contents/data collection
3. Factors in LEADERS (in general) which contributed the most to the personal development as a leader (participants + alumni):
    - The main answers reported are related both to specific activities and to the meaningful relation to people at LEADERS:
        - "Team meetings" which mainly contributed to the development of self-awareness/feedbacks
        - "The relation with the instructor" which mainly contributed to the development of sense of ability/capability
        - "The relation to senior management" which contributed to the development of sense of ability/capability
        - "Working on the project" which taught how to LEADERS processes and to influence.

	New Alumni	Old Alumni	All Alumni	Participants 1st year	Participants 2nd year	All participants
Team meetings	19%	23%	21%	24%	34%	28%
Relation with instructor	32%	9%	23%	13%	17%	15%
Relation with senior management	15%	30%	21%	9%	14%	11%
Working on project	6%	19%	11%	17%	14%	16%
Conventions	1%	6%	3%	9%	10%	9%

4. LEADERS's contribution to the personal development as a leader:
   - Most interviewees in each of the audiences reported that their participation in LEADERS contributed to their personal development as leaders (except for the audience of the drop outs, among the rest of the audiences there are more who reported "contributed a lot" in contrast to "fairly contributed").
   - The rate of those who believe so among the drop outs is the lowest, yet, relatively high (69% in contrast to above 90% among the rest of the audiences).
   - The rate of those reported "contributed a lot" is higher among the participants in contrast to the alumni (71% of all participants in contrast to 58% of all alumni).
5. LEADERS's overall contribution to its participants:
   - The main answers reported are related to the aspects of personal development:
     - Self-awareness
     - Self-confidence/feeling of capability
     - Development of leadership skills
   - Additional contribution is related to the nature of the program- "getting to know high quality teenagers".

The instructor

1. General satisfaction from the relation with the instructor:
    - Among the participants (first and second year) and among the new alumni the level of satisfaction is relatively high (8.5, 8.6 respectively).
    - The lowest level of satisfaction is among the drop outs (average grade 6.7) and then among the old alumni (7.7).
2. Satisfaction from the instructor's accompaniment the work on the project:
    - The level of satisfaction in this aspect is slightly low in contrast to the general satisfaction among the audiences.
    - Among the drop outs:
        - The level of satisfaction is the lowest (6.6).
        - One third of them (35%) ranked 1-5 which is a higher rate in contrast to the rest of the audiences (their rate ranges from 3%-13%).
    - Among the rest of the audiences, the level of satisfaction ranges from 7.5 to 8.6 while more than half of them ranked 8-10 grades.
3. Arguments for different levels of satisfaction regarding the instructor's accompanying the work on the project (participants +drop outs):
    - The arguments for high grades (8-10 grades) are mainly "supported and accompanied me along the way" and "personal relation/I felt comfortable to turn to him/her".
    - The arguments for medium grades (6-7) and low grades (1-5) are mostly the opposite of the high grades: "didn’t give enough support", "didn’t push me when I needed it", "more of a team accompaniment than personal".
4. Satisfaction from specific qualities of the instructor (participants + drop outs):
    - The 2 qualities which get the highest satisfaction level among all audiences is related to professionalism:
        - First place "professionalism in terms of content and knowledge" (average grades of 9.1-9.5).
        - Then "professionalism in terms of management of the meetings and the team guidance" (8.5-9.1).
    - Regarding the rest of the qualities, "caring", availability", "support", "challenging", "helping to self-develop as a leader", the level of satisfaction is similar among them but different among the different audiences:
        - Among the participants, the level of satisfaction is medium to high (8.4-8.7).
        - Among the drop outs the level of satisfaction is low to medium (6.2-8.1).
5. The figure they would like to see as an instructor (participants + drop outs):
    - There are no significant differences between the participants and the drop outs.
    - The desirable instructor figure possesses the following qualities:
        - First of all "supportive" (58%-81%)
        - Then "serves as a role model" (42%-51%)
        - "Professional" (36%-56%)
6. the nature of the relation between the instructor and the team members (participants + drop outs):

- Among the participants, more interviewees describe the relation as more "personal and warm" (half) than "to the point and formal" (one third).
- Among the drop outs the situation is the opposite- a higher rate describes the relation as more "to the point and formal" (60%) than "personal and warm" (24%).

The team

1. General satisfaction from the relation with the ambassadors of the team:
    - The level of satisfaction among all audiences is medium. The average grades ranges from 7.6 to 8.2.
    - The level of satisfaction is slightly higher among the participants, in contrast to the audience of the drop outs and the alumni.
2. The nature of the atmosphere in the team:
    - Among each of the audiences:
        - Most interviewees describe the atmosphere in the team as "warm and supportive".
        - A lower rate describes it as "to the point/mission oriented".
        - Even a lower rate describes it as "competitive".
    - Among the participants, the rate of those who describe the atmosphere in the team as "warm and supportive" is significantly higher compared to the rest of the audiences (80% in contrast to 53% among the alumni and 49% among the drop outs).
3. Satisfaction from specific characteristics of the team (participants + drop outs):
    - The 2 qualities of the team which receive the highest level of satisfaction are related to the social aspect:
        - In the first place: "friendship" (average grade of 7.5 among the drop outs and 8.3 among the participants).
        - Then "the team spirit" (7.2 among the drop outs and 7.7 among the participants).
    - "assisting in initiating a project", "challenging", "supporting personal development as a leader": for these, the level of satisfaction is the lowest (6.0-7.5).
    - The level of satisfaction among the drop outs is lower in contrast to the participants in each of the qualities that were analyzed.

The meetings

1. General satisfaction from the regional team meetings (participants only):
    - Most of the interviewees (80% of all participants) reported a high level of satisfaction from the meetings (grades 8-10).
    - There are no differences in the level of satisfaction between first year and second year participants.
    - The main argument for high level of satisfaction (out of 80%):
        - "contribute to my personal development" (30%)
        - "contribute to the development of my leadership skills" (24%)
        - "interesting meetings" (21%)

- Main arguments for medium level of satisfaction (6-7 out of 18%):
  - "wasting too much time on issues which are not related to the projects" (29%)
  - "do not contribute to leadership skills" (14%)
  - "feeling that we don't do anything/just talking" (14%)

2. Satisfaction from the frequency of the regional team meetings (participants +drop outs):
   - Most interviewees think that the meetings frequency is appropriate (74% among the participants and 68% among the drop outs).
   - More among first year participants than second year believe the frequency is too low and the meetings should be conducted once a week (29%, in contrast to 18%, 19% respectively).
3. Dealing with projects during the meetings (all interviewees):
   - More among the first year participants, in contrast to the rest, believe that the frequency is too low, i.e. dealing with too many other contents and less working on the project (26% of them in contrast to 14% among second year participant, 16% among the drop outs and 9% among the alumni).
4. The contents in the meetings- by reading:
   - Most of the interviewees among each of the audiences believe that the contents of the meetings contribute to the development of their leadership qualities and abilities (between 48% and 71%).
   - Between 30% and 40% among each of the audiences believe that the contents do contribute, however in other aspects, with no relation to their leadership abilities.
   - Only a minority thinks that the contents do not contribute anything at all (the rate of those who believe so is higher among the old alumni in contrast to the rest- 13% in contrast to 1%-7% among the rest of the audiences).
5. The feedbacks- by reading:
   - Most of the alumni (82%) and the drop outs (84%) reported they participated in the feedbacks. More new alumni participated than old alumni (64%).
   - Most interviewees participating, among each of the audiences (80% and above) reported the feedbacks as being contributing.
   - Nevertheless, more interviewees defined them as "harsh" in contrast to those who reported they "feel comfortable with them", except for first year participants where the tendency is the opposite (more of them feel comfortable with the feedbacks than perceive them as harsh).
6. suggestions for feedbacks efficiency (participants only):
   - One third (29%) believes there is no need to improve the feedbacks; all the rest reported some kind of improvement suggestion, mainly (out of 71%):
     - "more guidance/definition of limits" (13%)
     - "they shouldn't be too long" (12%)
     - "they should be more thorough" (11%)
     - "they should be truthful" (8%)
   - the instructor's role as perceived by the participants should mainly be instructor/someone who directs/ determines limits and takes care that the criticism will be constructive and not destructive (39%).
   - Other answers reported:
     - "to watch from a distance/ not to interfere" (20%).
     - "to give opinion/ to give feedback at the end in order to not influence the team members" (20%).

The conventions

1. The conventions' contribution to the personal development as leaders (participants + alumni):
    - The majority of the interviewees in all audiences (89% and above) believes that the conventions contribute to the personal development as a leader (reported: "contributing a lot" + "quite contributing").
    - Out of those reporting, the conventions are perceived as:
        - "enriching/ providing knowledge"- 17% among the participants, 18% among the alumni.
        - "personal development"- 9% among the participants, 14% among the alumni.
2. Ranking of the specific conventions contribution (participants only):
    - All conventions are perceived as contributing in medium to high level (average grades of 7.3-8.8).
    - The 2 conventions which received the highest grade:
        - Creativity convention- 8.4 (among all participants)
        - Change convention- 8.8 (relevant to second year only)
    - The convention which received the lowest grade average is Futurism (4- 7)

The projects

1. The project as a mean or as a goal:
    - Most interviewees, among all audiences, believe that the project is more of a mean to develop leadership skills than a goal on its own.
    - Yet, among the drop outs, more than one third believes that the project is a goal on its own, a rate which is higher in contrast to the rest of the audiences (39% of them in contrast to 10% out of all participants and 14% out of all alumni).
2. The project's influence on the transition from first year to second year (participants + alumni):
    - Most interviewees believe that the progress of the project is important yet it is not the main thing that determines whether one proceeds to second year.
    - Nevertheless, first year participants (26% of them) report that the progress of the project is the main thing that determines. This rate is high compared to those who believe so in the rest of the audiences (4% among second year participants, 12% among all alumni).
3. Accepting the support and accompaniment needed to promote the project:
    - Most interviewees believe that they received the support and accompaniment needed in order to promote the project (yet more reported "in a sufficient way" than "in a very sufficient way").
    - Yet, less drop outs compared to the rest of the audiences, believe that they received sufficient support (61% of them in contrast to 88% among the alumni, 85% among the participants).

- Out of the participants and the drop outs who believe they received sufficient support ("very sufficient" + "fairly sufficient"), the main arguments are:
    - "the instructor is supportive"
    - "the team is supportive"
    - "I get what I need"
- Among those who believe they haven't received sufficient support ("not so much" + "not at all")- which are 15% among the participants and 36% among the drop outs, the main arguments are the opposite to the arguments of those who have received support:
    - "the instructor is not supportive enough"
    - "the team is not supportive enough"
    - "they don't teach me enough how to act"

4. Involvement in founding the project (drop outs + alumni):
    - Most of the alumni interviewed (81%) took part in/ were partners in leading a project which came into live.
    - Most of them reported that " they put their heart and soul in it therefore it took a lot of effort and time" (78%).
    - More of the old alumni than the new ones reported that "they did a project that was okay and it was done because they had to do it" (29% compared to 17% respectively).
    - Among the drop outs, a substantial part of them didn't do a project (39%) or they did it partially (53%).
    - Out of the drop outs who did a project in a complete way (8%) or partial way (53%)- most of them reported that the effort they put in it challenged them (57% of them).
5. The contribution of the project for the personal development (participants alumni who founded a project):
    - Most interviewees believe that the project contributed to their personal development (and more "contributed a lot" than "quite contributed") - 92% among the alumni, 83% among the participants.
    - There is a rise among those who believe so- between first year and second year participants (78% compared to 90% respectively).
    - The main argument:
        - "self-confidence/ sense of capability"
        - "taught me how to lead processes/ taught me how to lead people"
6. The contribution of the project on the personal development as a leader (participants + alumni who founded a project):
    - Here, as well, most interviewees believe that the project contributed to their personal development as leaders (more "contributed a lot" than "fairly contributed", except for the old alumni) - 87% among the alumni, 86% among the participants.
    - The main arguments are similar to those of the contribution of the project to the personal development in general (see previous section):
        - "taught me how to lead processes"
        - "taught me how to lead people"
        - "self-confidence"
7. Who/what assisted the most while working on a project (participants only:
    - The instructor is perceived as the one most assisting in the work on the project (61% among first year participants, 56% among second year participants).
    - In second place are the team members/ part of the team members (51% among first year and 48% among second year participants).

- Second year participants reported:
  - Senior Management (36% of them compared to 14% among first year participants).
  - Instructor (34% of them compared to 3% among first year participants).
- First year participants reported: "other function outside of LEADERS" (19% of them compared to 8% among second year participants).

8. Are all projects equal?
   - Most interviewees in most audiences (59%-74%) believe that not all projects in LEADERS are equal, some of them "count more" than others.
   - Among first year participants the situation is the opposite, meaning, a higher rate believes that all projects are equal (61% compared to 39%).
   - An interesting point is that there is an increase according to seniority of participation in LEADERS in the rate of those who believe that "not all projects are equal"- this is a sequence that apparently overlaps the phases of the project progression therefore reinforces the differential perception:
     First year- only 39% ----- Second year- 64% ----- New alumni- 74%
   - Out of those who believe that not all projects are equal, " project" is perceived as having the following characteristics:
     - LEADERS's staff is enthusiastic about it
     - Big/ national/ with branches
     - Publicized
     - Rich in resources/ budget
   - Less worthy project is basically the opposite (small, LEADERS's staff is not enthusiastic about it/ not interested in it, project which did not start from scratch).
9. Suggestions for changes regarding the projects (participants + alumni):
   - Approximately half among most audiences reported that they would have changed something in the project (all the rest "wouldn't have changed a thing").
   - First year participants' audience is outstanding in the fact that the majority reported that they wouldn't have changed a thing, compared to those who would have changed something (67% compared to 33%).
   - Main suggestions that came up (out of those who reported they would have changed something):
     - "to allow to succeed in LEADERS even without a project/ to change the perception regarding the project/ to emphasis that the project is more a mean than a goal"
     - "all projects will be equally estimated"
     - "more help and guidance"
10. The project as a measure of personal development and leadership development- (all participants):
    - Most interviewees (60% and above) among each of the audiences believe that the project should be "one of the measurements should be of equal weight to additional measurements which indicate the personal and leadership development of the ambassador".
    - The second answer reported is that the project should be "the main measurement, yet not the exclusive one, which indicates the personal and leadership development of the ambassador" (between 10% and 405).

- There is an increase in the rate of those who believe that the project should be of equal measurement in weight to other measurements, among first and second year participants (73% compared to 88% respectively), on the account of a decrease in the rate of those believing that it should be the main determining measurement.
- More among the alumni, compared to the participants and the drop outs, believe that the project should be the main measurement (34% compared to 14% and 21% respectively).
- Only a minority reported that the project shouldn't be a measurement at all or should be the exclusive measurement.

11. additional measurements which indicate that the ambassador developed leadership skills:
    - Out of all those who reported that the project shouldn't be the exclusive measurement, the main additional measurements reported are:
        - "activity/ meaningful influence/ contribution in a team"
        - "activity/ involvement in the community which is done along the participation in LEADERS"
        - "progress of previous activity along the participation in LEADERS"

The management

1. The extent of the involvement of the management team in the ambassadors activity and the extent of the level of convenience to address them (participants only):
    - The level of involvement in the ambassadors' activity is perceived as medium to good (6.9-8.4).
    - There is an increase in the perception of involvement of each of the functions between first and second year.
    - Among the 3 functions, senior management level of involvement is perceived as the highest (average grade of 7.6 in contrast to 7 regarding the staff).
    - Nevertheless, regarding the feeling of addressing them, first year participants feel the most comfortable to turn to the staff, and second year participants express the same level of comfortableness to turn to any of them (7.9-8.1).
2. The extent in which the staff members- the instructor, senior management and the staff- serve as role models (participant only):
    - Each of the functions is perceived as a role model in a high level (all grades above 8.2).
    - Among all these factors, the instructor and senior management receive the highest grades.

The social surroundings attitude to the participation in LEADERS

1. The friends outside LEADERS attitude (participants + drop outs):
    - The majority in each of the audiences reported complimenting reactions and feedback- still, more among the participants (56%) than the drop outs (42%).

- There is an increase between the participants from first year and second year regarding the rate of those reporting on encouraging attitude (from 51% to 64%). There is a decrease among those reporting on disrespectful attitude (4%-12%). This fact might demonstrate that in the long run, when the ambassadors spend more time in LEADERS, they share it with their friends and they become more proud and self-assure in their being in LEADERS.

2. The parents attitude (participants + drop outs):
    - Approximately 70% among the participants and the drop outs reported that their parents are proud of them being part of LEADERS.
    - Approximately 20% reported the parents are proud but the success in school is more important to them (all the rest- "no special attitude").
3. The teachers attitude (participants + drop outs):
    - One third among all participants (32%) and among the drop outs (34%) reported a supportive attitude, feedback and considerate approach of their teachers.
    - There is an increase among the participants from first year to second year regarding the rate of those reporting supportive attitude, feedback and considerate approach (from 24% to 42%).
    - Only a minority in each of the audiences (less than 10%) reported that the teachers do not know they are part of Lead.

The future relation with LEADERS

1. The level of interest in the continuation of the relation with Lead as alumni (second year participants + alumni):
    - Most interviewees reported a high level of interest to continue be in touch with LEADERS as alumni (79% and above, and more of them reported "very interested" than "fairly interested").
    - Yet, the level of interest decreases in the long run, while there is a time distance between the participation period in LEADERS, especially among those who reported a high level of interest ("very interested").
      Second year participants: 82% --- New alumni: 67% --- old alumni: 47%
    - Out of those who reported a high level of interest ("very interested" + "quite interested"), the majority (above 80%) are interested both in an informal and formal relation, related to specific goal.
2. Type of relation they would like to have- (alumni only):
    - Out of the alumni who reported a high level of interest in continuing the relation with LEADERS ("very interested" + "fairly interested"), which are 94% of the new alumni, 79% of the old alumni, the main answers reported regarding the type of relation are:
        - "participating in conventions" (33%)
        - "to be integrated into LEADERS staff/ becoming an instructor" (26%)
        - "to take part in the activities/ alumni meetings" (19%)
3. The level of interest in specific activities (alumni +second year participants):
    - In general, the ranking of the specific activities (read to the interviewees) is decreasing along the time, while there is a time distance from the period of being in LEADERS. The

highest ranking of every activity is among second year participants and the lowest ranking is among the old alumni.

- Second year participants provided the highest ranking for:
  - "to become the head of alumni staff in the opening convention" (8.9)
  - "to interview new candidates" (8.6)
  - ""to be a tutor to a LEADERS ambassador" (8.4)
- Both the new and old alumni provided the highest ranking to:
  - "personal work with LEADERS's instructors in small teams…which will focus on personal growth and on the exploration of issues related to the current position of each one in his life" (7.6)
  - Dual track academic program in the framework of a certain university, in which only LEADERS alumni will be included and each one could study for a degree in a major field that he wishes, from art and theatre to law and business, in parallel to studying additional program on the subject of leadership" (7.9)
- The old alumni provided the lowest grades compared to the new alumni and second year participants regarding each of the activities.
- Regarding "discussions/ alumni forum on the LEADERS website", there is a rise in the lowest level of appreciation among all activities read- 6.3 among the new alumni, 5.7 among the old alumni.

The process/considerations for leaving LEADERS

1. The reasons for leaving LEADERS (drop outs):
   - The main reasons reported are related to the workload of participating in LEADERS- the difficulty of combining LEADERS with school (26%) or with other activities (20%).
   - Another reason is related to the pressure/ uncomfortable feelings related to the work on the project (16%).
   - Additional reason- "not having good relations with the instructor"- 13% reported.
2. Factors which might prevent the leaving (drop outs):
   - Most drop outs (77%) reported on things that might have influenced them on staying in LEADERS (all the rest- "nothing could have caused that"), and mainly with relation to more success/ less pressure regarding the project (19%) and more supportive and personal attitude of the instructors (19%).
   - Only a lower rate reported regarding the personal and technical matter of "less pressure" (12%).
3. The manner of leaving (drop outs):
   - Most drop outs (61%) reported on a supportive and respectful parting.
   - 11% reported on a negative parting- in the form of offensive/uncaring/cold attitude.
4. the experience of participating in LEADERS in retrospect (drop outs):
   - Most of them (84%) reported on a positive experience ("fairly" + "very"), all the rest (16%) reported on mixed emotions regarding the experience- both positive and negative.
   - No one reported on negative experience only ("fairly" or "very").

- Out of those reporting a mixed experience (16%), the less positive aspects reported are mainly related to the instructor/staff attitude (33%) or pressure regarding the project (17%).

5. Thought/reflection regarding leaving LEADERS (first year participants):
    - Approximately one fourth among first year participants reported they think about it, out of them:
        - More than half (56% which are 13% of the participants model) reported it is due to the feeling of workload.
        - One fourth (25%, which are 6% of the model) reported that it is due to feeling uncomfortable regarding the project or pressure.

LEADERS's influence on today's alumni

1. Their leadership aspect today:

- The absolute majority among the alumni, both the new and the old (89%, 98% respectively) reported that their leadership skills is expressed in their daily lives, mainly:
    - In the army- "commanding positions"/ officers ranks" (32% of all alumni).
    - In general- "taking responsibility/being proactive" (16%).
    - "managing and organizational skills" (11%).
- Most alumni (97%) reported that their expression of leadership has a certain or meaningful connection to their experience in LEADERS:
    - Among the old alumni- 67% "certain connection", 33% "meaningful connection".
    - Among the new alumni- 42% "certain connection", 55% "meaningful connection".

2. Circles of influence of the alumni:
    - Most alumni (81%) reported something their friends would have said regarding their leadership skills, mainly:
        - "good leadership skill in general" ("you have it in you"/ "exactly for you") - 34%.
        - "charismatic/ leading"- 20%.
        - "caring/supporting"- 9%.
        - "social doing"- 5%.
    - Close to half (47%) reported that they have influence only on a limited circle, mainly:
        - "close friends" (77%)
        - "family/parents" (68%)
        - "Colleagues" (27%)
    - Areas of influence on the limited circle (out of 47%):
        - "to make them contribute to the community" (31%)
        - "serve as role models" (22%)
        - "support/consulting/help" (22%)
        - "their opinion count" (15%)
    - Approximately half of the alumni (51%) reported that they have influence on a wider circle, mainly:

- "less close friends" (31%)
- "soldiers/ subordinates" (30%)
- "friends" (25%)
- "Colleagues" (18%)
- "students they study with" (15%)

- Areas of influence on the wider circle (out of 51%):
    - "make them be involved/ to contribute to the community/ to the country" (38%)
    - "serve as role models" (38%)
    - "raising the awareness of different issues" (13%)
- Only isolated percentages among the alumni reported they have no influence at all.

3. LEADERS's influence on decisions of various fields:
    - In the army:
        - Approximately half of all alumni (48%) and more among the new alumni compared to the old ones (53% compared to 40%) reported that the experience in LEADERS had an influence on the choices they made in the army, mainly:
            - ✓ "reaching commanding positions" (48%)
            - ✓ "ambition to reach farther" (10%)
            - ✓ "being proactive" (9%)
    - In academic studies:
        - Only 30% among all alumni (24% among the old ones and 34% among the new ones) reported on such an influence, mainly decisions related to:
            - ✓ Political field- political science, international relations, politics (72%)
            - ✓ Sociology/psychology (15%)
            - ✓ Social work (9%)

            Aspiration to change/ influence (12%)
    - At work:
        - Only 24% among all alumni (32% among the old ones and 19% among the new ones) reported on such an influence, mainly decisions related to:
            - ✓ Working with disabled population (24% of them, more among the old alumni).
            - ✓ Management positions- shift manager (more among the new alumni), assistant to general manager (only new alumni), and project manager (8%).
            - ✓ A year of service in LEADERS (only new alumni, 15%).
    - Summarizing table:
        - One should notice a certain gap between perceptions and intentions and de facto decisions, since the rate of those reporting that the decisions they reached in the different frameworks they been to were influenced by LEADERS, is just half and less:

LEADERS experience had influence on…	New alumni	Old alumni	All alumni
Choices made in the army	53%	40%	48%
Choices made regarding academic studies	34%	24%	30%
Choices made regarding employment	19%	32%	24%

4. LEADERS's influence on the current frameworks they are in:
   What frameworks they are in?
   - The new alumni:
     - Most of them are in the army, mostly soldiers (approximately 60%)
     - A minority studies (8%) or works (13%).

   The old alumni:
     - One third attends universities (33%).
     - One fifth serves in the IDF as officers (20% or work (22%).

	New alumni	Old alumni	All alumni
IDF- junior rank soldier	60%	7%	39%
IDF- junior rank officer	4%	7%	5%

IDF- high rank soldier	4%		3%
IDF- high rank officer	4%	20%	10%
Study in college		7%	3%
Study in university	7%	33%	17%
Study in other institution	1%	2%	2%
Employed	13%	22%	16%
Unemployed	7%	4%	6%

DO they bring abilities from LEADERS?

Most of the alumni (above 90%) reported abilities they bring with them to the frameworks they are in and mainly:

"being proactive/ initiation/ responsibility" (46% of the alumni)

"ability to listen/ hear people" (39%)

"ability to lead/ to influence people" (37%)

5. Perceptions and influence on the current situation of the Israeli society:
    - Most alumni reported a high level of interest regarding what is currently going on in the Israeli society (96% of all alumni, and more of them reported "very interested" than "fairly interested").

- Most of them also reported their aspiration to be in an influencing position on the society and the life in Israel in the future (96% of all alumni, and more of them reported "would very much like so" than "would quite like so") and mainly in the following fields:
  - Society (45%)
  - Education (22%)
  - Communication and media (17%)
  - Politics and government (17%)
  - Economics (14%)
- A higher rate among the new alumni compared to the old ones reported "would very much like so" (74% compared to 54% respectively).
- Most alumni believe that they would reach an influencing position (85% of them, still more of them reported "quite believe" than "truly believe" and more among the new alumni compared to the old).
- Most alumni (79%) reported that it is very clear to them that they would live in Israel.
- Only 8% reported it is depended on the circumstances in their lives.

Summary and Conclusions

LEADERS's goals and vision

1. A high level of appreciation towards LEADERS among all audiences is evident in the research.
2. However, in parallel, a perception of awareness problem and familiarity with LEADERS emerges. It is perceived as one of its disadvantages and raises the need of an intensive branding process.
3. In the branding process it is first of all important to declare LEADERS's main goal, which currently tends to be vague:
   - In a theoretical way, many identify LEADERS with leadership development.
   - Yet, from various data in the research a level of vagueness regarding the definition of leadership is emerged, which increases the importance of providing a clearer content regarding the intent and the vision of LEADERS, with relation to leadership development, both regarding participants of LEADERS (the ambassadors) and the alumni (most of them have the misperception that LEADERS has a continuous effect on their lives).
4. Examples of vagueness can be observed while even though many think that LEADERS provides a range of tools to leadership development, there are many different interpretations regarding its practical expressions, especially on the long run influence of LEADERS on its alumni:
   - Some identify leadership with management positions (even "a shift manager").
   - Others, with "initiative and responsibility whenever they are".
   - Others with characteristics such as "the ability to listen", "self-confidence", self-awareness"…
5. In addition, regarding different activities in LEADERS, there is a substantial amount of interviewees who do not find a direct and clear correlation between these activities and leadership (for example, one third of the interviewees reported so regarding the regional team meetings).

6. Along the branding process, a further emphasis and establishment of the intensities related to LEADERS today, which distinguish LEADERS from other frameworks meant for youth, should be continued:
   - Empowering/ developing/ investing in teenagers
   - Being qualitative in various aspects- high quality youth, high level instructors, and substantial contents.
   - Emphasis on doing, being active, involvement and influence on the society.
7. At the same time, there is a place for examining and discussing 2 disadvantages related to the character of LEADERS:
   - Rigid framework- this is one of the main disadvantages reported and in a higher rate among the drop outs (23%).
   - A framework which creates burden and difficulty to integrate LEADERS with other additional activities (school for example)- this comes up more among the drop outs than the first year participants (18% among each audience).

<u>The recruitment and screening process (only the participants were asked)</u>

1. The recruiting problem:
   - The problem of familiarity and awareness regarding LEADERS decreases the rate of those turning to the organization (and apparently those who come to the interview), therefore, a branding process is required.
   - In this relation, there are 3 factors emerging as having influence on the motivation of youth to join LEADERS, therefore, they should be used and expanded:
     - An ambassador who participates in LEADERS and offers his friend.
     - A staff member or management member of LEADERS who personally turns to youth.
     - LEADERS's presentation.

   Presenting a presentation (or sending it via email) to all students in order to enable everybody to try and be accepted, is perceived as the best recruitment process:
     - It has a broad appeal to all students.
     - It has the effectiveness of the presentation.
2. The screening problem:
   - The screening process should be examined (however, only as a second phase right after establishing and organizing the recruitment process which should create a higher rate of applications):
     - There is a perception of a problem regarding the effectiveness of the current screening process- most believe that more stages should be added to the screening process.
     - There is a perception of ambassadors and team members who do not fit LEADERS.
     - The following questions should be discussed:

- ✓ Whether to accept weak/disturbed/ deprived youth- maybe they have leadership potential in them?
- ✓ Is the success in school is a condition of being accepted? On the one hand, not every student who is a good student in school possess leadership skill potential, on the other hand, by defining LEADERS as a demanding framework, perhaps those who are weak in school will deteriorate more due to participation in LEADERS.

The instructor

1. It is important to continue maintaining and upholding the instructors' professionalism (Both in terms of knowledge and contents and in terms of team management)
    - Today, the level of satisfaction regarding these aspects is high.
    - This is also a part of the perception that LEADERS is qualitative.
2. At the same time, it is important to nourish supportive and empowering relations between the instructor and the team members, especially with relation to working on the project:
    - All (participants + drop ours) would have liked to see the instructor first and foremost as a supportive figure.
    - The instructor's support is the primary source of influence on the level of satisfaction of the relation with him/her (for example, the drop outs express the lowest level of satisfaction regarding the instructor and mostly relate it to lack of support).

The team

1. Current satisfaction from the relation with the team is perceived as medium up to good (average grades range from 7.6-8.2).
2. The same as with the instructor, it is important to nourish warm and supportive relations with the team members:
    - Creating a sense of belonging
    - Among the drop outs, the level of satisfaction regarding these aspects is low compared to the rest of the audiences.
3. At the same time, one should pay attention to elements regarding the team's relations which are more related to leadership development ("assisting in establishing a project", "challenge", "assisting in personal development as a leader"):
    - The level of satisfaction is lower (6.0-7.5).
    - They have a contribution to LEADERS's main goal.
    - One should be careful that these elements will not be on the account of friendship and supportive relations.

The meetings

1. It is important to continue and nourish the elements of personal development in the meetings. The level of satisfaction from the meetings is currently high and especially due to these elements.
2. Still, the contents which have the aspects of qualities development and leadership skills, should be further emphasized. . There are between 30% and 40% among each of the audiences who believe that the contents of the meetings do contribute to them, however in other aspects, regardless of the leadership abilities.
3. The feedbacks are useful and contributing but they can still be improved:
    - More sensitive and constructive guidance in terms of the instructor- as the one defining the limits of the feedback, maintaining a constructive and respectful criticism, defining parameters for reference.
    - Other suggestions for improvement (only participants were asked):
        - More thorough feedbacks
        - Not too long feedbacks
4. The frequency of the meetings, once every 2 weeks, is perceived by the majority as appropriate.
5. The time spent on dealing with the projects during the meetings is in general appropriate.

The conventions

1. It is advisable to continue and nourish the aspects contributing to the leadership abilities development:
    - Most of the interviewees among each of the audiences (89% and above) believe that the conventions are contributing in these aspects.
    - This perception is mainly due to the models and knowledge transferred in these conventions, but also in aspects of personal development/development of skills.
2. All conventions should be synchronized- not all of them are perceived as contributing in the same level (only participants were asked):
    - Creativity and change conventions are perceived as the most contributing (8.4, 8.8 respectively).
    - Futurism convention receives the lowest grade average (7.4).

The project

1. The idea of founding a project is perceived as positive and important to the personal development of the ambassadors:
    - Above 89% of the interviewees asked (only participants and alumni) reported that the project contributed to their personal development (a higher rate reported "contributed a lot" than "fairly contributed").

- The contribution is regarding aspects related to leadership development "self-confidence/ feeling of ability" + "taught me how to lead processes"/ "taught me how to lead people".

2. Nevertheless, it is advisable to strengthen and emphasize that the project is more of a mean for development of leadership skills than a goal on its own:
    - Among the drop outs, 40% reported that the project is a goal on its own.
    - In addition, approximately one fourth of the first year participants (26%) think that the progression of the project is the main factor which determines the transition to the second year.
    - A change of status/ defining the project role is one of the suggestions raised regarding the improvement of the issue of "the project" in LEADERS.
3. It should be considered to establish additional measurements which will indicate the personal and leadership development of the ambassadors and will have the same weight as the project:
    - Most of the interviews (60% and above) among each of the audiences believe so.
    - Additional measurements raised by the interviewees are related to the expansion or progression of previous activity related to involvement in the community (of course while participating in LEADERS), or even "activity/ significant influence/team contribution…"
4. It is important to encourage and nourish the support of the instructor and the team for establishing a project of the ambassadors:
    - The perception regarding the extent to which LEADERS provides the support and accompaniment needed for promoting the project mainly leans on these factors.
    - There is importance to a more concrete guidance- providing practical tools, related to daily activity, in order to promote the project.
5. Finally, it should be decided whether it is right to have differentially in evaluating the projects- projects that are considered more worthy and projects that are less.

<u>The management (only the participants were asked)</u>

It is advisable to examine whether to formally arrange the involvement of the staff and senior management in the ambassadors' activity as a whole and the promotion of the project specifically:

- Dealing with the involvement of these functions is significant due to the following reasons:
    - It is possible that the mere turning to them undermines the instructor's status (who is perceived as the central figure for the ambassadors).
    - It is possible that often the important information regarding the ambassador's feelings and difficulties due to variety of functions or the commitment to maintain discretion is lost.
    - On the other hand, if they are supposed to be the address to each and every one - it is important that all ambassadors would feel comfortable to

turn to them- to inform them about it and maybe even to initiate that they would address certain ambassadors who refrain from doing so.

The social surroundings approach

1. In general, it should be considered to create in an initiated and activist way points of contacts with the different functions of the social and familial surroundings of the ambassadors:
    - It might contribute to "publicizing"/ advertising LEADERS in a substantial way, by creating exposure to the organization and its strengths.
    - It might create a higher level of involvement and support in the ambassador's activity and raise their motivation/pride.
2. Regarding the friends:
    - A convention/meeting where the ambassadors could invite friends can be conducted.
3. Regarding the parents:
    - A convention/meeting where the ambassadors could invite their parents can be conducted.
    - In addition, it is advisable to create a periodic application to parents in which they would give feedbacks on the ambassadors (including feedback regarding their effort in school). Such feedback could give indication regarding their satisfaction and influence on the ambassadors and calm the parents as well, since in LEADERS they are constantly updated.
4. Regarding the teachers:
    - It is advisable to turn to the teachers for feedback (also the specific teachers).
    - An organized database on teachers can be built (including basic information such as phone number etc. as well as names of applicants and/or ambassadors who were sent by those teachers). This database will serve as the basis of sending presentations and updates regarding the branding process.

The continuation of the future relation with LEADERS

1. Continuation of the relation between LEADERS and its alumni should be created- the level of interest in continuing the relation is high.
2. Continuation via informal and formal relation related to a defined goal should be established- Most of those reporting on a level of interest in the relation with LEADERS are interested in this kind of relation (89% and above).
3. a discussion regarding the activities gaining the highest appreciation by the alumni (new and old) should be conducted:

- "Personal work with LEADERS's instructors in small teams…which will focus on personal growth and on the exploration of issues related to the current position of each one in his life"
- "Dual track academic program in the framework of a certain university, in which only LEADERS alumni will be included and each one could study for a degree in a major field that he wishes, from art and theatre to law and business, parallel to studying additional program on the subject of leadership"
- In addition, in an independent way by the alumni themselves, a willingness to keep up the relation with LEADERS via participation in conventions and/ or integrating in LEADERS as part of the staff in some kind of doing, was raised by some of them.

4. Regarding "discussions/alumni forum on LEADERS site", the lowest level of appreciation came up among all activities read:
    - It is possible that the phrasing in which the idea was presented is too "stale" and it is also possible that the website as it is today is perceived as irrelevant for the alumni, therefore they don't see themselves taking part in it.
    - It should be considered to establish a more significant forum for the alumni on the website. For example, networking where the alumni could establish relation with regards to common goals (for example: business networking), updates and presentations sent directly to the alumni.
    - The idea should be examined at the annual alumni convention.

<u>The process/considerations for leaving LEADERS</u>

1. 3 factors of dropping out from LEADERS should be noted:
    - Uncomfortable feeling/pressure regarding the foundation of a project
    - No good relations/lack of support of the instructor
    - Workload and difficulty to integrate LEADERS with school and/or other activities
        - These factors were reported by the drop outs
        - In addition, one fourth of the first year participants reported on thought of leaving due to similar reasons.
2. Eventually, it is important to continue and pay attention to a respectable parting from those who leave- there is certain rate (though it is low, 11%) who describes an offensive, cold and uncaring attitude.

Appendix III: ACADEMICS - Results Formative Research

Evaluation of ACADEMICS Program

Evaluation of ACADEMICS Program between 2005 - 2008

Evaluation of the ACADEMICS Program between 2005 - 2008

The Evaluation combines:

A. Repeated measurements for the same population
B. Comparison between experimental group (students of ACADEMICS program) and control group (students who do not participate in the program and are a similar population to the students of the program)
C. Evaluation of the different activities and in the various activity locations

Evaluation Tools

1. Semi-open questionnaires- combination between closed questions and open-end questions. Within the 3-year period we received 2,557 questionnaires of the ACADEMICS program, amongst them repeated questionnaires from the same students. Also, more than 500 control group questionnaires were received.
2. In-depth interviews with students, teachers, school principals, tutors, educators, program coordinators, parents, coordinators in academic institutions, etc.. hundreds of interviewers were interviewed.
3. Observations during various activities: educational reinforcements, tutors, other lessons, tours and observations.
4. Questionnaires to students learning in ACADEMICS- were distributed during a period of two years.
5. Examination of scores and achievements- to 20 graduates participating in an in-depth research.

Evaluation Results

The following were the principal results in the various fields during 2005 - 2008

ACADEMICS Population

- It was found that the ACADEMICS program reaches its intended population: most of the students are from a medium-low socio-economic level, both parents without academic education. Most of the students were defined when entering the program as below - average students in the educational aspect
- It was found that ACADEMICS program guides families in such a way that it facilitates support to the child and the family see the program as a socio-economic mobility channel for their child.
- All students in the in-depth research entered the program because they saw in it an opportunity to succeed academically in school and continue in their tertiary education.

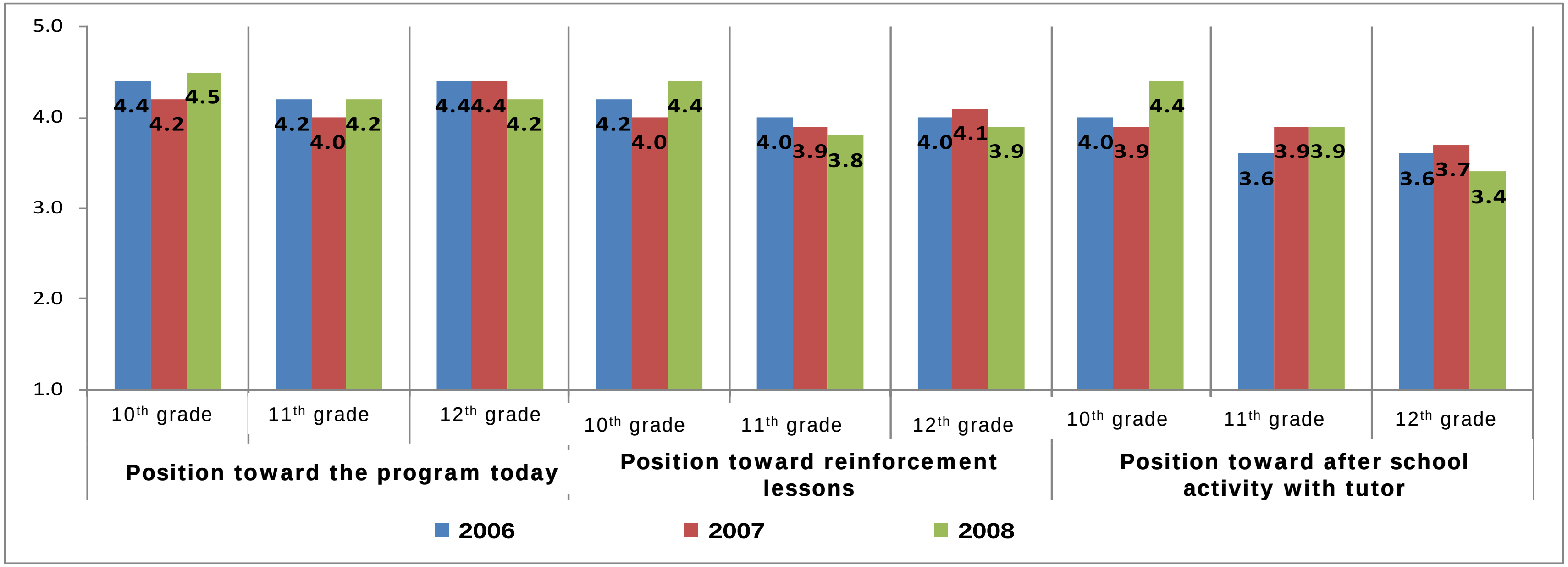
Level of Satisfaction with the Program

Students, parents, educators and teachers showed a high level of satisfaction with the program throughout the years.

Frequent sentence: "I don't know what would I do without the program"

Average level of satisfaction of students during the different years

Scale 1- Not satisfied at all –up to 5 - Satisfied to a great extent



What do the High School graduates of ACADEMICS say

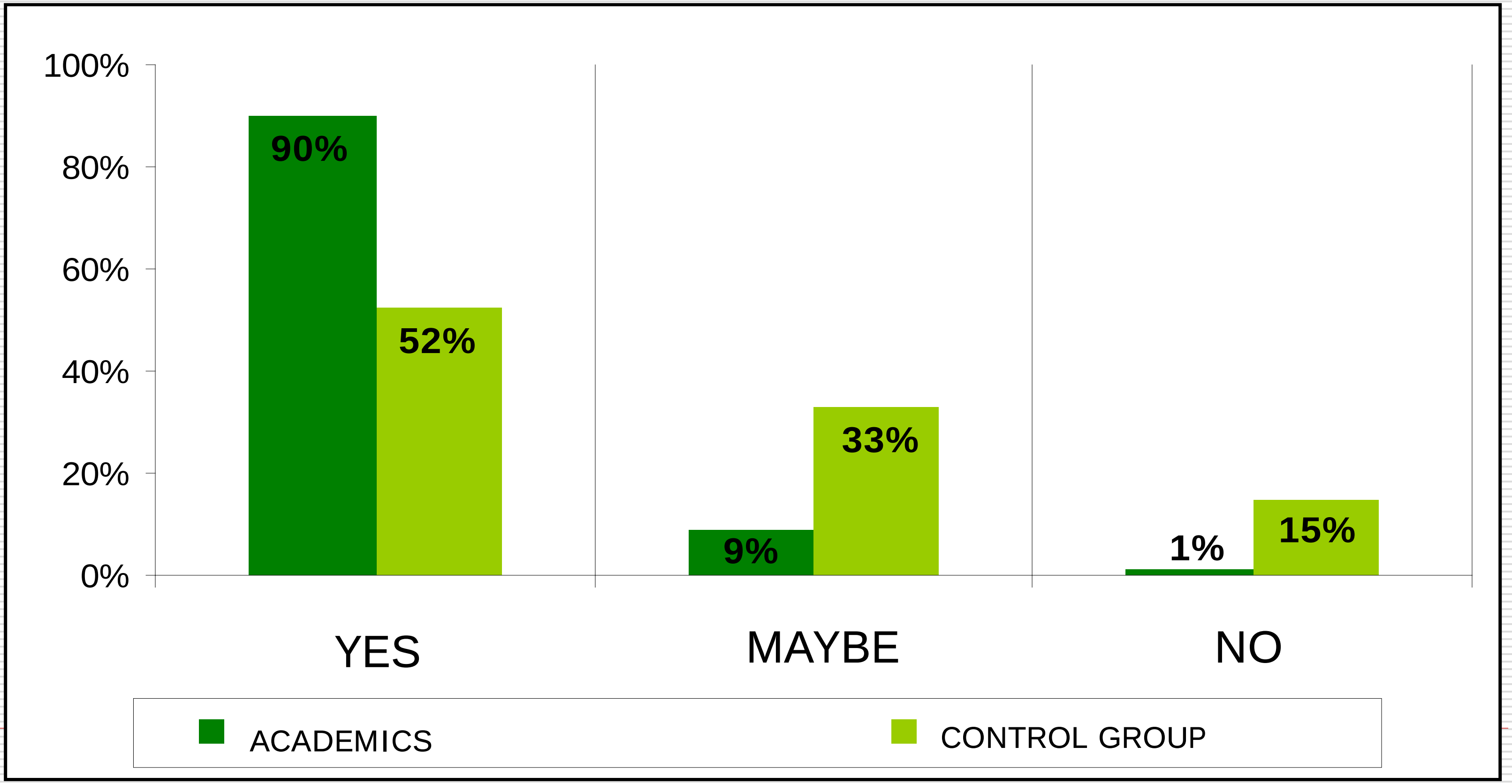
What is the meaning of the ACADEMICS Program for you?

“A framework with hardline conditions. At other classrooms students deteriorate and deteriorate one another as well. My aim is to reach high scores. I watch the behavior of friends of mine, that are not in the ACADEMICS Program - they don’t invest. And I am done! I go out and have fun and at the same time I invest in studies, I want to prove”.

“ Three years in the ACADEMICS Program and it fosters a competitive enviroment to learn and know more”

Percentage of Students who Intend to Study at University Compared between ACADEMICS Students and the Control Group

Results at end of the research period

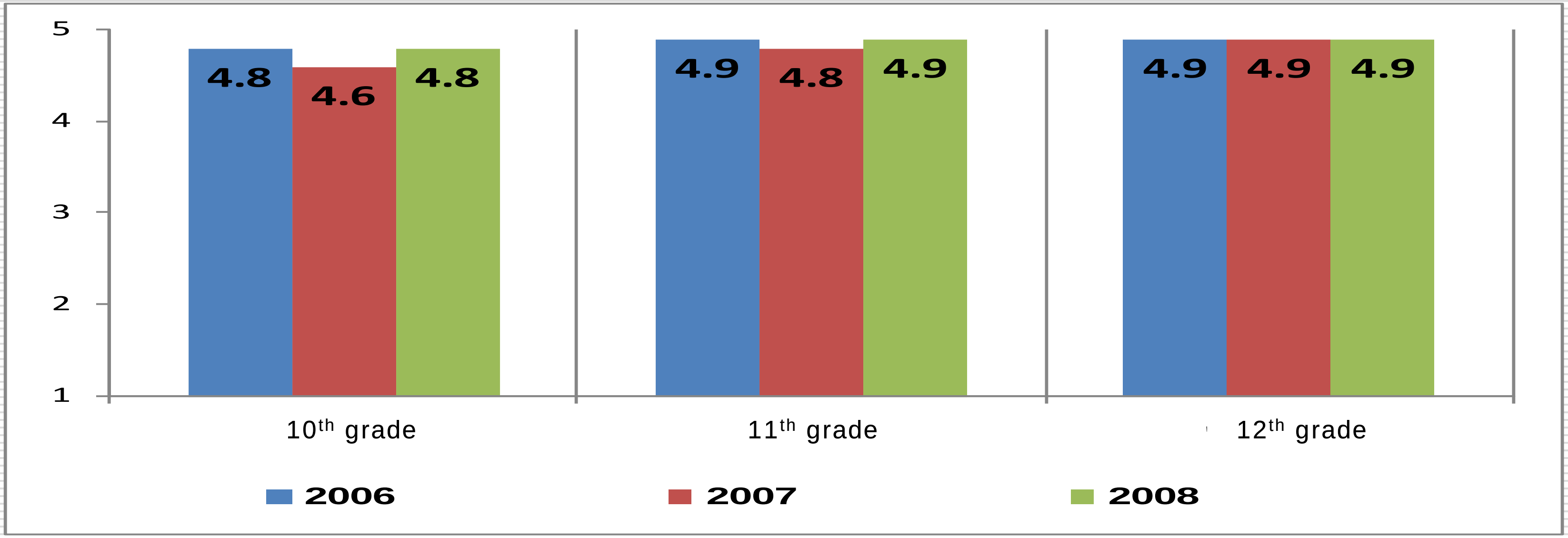


ACADEMICS Students Perception about the World of Academic Professions

It was found that through the years, students consolidate clear and more specific concepts concerning the actual professional academic world. For example, at the end of the research period approximately 80% of the students at the ACADEMICS program, indicated the academic profession they wish to study in the future. While at the beginning of the period their knowledge of the field was partial and inaccurate.

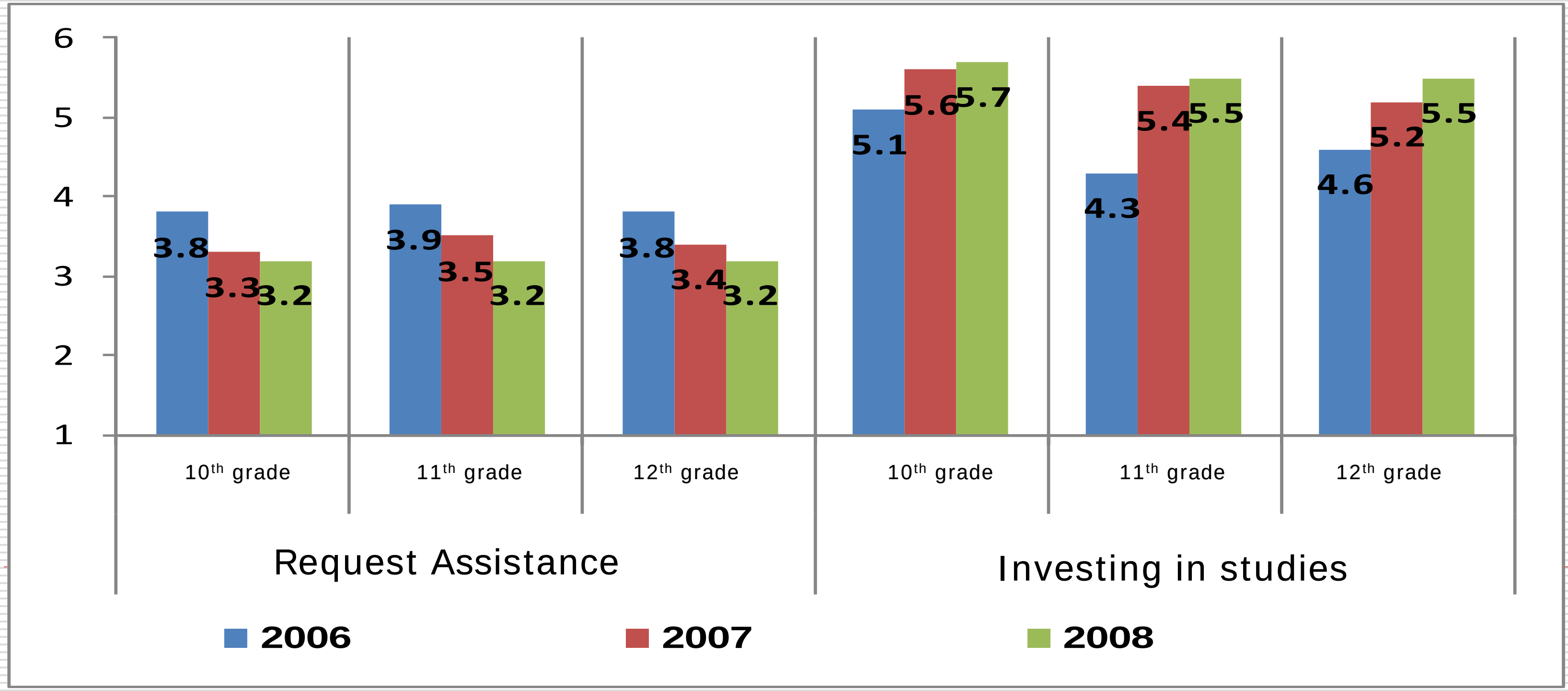
Evaluation of ACADEMICS Students' Ability to Achieve Full Matriculation

Despite the fact that ACADEMICS students are considered as those who have difficulties in achieving full matriculation without their participation in the program, after all their self perception about their ability to succeed are very positive



Investing in Studies and Reaching Out for Assistance from others

- Students in the ACADEMICS program consider it being of great importance to invest in studies and in a profession in which they will want to invest in the future.
- There is improvement in 12th grade classroom compared to the year before, as well as improvement between both periods, while in grade 10th. Request for assistance from others has decreased.



Recruitment to the Army and Intentions to Enlist in the Army

- A higher percentage of ACADEMICS program students intend to enlist in the army compared to the control group students (95% among ACADEMICS students compared with 87% of control group). Almost all ACADEMICS students, who do not enlist in the army, declare they will do national service. When control group students do not declare such an intention.

- All in-depth research students that graduated from the first part of the ACADEMICS program, either enlisted in the army or national service or intend to enlist. Most of them aim to serve a meaningful service.

Students' Self Perception

- There is an increase in students' awareness of their own strengths and weaknesses.
- There is an increase in students' perception of self-efficacy

(Averages 4.7-4.9 during the years 2006-2007, with no difference in 2007 - 2008. While the measuring scale is between 1- doesn't feel capable at all to-5 highly capable).

- There is a decrease in percentage of students who are afraid of exams. This decrease is particularly prominent in comparison with the control group.
- Over 50% of the high-school graduates interviewed report a change in their self-image in non-academic aspects: strong self- identity, faith in personal ability and self confidence.

Perception of Reinforcement Lessons

- Students showed very high satisfaction rates in receiving reinforcement lessons.

- Interviews with students, teachers and parents show that reinforcement lessons are considered a key component in the program. Without this component students wouldn't reach a high percentage of success in their matriculation exams.

Perception of Tutor’s Role in the Eyes of the Students

- It was found that the tutor has a significant role in the students’ life.
- According to the students: “he/she are like my brother/sister and even more than that…”
- The tutor is considered as one who contributes to developing the personality and expectations of the student. The tutor perceived as an inspiring role model. students began to dream about future professions, understanding the way they have to pave in order to reach their goal.
- Students are highly satisfied with the tutor’s functioning and contribution to their studies and development.

Program Contribution from a Social Perspective

- Contribution to the Community – ACADEMICS program has a purpose to promote social involvement. Most of the graduates in the program, who were interviewed, volunteered in addition to the mandatory volunteer activity in the 10th grade and continue to volunteer.
- A difference was found between the different towns. It was found that volunteering in some schools was partial and not successful.

Social Contribution –

1. Change in circle of friends- transition from negative to positive social environment.
2. A more integrated class where students feel more a sense of belonging.
3. A feeling of belonging in a cohesive class, where students help each other.

Added Value

- The ACADEMICS Program succeeds in attaining achievements with its systematic intervention that includes:
- Exposure to Academic Institutions
- Nurturing the participants through the years of high school and their army service, until they reach tertiary education
- Enhanced social activities within the ACADEMICS community
- School for parents – group activities with parents' participation
- This is in addition to reinforcement lessons, tutoring, activities, supportive activity by school coordinators, coaching and personalized work with each student

ACADEMICS Program – Learning and Development

- The ACADEMICS Program is characterized by learning, development and drawing conclusions, and evolving from lessons learnt.
- Significant improvements have been carried out throughout the years together with the teachers and include: changes in the role of the home-class teacher and increased responsibilities and involvement of the teachers.
- Important changes have been implemented in defining the role of the tutors as being a significant role-model that helps shape the students’ future and achievements in the academic as well as the personal realm