

**SHIBBOLEY SCHECHTER:
A GATHERING OF IDEAS
FOR LAY AND PROFESSIONAL
DAY SCHOOL LEADERS**

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**UNITED SYNAGOGUE OF CONSERVATIVE JUDAISM
SOLOMON SCHECHTER DAY SCHOOL ASSOCIATION**

The recent Schechter Consultants' Brochure, produced by the Schechter Service Center, prompts us to talk all about using consultants. Please read on, determine your needs, review our new Collection Of Consultants and let us know how we may assist you. If you need a copy, please let us know.

What's A Consultant?

The dictionary provides us with two definitions:

- "A person who consults with others."
- "An expert who is called on for professional or technical advice or opinions."

Webster's informs us that an expert is someone who is "very skillful; having much training and knowledge in a special field." Expertise and experience have a common Latin root, *experiri*, meaning to try, to test, to prove. A consultant, then, is above all else willing to try things to see what happens.

In sum, a consultant is someone who helps others profit or learn from their own experiences. A really good consultant helps us see the value of our experience.

On Using Consultants!

The following article is reprinted with permission from *The Management Assistance Program for Nonprofits*:

Situations When a Consultant is Useful

The following are typical situations when an organization might need a consultant.

1. The organization has no expertise in the area of need.
2. The time of need is considered short-term, e.g., less than a year, with a general start and stop time.

DATES TO SAVE:

December 16-18, 2001

Principals Conference, Toronto

February 10-12, 2002

Conservative Movement Convention 2002, Washington, DC

3. The organization's previous attempts to meet their own needs were not successful.
4. Organization members continue to disagree about how to meet the need and bring in a consultant to provide expertise or facilitation skills to come to consensus.
5. Leaders want an objective perspective, i.e., someone without strong biases about the organization's past and current issues.
6. A consultant can do work that no one else wants to do.
7. An outside organization demands that a consultant be brought in, e.g., a funder wants to ensure the organization is well suited to spend the funder's money.
8. The organization wants a consultant to lend credibility to a decision that's already been made (this situation would be viewed by many experienced consultants as highly unethical).

How You Can Make a Consultancy as Productive as Possible

1. Know what you want to do, and make sure your agency is prepared for it.
2. Try to reach internal agreement (board and staff) about the consultancy.
3. Don't become dependent on a consultant.
4. If possible, don't limit the consultant to recommending action; get the consultant involved in implementing recommendations.
5. Fix causes, not symptoms.

Additional Advice (orient consultant, evaluate project, avoid IRS penalties)

1. Help Consultants to Understand Your Organization

There are a few basic techniques which can greatly help the consultant to understand your organization, particularly if they are brought in to work organization-wide on non-technical issues.

a) Help them understand your service(s), market(s) and stakeholder(s). For example, provide them copies of your strategic plans, budgets, policies, most recent annual report, organization charts, and advertising/promotions/sales literature. If there is a full range of these types of documents, your organization probably values careful documentation when making important decisions, and will likely prefer the same from the consulting project. If these documents appear to be

very comprehensive and include a great deal of graphs, figures, and numbers, your organization probably highly values careful research, analysis, and conclusions, and will prefer the same in the consultation project.

b) Give them a sense for the overall nature of your organization. For example, are staff highly independent and work alone or do they prefer working in teams? Do you go for consensus on decisions even if it takes a long time to get or do you want timely closure on decisions? Are their strong traditions you require based on the diversity of your workforce? How does the staff feel about using consultants?

c) Give them a sense for the overall priorities of your organization. For example, you might attempt to identify the general life stage of your nonprofit, e.g., start-up, developing/building, stabilizing, declining, etc. The stage will indicate your overall priorities, as well, e.g., getting any help you can get, grabbing market share and/or more clients and/or more revenue, developing a wide range of careful documentation, divesting resources while ensuring client needs are met, etc.

2. Include Frequent Evaluations, Including Project Follow-Up

The extent of the consultant's and clients' participation in evaluating the project is often an indicator of how much they really see themselves responsible for the overall, long-term quality of the consulting project.

a) The consulting project should be evaluated regularly, including briefly at the end of each meeting (about the process used in that meeting), at mid-point in the planning effort, and at its end. Specify in the contract that certain deliverables (e.g., tangible products, such as reports, presentations, project reviews, etc.) be delivered during the project. Ideally, the project should be evaluated at three months and again at six months after completion of the project. Attention should be given particularly about whether the consultant's recommendations were implemented and whether or not the project's goals were reached.

b) Establish criteria early on from which the overall consulting effort can be evaluated at the mid-point and end of the project. Establish criteria by having you and the consultant specify what constitutes a successful consulting project and process. Get descriptions to be as detailed as possible so as to later know if the project was clearly a success or not.

c) Don't base evaluations mostly on feelings. Avoid this mistake by specifying, as much as possible, *behaviors* that will reflect a successful consulting project.

3. If IRS Disagrees Service Provider is "Independent Contractor," You May Pay Penalties and Taxes

Hevra,

by Deborah Astor
President, Solomon Schechter Day School Association

I chase excellence. Don't you? Sometimes it's achieved through the skills and expertise of the people around me, or my own. Sometimes there's just a frustrating, universal shortfall. Given the sheer number of specialties and skill sets required to operate, protect and fund a good school, it's fair to assume that some needs will best be met by the inclusion of a consultant.

The Schechter Association's Service Center recently sent you its brand new brochure "A Collection of Consultants". I hope you will take a serious look at it. The people listed there know our schools, we know them, we use them. They know their stuff and they know how to teach and how to guide. There has long been a call for this and it is

especially satisfying to see it launched by the Service Center!

Over the last year, the Association has brought the benefits of expert consultants to Presidents all over North America via conference call. We have talked about governance, fundraising / development, strategic planning / board development and legal issues. No participant has failed to be excited and enlightened by the consultant's special lens, even in a sixty minute format! The next conference call for presidents will feature an outstanding consultant, Dr. William Weary, who will spend an hour on the phone with anyone who wants to join in. The topic will continue the theme of this issue of *Shibboleth Schechter*; how to utilize the services of an outside consultant. That call will take place on October 24th, 11:30 AM - 12:30 PM, ET. Make your reservation early.

So, as we enter a new year with its potential for growth, I hope that all of this discussion on consultants will intrigue you and entice you to new ground.

Wishing you every blessing.

School Heads Conference

This year's conference on December 16, 17 and 18 will be hosted by the United Synagogue Day School of Toronto, Canada and chaired by Ms. Lucy Cohen. Featured presenter will be Dr. Andrew Hargreaves on Sustaining Leadership in Education.

Shalom

by Dr. Zvi Schoenburg, Chair, Principals Council,
Head, Solomon Schechter Day School of St. Louis, MO

Do you remember the old joke, "To a teacher, what are the three sweetest words in the English language? — Answer: June, July, August." To a Head of School, wouldn't you agree that no three words are more daunting, more anticipated, more dreaded and more exciting, than these: Back to School.

The importance of getting the school year off to the right start probably cannot be underestimated. First impressions count. Planning counts. Anticipating problems and preventing them is much more efficient than fixing them later. Here are a few last minute ideas, culled from a variety of sources, which may prove to be of some value:

- Identify a theme or a few themes for the new school year to give focus to faculty and parents alike. Publicly list all this year's new programming initiatives, new faculty positions, new policies, etc. Do this frequently. Embrace change and highlight change. All school constituents need to feel that the school is moving forward.
- Meet new teachers and staff members as a group to welcome them to the school and orient them to the school's purposes and culture. Pair up new faculty with the most positive and helpful veteran faculty members to assist them in their ongoing task of figuring out how things get done. Follow up with additional new faculty meetings after the holidays

and into the school year.

- Stick to your guns. Having carefully set schedules, class assignments, policies, etc., do not succumb to the temptation of tinkering further except in those cases regarding which you are now convinced disaster looms unless you change course. The wisdom of any schedules, assignments, and policies, you have worked up can be monitored carefully over the first few weeks of school and changes can be made.

This last point leads to the day school 'back to school' bonus: The *yom tov* reprieve! In a year like this one with the *Tishre* holidays all falling midweek, you get a second chance at back to school *aharei hehagim* — after the holidays! So mark your calendars for October 11th, and start again!

Wishing one and all a sweet and healthy New Year!

The purpose of this checklist is not to raise anxiety at this challenging time of year. Remember that *Kol Hatalot Kasha* — All beginnings are tough! — and that as we're all in the same situation, that's half a consolation.

Join Schechter in Cyberspace

There are now 3 Solomon Schechter listservs:
Roshnet@uscj.org — for Principals
SSDS-Prez@uscj.org — for Presidents
SSDS-Business@uscj.org — for Business
Managers

A listserv allows people with a particular interest — in our case, Schechter — to share information regarding that interest. Once you sign on, all participants in the listserv receive all postings via e-mail. Registrants are encouraged to be active participants by posting questions, concerns, and ideas to the group regarding issues of interest to the Schechter organization.

To sign up for the appropriate listserv send an e-mail to education@uscj.org. On the subject line type in "new sign up for" (choose appropriate listserv: Roshnet, SSDS-Prez or SSDS-Business). You will receive a message welcoming you to that listserve. You may then send a message, question or comment and it will be distributed to everyone on that list. Enjoy!

Open A Schechter Website!

United Synagogue invites all Schechter schools to open WEBSITES. Contact Martin Kunoff, kunoff@uscj.org, for immediate attention. Many Schechter schools have already taken advantage of this opportunity. There is no fee — Enjoy!

In The News

A gentle reminder for all your publicity — from stationery to news releases and bulletins — please indicate your school is affiliated with the Solomon Schechter Day School Association of the United Synagogue of Conservative Judaism. You may also include our logo.

Many, many thanks.

The First Day of School

by Judith Viorst

Will they let me go when I need to go to the bathroom?
And what if I get lost on my way back to the class?

And what if all of the other kids are a hundred, a thousand, a million times smarter than I am?

And what if we have a spelling test, or a reading test, or an anything test, and I'm the only person who doesn't pass?

And what if my teacher decides that s/he doesn't like me?
And what if, all of a sudden, a tooth gets loose?

And what if I can't find my lunch, or I step on my lunch?
or I (oops!) drop my lunch down someplace like the toilet?
Will they just let me starve or will somebody lend me a sandwich? A cookie? A cracker? An apple? Some juice?

And what if they say, "Do this," and I don't understand them?
And what if there are teams, and nobody picks me to play?

And what if I took off my sneakers, and also my socks, and also my jeans, and my sweatshirt and T-shirt,
...and started the first day of school on the second day?

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Chair: Temma Kingsley

Department of Education

Dr. Robert Abramson, Director

Kay Pomerantz, Senior Assistant Director, Editor

Dorothy Sachs, Coordinator

Serene Victor, Consultant for Synagogue Education

Solomon Schechter Day School Association

Deborah Astor, President

Newsletter Advisory

Anaruth Bernard



United Synagogue of Conservative Judaism

Stephen S. Wolnek, President

Rabbi Jerome M. Epstein, Executive Vice-President

155 Fifth Avenue, New York, NY 10010
(212) 533-7800 x 2500 education@uscj.org
Website: <http://www.uscj.org>

Welcome to Our Second SREL Fellow!

Our second SREL fellow gives us an additional reason to kvell — she's a Schechter graduate! The Schechter Resident in Educational Leadership program has been made possible through an anonymous endowment to the Solomon Schechter Day School Association of the United Synagogue of Conservative Judaism.

Learning While Doing

by Rabbi Sheryl Katzman, SSDS of Metropolitan Chicago, IL

This year I am honored to be the second SREL fellow. I will be spending the three years of the fellowship working at the Sager and Skokie Solomon Schechter schools in the Chicago area. I come to Chicago having completed six years at the Jewish Theological Seminary where I earned a masters in education and received rabbinic ordination. I grew up outside of Detroit, Michigan so Chicago as a city is a great fit. Not only is it close to my family who are still in Detroit, but both me and my husband have family living in Chicago, including our two sisters. As an alumnus of Hillel Day School, the Solomon Schechter school that serves Metropolitan Detroit, it feels equally like home to be back in a Schechter school. At this writing, I am only a few weeks into the fellowship and already incredibly excited by (and busy with) all the opportunities to learn and teach in the school.

For the first year of my fellowship, I will be working primarily in the middle school, serving as the rabbi in residence. In this role, I pursue many diverse projects which will allow me to begin to understand school culture. I will have the opportunity to teach *Tanakh* in the eighth grade and to collaborate with the other eighth grade *Tanakh* teacher in order to build a new curriculum. I will also spend much of my time working to enhance the *tefillah* and *hagim* programs in the school. In addition, I will have the chance to work with the board and various committees to learn from them and to contribute to their work. Much of my time will be spent working with the middle school administrators in order to begin to understand their roles. Finally, I will also have the opportunity to meet regularly with the head of schools and the director of religious life in order to share their insights into school culture.

One of the most exciting aspects of this year is the terrific team of administrators and teachers who will be guiding me through this fellowship at the Chicago Solomon Schechter schools. I hope that, over the course of my years at the schools, I will have the opportunity not only to learn from the school, but also

to contribute to its excellent education by deepening the conversations about God and Judaism and their potential to play a central role in our every day lives.

School Success Factors

A recent monograph, “Beyond Collaboration,” published by the National Center for Nonprofit Boards indicates there are four characteristics that help schools succeed: Mission, Flexibility, Leadership and Growth.

Mission: The first factor to success is a clearly defined mission that is embraced by school leaders, both volunteer and professional. A strong commitment requires more than a written statement. The mission must drive the school on a daily basis as the most important element in decision-making.

Flexibility: Many organizations and schools strive to maintain the status quo while the whole world is changing with unprecedented rapidity. Some attempt to preserve the “way we’ve always done things,” struggling to hold back time — a battle that can’t be won. Successful schools not only embrace change, but anticipate or even create it. In pursuit of their missions, successful schools have become more technologically sophisticated and “customer” focused.

Leadership: There is no substitute for good leadership. Successful schools have enterprising professionals who work in harmony with dedicated, involved boards. These Heads keep their boards well informed, give both the good news and the bad and involve their boards in the school’s struggle. They view board members as the “actors” rather than the audience, in the drama of the organization’s life.

Growth: Successful schools also share a desire to grow in order to deliver more services and better services and in order to increase financial stability.

(cont'd. from page 2)

The Issue

A major, recent issue found during IRS audits is nonprofits arranging to use what they term as “independent contractors,” but what the IRS concludes are “employees.” In these cases, the IRS demands the nonprofit pay back taxes and penalties. Consequently, a client must be very careful when entering into a relationship with a service provider to ensure the relationship will be deemed an “independent contractor” relationship by the IRS.

Background

As background, one aspect of the arrangement between a client and consultant is that the client typically does not have to pay benefits and workers compensation, match Social Security payments, and withhold income taxes. Consequently, the IRS is quite concerned that clients accurately classify their service providers as “employees” or “independent contractors.” There appears to be no clear distinction between the two in the law, and each situation is settled on a case-by-case basis. However, there are certain guidelines a nonprofit can follow to minimize the likelihood that IRS will deem a service provider to be an employee.

Guidelines to Minimize Likelihood of IRS Penalties and Taxes

Whether a service provider is an employee or an independent contractor depends primarily on the extent of control the client organization has over the service provider: the less control in the relationship, the less likely the IRS will deem the service provider an employee. Consider the following actions when attempting to define the relationship with an independent contractor:

1. Carefully specify your relationship with the service provider in a written document.
2. The terms of the relationship (specific services, fees, project start and stop dates, etc.) should all be specified in the contract.
3. Attempt to arrange fees to be based on results or tasks, rather than on time.
4. In the document, specify the relationship to be with an independent contractor who is responsible for paying their own taxes.
5. The service provider should have all or considerable discretion in how services are carried out, including the process and scheduling.
6. The service provider should be responsible for obtaining and paying for their own training to carry out the services.
7. The service provider should not be required to carry out his or her services at the offices of the client.
8. The service provider should have or be making obvious efforts to advertise and retain business with other clients.
9. The service provider should have their own place of business.
10. Note that the more a service provider appears as a manager (i.e., makes operating decisions, supervises people, is responsible for allocations, etc.), the more likely the service provider will be deemed an “employee” by the IRS.

Additional Information:

The Management Assistance Program for Nonprofits website contains much additional information: www.mapnp.org

- Go to www.mapnp.org/library/ and click on consultants.
- Need help writing an RFP (Request for Proposal)? Go to www.internettraining.com/6art2.htm. Developing a well-written RFP takes time and planning. Sample components included in this information are: Organizational overview, Target audience, Proposal.
- Would you like to see a sample consultants’ proposal and plan? Go to www.mapnp.org/library/misc/proposal.htm.
- Want help understanding Life Cycles of organizations? Go to www.mapnp.org/library/grow_biz.htm#anchor581127.

MaToK in Fifth Grade

Two of the greatest narratives in the Torah—the Exodus and the giving of the Ten Commandments—are to be found in *Sefer Shmot*—the Book of Exodus. This year, the Schechter Bible curriculum will address these pivotal stories, as MaToK moves into the fifth grade.

In preparation, forty teachers participated in a professional growth workshop in New Jersey in early May. The teachers practiced using the active, cooperative, varied learning strategies that are the hallmark of MaToK. They considered the serious theological issues imbedded in *Shmot*. And they observed and evaluated a sample lesson with delightful students from the Solomon Schechter Day School of Essex and Union, Cranford Campus.

This year, the MaToK writing team will complete its work on *Shmot* and turn its attention to the last three books of the Torah.

MaToK is co-sponsored by the Education Department of the United Synagogue of Conservative Judaism and the Melton Research Center for Jewish Education of the Jewish Theological Seminary of America. It is supported by a generous grant from the Jim Joseph Foundation. Deborah Miller is the Project Director.

On-line Teacher Placement Service

There are over 60 teacher resumes at this website available to School Heads. Type in usecj.org/education/placement.html and click on Teacher Placement login.