CIVIL LEADERSHIP

THIRD SECTOR UMBRELLA ORGANIZATION R.C

Umbrella Organizations in Israel:

Roles and Challenges in Representing Non-Profit Organizations

2018

The Study Project Team

The Israeli Civil Leadership Association (Civil Leadership) is the umbrella organization of civil society organizations and the third sector in Israel. Since 1986, the organization has dealt with broad issues that affect all NPOs in a comprehensive sectoral perspective. Civil Leadership represents and promotes policy by its interactions with government, the business sector and the general public in order to expand the influence of the third sector.

This document was written in the framework of the process for strengthening the infrastructure of representation in the third sector in Israel, supported by **The Government-Civil Society Initiative, which** is a joint venture of seven ministries: welfare, finance, education, health, the Prime Minister's office, law, absorption, civil society, representatives of the Diaspora and the JDC Israel Institute of Leadership and Governance.

Preface

An umbrella organization is the most characteristic expression of a representation infrastructure: an organization of organizations founded for the purpose of representing its members. In recent years, Civil Leadership, the umbrella organization for Israel's third sector, has led processes aimed at strengthening civil society organizations which make up the third sector in Israel, by formulating a common and clear sectorial voice and mobilizing joint action. During 2014-2016 Civil Leadership led a unique process of participatory discourse in civil society organizations with the participation of approximately 300 CEO's of civil society organizations and other stakeholders, in which common issues and challenges were identified and a joint agenda was formulated and jointly implemented. A number of significant agreements were reached in the course of this dialogue, the most fundamental of which was the recognition of the **importance of strengthening the infrastructure of representation among civil society organizations**, in order to give expression to diverse voices that are not heard sufficiently and in an orderly manner to promote broad social issues, both intra-sectoral and inter-sectoral, as none of these voices were heard in the places where decisions are made.

Following on from this process, we present a model of the reality we wish to promote, in which civil society engages in a variety of representative infrastructures, each representing a group of organizations operating in civil society and organized according to common denominators, such as a geographic area, content or community. **The representative infrastructure will help mediate the needs and responses of the organizations in the field**, among themselves, between them and other umbrella organizations and between them and the overall umbrella organization, i.e. Civil Leadership. In this way, **a broader basis will be created for coordinated, efficient and organized cooperation** between the organizations, both in times of calm routine and in times of crisis, and thus enable **the effective representation of all civil society**

organizations in Israel. In addition, representative infrastructures will help strengthen inter-sectoral discourse and **will become accessible to non-third sector actors** who seek focused dialogue with various groups in civil society, as needed, thus helping to increase the influence of the individual organization on a broad range of processes.

In the last two years we have worked to initiate and strengthen the infrastructures of representation in civil society on four levels:

- Regional representation infrastructures - in the Israeli geographic periphery areas: in north and south;
- Content representation infrastructures - through the Forum of Umbrella Organizations;
- Sectoral representation infrastructures - to strengthen the representation of underrepresented populations (such as Arabs and Ultra-Orthodox Jews);
- A role-based, sectoral representation mechanism - through The Association of Third Sector CEO's.

As part of this process, we established and convened the Israeli Forum of Umbrella Organizations; we established the Association of Third Sector Organizations in the Negev, in cooperation with the Negev Council and leading civil society organizations from the south of Israel; we strengthened our ties with organizations from the northern area of Israel while laying the groundwork for establishing a representation infrastructure; we made official, the connection between Civil Leadership and the Association of Third Sector CEO's (comprising around 350 members), and we worked to enlarge the circles of communication and strengthen the connection with organizations from Arab society and the ultra-orthodox Jewish society in order to help establish representative infrastructures in these communities in the future.

The Forum of Umbrella Organizations, which played a central role in the preparation of this document, was created out of a dual need. Managers of umbrella organizations in the third

sector sought to create a platform for peer learning and discussion of issues common to umbrella organizations. At the same time, we in Civil Leadership identified the need to create a structured and coordinated communication channel with third sector umbrella organizations in order to prevent duplication and to expand the representation of all organizations.

The document before you, records and summarizes, for the first time in Israel, the up-to-date and relevant academic knowledge and practical knowledge pertaining to all those engaged in umbrella organizations and civil society in general. You will find herein, a survey of literature pertaining to umbrella organizations in the world and in Israel; issues and dilemmas in the activities of umbrella organizations that emerged from the work of the Forum of Umbrella Organizations; and insights from the work with the Forum of Umbrella Organizations that we intend to implement in the process of strengthening the infrastructures of representation.

In the coming years, we will continue to work towards building and strengthening additional representation infrastructures, based on the understanding that this is an important means of reaching out to unrepresented publics and expressing their unique voice, as well as creating a basis for cooperation between civil society organizations and promoting inter-sectoral dialogue. This is in order to increase the social impact of the third sector in joint processes with the government sector and the business sector, in order to consolidate joint responsibility for what is happening in Israeli society.

Lior Finkel Perl, Dana Bar, Gali Sembira   **The Israeli Civil Leadership Association**

Introduction

Infrastructures of representation of civil society organizations, including umbrella organizations, are formal or informal associations, that represent groups of organizations with common interests in civil society. These representation infrastructures create added value for their members that could not be generated by the individual activity of each organization. Thus, for example, representation infrastructures can bring many voices into the decision-making arena. They enable cooperation between organizations to promote common goals. They provide an address for external parties seeking a partner for discourse or action, and they enable the pooling of intra-sectoral resources. The importance of representation infrastructures is reinforced in the current context, in which the state is not only a potential opponent in conflicts but also a potential partner for collaborations. The evolving discourse between the state and civil society, requires the creation of organizational tools to strengthen the representation and dialogue of civil society organizations in their discourse with the government sector and with third sector philanthropists. However, despite the importance of representation infrastructures, Israeli civil society does not have many representative infrastructures, and therefore the reinforcement of these infrastructures is today, a central goal of Civil Leadership, as noted before.

Moreover, although umbrella organizations in civil society have existed and operated for many years in various countries around the world and have served the diverse needs of organizations, with emphasis on representation, there is very little written material on how to set up and operate a representation mechanism for civil society organizations. For this reason, Civil Leadership initiated this study, which has two main objectives: first, to review existing knowledge in the field of umbrella organizations in the Third Sector in Israel and around the world, and to present it for discussion and reflection before civil society organizations and their

counterparts in government; and second, to gather and develop knowledge on the subject of representation infrastructures in the third sector. This knowledge can serve both Civil Leadership as an umbrella organization that seeks to improve its ability to faithfully represent grassroots-level interests by building representation infrastructures, as well as civil society organizations that seek to organize for joint activity and representation.

The structure of the document reflects these objectives. The document contains three sections: **The first section** presents a literature review of third Sector umbrella organizations in the world and in Israel. **The second section** opens with a description of the work of the Forum of Umbrella Organizations in Israel, which was initiated by Civil Leadership, and then reviews the roles of umbrella organizations and the dilemmas that characterize their activities, as they emerged from the meetings of the Forum. **The last section** combines the theoretical level of the document with the practical level. The chapter presents insights that emerged from the work with the Forum of Umbrella Organizations regarding the process of strengthening representation infrastructures.

Sources of Information used in writing this document

• Information gathered in a series of meetings of the Forum of Umbrella Organizations held in the years 2016-2017 led by Civil Leadership and with the participation of managers of umbrella organizations in Israel. During these meetings, the participants discussed the unique issues and challenges of umbrella organizations and presented the structure of their organization and their style of governance, the manner in which they deal with the member organizations and external bodies, such as the state, as well as their challenges and successes.

• Academic articles dealing with definitions, roles, and examples of umbrella organizations in various parts of the world. These sources formed the basis of a literature survey on umbrella organizations in different countries and informal organizations of organizations (see Appendix).

• Official documents describing the patterns of work of international organizations with umbrella organizations, from which one can learn about the attitude of international organizations regard umbrella organizations rolls.

• Examining the materials that umbrella organizations around the world present on their websites: how they approach member organizations, their activities, their governance structure, such as membership conditions, goals, and vision, and more. With the help of these materials, several types of umbrella organizations were identified, which differ in their scope of activities, their purpose, and in the roles they play.

1. Umbrella Organizations in the World: Review of the Current State of Knowledge ● ● ●

Umbrella Organizations in academic literature

Despite the importance of umbrella organizations for inter-sectoral dialogue and representation of civil society organizations, there is no precise estimate of the number of umbrella organizations in the world[1]. The proportion of civil society organizations belonging to NUO's (Non-Profit Umbrella Organizations) varies among countries, as it was found that organizations can belong to more than one umbrella organization at the same time. A 1993 study of the third sector in the US estimated that 22% of civil society organizations in social services, health, arts, education, religion, and other areas are members of national umbrella organizations[2]. According to Melville's study of umbrella organizations in Australia[3], surveys in the nineties of the twentieth century showed that at the time were about 400 umbrella organizations (Peak organizations) in Australia.

According to Limor and Eisenberg[4], despite the importance of umbrella organizations as representatives of the sector or the field of activity in which they operate, in practice their membership rate is low and they usually represent only a small percentage of the organizations

---

[1] Melville, R. (2010). Umbrella organizations. In H.K Anheier and S. Toepler (eds.). *International Encyclopedia of Civil Society*. New York: Springer, pp. 1577–1582

[2] Hodgkinson, V. A., Weitzman, M. S., Noga, S. M., & Gorski, H. A. (1993). *A portrait of the independent sector*. Washington, DC: Independent Sector.

[3] Melville, R., & Perkins, R. (2003). *Changing Roles of Community-sector Peak Bodies in a Neo-liberal Policy Environment in Australia: An ARC Funded Study (2000-2002)*. Institute of Social Change and Critical Inquiry, University of Wollongong.

[4] Limor, N., & Aisenberg, S. (2004). *Israel's Third Sector*. http://www.mashabim.org.il/contentManagment/uploadedFiles/maagar_yeda/Israels_third_sector.pdf

operating in the field. The researches show that only 5% -7% of civil society organizations around the world are members of umbrella organizations. Limor and Eisenberg offer two explanations for this reality. Firstly, organizations benefit from the activities and achievements of the umbrella organization, but do not rush to join it as members and pay membership membership fees (the phenomenon of "the free traveller"). Secondly, the first organizations to join the umbrella organizations are usually the largest and strongest, with the ability and the time to engage in public activity in their field of content, however, these organizations do not usually constitute the bulk of the organizations active in the field.

Motives and goals for establishing umbrella organizations

A review of the literature on umbrella organizations presents various motives for the establishment of umbrella organizations. Young[5], a civil society researcher, defined an umbrella organization as a non-profit association whose members are themselves non-profit organizations. Young defined three identities of umbrella organizations according to the purpose of their establishment (a particular organization can have more than one identity):

• **An umbrella organization for the promotion of a common goal**: The member organizations of the umbrella organization work in coordination to achieve common goals.

• **An umbrella organization with an economic purpose**: Members in the organization work together to coordinate and streamline the attainment of their economic needs, and thus work better than as individual players in the free market.

---

[5] Young, D. R. (2001). Organizational identity and the structure of nonprofit umbrella associations. *Nonprofit Management and Leadership* 11(3): 289–304

• **An umbrella organization with a political purpose**: The member organizations have similar interests, but with different priorities and modes of action, in order to promote similar positions, strategies and cooperation.

Kröger[6], who studies civil society organizations in the European Union, believes that the motive for establishing an umbrella organization is related to the target community that the member organizations are serving. Accordingly, she classifies the umbrella organizations according to the degree of closeness between umbrella organisation and its member organizations or to the social group represented by the member organizations. Thus, she raises the issue of the legitimacy of the umbrella organizations to represent the member organizations and their target community:

• **Umbrella organizations classified by "Reason":** Organizations promoting an idea whose supporters are not directly affected by its results. Legitimization of their activity is structural and based on a sound research argument to attract supporters to promote the idea, for example environmental organizations.

• **Umbrella organizations classified by "weak interests"**: Umbrella organizations that represent weak or excluded social groups that, for the most part, have no ability, financially or organizationally, to organize themselves, and therefore there is a "distance" between the groups for which the organization operates and the organizations representing them.

• **Umbrella organizations classified by "Members":** These organizations represent groups that work for themselves, such as workers' organizations or professional organizations, whose members are people who are capable to represent themselves. These organizations are economically viable due to their ability to collect membership fees.

---

[6] Kröger, S. (2013). Creating a European Demos? The representativeness of European umbrella organisations. *Journal of European Integration* 35(5): 583–600

Another motive for the establishment of umbrella organizations is the need of the state or an inter-state organization to create a platform for transferring resources to the field organizations through the umbrella organizations. The Australian Peak organizations and the umbrella organizations in Norway are examples of umbrella organizations established with the support of the state to create inter-sectoral cooperation and as a way of funding NPOs

"Peak Body" is the term used in Australia to describe umbrella organizations with members of organizations that represent weak target communities, as well as organizations that provide services to these target communities. The Australian peak organizations were formed as field organizations, from the bottom, providing solutions to weak groups. They were established in the 1970's with the encouragement and support of the Australian government to represent the views of their peers to the government, the community and other bodies[7], as well as to provide information, services, support, coordination, advocacy, representation and research to their members[8]. These organizations have two types of roles:

• **External roles (social reform):** policy development, feedback on government policies or programs, advocacy and representation before the government and the wider community, counselling, policy promotion, community education and networking with interest groups and allies.

• **Internal functions:** support for member organizations, dissemination of information, coordination, infrastructure development and the creation of working relationships between member organisations (including the development of regional infrastructures).

The Australian peak organizations were created to meet the needs of the state in a dialogue with civil society organizations, and today they are facing the challenge of balancing the

---

[7]Cheverton, J. (2005). Past their peak? Governance and the future of peak bodies in Australia. *Australian Journal of Social Issues* 40(3): 427
[8] Quixley, S. (2006). *What is a "Peak Body"? Summary & Analysis of Key Documents 1995-2005*. Youth Affairs Network of Queensland (YANQ)

government's demands as the main sponsor of the umbrella organizations, Vs those of the umbrella organizations[9].

Like the Australian organizations, the umbrella organizations in Norway[10] are also a platform for transferring public funds to civil society organizations - in the Norwegian case to development organizations in developing countries. As in the case of the Australian peak organizations, there is also tension in Norway because of the different and sometimes conflicting expectations of the various stakeholders, and the need to mediate between the desire of the state for savings and efficiency and the desire of civil society organizations to advance their goals.

In the next section we will examine how the roles and characteristics of umbrella organizations that appear in the literature are expressed in practice, in describing the activities of such organizations.

1.2 Activity patterns of umbrella organizations

The purpose of this review is to characterize the unique activity patterns of umbrella organizations, which stem from their unique structure as organizations of organizations, and from the need and desire to act jointly. For this purpose, eight umbrella organizations websites were reviewed[11], for the purpose of identifying their methods of promoting their goals, their governance patterns, and their model for economic maintenance. The umbrella organizations' websites appeal to their member organizations and other organizations in order to encourage

---

[9] Cheverton (2005) ,see 7 above.
[10] Breistein, A., and Steel, C. (2010). Working as a Norwegian environmental umbrella organization – Experiences of The Norwegian Biodiversity Network SABIMA. https://www.regjeringen.no/globalassets/upload/md/vedlegg/internasjonalt/sabima_environmental_umbrella.pdf
[11] UK community Foundations, The Swedish women`s Lobby, The Global Alliance for the Rights of Older People, ILGA-Europe, FEANTSA: the European Federation of National Organisations working with the Homeless, The Australian Youth Affairs Coalition (AYAC), National disability representative organisations

them to join the umbrella organisation. The sites are dedicated to explaining the organizations' goals and how they promote them as well as to emphasize the benefits for the member organizations in joining the umbrella organizations, and the democratic governance processes that are intended to establish equal representation for each of the member organizations.

Classification of umbrella organizations according to action models

In reviewing the activities of umbrella organizations around the world, two main models were found: On the one hand, umbrella organizations whose main activity is advocacy by means of building a base of knowledge and disseminating it, in order to change attitudes among the public and the government; and on the other hand, umbrella organizations that deal both with advocacy and the development and expending their member organizations community.

Umbrella organizations dealing mainly with advocacy: These umbrella organizations are primarily concerned with promoting their field of endeavour, representation and disseminating knowledge. They do not support the development of the member organizations' capabilities and do not provide their members with services or tools for empowerment, but only engage in the activities of developing knowledge in their professional field, advocacy, and publicity.

In light of their limited role, it can be assumed that umbrella organizations of this type are characterized

by a small professional team, which affects the amount of funding they require.

Example of an umbrella organization whose main activity is advocacy

FEANTSA: The European Federation of National Organizations working with the Homeless

FEANTSA works to prevent homelessness by:

1. Constant **dialogue** with European institutions and national and regional governments to promote, develop and implement effective measures to end the phenomenon of homeless people
2. Performing and **disseminating research and data collection** in order to promote a better understanding of the characteristics, scope, causes and solutions of the phenomenon homelessness
3. **Exchange of information, experience and best practices among the member organizations of** FEANTSA and relevant stakeholders with a view to improving policies and procedures dealing with the homeless
4. **Raising public awareness** of the complexity of the phenomenon of homeless people and the multi-dimensional nature of the problems facing them
5. **Developing an infrastructure for social networks** on the subject of homeless people

For more information, see http://www.feantsa.org/en/about-us/what-is-feantsa

Other examples of such umbrella organizations include the Swedish Women's Lobby, which promotes joint projects to advance the status of women; The Global Alliance for the Rights of the Elderly, whose sole service to its members is the knowledge of the rights of the elderly as a common basis for their work; and the Norwegian Biodiversity Network (SABIMA). Although

SABIMA presents itself as an umbrella organization, its main activity is to promote policy and influence decision-makers regarding environmental protection and biodiversity in Norway. This organization is funded mainly by the government.

Umbrella organizations that support the development and expending of the community of member organizations: These umbrella organizations support member organizations in every aspect, including the establishment of additional organizations in order to expand the community of member organizations and thus increase their range of influence. An example of such an organization is the European LGBT organization, ILGA-Europe. From the organization's website one can see that it works in all ways: promoting the common area of activity of the member organizations, supporting its members, serving as a network of information and awareness, and assisting in the establishment of additional organizations.

ILGA – Europe

Among the organization's functions:

"The organization is adapted to the needs of the LGBT movement in Europe … from providing various forms of capacity building to organizations, to local and international advocacy … If you need to understand how to debate or promote a public awareness campaign, we can help. From tips regarding collecting donations, advice about managing an organization or establishing a group of volunteers, ILGA-Europe will support the movement in any way "

"In addition to supporting local critical advocacy efforts, ILGA-Europe offers regional training, coaching and educational visits, enhancing members' skills and deepening their knowledge"

"ILGA-Europe is concerned with available financial resources for the European LGBTI movement […] One of the tools that ILGA-Europe has developed is support for building organizational capabilities, including grants." That is to say that ILGA-Europe is an intermediary in the management and distribution of funding from many donors to various organizations,

"Beyond all this, ILGA-Europe serves as a network of activists and an important node for exchanging experiences, and perhaps most important, as a strong solidarity network for the European LGBTI Movement. This sort of support is the foundation of all the organization's activities.

- http://www.ilga-europe.org

Another example of an umbrella organization whose purpose is to develop and expand the community of member organizations is the UK Community Foundations (http://www.ukcommunityfoundations.org/). The community website states: "We provide advice and support to corporate foundations with one simple goal: to help build prosperous communities ... to help community foundations develop individual and collective abilities so that we are more efficient," said the organization's website. The main function of this organization is to support the member organizations themselves, from consulting to improve work processes to fundraising.

Such an umbrella organization, which supports member organizations, is naturally characterized by a wider and more diverse professional staff, and it is likely that it requires a broader economic base.

System of Governance in Umbrella Organizations

A review of umbrella organizations in different countries shows that the common denominator between them is a democratic system of governance, based on regular meetings of member organizations for the purpose of electing a board of directors, establishing and maintain personal relationships, and joint decision-making, which includes setting the agenda of the umbrella organization. In addition, some of the umbrella organizations operate through professional committees composed of representatives of the member organizations in order to advance the goals of the umbrella organization.

All the umbrella organizations reviewed expressed on their websites the desire to enrol additional member organizations. The main message in favour of joining is that member organizations will be able to participate in the development of joint policies, benefit from representation before outside parties and gain the power to influence – (i.e.: full membership entitles the organization to the right to vote in all decisions as opposed to "Corresponding

Membership" which does not confer voting rights). For example, the website of the Women's Lobby in Sweden reads: "Being a member of the Swedish Women's Lobby is to make your voice heard!"

The Economic Model of Umbrella Organizations

A review of the organizations' websites reveals that their sources of funding are varied and include: membership fees (sometimes varying according to the size of the member organization), government funding, philanthropic foundations external to the organization, and more.

It seems that the umbrella organizations are aware that some member organizations cannot pay membership fees, and therefore there are umbrella organizations that offer different types of membership with different levels of membership fees. In some cases, differential membership fees are set according to the size of the member organization - for example, an organization of up to 3,000 members pays € 600 and an organization with more than 3,000 members pays € 3,000 [12]. In other cases, differentiation is made according to the level of income of the member organizations - for example, membership fees equal to 1% of the annual income of the organization, up to a maximum payment of € 1,300.

Apart from examining the websites of the umbrella organizations themselves, we sought to examine the attitude of external bodies to umbrella organizations. To this end, we examined how international institutions relate to umbrella organizations, as detailed in the next section.

---

[12] UK community Foundations, The Swedish women`s Lobby, The Global Alliance for the Rights of Older People, ILGA-Europe, FEANTSA: the European Federation of National Organisations working with the Homeless, The Australian Youth Affairs Coalition (AYAC), National disability representative organisations

1.3 Attitudes of International Institutions to Umbrella Organizations

An examination the definitions of umbrella organizations and the way international institutions, like the European Union, the World Bank and the United Nations relate to them in their documents, illustrates the need of the "other side", the government sector, for umbrella organizations. A review of the documents of these institutions reveals that, not only are civil society organisations seeking ways to conduct dialogue with national and international institutions, rather these institutions are also searching for ways to communicate with civil society, through representative umbrella organizations.

The European Union

The EU views Civil Society Organizations (CSO's) as a means of democratizing countries within and outside the EU, and as a means to democratize the governing processes in EU institutions. Since European umbrella organizations base their legitimacy on the grounds that they represent a broad groups of member organizations they perceived as representing of a broad public in the EU policy-making process, as so the European Commission hope to increase their own legitimacy by consulting with these umbrella organizations, and thus systematically contribute to funding the establishment of umbrella organizations[13].

An EU document[14] proposes a division of NGO's into four levels, based on their inter-sectoral relations (within civil society), and their ability to promote goals and conduct extra-sectoral dialogue (with state institutions).

---

[13] Kröger, S. (2013). Creating a European Demos? The Representativeness of European Umbrella Organisations. *Journal of European Integration* 35(5): 583–600

[14] European Commission. (2012). Mappings and Civil Society Assessments – A Study of Past, Present and Future Trends. *Tools and methods series concept paper No.3.*

The document emphasizes the desire to seek ways of communication between the countries and the European Union and the civil society organizations, in order to strengthen democratic governments by establishing civil society organizations on several levels.

• **At the first level** are the field organizations, representing well-defined audiences and ideas, such as the disabled, residents of a specific neighbourhood, an idea for improving the environment, and so forth.

• **On the second level** are the intermediary organizations that provide professional development services to the field organizations. These organizations do not represent civil society organizations but provide them with joint services, mainly intra-sectoral services such as consultation regarding fundraising, volunteer management, project management, etc.

• **On the third level** are organizations of formal organizations that operate regularly on a geographical or thematic basis. These organizations are concerned with building the capabilities of member organizations and promoting common goals through different strategies. Network development, or grouping of organizations by federal, geographic, or subject areas, occurs when individual organizations decide to group to promote their goals, bear common costs, streamline information flow, learn from each other, and share experience, build better representation, or protect their interests, and this mutual support will yield greater political influence. The establishment of umbrella organizations, which are formal, to one extent or another, creates a space for exchange of information, communication, consultation, and joint organization, as well as the provision of services to members of the organization, the execution of joint projects and access to funding.

• **On the fourth level**, there are informal organizations, without an organized structure or an anchored arrangement among the member organizations, which were created in order to deal with a common external challenge with the authorities. These organizations are called

"umbrella organizations" although they correspond to the definitions of informal organizations such as coalitions, networks, or forums. Sometimes these networks link local, regional, and national groups to promote a common strategy.

World Bank

Like the European Union, the World Bank views umbrella organizations as a means of joint representation of many field organizations and recommends: "With regard to Resolution 21647 of June 2000, regarding Civil Society Organizations - General Guidelines for World Bank Staff, Tips for Effective Consultation: […] umbrella civil society organizations should be given a clear role in shaping the work process and in choosing the civil society organizations that will participate in the process."[15]

UN Committees

The United Nations Office on Drugs and Crime[16] (UNDOC) published a document detailing the roles of local umbrella organizations in managing a local UN project:

"These organizations facilitate the activities of UNODC and regional and local civil society organizations. UNODC is well aware of their existence and value and consults with them [..] views them as representatives of the interests and opinions of their members, at conferences and committee meetings, providing vital communication and information on the central events that concern civil society organizations at the regional and local level, and encourage dialogue between civil society organizations."

[15] European Commission (2012). Commission Staff Working Document.
http://ec.europa.eu/regional_policy/sources/docoffic/working/strategic_framework/swd_2012_106_en.pdf

[16] https://www.unodc.org/unodc/en/ngos/Civil-Society-partners.html

1.4 Summary

The analysis of documents of international organizations, together with a review of the websites of umbrella organizations around the world, reveals three main goals for the activities of the umbrella organizations: representation, mediation and mutual support.

• **Representation:** The common goal of all the umbrella organizations is to create a common voice based on large groups of organizations, which on the one hand, enables the creation broad agreements to promote conflicts actions and to make demands to national and international bodies, and on the other hand enables small and medium-sized organisations to influence the discourse in their field of activity.

• **Mutual support for member organizations and increasing the community of organizations in the field:** Some organizations view the umbrella organization as a tool for strengthening the ability of member organizations to advance their goal through training, consultation and the transfer of information and knowledge between the organizations as well as increase the number of organizations in their respective fields

• **Inter-sector mediation and connection:** Government sector organizations and international organizations view the umbrella organizations as tools for mediation and connection between them and the many civil society organizations, in order to create a multi-sectoral discourse in which the majority of civil society organizations, representing various civil voices, will be heard.

Alongside these goals, the literature describes two challenges: The first challenge is the basis of the legitimacy of umbrella organizations, that is, the extent to which they relate to member organizations or to the audience they purport to represent[17]. The second challenge is the tension between the state and the umbrella organizations, in cases where the state supports the

---

[17] Kröger (2013) ,see footnote .6

umbrella organizations to promote its needs. In such cases, the organizations must find the balance between realizing their own goals and realizing the expectations of the state as a benefactor.

These goals and challenges, which are characteristic of umbrella organizations around the world, will be examined in the next chapter in the context of umbrella organizations in Israel, as reflected by voices heard from the "field" through the Forum of Umbrella Organizations in Israel.

2. Umbrella Organizations in Israel - Roles and Challenges ● ● ●

2.1. Data on umbrella organizations in Israel

The attempt to map the field of umbrella organizations in Israel presents us with a complex challenge. In Israel, there is no accepted definition of an umbrella organization that is used by all the relevant bodies, and accordingly, there is not much information available on the number of umbrella organizations in Israel. From the data of the Israeli Registrar of Associations, it is possible to collect information on the number of umbrella organizations and their areas of activity, but due to the lack of a specific definition of an umbrella organization, it is sometimes necessary to rely on other characteristics such as the organization's name and goals. Similarly, even when such data has been obtained, it is difficult to assess the extent to which the field organizations are familiar with the organizations identified.

In a preliminary examination carried out in 2017 in preparation for this paper, 78 registered organizations, were identified at the Registrar of Associations as associations whose goal is to act as umbrella organizations. It was found that 13 of them do not actually operate as organizations that join organizations together, but rather act to represent a field of activity independently. 24 other associations unite professionals or hobbyists, such as hunters, therapists, and athletes, or represent professionals in business sectors such as tourism, parking lot operators and others.

A study conducted by Civil Leadership (based on the Registrar's data and additional data) shows that **48 civil society organizations in Israel define themselves as umbrella organizations that work to unite and represent other organizations**. This type of organization is the subject

of this paper. 18 of them work to represent social groups, such as women, immigrants, youth, LGBT and others; 13 operate in the field of social welfare, such as the Union of Organizations for the Disabled, organizations for the hearing impaired, organizations for the elderly etc., 8 umbrella organizations operate in the field of religion including yeshivas and religious institutions, 4 organizations deal with culture and communication, such as the Association of Museums, 3 umbrella organizations operate in the field of infrastructure for civil society, and two umbrella organizations work in the field of environment.

Civil Leadership's study estimates that of these 48 organizations, about 30 are active umbrella organizations.

In order to produce up-to-date and reliable data on umbrella organizations in Israel, Civil Leadership conducted a survey in November 2017 among umbrella organizations. 20 organizations responded to the survey. According to the survey, the umbrella organizations that responded represent a diverse number of organizations, from a few to hundreds of organizations. The range of issues the umbrella organizations represent is also very broad: culture, education, youth, sports, environment, religion, minorities, the elderly, animals and more.

The umbrella organizations share common areas of activity: 85% of the participants in the survey indicated that they are engaged in representing and advancing policy in discourse with the government, and decision-makers to a large or very large extent; 70% of the respondents stated that they are engaged in formulating a common agenda in consultation and coordination between the organizations that are members of the umbrella organization to a large or very large extent; 60% of the organizations reported that they are working to collect and construct new knowledge in their field of endeavour to this extent; and two additional activities: representation and public education with the general public and strengthening the capabilities of the member

organizations, occupied 55% of the organizations to a large or very large extent. Similarly, 6 of the umbrella organizations that participated in the survey (30%) indicated that they raise funds for their member organizations.

The governance model of the organizations that responded to the survey is very similar. In 70% of the organizations, the executive committee consists only of representatives of the member organizations. In 10% of the organizations, the committee also includes representatives, other than representatives of the member organizations, public representatives and experts. In contrast, in 10% of the organizations, members of the committee are individuals who do not represent the member organizations but are among the target communities of the member organizations. In 10% of the organizations there is no representation on the executive committee for organizations or target communities, and the committee consists of public representatives or experts in the field only.

As for the economic model of the umbrella organizations, membership fees are charged in only five of the responding organizations (25%), and in the other organizations it is not customary.

2.2. The Forum of Umbrella Organizations

As part of the process of researching infrastructures of representation in civil society organizations in Israel, alongside the desire of the umbrella organizations to establish a peer study group focusing on common issues and challenges, Civil Leadership promoted the establishment of the Forum of Umbrella Organizations, comprised of CEO's and leaders in umbrella organizations in Israel.

The objectives of the forum were:

• Peer learning, discussing, and clarifying common issues concerning umbrella organizations: Managing the relationship of the umbrella organization with the member organizations, dealing with unique challenges such as fundraising for an umbrella organization, administrative and general expenses, working with the government and regulators, and more.

• Designing and creating a framework for the connection and work between the umbrella organizations and Civil Leadership in order to expand the representation of all the organizations.

• Conceptualization and surveying the field: surveying of umbrella organizations, functions, role perceptions, relations between umbrella organizations and infrastructure organizations, etc.

The members of the forum met for a series of meetings, each of which included a discussion with a guest lecturer on the subject of unique content for the umbrella organizations (see appendix for the topics of the meetings and the experts who contributed to them). The discussions dealt with **defining the concept of "umbrella organization"**, describing **the roles and modes of operation** of umbrella organizations in Israel, and the **dilemmas and challenges** that arise during their work. The information collected in these meetings constitutes a case study for a description of umbrella organizations in literature and a case study for comparison with the patterns of activity of umbrella organizations around the world.

At the forum meetings, the following proposal was formulated for the definition of an umbrella organization in Israel:

An umbrella organization is a formal association of non-profit organizations aims to promote the common goals of its member organizations, with an emphasis on representing organizations in discourse with government

• The first line defines the umbrella organization as **a formal association of non-profit organizations**. The formal legal status gives the umbrella organization stability and the ability to create common value over time, to build a common knowledge and information base, and a professional reputation. These characteristics establish the legitimacy of the umbrella organization to represent its sphere of activity in any dialogue with outside parties, negotiation, management of a public conflict or substantiating an opinion among decision-makers and the general public.

• The definition emphasizes the umbrella organization as an association of formal **organizations,** and indeed most of the umbrella organizations incorporate organizations rather than individuals. In the background of this section is a discussion of whether the umbrella organization can or should accept individuals - experts or socially engaged citizens.

• The second line defines the goal of the umbrella organization, which is **to promote common goals of member organizations**. The discussion on this issue dealt with the question of whether the umbrella organization should advance the common goals of all the organizations or its field of activity and its target community. For example, does the umbrella organization deal with serving member organizations or serving the social communities of the member organizations? The use of the definition of "shared goals" is intended to emphasize that the umbrella organization serves its member organizations and that the members must reach consensus regarding the organization's goals.

• With an emphasis on representing organizations in discourse with government bodies:
While the first two lines can describe the current situation in most of the umbrella organizations in the world the third line concerns the unique nature of the activity of umbrella organizations in Israel, which tend to deal with representation in discourse with government bodies. In a recent survey conducted by Civil Leadership among the umbrella organizations in Israel, 85% of the umbrella organizations noted that their goal was to promote policy vis-a-vis the government and decision-makers to "a large extent" and above, whereas, the issue of public relations was rated as "a large extent" and above by 55% of the organizations. Strengthening and building the capabilities of the organizations received this rating from- 55% of organizations, and building new knowledge was rated as above among 60% of the organizations.

2.3. Issues and Dilemmas in the Activities of the Umbrella Organizations

At the beginning of the process of researching umbrella organizations, our goal was to present a model in principle for the activities of an umbrella organization. However, in the process of learning from literature, and even more so in examining the patterns of activity of umbrella organizations in the world and in Israel, it became clear to us, that every umbrella organization is first and foremost a reflection of the composition of its member organizations and the goals and functions they are intended to serve. We therefore chose not to present one optimal model but rather to present the main issues and dilemmas in the patterns of activity of umbrella organizations. The topics that emerged in the meetings of the Forum of Umbrella Organizations are listed here. These are issues and dilemmas that have arisen in the discussions, but they are not necessarily common to all the forum members. Alongside the topics there are quotes of the participants in the forum meetings (CEOs of umbrella organizations and guests from the government sector and philanthropic foundations).

The topics are organized under five headings: organization, governance, representation, support and economics.

- **Organization** deals with the roles and processes required to organize several organizations together.
- **Governance** deals with the joint decision-making process and establishing consensus.
- **Representation** deals with two issues: the development of the legitimacy of an umbrella organization to represent its member organizations and / or its field of activity, and the roles of an umbrella organization in representing the member organizations.
- **Support: developing the capabilities of the member organizations** deals with the functions of the umbrella organization in building the individual capabilities of the member organizations and of the community of civil society organizations involved in the field.
- **Economics** deals with the economic model for the maintenance of an umbrella organization and the fundamental dilemmas that arise from it.

We will now present the main issues discussed under each heading.

Organization: Organization of Member Organizations (intra-sectoral activities)

In order to establish and operate an umbrella organization, member organizations must recognize that the value of an umbrella organization exceeds the value of its components. The added value of umbrella organizations stems from their ability to pool economic resources as well as resources of knowledge, experience, and professional skills, and even to pool voices and target communities.

Hence the first mission of an umbrella organization is to manage the organization of organizations and the pooling of their resources. On the face of it, this is a managerial-technical

A member of the umbrella organization's forum: "An umbrella organization should not be imposed from above, but must grow from below"

action, but in practice it is a social action aimed at creating joint and consensus-based group work.

Actions to organize the member organizations

• **The umbrella organization and its staff are responsible for creating intra-organizational social capital** based on familiarity and trust between the member organizations. Such social capital will serve as a platform for decision-making, consensus, and development of joint projects. This role also exists in informal associations of civil society organizations, whose main purpose is to network between organizations and activists, to exchange information and to serve as a basis for cooperation between part of the organizations.

• **Development and implementation of intra-organizational representation processes**, such as regular meetings aimed at making decisions regarding intra-organizational governance, formulating consensus, or informing member organizations on various issues (see the section on "the governance axis" for greater detail).

Development and leading of activities to promote the objectives of the umbrella organization

One of the functions of an umbrella organization is to initiate and manage actions to promote the organization's professional content area. The advantage of an umbrella organization over member organizations is the broad range of professional skills and roles embodied in the staff of the umbrella organization, which usually do not characterize the member organizations, and

the ongoing relationship with all member organizations that enables them to identify challenges or needs shared by some, or all of them. These advantages serve the umbrella organization in initiating and leading actions that member organizations are not able to promote themselves, either because of lack of financial or professional resources, lack of availability and time, or because the promotion of this issue requires the cooperation of many organizations. For this purpose, the staff of the umbrella organization must be skilled in developing projects, with the ability to engage in dialogue with the member organizations and is experienced in managing partnerships and in building consensus and cooperative processes.

The development and conduct of such operations requires the execution of several tasks detailed below. A leading principle in accomplishing these tasks is the participation of most member organizations, either by the allocation of roles among them during the management of a project or a conflict, or by establishing professional and subject-specific committees composed of representatives of the organizations. The participation of member organizations in ongoing activities will enable the use of the knowledge they have, in order to carry out the task and create a sense of cooperation and identification with the umbrella organization.

• **Establishment of a professional database** open to the public that will serve the umbrella organization for public relations purposes and for further research needed to advance the goal.

• **Public relations and educational activities for the general public** to promote the umbrella organization's field of activity and to expose it to public debate, in order to change the attitudes and behaviour of the general public.

• **The establishment of professional or topic-focused committees** that deal with the promotion of one focused topic from among the broad range of the umbrella organization' activities. The committees are composed of representatives of the member organizations, the staff of the umbrella organization and professional consultants, as required. The purpose of the

committees is to gather information, analyse the field of work, propose actions and solutions, and to promote them.

Organize a mass of organizations to promote conflicts and pool resources

A representative of a philanthropic foundation: "The legitimacy of the forum is important to us, as philanthropists who come to work with umbrella organizations, we check how many organizations are in the field and how many of them are members of the umbrella organization, and also how many of them pay membership membership fees."

In order for an umbrella organization to be considered a legitimate representative of its field of activity by government agencies, philanthropists, and others, it must prove that it represents a mass of organizations active in the field. The fact that the subject is promoted by a large number of organizations in the field reinforces the validity of the subject, the necessity of dealing with it and the credibility of its message, and enables the other side (government agencies, philanthropists, and others) to feel that they are engaged in dialogue with a large number of civil organizations in the field.

An umbrella organization can try to increase the number of its member organizations by contacting other organizations and emphasizing the specific benefits that will accrue from joining any organization either to promote the field, such as influencing public policy, familiarizing and developing relationships with similar organizations, obtaining information and knowledge required for the organization's activities, and also experience belonging to a large group that enables the development of joint operations.

Governance: Decision-Making Processes and Consensus Building

Member of the Forum of Umbrella Organizations: "In order to be a representative umbrella organization, you must prove that you have member organizations behind you and name them"

Governance processes deal with the manner in which decisions are made in the umbrella organization: Disseminating information, participation of member organizations and building consensus among all civil society organizations. In order to stabilize the validity and reputation of the umbrella organization as the representative of its members, it must conduct internal governance processes based on the full and balanced participation of all member organizations.

Governance is also expressed in the degree to which the member organizations are close to their target community: to what extent the member organizations are familiar with the target community or the end-user in who's name they operate, conduct activities or, with whom they conduct a continuous and ongoing dialogue. The closer the organizations are to the target community, the more the umbrella organization becomes a reliable representation mechanism for the end-users, and the more the decision-making in the umbrella organization reflects their views or needs. A strong connection to the target community contributes to the legitimacy of the organization and its ability to represent them in any forum and is an important element in its governance.

An example of a governance mechanism in an umbrella organization: The Executive Committee of Civil Leadership

In the last elections to the Executive Committee of Civil Leadership, the representatives were chosen according to a representative formula, with the aim of forming an executive committee representing the entire civil society in Israel. In this way, each representative does not represent themselves but a specific segment of civil society: By type of organization (e.g. infrastructure organizations, umbrella organizations, large organizations, small organizations); or by constituency (organizations of people from a particular sector; geographical area; organizations from underrepresented communities, and more.)

The purpose of the governance processes presented here is to create transparent and participatory processes as a reliable basis for decision making and consensus building. Transparent and balanced governance processes are important in order to create legitimacy among the member organizations, who view the umbrella organization as a body that represents their views and integrates them into decision-making, as well as for external parties who wish to use the umbrella organization to reach many diverse organizations in civil society and to obtain a true picture of the voices of all interested parties.

Representative of a philanthropic fund: "The governance processes of the umbrella organization are an important consideration of philanthropists in deciding whether to work with the organization. Is there a leading forum and are there open elections for this forum? Does the umbrella organization treat its member organisations equally?"

Suggestions for activities on the governance category

• **Contacting and informing** all member organizations of the activities of the umbrella organization, both routinely and during a conflict or a dialogue with outside parties. Today there is a broad range of online tools for daily internal communication and discussion such as

Facebook, WhatsApp groups, Instagram and more. The issues to be addressed are the activities of the umbrella organization, decisions taken, information that comes from outside the umbrella organization regarding government policy in the field, new research information, events that occurred in Israel or around the world that are connected to the umbrella organization's field of action, and more.

• **Regular meetings for the selection of representatives**: Most umbrella organizations are managed by the member associations through a general assembly which elects the board of directors, officials, and decision makers of the umbrella organization. In addition, it is customary to convene additional meetings that have the important roles of enabling members to get to know each other, to be informed about various issues and to set up thematic committees for promoting and dealing with specific issues.

• **Establishment of thematic or professional committees** that examine and offer topics for promotion and response. The purpose of the thematic committees is to develop a specific field in depth, in consultation with professionals outside the umbrella organization and in cooperation with the member organizations. The committees can serve as a platform for the participation of the member organizations in the umbrella organization's work. The integration of active member organizations in the field with the work of the umbrella organization creates the added value of the umbrella organization over other organizations - business, civil or governmental.

Formal membership in the umbrella organization

A member of the Forum of Umbrella Organizations: *"The recognition must be mutual: the umbrella organization must know the area, and the organizations must recognize the umbrella organization, in the form of joining or paying membership membership fees"*

Participation in the regular meetings of the umbrella organization, in which members are elected to active roles in the umbrella organization (as determined by the Law of Non-Profit Associations), proves that the member organizations are involved and influence decision-making. However, in addition to this, the organizations must express their membership in real terms by paying membership membership fees. Payment of membership fees constitutes formal evidence of their joining the umbrella organization and recognition of it as their representative. (For more on the subject of membership fees, see "The economic axis" below.)

Representation

A survey of umbrella organization managers, conducted by Civil Leadership (2017) found that the main role of umbrella organizations in Israel is representation: 84% of the umbrella organizations are involved in promoting policy at the level of government and decision-makers (for the full survey data see section 2.1). Representation work can include activities such as presentation of the principles and message of the umbrella organization to the public for the purpose of promoting public education and social change, dialogue with external bodies such as state authorities or philanthropic entities, and even representation of the umbrella organization in coalitions or forums.

The umbrella organization's legitimacy as a representative of the member organizations stems from two principles: the first is the existence of internal processes for attaining consensus, and the second is the balanced representation of civil society organizations, which differ in their geographical location, scope of work and degree of influence. In order to uphold the first

principle, the umbrella organization must create consensus between the member organizations regarding ongoing activities and in times of crisis or in discussions of principle. In order to uphold the second principle, the umbrella organization must show that it represents many organizations in its field of work and that its processes of governance are participatory and balanced, enabling equal expression of all its member organizations.

Discussion: Who does the umbrella organization represent? Its member organizations, or the field of work and its target communities?

> *A member of the Forum of Umbrella Organization: "I see our organization as an organization with two hats: 1. An advocacy organization 2. An umbrella organization. My goal is not only to be an umbrella organization and to serve the member organizations but also to serve the victims of the [.. .] in Israel, the member organizations serve them at the micro level, and we - the umbrella organization – at the macro.*

> *A member of the Forum of Umbrella Organization: "I operate only in the service of our member organizations. If I run a project," over their heads" then I am not an organization that represents members, but another organization that works in the organizations' field of activity, but at the national level and not at the local level "*

The issue of representation was fertile ground for discussions and exchange of views among the members of the Forum of Umbrella Organizations in Israel. The statements quoted above present opposite approaches as to who an umbrella organization represents. While the one sees himself as an independent organization acting on behalf of the target community of the member organizations, at the state level, and has the freedom to act in any way, the second considers himself working on behalf of the member organizations and in order to advance the agreed goals, jointly and in accordance with their guidance. This dilemma has no single answer. An umbrella organization is usually set up by the member organizations, and therefore the decision regarding the purpose and the intended beneficiary of the organization's action must be made

and accepted by the member organizations. As illustrated by the quotes, there are two possibilities: the first is that the umbrella organization acts to represent only the member organizations, their needs, and their goals. In this situation there is no contradiction between the activity of the umbrella organization and the member organizations, there is no room for competition for economic resources, and the economic model for the existence of the umbrella organization is based mainly on membership membership fees or donations. In this situation, the umbrella organization can also act as an advocate against government or legal entities. A second possibility is that the umbrella organization (based on the decision of the member

Member of the Forum of Umbrella Organizations: "It is legitimate that we, as an umbrella organization have a unique role, that the member organizations don't have at all. We compete for resources, but this is fair competition because our job is to advocate and change policy at the systemic level"

organizations) aims to advance the field of activity and for their end users.

In this situation, the umbrella organization enjoys greater independence and its activities are more diverse, including projects to promote the field of endeavour and activity with end users that are not supplied by the field organizations (e.g., legal representation as opposed to other personal services that are provided by the field organizations).

The importance of representation of small organizations and weak social groups

Representative of a government agency: "I always ask myself whether the umbrella organization really represents the multiplicity of voices of the organizations, or that maybe the umbrella organization does not really represent all of the organizations - and then it can be claimed that the process that I lead is not inclusive"

In order for the umbrella organization to enjoy legitimacy and to be trusted as a representative of its members, it is expected that it will aspire to reach most of the organizations in its field, including small organizations, in different places and at different stages of development, so that

it will be able to express most of the needs and voices in the field. If it succeeds in doing so, it will be seen by external entities (primarily the state and philanthropic organizations) as a reliable representation mechanism for the civil society organizations in the field and these entities will seek its assistance in order to reach the umbrella organization's target audiences or it's the member organizations. For example, the government's representative said in a discussion at the Forum of Umbrella Organizations:

"We, as government agencies, try to bring to the table, those who do not reach us. We have to reach audiences that are not close to the table. Often the sin of the third sector organizations is just like the government's sin: they work with those who come to the table and the small organizations that are fully occupied with trying to survive have no time to arrive, and so their voice is not heard. Therefore, I think that you as umbrella organizations have the same responsibility as we (the government) do, and as we rely on you. You have to bring us the voices of the weak groups among those that you represent, and if you represent only the strong ones, then we have sinned twice."

The process of constructing a representative voice

Reliable representation is based on the building of consensus, among the member organizations, regarding the principles that are the basis for the joint presentation of their social goals, in order to present demands to government bodies or to conduct joint struggles. Moreover, the creation of an up-to-date, agreed upon document enables the umbrella organization to conduct any discussion with an outside party from a position of initiator with clear goals, rather than from a reactive or passive position.

The process of building consensus and a single clear voice should address the following issues: The common interests of member organizations; the reasons and objectives for establishing a

joint umbrella organization; representation and / or participation of their target community and end users and the goals and ideas they want to promote jointly.

It is important to note that creating a unified voice requires the member organizations to reach overall consensus even when some of the elements of the consensus differ from their own internal principles or decisions.

Conducting dialogue, conflicts or public information campaigns on a common subject

The umbrella organization represents the member organizations during the promotion and management of dialogues or conflicts with the state authorities and in the promotion of public information, and for this purpose it must engage in the following activities:

• Preparation of position papers that faithfully represent the consensus between the member organizations

• Contacting the appropriate authorities or responding to requests from government agencies

• Initiating participation in dialogue or in the processes of participation of civil society organizations

• Negotiating or entering into dialogue with other entities

• Developing and promoting public information campaigns to change public opinion and promote social change

Support - in Building the Capabilities of the Member Organizations

Detailed support for building the capacities of civil society organizations is not the main goal of many umbrella organizations that focus on representation. However, through the pooling of

resources, umbrella organizations can act to advance the specific capabilities and goals of the member organizations and to enlarge the community of organizations in their field.

Supporting member organizations and expanding the community of organizations

A member of the Forum of Umbrella Organizations: "Does the umbrella organization really have something valued and important that it can give to member organizations?"

The umbrella organization should create a benefit for the individual organization that is not available from acting solo. **The first added value of an umbrella organization is its availability to address broad issues**, which non-profit's in the field usually don't have. This includes resources such as advocacy, promotion of policy and public education, locating information,

Representative of a government agency: "You have the privilege of serving as an umbrella organization. Non-profit organizations are busy working to survive, so you have to be professional and understand the government, and like everything else you have to become professional in other services that you give to the non-profits"

raising funds, and conducting dialogue with state officials or philanthropists. Furthermore, collaborating in the format of an umbrella organization enables civil society organizations to establish, together, professional functions that provide services to all member organizations, such as: consulting for intra-organizational governance processes, managing volunteers and paid employees, public relations and public education, documentation, and evaluation and more.

The second added value is the access to the original knowledge that member organizations possess - information and methods that have been built in the field of phenomena and trends that the member organizations know or identify in the field in their direct contact with

the target community or with the place where they operate, and the unique work methods and unique solutions that the organizations have created to respond to these needs. The activities that the umbrella organization must carry out in this context are:

• **Collecting knowledge from the field in a continuous and up-to-date manner**, in order to "stay in the loop" and identify recurring trends and phenomena. This can be done by means of regular meetings; setting up of a closed Facebook group or a WhatsApp group that will enable employees in member organizations to report in real time, to ask questions and tell about special cases and the integration of office-bearers of member organizations into the work of the umbrella organization - professional committees, campaigns, writing position papers and more.

• **Documentation and evaluation** of models and work methods that can serve the other member organizations or contribute to the professional development of their field of work.

An umbrella organization needs to create unique value from these resources, both for the member organizations and for external entities, in addition to the cumulative value of pooling economic or human resources. The output of these activities can be used to develop professional and academic knowledge, to write reports, as a basis for demands from the state for treatment, legislation, or the transfer of budgets, or to present relevant cases as part of a public information campaign.

Economics: An Economic Model for Maintaining an Umbrella Organization and the Dilemmas Involved

An umbrella organization is registered as a formal non-profit organization, separate from any other organization, including the member associations. Like any non-profit, an umbrella organization also requires financial resources for its existence. The known sources of funds for

umbrella organizations are membership fees from the member associations, philanthropists, tenders, and projects in the field of endeavour of the umbrella organization and state funding. Each of these sources contains fundamental issues and dilemmas that affect the management and activity of the umbrella organization.

The economic requirements of umbrella organizations

The challenge of an umbrella organization in the development of economic resources stems from the definition of its role as director and organizer of the association of member organizations. This general goal is not a "project" but an ongoing process that is generally perceived as an office activity or as "overheads". Under this definition, there are many networking activities, the existence of the governance processes described above, the

> *A member of the Forum of Umbrella Organizations: "Funds from government ministries do not come to us. They are transferred directly to the field organizations. Only they are entitled to access the calls for bids or tenders of the various government ministries "*

representation of the goals of the umbrella organization on an ongoing basis, and other activities that are at the core of the umbrella organization.

Alongside these central functions, there are umbrella organizations that can develop "projects", such as setting up a database that will be used by all those involved in the field, including the general public; a focused campaign; unique service that most member organizations do not give to the target community (e.g. setting up a distress center) and more. These projects, of course, also require funding.

> *Member of the Forum of Umbrella Organizations: "As the head of an umbrella organization I have to maintain the umbrella organization in order to muster resources for member organizations and to work for the large goals. At present, my principles of action are 'sustainability' and 'synergy', not only for the member organizations but for myself"*

Dilemma: preventing competition for resources between the umbrella organization and the member associations

Members of the Forum of Umbrella Organizations: "There is economic competition for resources between us and the member organizations. We rely only on donations, while 30% of the member organizations' budgets come from the state"

Representative of the Philanthropic Foundation: "There is competition between the umbrella organization and the organizations it represents. We try not to give money to an umbrella organization, for activity that is, after all performed by its member organisations"

Since the umbrella organization operates in the same area of activity and for the same purposes as its member organizations, there may be competition between umbrella organizations and member organizations for sources of income, from philanthropists and government budget allocations. This tension can be relieved by means of an agreed division of areas of activity and sources of funding.

A Member of the Forum of Umbrella Organizations: "In my opinion, preventing competition is more relevant to infrastructure and less to representation. There is also competition for financing and to prevent it, rules should be laid out regarding agreed procedures, in order to receive legitimization from the organizations.

An umbrella organization is not supposed to deal with tasks intended for member organizations in the field, even if they have workers skilled in this task. Umbrella organizations may find themselves doing this, if only for the purpose of raising funds. Therefore, it is possible to divide the financial resources according to subjects of activity: For example, resources intended for

advocacy missions or for other projects that can only be promoted through an umbrella organization (national or professional) will be allocated to the umbrella organization, while financial resources intended for field projects, or at the local level are intended only for the member organizations.

In any case, the distribution of funding resources between the umbrella organization and the member organizations should be done by means of a process, agreed upon by the member organizations and the umbrella organization.

A proposal for allocating tasks between the member organizations and the umbrella organization

	Member Organization	Umbrella Organization
Target community	End user (e.g.: women, children at risk, etc.)	The member organization and/or the target community as well.
Roles	• Treatment of populations in need of help • Developing innovative work methods • Identifying new needs and responses • Representing local or sectoral audiences • Developing local social capital • Raising resources for the organization's projects	• Negotiating with entities outside civil society • Developing social capital among member organizations • Promoting government policy • Promoting public awareness • Knowledge and information management • Support in building the capabilities of organizations according to need and skill
Staffing and skills required	• Professionals and volunteers suitable for field work, such as social workers, educators, nursing staff, academic experts etc., • Representatives of the target audience • Managing volunteers	• Professionals in fields of influencing policy, public education, negotiations, advocacy, law, lobbying and public relations • Professional counsellors for support in building the capabilities of member organizations, such as raising funds, managing volunteers and more • Broad scope project management

Dilemma: Should the state fund the umbrella organizations?

Representative of Government ministry: Even today the government funds some of the umbrella organizations. To what extent is the government responsible and obligated, to invest in civil society infrastructures? I really want a civil society, but already today, 50 percent of third sector funding is from the government, and if this proportion rises it will no longer be civil society, but a government "shop", and the more an organization becomes dependent on the government, it will tend less to oppose it. This is a very delicate game. We want a civil society that grows from the field and not a government that has established a civil society for itself "

The need for the state to be aided by the civil society organizations (such as welfare, education and health organizations), or to conduct a dialogue with civil society organizations that specialize in various content issues (environment, human rights, education, employment, health, etc.) can lead to the state supporting umbrella organizations, in order that they can become a mechanism of representation for civil society, but will make this support conditional upon compatibility with the needs of the state (e.g. representation of only certain voices). State support for umbrella organizations can stem from a desire to "produce" a partner for dialogue, or to express interest in the development of civil society and its means of representation before state authorities. Various government ministries in Israel promote the establishment of round table conferences with the participation of civil society organizations in various fields, and in these cases the state can invite a variety of associations of its choice to the round tables. The existence of independent umbrella organizations, established by civil society organizations themselves, can prevent such a situation and create a representation of civil organizations on behalf of civil organizations.

Funding of umbrella organizations was reviewed in the literature review of this document. This review raises the issue of the tension between the needs of the state (which supplies the funds)

and the social goals of the umbrella organizations. Involvement of external funding entities - state or philanthropic - may cause tension between the goals of the umbrella organizations and the needs of the funding bodies. In the event of conflict with the needs of a philanthropic entity, the result may be a departure from the goals of the umbrella organization and the channelling of resources to issues of interest to the philanthropist. In the event of a conflict of principles with the state, the umbrella organization may be swayed to waiver its demands for reforms and to yield to the state's decisions for fear of losing economic resources.

It should be noted that there is also another funding model in which the state funds the activity of an umbrella organization without determining its agenda and without being involved in its decisions. In this model, the tension described above was resolved between the social objectives of the umbrella organization and the goals of the funding body, and the funding enables strengthening of the umbrella organization as a representation mechanism and supports it in achieving its goals. Some Israeli government ministries are currently examining models of funding of this kind, in order to enable organizations to operate on the basis of common goals for organizations and the government.

Model for collecting membership fees

> **A member of the Forum of Umbrella Organizations:** "We insist on collecting membership fees because they indicate seriousness, and we believe that if the partnership creates value it also has a cost"

Civil Leadership's survey of 2017, which included 20 responding organizations, found that 63% of the respondents charge membership fees from member organizations and 37% do not charge membership fees on a regular basis. The lack of collection may stem from the decision of the umbrella organization not to charge membership fees or because member organizations find it difficult to pay membership fees. As noted above in the literature review, umbrella organizations

in different countries offer different models of "membership" in an umbrella organization, so that membership rights (like voting and participation in decision-making) will differ among organizations, in accordance with the level of membership fees collected from the respective organizations.

Dilemma: Should the umbrella organization be involved in raising funds for member organizations?

> **A member of the Forum of Umbrella Organizations**: "In my opinion, an umbrella organization is supposed to raise funds and to distribute them to its member organizations, and that is also what some of the organizations that are members of our organization think, but the tension exists all the time"

> **A member of the Forum of Umbrella Organizations**: "The organizations demanded that the umbrella organization raise funds for its activities because they do not pay membership fees, but who is responsible for obtaining funding for the operation of the umbrella organization, the umbrella organization itself or the member organizations?"

Umbrella organizations are established by member organizations for various purposes, including fundraising. In order for the umbrella organization to be able to raise funds, the executive committee of the umbrella organization, composed of representatives of the member organizations, must empower the umbrella organization to do so, and also to give the umbrella organization the tools to fund the organization – such as financing the employment of a fund-raiser who will be entitled to represent the organization for this purpose.

It should be noted that, in addition to direct fundraising, with regard to which opinions are divided, the umbrella organization can also assist in the fund-raising efforts of member organizations indirectly by raising public awareness of the of the organizations' field of action. The umbrella organization can choose to raise a specific issue on the public agenda related to the activities of the member organizations, thus promoting fundraising for the entire field rather than for a specific organization, in order to increase the resources of all the organizations.

3. Infrastructures of Representation in Civil Society Organizations –
in practice ● ● ●

As can be seen from previous sections of this document, umbrella organizations in civil society serve as a representative mechanism for field organizations that bring their voices to the public and to the decision-makers in the government sector.

However, despite the usefulness of the association of civil society organizations in a joint representation mechanism, umbrella organizations or other organizations of organizations in Israel, they are few and serve only a small number of organizations and fields of action. Many civil society organizations are prevented from participating in decisions and actions related to their fields of work and their environment by their lack of access to the decision-making centers of civil society and the government sector (government ministries and local authorities), and the lack of representation of their needs and goals. It is therefore not surprising that the importance of strengthening the infrastructures of representation in civil society in Israel was one of the agreements that emerged in the process of participatory discourse in civil society organizations led by Civil Leadership in the years 2014-2016. In this chapter we will present insights from the work with the Forum of Umbrella Organizations that we intend to utilize in order to continue this process.

3.1 The importance of representation infrastructures in civil society organizations

In recent years, there have been various forms of inter-sectoral dialogue, such as "round tables" or "collective impact". These processes are usually run with the support of the state, and they revolve around specific issues or specific points in time. Moreover, since the discourse is usually initiated by the state, it tends to deal with subjects of interest to the government ministries, and the civil society organizations that were invited are chosen by the government ministry to initiate the discourse or to participate in it. Therefore, these organizations do not participate in the discourse as bodies that represent most of the voices in their field, but usually represent themselves only - each organization represents itself, its worldview and needs, without prior coordination between the civil organizations relevant to the discourse.

Thus, for example, the field of education abounds with civil society organizations, like other areas of social services. These organizations could benefit from a joint association to represent their needs and to manage inter-sectoral dialogue, but they do not organize for joint representation despite the common needs and despite the existence of an ongoing dialogue between the Ministry of Education and a small number of educational organizations[18], without dealing with the issue of representation by civil society organizations. The professional process is initiated and managed by the Ministry of Education because there is no mechanism for representation of the many educational organizations, even though their work is heavily influenced by the process. In another case, regarding the "Yated" program operated by the Ministry of Welfare, two representatives of organizations and two representatives of

---

[18]Following a roundtable discussion with educational associations, the Ministry of Education established a database of non-profit organizations that operate in schools. See -http://apps.education.gov.il/tyhnet/public/#/tochniyot :http://meyda.education.gov.il/files/MinhalPedagogy/mapa.pdf.

philanthropic organizations were elected to serve on the Steering Committee of the National Program.

In the context of the desire and need of government ministries to conduct a dialogue with civil society organizations, there is a need for representative infrastructures that will enable bringing an organized voice of NGO's and Civil organizations to the inter-sectoral dialogue that will be based on intra-sectoral agreements and legitimate representation of a large number of organizations and communities, and a wide range of opinions, ideas, and needs that are common to civil society organizations.

3.2 Civil Leadership Vision: A network of representation infrastructures for civil society organizations

Civil Leadership, as the umbrella organization of third sector organizations and civil society in Israel, deals with representing organizations in interactions with the government sector and promoting the third sector's common needs, both in the areas of their unique legal status as non-profit organizations, such as the development of a regulated and professional work environment, as well as those stemming from their social and civil characteristics. In its daily work, Civil Leadership acts on behalf of all the organizations, although, the large number of organizations (around 21,000) and the heterogeneity of civil society in Israel, in terms of the subjects of activity and the types of activity, the social sectors and the geographical dispersion, makes it difficult to fully and equally represent the changing needs of the many associations.

Civil Leadership identifies in its work, many areas of action of civil society organizations that are not organized in such a way that can enable the creation of a large group of stakeholders to advance common goals, or to pool resources for mutual support. These include, for example,

civil society organizations in the ultra-orthodox Jewish community and in the Arab community, as well as organizations in peripheral geographic areas. Civil society organizations develop knowledge and skills, gain trust in communities in the field and succeed in generating change among limited audiences, however, these abilities are not translated into influence on their work environment, through discourse and representation with decision makers in government ministries or municipal authorities, and they cannot be expressed in joint processes for civil society, since most of the non-profit organizations do not participate in organizations of organizations. In this state of affairs most of the organizations are not represented - not in intra-sectoral processes and not in inter-sectoral processes.

Therefore, Civil Leadership seeks to encourage the establishment of a network of representation infrastructures for additional groups of civil society organizations, in a way that enables them to pool needs and goals, to represent their members, to work together to advance their goals and to bring their voices and special needs before the state institutions and the general public.

According to the picture of the future that emerges from the vision of Civil Leadership, the network of representation infrastructures will include umbrella organizations, official and non-official, including thematic umbrella organizations that unite organizations dealing with common content areas (health, education, environment, women and others), umbrella organizations of organizations operating in certain sectors and communities, such as umbrella organizations of Arab civil society organizations or the ultra-orthodox Jewish community organizations and others[19], and organizations that share similar challenges in their geographic or managerial work environments. An example of the latter is the organizations that are members of the "Association of Third Sector Organizations in the Negev" (see Appendix), who

---

[19] These umbrella organizations do not exist. They are examples of networks based on social sectors.

share a geographic environment, or the "Forum of Umbrella Organizations" whose member organizations share a similar administrative and regulatory environment. The role of these representation infrastructures is to create a CSO's enabling work environment for civil organizations by means of representing organizations in the regulation of professional, financial, legal, regulatory, and other issues in inter-sectoral and intra-sectoral dialogues.

Civil Leadership recognizes the need to establish and maintain a variety of representation infrastructures for various spheres of activity and sectors in Israeli civil society, and views civil society in its entirety as a mechanism for representing communities and ideas. This approach is consistent with the EU approach, as noted: EU documents describe civil society as comprising several levels of representation (see section 1, clause 1.2). The first level, which is the core of civil society, is grassroots organizations. The second level is organizations that provide professional advice and infrastructure to the field organizations. At the third and fourth levels there are infrastructures of representation of different types. At the third level are formal representation infrastructures, such as umbrella organizations (umbrella organizations for organizations of the disabled, the elderly, women, etc.). On the fourth level there are, formal and informal representation infrastructures to promote the work environments of the field organizations and umbrella organizations, including the regulatory and legal environment, promotion and management of inter-sectoral representation processes and other issues related to their unique status, both as non-profit organizations and civil society organizations. According to this model a civil society, in which all levels of representation exist, enables field organizations to be represented at all levels of inter-sectoral discourse, from the local or thematic level in which they work, at the state level and also representation in the European Parliament.

Despite the importance of the umbrella organizations as representative infrastructures for the many organizations and their communities, it is worth noting the message in the work of Sandra

Kröger[20], who researches the representation of civil society organizations in EU institutions. Kröger raises the problem of the distance created between the target communities of the field organizations and the representation infrastructures that represent their organizations. According to her, this distance may distort the voices of the local public and undermine the legitimacy of the representation infrastructures as representatives of the weaker communities who receive service from the grassroots organizations acting on their behalf.

In Israel, it is possible to characterize Civil Leadership as a civil society organization belonging to the fourth level, alongside other new organizations that have been established independently, in cooperation with or at the initiative of Civil Leadership, as part of the process of strengthening the infrastructures of representation, such as the "Forum of Umbrella Organizations", "The Association of Third Sector Organizations in the Negev" and "the Association of Third Sector CEO's." These organizations (which are not officially incorporated) were established to represent non-profit organizations that do not share common areas of activity but that deal with the same work environment.

3.3 The Roles of Representation Infrastructures in Civil Society Organizations

We identified three important roles that need to be at the core of representation infrastructures:

1. Representation of grassroots organizations in regional or state processes

Representing shared needs through pooling a mass of similar organizations with similar needs and demands. Most of the field organizations operate in their special areas of activity or in specific geographical locations. Civil society organizations also accumulate knowledge about

---

[20] Kröger (2013) see note 6 above.

the needs that are relevant to other organizations in their field of work or in their geographic environment. This knowledge, gathered in their daily work is not expressed outside their circles of influence, and their unique needs are not answered. One way to express the representation of common needs is to **build consensus and joint position papers on common issues**. This consensus will enable organizations to create a dialogue with the state from a crystalized position accepted by many organizations, rather than through a rapid response in times of crisis or the response of individual organizations to a state-initiated dialogue.

2. Creating an infrastructure for intra-sectoral networking and cooperation

Creating an infrastructure and a place for networking between the various organizations, based on a common area of activity or on a common geographical location, will enable the non-profit organizations to create trust and a basis for exchange of information and development of joint projects.

Representation infrastructures can serve as a conduit for communication to member organizations to create networks of information and sharing on the issues of their working environment in the regulatory, managerial, and professional spheres. For example, it will be possible to inform organizations about a change in the law relating to the taxation of non-profit organizations, or to invite them to participate in a joint thinking process.

3. Creating an infrastructure for inter-sectoral networking and cooperation

The establishment of legitimate representation infrastructures for groups from among civil society organizations will create a dynamic of information exchange, consultation and cooperation between government ministries and other bodies from the government sector and organizations in the field. The existence of an umbrella organization or an association which represent an area of activity will enable the relevant state bodies to approach it as required. For example, when promoting a national project that deals with specific services (the elderly, health,

youth, and young people at risk, promoting the study of mathematics and others), the government ministries will be able to approach the relevant representation mechanism, consult and share with the many organizations involved in this field. This is particularly important because civil society organizations, by the nature of their work, tend to operate among weak or excluded populations that are under-represented in state service systems or among new communities that the state has yet to identify. In these cases, active representation infrastructures, with defined and consensual positions based on the knowledge and needs of their members, will enable the development of inter-sectoral cooperation.

An additional example is security emergencies that develop in Israel from time to time. In these situations, the relevant government ministries look for partners in the field from among civil society organizations, but in times of emergency, they find it difficult to find suitable partners among the many organizations. A regional association of civil society organizations will enable government ministries to address a single address that will represent all the relevant organizations.

3.4 Establishment of infrastructures for representation in civil society organizations - insights from the experience of Civil Leadership

In the last two years, Civil Leadership worked with a number of organizations to establish or strengthen representative infrastructures, including "the Association of Third Sector Organizations in the Negev", the Association of CEOs' of the Civil Organizations and "the Forum of Umbrella Organizations." In this section we present insights from this work in order to encourage the establishment of additional representation infrastructures in the form of a three-

stage model based on building social capital among organizations that recognize that they are facing common challenges.

Stage A: Recognize common challenges and benefits of joint organization

The first stage we identified in the process of establishing a representative mechanism is identifying the common challenges of the relevant organizations, and, no less important, understanding the benefits that joint association can bring to the organizations. In the case of the Forum of Umbrella Organizations, the forum was convened by Civil Leadership, following a need that arose from the umbrella organizations, and from the understanding that the umbrella organizations in Israel face common managerial and regulatory challenges, and since there is no academic or practical information in their field of work, there is a need to formulate new information and to find solutions to common problems.

In addition, Civil Leadership viewed the Forum of Umbrella Organizations as an opportunity to establish a representation mechanism that will serve as a gateway for organizations in various content areas, to improve and expand the representation of all the organizations by **designing and institutionalizing working relations between the umbrella organizations and Civil Leadership.**

Stage B: Building Social Capital - Inviting stakeholders to participate in a joint learning and thinking process

The second stage in the establishment of a representative mechanism, as we identified from the work of Civil Leadership, is locating the organizations that have a stake in the field in question and appealing to them to join the process. In the case of the Forum of Umbrella Organizations, in order to establish a representative forum for the umbrella organizations, civil leadership conducted a survey of the umbrella organizations operating in civil society in Israel, and then

approached them with an invitation to take an active part in the forum[21]. The discussions in the joint forum dealt with issues common and unique to umbrella organizations in the format of "peer learning", including mutual sharing of challenges and management patterns. During the meetings, a group of colleagues – the CEOs of umbrella organizations – was formed and met for the first time. Recognizing that they were facing similar challenges, they shared their experience and knowledge, and began to formulate a common approach to some of the issues that arose in the discussions. This process facilitated the development of trust between the colleagues and a decision to formalize the meetings into a platform which made it possible to reach the member organizations of each of the umbrella organizations in the forum, in the interest of expanding the representation of all the organizations.

Following the conclusion of the series of meetings, and following the participants' feeling that they had not exhausted the common issues, and because of the need to formulate and advance consensus on various common issues, it was decided to continue the discussions in the framework of a regular forum of umbrella organizations that would be convened twice a year.

Moreover, this permanent forum would be able to serve as a conduit for hundreds of non-profit organizations that are members of the umbrella organizations that participate in the forum, and in this way common issues and challenges for many NGOs would be able to receive a response or a place in inter-sectoral and intra-sectoral discourse.

Stage C: Managing the partnership and creating value for members

Following the establishment of the representation mechanism, the partnership between the member organizations must be maintained and managed. This connection between member organisations must be preserved constantly by means of mutual updates, continuous collection

---

[21] The full text of the invitation and the list of discussion topics appear in the appendix

of information about organizations' needs, as well as periodic meetings for learning and promoting common issues. In any mechanism of representation, it is important to appoint an activity coordinator in charge of maintaining contact with the member organizations, expanding the circles, and enrolling new organizations. The coordinator will constitute a significant axis in the representation mechanism and its effectiveness in creating value for the member organizations – by representing the unique voice at the decision-making centers, creating a network for mutual-acquaintance and cooperation and promoting common issues.

The Forum of Umbrella Organizations, as noted above, continues to operate under the leadership of Civil Leadership. The forum convenes at least twice a year in order to promote joint issues and dialogue with government officials, relevant to the unique activities of the umbrella organizations. At the same time, Civil Leadership, in its role as the overall umbrella organization, maintains constant contact with members of the forum - managers of umbrella organizations - in order to disseminate information to the umbrella organizations that are members of umbrella organizations and to pay attention to their voices on various issues.

3.5 Summary

Civil Leadership, the umbrella organization for Israel's third sector, has been leading significant processes in recent years to strengthen civil society organizations, while formulating a common and clear voice and motivating joint action. In this framework, we are working to establish infrastructures of representation among civil society organizations, in order to give expression to diverse voices that are not being heard in a cogent and satisfactory manner in intra- and inter-sectoral processes, as well as at state and local decision-making levels.

In our view, each of the representation infrastructures represents a group of organizations that operate in a civil society and organize themselves according to a common denominator, such as a geographical area of activity, a content area, or a sector. In our vision, the representation infrastructures will help mediate the needs and responses of the organizations in the field, among themselves, between them and other umbrella organizations, and between them and the overall umbrella organization. In this way, a broader basis will be created for cooperation and coordinated, efficient and organized work between the organizations, in times of calm routine and in times of crisis, and thus enabling the faithfully representation of all civil society organizations in Israel. In addition, representation infrastructures will help strengthen inter-sectoral discourse and will be a contact address for non-third sector entities which seek a focused approach to specific groups in civil society, as needed, thus helping to increase the influence of the individual organization on broad processes.

As described in this document in detail, the vision of Civil Leadership to strengthen the representation of civil society organizations in Israel is consistent with the approach and the method of action of international organizations such as the European Union, UN institutions and the World Bank. These organizations seek methodical and organized ways to communicate with the civil society, by means of Umbrella organizations or effective representative infrastructures, in order to reach a variety of organizations and communities operating in the field.

This document clearly shows the importance of representation infrastructures in civil society, including umbrella organizations, for inter-sectoral dialogue processes and the representation of civil society organizations in various content areas. However, in practice, the organizations' participation in representation infrastructures in the world and in Israel is low. In light of this reality, the challenge before us is to realize the value and importance of participation in the representation infrastructures for the individual organization. Thus, we can establish civil society as an influential factor in formulating and leading social, environmental, and economic policies, alongside the government sector and the business sector.

4. Appendices ● ● ●

4.1 Review of the definitions and examples of the organization of organizations

This document was written as part of a learning process on formal umbrella organizations, but it is important to be aware of other forms of organizations of organizations - both to learn from them and to understand the continuum of possibilities.

The Cambridge Dictionary defines an umbrella organization as "an organization that controls or organizes the activities of a number of other organizations with a common purpose." This broad definition can include any organization or event in which multiple organizations of any kind join a common activity – ranging from a meta-organization that can include a network of businesses or private individuals with a common systemic purpose[22] to an ad hoc coalition of civil society organizations, with or without formal legal status. In a preliminary examination of organizations of organizations, it was found that many of them, both formal and informal, use the terms "organization network", "forum of organizations", "coalition of organizations" and "umbrella organizations" in practice and it is difficult to identify consistency in the use of the different terms. In addition, organizations have undergone different processes over the years, changing their definition and concept of their work on the continuum of definitions of organizations of organizations.

---

[22] Gulati, R., Puranam, P., & Tushman, M. (2012). Meta-organization design: Rethinking design in interorganizational and community contexts. *Strategic Management Journal* 33(6): 571–586

What is common to most of the activities mentioned in the different definitions of organizations of organizations, which are not officially established as an organization, is the need for cooperation in order to create added value, relative to a single organization, with the purpose of promoting an idea, mainly in the fields of public education, and changing public policy.

Here below is a list of commonly used terms. Further to this document there is a need for practical clarification and additional writing that will distinguish between the different terms and characterize them.

A network of organizations

is an ongoing association of organizations established and intercommunicating to share knowledge and initiate opportunities for cooperation. The network allows its members to feel part of something larger than their organization. Mostly the network does not strive to make common decisions and allows its members to maintain a high degree of autonomy while maintaining relationships with similar organizations.

In a document published by Mercy Corps, an international development organization, they define a network organization as loosely organized groups of organizations that share values and ideologies and function primarily on the basis of information exchange and alliances for the purpose of synchronizing efforts and resources[23].

URI, for example, defines itself as a global, interfaith network of grassroots organizations that nurtures peace and justice by involving people in mediation in matters of religious and cultural differences[24]. Its strategy is to establish local coalitions in areas where there is inter-faith conflict (interfaith Cooperation Circles (CCs)). In Israel, one example was found of the association of

---

[23] Mercy Corps (2011). *Local Partnerships: A guide for partnering with civil society, business and government groups.*
https://www.mercycorps.org/sites/default/files/mclocalpartnershipsguide.pdf
[24] http://www.uri.org

organizations using the term "network" in its name - "The Jewish-Arab Partnership Network in Israel": http://coexnet.org.il/

Forum

In Israel, this term is widely used to describe organizations that are not registered as formal non-profit organizations. The organizations participating in "forums" can come from different fields of activity (such as a CEO's forum) or from similar fields, and their activities in the framework of the forum are intended to promote a common and focused goal that is related to the organizations' activities and is not necessarily at the heart of their activity.

In contrast to the concept of the "network," in which the primary purpose is contact and exchange of information, forum organizations have a common practical goal, which is expressed in the pooling of efforts to influence public opinion and policy. An empirical feature of the active forums in Israel is that most of them are initiated and managed by one of the participating organizations. It is possible that this feature is connected to the involvement of the Gandyr Foundation in the establishment of many forums, and therefore it can be said that the Foundation is one of the leading engines in the development of the modus operandi of forums in Israel. In this context, Dr. Gila Melech wrote for the Gandyr Foundation a document dealing with organization of organizations, entitled "Promising practices of forums that work for the joint social impact that are comprised of civil society organizations.[25]" This document defines the concept of the forum as "a long-term, voluntary, organizational framework of civil society organizations which strive to jointly promote the well-being of a defined population group in society, to create social influence that is beyond the activities of each individual organization. The three main channels of action used by the forums to promote their influence are networking,

---

[25] Melech, G. (2015). Promising practices of forums that work for a common social influence that are made up of civil society organizations. The Gandyr Foundation.

strengthening the field and developing the capabilities that operate in it; representation and promotion among policy makers, and increasing public awareness. "

The document of Dr. Melech and the Gandyr Foundation was based mainly on forums that work to advance young populations, and the goals of the forums reviewed include the networking of organizations, building their capacity and advocacy strategies. Similarly, regarding the performance of the forums, the document emphasises the importance of the commitment of their member organizations, as well as mutual trust, as the bases for its activities.

Examples of active forums in Israel:

The Peace Organizations Forum, founded by the Peres Center for Peace, is a dynamic "network" that promotes interaction and cooperation between Israeli and Palestinian peace organizations. Within this framework, the forum's members, comprising about 100 organizations, work together to promote peace and reconciliation processes in the region, with the aim of influencing decision-makers and influencers of public opinion, and by motivating civil societies on both sides[26].

"The Public Forum - Youth Villages and Boarding Schools in Israel" was established in 2012 and works to develop and strengthen Boarding School educational frameworks in Israel. The forum consists of representatives of donors, representatives of foundations and civil society organizations, representatives of the owners of the youth and boarding villages, representatives of the Ministry of Education and the Ministry of Welfare, professionals, and academics. The chairman and founder of the forum is Avi Naor.

"Transportation Organizations Forum" (appears on the website of "Transportation Today and Tomorrow"[27]): The members of the forum include environmental and social organizations,

---

[26] The Facebook page of the Forum of Peace Organizations.
[27] http://transportation.org.il/he/transportation-forum

organizations promoting the rights of people with disabilities and organizations from the ultra-orthodox Jewish sector. The purpose of the forum is to create a synergetic front for the promotion of sustainable transportation, which will be constantly operative and state-of-the-art, in order to maximize the potential of influence in each organization, and together, to lead a significant change.

"The Forum for Refugee Rights" is a body of eight human rights organizations. The forum was established in order to promote the recognition of the rights of asylum seekers and refugees in Israel by providing information to the public and decision-makers and through public activity. The forum is managed by an employee of the Hotline for Migrant Workers[28].

As mentioned, one can find contradictions between the various definitions, the actual characteristics, and the way in which the organizations define themselves, so that some of the forums can be defined as umbrella organizations, networks, or coalitions. This situation again sharpens the need to characterize the arena and to create a common language – "What is a forum?" "What is a coalition?" and so on.

Coalition

A coalition is a structured cooperation, with a greater emphasis on **promoting joint action**, sometimes **sacrificing the autonomy of member organizations** to promote common needs. The goal of the coalition is to **promote a relevant and focused issue** through joint work. Organizations from different spheres, who have a common goal can participate in a coalition.

The coalitions are characterized in the literature, as less formal and limited in life-span relative to official umbrella organizations. Coalitions are sometimes created in response to an opportunity or threat and vary in terms of their types of membership and their structures. There

---

[28] https://www.acri.org.il/camp/refugees.html

are three types of coalitions distinguished by membership: 1) grassroots coalitions organized by volunteers in times of crisis to pressure policy makers to act; 2) professional coalitions created by professional organizations in times of crisis or as a long-term approach to increasing their power and influence; (3) community coalitions composed of professional leaders, created to influence long-term health and welfare practices for their communities[29].

The Mercy Corps document defines coalitions as **temporary alliances or partnerships between groups** working to achieve a common goal or promote joint activities. According to the document, forming a coalition is the process by which parties (**individuals, organizations, or countries**) organize for cooperation[30].

Examples of coalitions in Israel are the Coalition for the Promotion of Affordable Housing in Israel, which includes organizations dealing with civil rights, law, and urban planning: http://israelaffordablehousing.blogspot.co.il/; The Coalition for Public Health in Haifa Bay: http://cfenvironment.org.il/index.php/hkoalitzia-lebriut-hatzibur, or the Coalition for Direct Employment: https://coalition4de2013.wordpress.com.

---

[29] Katz, H., and Schwartz, R. (2009). *Umbrella Organizations in Israel's Third Sector: A First Study towards a More Comprehensive Understanding.* Tel Aviv: Tel Aviv University, The Leon Recanati Graduate School of Business Administration, The Institute for Technology and Society
[30] Mercy Corps (2011) ,see above, note 24.

4.2 Other associations of organizations

In addition to the above review of the types of organization of organizations, two other types of civil society organizations are worthy of note:

Professional Forum of Officials in Organizations - Forums of this kind unite professionals working in civil society organizations, in order to create professional communities for them in various fields for the benefit of learning and enrichment in their fields of content, discussing common issues and creating an infrastructure for cooperation. Such active forums are the Human Resources Managers Forum, the Knowledge Managers Forum, the Forum for Fund Managers, and the Association of Third Sector CEO's.

"Collective Impact Initiatives[31]" - Social partnerships that connect players from all sectors - the public sector, the business sector, philanthropy, and civil society - in order to solve and advance complex social problems (e.g. the 5 times 2 initiative to expand the circle of excellence in mathematics, physics, chemistry, and technology; and the initiative to promote employment in Arab society).

---

[31] For more information on Collective Impact see the Sheatufim website:
http://sheatufim.org.il/subject/collective-impact/

The following chart, which was drawn up by the Civil Leadership Team, presents a continuum of various types of organization in civil society with, on the one end, the umbrella organization, which is the formal form of "organization of organizations," and at the other end is the professional forum that groups officials of civil society organizations. The other types of organizations of organizations, as reviewed above are ranged in between these two extremes. Further to this work, prepared by Civil Leadership and presented to you in this document, we intend to initiate a consultation meeting on this subject.

Types of Organization of Organizations

Professional Forum	Coalition	Forum of Organizations around a Content Theme	Impact Collective	Umbrella Organization
(Forum of Digital Leaders in NPO's, Forum of HR Managers, Forum of CEO's)	(The Coalition of Direct Employment, The Public HQ for Health Equality)	(Forum for the promotion of Civil-National Service, Forum of Organizations for Youth at Risk)	(The 5 times 2 Initiative, Employment of Arab Academics.)	

CIVIL LEADERSHIP
THIRD SECTOR UMBRELLA ORGANIZATION R.C

4.3 List of participants in the Forum of Umbrella Organizations led by Civil Leadership and a copy of the invitation to the forum

Chen Arieli and Imri Kalmann, **Israel's LGBT Task Force**

Esther Blum and Yvonne Kapon, **Council of Immigrant Organizations in Israel**

Michal Berman, **Panim – The Israeli Judaism Network**

Talia Levanon, **The Israel Trauma Coalition (ITC)**

Nir Papai, **Life and Environment – The Israeli Union of Environmental NGO's**

Orit Sulitzeano, **Association of Rape Crisis Centers in Israel (ARCCI)**

Yaakov Sandler, **Halev – The Union of Associations for the Elderly in Israel**

Shlomi Castro, **The Israeli Council of Youth and Children Organizations**

Yochai Rotenberg, **The Israeli Association for Community Media**

 (Here is the text of the design invitation)

4.4 The list of organizations whose representatives participated in the survey of umbrella organizations

The Council of Immigrant Associations in Israel

Culture & Art Institutions Forum in Israel

The Association of Yeshiva Directors and Torah Institutions

Council of Youth Movements in Israel (CYMI)

SID Israel – Society for International Development

Association of Rape Crisis Centers in Israel (ARCCI)

The Israel Trauma Coalition (ITC)

Life and Environment – The Israeli Union of Environmental NGO's

Halev (The Union of Associations for the Elderly in Israel)

The Aguda – Israel's LGBT Task Force

The National Union of Israeli Students

The Association for Spiritual Support in Israel

Panim – The Israeli Judaism Network

Noah the Israeli Federation of Animal Protection Societies

Israel Kennel Club

Otzma – Israel Center of Sport Clubs

Israeli Association for Community Media

The Association of Museums and ICOM Israel

The Israeli Civil Leadership Association (Civil Leadership)

The Joint Council of Pre-Military Academies

4.5 The Association of Third Sector Organizations in the Negev

"The Association of Third Sector Organizations in the Negev" deals with issues arising from the peripheral location of the non-profit organizations in the Negev, regardless of their professional field: i.e.: educational, welfare, health, environmental and social organizations, the common factor being that they are civil organizations located in the Negev. "The Association of the Third Sector Organizations in the Negev" facilitates the representation of the needs of third sector organizations that deal with special issues related to the Negev and enables them to make decisions and gives them access to decision-making processes and participation in budgets and projects specific to the Negev. It works to represent weak communities, such as the Bedouin, settlements established as development towns, etc., to promote access to transportation, to and from the center of the country and Jerusalem for all the Negev communities, and to increase governmental resources directed to the region, subjects which have influence on all the organizations in the Negev and are not specific to any single field of social activity.

"The Association of Third Sector Organizations in the Negev" represents civil organizations in two ways: Firstly, as part of the third sector, for example through its membership in the "Negev Council[32]", which consists of representatives of organizations from all sectors: municipal, civil, and business (and academic). Secondly, it represents the organizations as third sector organizations from the southern periphery, such as the in the Civil Leadership Executive Committee or opposite government ministries, for example in the struggle for compensation following Operation Tzuk Eitan[33].

---

[32] The "Negev Council" is a civic organization composed of heads of local authorities, public representatives, representatives of anchor institutions and the local business sector. It strives to represent all residents of the region, to express their voices and their needs to the various government ministries and policy-makers.

[33] On the role of the non-profits in the south during Tzuk Eitan and the resources that were required for this see:
http://www.ynet.co.il/articles/0,7340,L-4552277,00.html

ronitizraeli.com

CIVIL LEADERSHIP

THIRD SECTOR UMBRELLA ORGANIZATION R.C

www.migzar3.org.il • office@migzar3.org.il