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Talent Bank for Lead Communities, 1992-1993.

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# MEMORANDUM

To: Art Rotman  
Shulamith Elster  
Sol Greenfield

From: Jim Meier



Date: November 4, 1992

Re: Talent Bank

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The attached draft relates to our discussion of Talent Bank at tomorrow's meeting.

You will see that the first page and half is a synopsis of the components of the talent bank, and the numerically corresponding attachments that follow lay out details of each component.

I am working under the assumption that our object is to make the talent bank operational at the latest by the January "seminar." I believe that we have no time to spare if we want to achieve that deadline. (See the timetable in Attachment 7.)

See you tomorrow.

## **Talent Bank for Lead Communities**

### **Introduction**

The talent bank is an allocation and deployment system for directing experts in diverse areas of Jewish education to assist Lead Communities.

The talent bank will provide sources of professional assistance for planning and education to assist the Lead Communities. By mobilizing continental resources and recognizing excellence, the Talent Bank will also contribute to CIJE's long range goal of building the profession of Jewish education.

Consistent with CIJE's role as a catalytic agent for Jewish education, this proposal assumes that resources of existing organizations such as JESNA, JCCA and CAJE will be made available through the Talent Bank.

To meet differing needs of the Lead Communities, Talent Bank members should represent a broad spectrum of approaches and skills. In keeping with CIJE's commitment to quality and independence, the selection process should be fair and comprehensive.

The talent bank is built upon a database of educators, professionals, and others who are expert in diverse areas of Jewish education. A line of credit is provided to each Lead Community to obtain the assistance of these experts. The currency is hours of service. CIJE staff function as loan officers: they watch each account, approve major requests for services, and may recommend that a Lead Community avail itself of a particular expert or an expert of the community's choice in a particular area of expertise.

To become functional, various components of the Talent bank need to be minimally developed, and then expanded upon thereafter. These components, summarized below, are elaborated upon in proposals in the correspondingly numbered attachments to this draft.

### **Components of the System**

1. Areas of expertise: The categories in which expert assistance is likely to be needed. Expertise is grouped in two broad categories: a) "client" expertise, and b) subject or skill expertise. These categories encompass programs (e.g., starting with "Best Practice" areas), curricular areas, as well as specialists in areas of supervision (e.g., training, personnel evaluation), and administration (e.g., budgeting, fundraising, negotiation, systems development).



2. Selection of Experts: This section proposes protocol for identifying and contacting experts about their willingness to assist in this project. The abilities, strengths and limitations of experts in a fairly large number of areas are described according to a standardized and succinct format for entry into the database.
3. Terms of agreement with experts: One or more standard agreements specify the terms for expert participation in this project. Experts may be offered some combination of honorarium, fee, recognition, reciprocal services, or reimbursement of expenses. Differentiated agreements may apply to persons affiliated with national institutions, university faculty, private practitioners, or lay leaders.
4. Resource database and distribution: Define fields, develop database system, enter information, run reports.
5. Allocations: An allocation formula for distribution of hours of service to the three Lead Communities. The formula could combine a series of factors such as: base allotment; size of the community; however, a fixed amount per community is proposed for the immediate future. Incentive for community input or performance; replenishment of hours for achievement of targets or accomplishment of outcomes related to the use of prior experts are issues to be addressed for the future.
6. Management protocols: Delineates set of simple but consistent procedures by which communities initiate requests, indicating when CIJE approval is required, arranging expert visits, tracking and recording outcomes.
7. Calendar: A proposed timetable for making the talent bank operational by the mid January meeting of the lead communities.

Future steps:

- . Elaborate funding formula (see No. 5).
- . Publish Talent Bank directory.
- . Expand to include institutions as well as individuals.
- . Expand to other-than lead communities.
- . Develop ways a community can replenish its "account" other than by new CIJE allocation (e.g. consulting assistance to other communities; developing and/or disseminating curriculum materials to other communities).

Attachment 1AREAS OF EXPERTISE

(A) Client Expertise		(B) Professional Subject/Skills and Expertise			
Settings of agency and institutional clients	Community Clients (life-span)	Educational Personnel-Clients	Curriculum and Instruction (formal and informal)	Administration and Management	Methods/Skills
Adult residences Camps Central agency College campus College of Jewish Studies Community Supplementary Schools Congregational Schools Federation Israel Programs Libraries Synagogues Youth Groups JCC	<u>Infants-Pre School</u> Early Childhood ( <u>N-K</u> ) School age ( <u>6-18</u> ) <u>College age</u> <u>Young</u> <u>Adults/Singles</u> <u>Parents</u> with young children <u>Empty Nesters</u> <u>Mature Adults</u> <u>Senior Citizens</u> Immigrants Mixed Marrieds	<u>Bureau of central agency staff</u>  <u>Camp Directors and Staff</u>  Center Directors, Program Directors and staff  <u>Principles</u> <u>Rabbis</u> <u>Social Workers</u> <u>Specialists</u> <u>Teachers</u>	The Arts Bible Hebrew language Hebrew literature Holidays Holocaust Jewish History Israel Prayer theology* Text: Traditional Sources Yiddish Jewish literature Jewish Philosophy Rabbinic literature Mideast Affairs	Administrative Practice Budget Finance Development Facilities Personnel Planning Public Relations Research and Evaluation Systems Development Board Development Demographic Analysis Fund-raising	Curriculum Development Staff Development Leadership Development Program Design Questionnaires School Organization Child Psychology

## Attachment 2

### SELECTION OF EXPERTS

#### Criteria

- Recognized expertise in an area of potential value to lead communities.
- Ability to assist (that is, past evidence or reasonable basis for concluding that person can relate and respond to situation other than own).
- Reasonable availability (with respect to time, cost).
- Recommendation by 2 or more reliable sources.

#### Nomination Process

1. Steering Committee: Talent bank "working" steering committee is formed consisting of easily convenable members, e.g.:

- Shulamith Elster, chair
- Sol Greenfield
- John Woocher
- 1 or 2 senior advisors who know schools and programs
- Barry Holtz
- Judith Ginsberg
- Jack Ukeles or Jim Meier

2. Solicit Nominations: The Chief Education Officer, with the assistance of other CIJE staff and consultants, sends letter including sets of nomination forms to specific contacts in national agencies, training institutions, lead communities, principals of selected day and supplementary schools, JCC and camp directors, foundation officers, etc.

Short and easy nomination form would ask:



### Nomination for CIJE Talent Bank

Nominee Name: \_\_\_\_\_

Address/Phone number (if available): \_\_\_\_\_  
\_\_\_\_\_

Area(s) of expertise (see attached list of categories): \_\_\_\_\_

Has nominee ever worked with you on in a consultant or facilitator role?

yes \_\_\_\_\_

no \_\_\_\_\_

Under what circumstances would this nominee be most effective in a consulting or facilitating role to a Jewish education program, school, or community?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

May we use your name if we proceed to contact this nominee?

yes \_\_\_\_\_

no \_\_\_\_\_

- Follow-up calls are made to selected recommendors and other contacts.

### 3. Review Nominations:

- Lists of nominations are compared for overlap.
- Initial list of nominees is prepared.
- Steering committee reviews names; divides task of obtaining viewpoints of third party contacts.

#### 4. Invitations:

- Steering committee reconvenes to decide on names: a) proceed with invitation, b) maybe, more information needed, c) no.
- Chief Education Officer, or delegate, contacts selectees about willingness to serve on Talent Bank, and if so, for more information (see below).
- Phone invitation, followed by standard letter, covers:
  - . Purpose of talent bank
  - . Obligations/responsibilities of experts
  - . Committee's perception of nominee strengths
  - . Talent bank listing
  - . Compensation for services
  - . Follow-up information/profile required from expert

Follow-up letter will also include information on:

- . Training and support (none contemplated)
- . Reporting (if contemplated)
- . Standard contract (see attachment 3)

#### 5. Expert Profile:

- Expert asked to submit the following information:
  - . Resume
  - . Talent bank description for data bank



## **Attachment 4**

### **RESOURCE DATABASE, and DISTRIBUTION**

#### **Set Up Systems**

1. Hire systems consultant to identify software, set up talent bank expert database (e.g., sortable by variety of descriptors), and set up management tracking systems for accounts.
2. Secretary enters information into talent bank.
3. Printout and review profiles of experts.
4. Distribute first installment of talent bank to lead communities.

#### **Update/Maintain Systems**

5. Add new expert profiles to talent bank as they are identified.
6. Track talent bank use, including withdrawals by lead communities, and use of experts.

#### **Plan, Prepare, and Issue Directory**

7. Prepare glossier document that explains talent bank and includes profiles of resource experts.

#### **Directory**

8. The directory will make the results of the search available to a larger audience. This product could be one or both of two forms: a computer disk or an 8 1/2" x 11" loose-leaf notebook with two sections: reference indexes and member profiles listed alphabetically by name. Cross indexes will list the names of resource people by specialty or specialties in a variety of areas reflecting the categories of the Talent Bank database.

## Attachment 7

### TIMETABLE FOR LAUNCHING TALENT BANK

<u>Pressing Tasks</u>	<u>Completion date</u>
0. Preliminaries . Approve overall plan . Hire p-t coordinator and clerical help (See 4. Allocations and Budget)	mid Nov.
1. Define areas of expertise	end Nov.
2. Select experts: first round . Set up steering committee . Solicit nominations . Review initial nominations . Invite experts . Obtain profile information from experts	mid Nov. late Nov. early Dec. mid Dec. late Dec.
3. Terms of agreement . Develop standard agreement . Send to experts following acceptance	early Dec.
4. Systems/database . Hire consultant . Set up system . Data entry . Distribute listing	late Nov. late Dec. early Jan. mid Jan.
5. Allocations and Budget . Decide on budget . Identify/hire p-t coordinator . Identify/hire p-t clerical . Announce allocations to LCs	asap early Dec late Dec. early Jan.
6. Management Protocols . First draft . Final draft . Distribute	late Nov. late Dec. mid Jan.



To Shulamit  
From Dan

[draft: 10-16-92]

### **Talent Bank for Lead Communities**

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The talent bank is an allocation and deployment system for directing experts in diverse areas of Jewish education to assist Lead Communities.

The talent bank is built upon a database of educators, professionals, lay leaders, and others who are expert in diverse areas of Jewish education. A line of credit is provided to each Lead Community to obtain the assistance of these experts. The currency is hours of service. CIJE staff function as loan officers: they watch each account, approve major requests for services, and may recommend that a Lead Community avail itself of a particular expert or an expert of the community's choice in a particular area of expertise.

To become functional, various components of the Talent bank need to be minimally developed, and then expanded upon thereafter.

1. Areas of expertise: Define the categories in which expert assistance is likely to be needed. Categories should encompass programs (e.g. starting with "Best Practice" areas), curricular areas, as well as specialists in areas of supervision (e.g., training, personnel evaluation), administration (e.g., budgeting, fundraising, negotiation, systems development), and planning.
2. Experts: Experts in a fairly large number of areas need to be identified and contacted for willingness to assist in this project. Their abilities, strengths and limitations should be described according to a standardized and succinct format for entry into the database.
3. Terms of agreement with experts: One or more standard agreements should be devised specifying the terms for expert participation in this project. Experts may be offered some combination of honorarium, fee, recognition, reciprocal services, or reimbursement of expenses. Differentiated agreements may apply to persons affiliated with national institutions, university faculty, private practitioners, or lay leaders.
4. Resource database: Define fields, develop database system, enter information, run reports.
5. Allocations: Devise an allocation formula for distribution of hours of service to the three Lead Communities. The formula could combine a series of factors such as: base allotment; size of the community; incentive for community input or performance; replenishment of hours for achievement of targets or accomplishment of outcomes related to the use of prior experts.
6. Management protocols: Delineate a set of simple, but consistent procedures by which



communities initiate requests, defining when CIJE approval is required, arranging expert visits, tracking and recording outcomes.

7. Fundraising: Develop a strategy/proposal for increasing funding available for this initiative.

8. Future steps:

- . Publish Talent Bank directory.
- . Expand to include institutions as well as individuals
- . Expand to other-than lead communities.



**COUNCIL FOR INITIATIVES IN JEWISH EDUCATION**

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**MEMORANDUM**

TO: Art Rotman

DATE: January 14, 1993

FROM: Shulamith Elster

SUBJECT: Unfinished Business-  
The Talent Bank

Left over from before your tenure as our Executive is the following matter which I would like to resolve, if at all possible, by the end of this month.

As you may recall, there have been discussions about CIJE Fellow, A Talent Bank or other resource groups for the CIJE for years now. As part of the work plan for the Spring of 1992, I was asked to develop some thoughts on a Talent Bank for the CIJE. This was at the same time that I was appointed or annointed (depends on one's reading of the text) as the Acting Executive Officer. Annette and I were to meet in Washington in May for a several-day work session and the Talent Bank was among the items on the agenda.

In the interest of both time and a quality approach, I asked someone I knew in Washington to develop a proposal for a CIJE Talent Bank and held out the possibility, very reasonable at that time, that there might be several days of consulting on the project or - at the very best - a very part-time job if we moved forward with the idea.

When Annette and I met in May, she indicated that there was never any intention of having such a Talent Bank of individuals - actually, that we didn't need such a group (or a process to organize and collect such a group) - because we already knew everyone who counted (or was worthy of inclusion). After this initial reaction, I put the proposal in the files.

When the assignment to Jack and Jim included thinking about a Talent Bank (in connection with the now-defunct 'line of credit' for consultants in a variety of fields), I passed along the proposal and some elements did find their way into the materials which were later circulated among our inner-group on the Talent Bank.

Having thought after the fact -- and with the knowledge that we are utilizing consultants for our projects and compensating them for time spent planning and producing -- I would like to make this a formal request for \$500.00 for this piece of work done last Spring.

A copy of the Proposal for the Talent Bank is attached. I welcome the opportunity to speak with you about this personally. I have no interest or intention of taking this request to Annette for approval. It rests solely in your hands.

Thanks for reading this far and for your consideration.



March 20, 1992  
D R A F T

DEVELOPING A TALENT BANK  
FOR THE COUNCIL ON INITIATIVES IN JEWISH EDUCATION  
A Proposal  
by Livia Bardin

**OBJECTIVE:** To create a Talent Bank of outstanding Jewish educators to serve as consultants to the Lead Communities and in other appropriate roles in CIJE projects.

The Talent Bank will provide sources of professional assistance for planning and education to assist the Lead Communities. By mobilizing continental resources and recognizing excellence, the Talent Bank will also contribute to CIJE's long range goal of building the profession of Jewish education.

Consistent with CIJE's role as a catalytic agent for Jewish education, this proposal assumes that resources of existing organizations such as JESNA, JCCA and CAJE will be made available through the Talent Bank. The intent of this proposal is to facilitate the identification of talent not now readily available at the continental level.

To meet the differing needs of the Lead Communities, Talent Bank members should represent a broad spectrum of approaches and skills. In keeping with CIJE's commitment to quality and independence, the selection process should be, and should be perceived to be, fair, comprehensive and objective.

PLANNING

I envision a planning stage in which the Chief Educational Officer works closely with the Senior Policy Advisors to:

- 1) Develop criteria for membership in the Talent Bank;
- 2) Develop a selection process that combines a wide sweep for potential nominees with up-front quality control to select only top-quality talent.
- 3) Develop plans for monitoring Talent Bank members, including training, support and evaluation. Defining what training and support CIJE can reasonably provide



will help define criteria for membership in the Talent Bank, as will developing an evaluation instrument.

### Criteria

CIJE should establish clear, written criteria for membership in the Talent Bank. Some possible elements:

- Experience
- Academic background
- Recommendation by more than one source
- Openness of attitude
- Ability to relate to contexts and situations different from one's own
- Availability (with regard to time, energy, place).

CIJE may want to rank criteria, as well. For example, practical experience may be more important to Talent Bank clients than heavy involvement in theory. And are there de-selectors?

### Selection Process

CIJE should maximize the opportunity to build in quality control at the front end through a meticulous, impartial selection process. The process should be explained in writing and should be conscientiously adhered to in all cases.

Methods used by other organizations with talent banks:

- Recommendations from national group of experts
- Recommendation by more than one person
- Review of resume
- Calls to check references
- Attendance at conferences or events where prospect is presenting
- Approval by review board of people from the field
- Review of nominations by higher authority

The process should also incorporate conflict-of-interest precautions covering such issues as nepotism, self-nomination and recusal of review board members from considering their own employer or employees.

### Monitoring and Support

For quality assurance, the National Diffusion Network sends pairs of evaluators to each school. New members of ASCD talent banks attend other ASCD conferences before going out on their own. ASCD also starts its new talent in low-risk situations like mini-conferences. Mechanisms like these may contribute substantially to the success of the Talent Bank.

Ongoing evaluation is a basic monitoring tool. Every group that uses a Talent Bank consultant should provide a written evaluation as part of its obligation to the Talent Bank -- and consistency requires a uniform evaluation instrument. Evaluations will also help CIJE assess its own services. Developing an evaluation instrument will focus planners on the probable needs and expectations of the Talent Bank's potential clients and thereby help establish criteria.

If an evaluation pinpoints a problem, what will CIJE do about it? Or what if an otherwise desirable Talent Bank member has little or no previous experience in consulting? Can CIJE organize and offer the necessary training? Or can it direct members to appropriate seminars offered elsewhere? Availability of training and support will be a consideration in selecting nominees.

#### IMPLEMENTATION

After addressing these fundamental issues, CIJE must:

- 1) Carry out the procedures established for nominating and selecting Talent Bank members;
- 2) Produce and disseminate the resulting list of Talent Bank members;
- 3) Follow through on training, monitoring and evaluation.

#### Procedures

The various administrative chores required to carry out the procedures include setting a calendar, seeing that those involved complete their tasks in a timely manner, collecting and processing information for the use of the decision-makers, notifying those selected and securing their consent to serve.

#### Product

All the planning and procedures will be useless without a final product making the results of the search available to those who need them. This product could be either a computer disk or an 8 1/2" X 11" loose-leaf notebook with two sections: reference indexes and member profiles listed alphabetically by name.

- 1) **The indexes** would list the names of resource people by specialty or specialties in a variety of areas reflecting the 23 areas identified by the Commission on Jewish Education for its agenda. Each person could be listed in several different places. By cross-checking the indexes, it would be easy to distinguish, for



example, someone with expertise in administering camps as opposed to an expert on camp curricula. Categories and sub-categories might include:

#### Educational expertise

- Adults
- Day schools
- Early childhood
- Informal education
  - Camping
  - Israel experience
  - etc....
- Special education
- Supplementary schools
- etc....

#### Professional expertise

- Administration & management
- Board development
- Child development
- Curriculum
  - Bible
  - Holocaust
  - Jewish history
  - etc....
- Demographics
- Fund-raising & public relations
- Research
- etc.....

2) The profiles would list the person's present position (including address and phone number), background and publications (if any). Each profile would include a brief narrative providing relevant ideological and/or philosophical and other information. This would enable CIJE to provide important information that might not fit into a form such as "Rabbi X is committed to the pluralistic view of Judaism," or "Ms. Y took over Camp Zed when it was reeling from that ultimate camping disaster, a fatal accident, and brought it back to success."

This format makes for easy updating, as revised indexes and profile pages could be supplied without re-doing the entire book.



## TENTATIVE CALENDAR

Commence work April 1, 1992

April 15 - Drafts of membership criteria, selection process, training and monitoring plan, evaluation instrument to CIJE for review by Senior Policy Advisors.

May 1 - Policy Advisors' comments all in.

May 8 - Revised drafts submitted to CIJE.

May 15 - Plans finalized, begin collecting nominations.

June 15 - Close nominations for first-round members.

June 30 - Complete screening process, results to CIJE.

? Time needed to complete selection process depends on the process decided upon.

30 days from completion of selections to complete copy for final product.

Production time depends on nature of product.

