

Documenting The Cohort-Based Experiences Experiment

Introduction

In early 2022 The Jim Joseph Foundation, in partnership with Maven Coaching and Consulting (“Maven”), launched the Cohort-based Experiences Experiment (CBE), an initiative to test new models of learning and leadership development in cohort settings within the Jewish community. As the name suggests, the project was designed to test cohort models and provide insights about what makes cohort experiences so powerful, which elements most contribute to their success, and - to quote CBE documents - “how might we greatly expand and democratize the cohort-based learning experiences available in the Jewish communal ecosystem to support and nourish the Jewish educators and mid-career professionals who are the backbone of Jewish communal life?” The Jim Joseph Foundation and Maven engaged Rosov Consulting to be a learning partner in this endeavor through documenting the planning and implementation of the cohorts, the experiences of cohort facilitators and participants, and potential directions for the next phases of the experiment. This report presents the key learnings that have emerged from the 8-month documentation process, which involved reviewing cohort planning and implementation materials, interviewing the Maven CBE Team, participating in CBE Team meetings, and reviewing Zoom recordings of the final sessions for four of the six Cohorts.

Cohort Planning and Recruitment

The original CBE team – Heather Wolfson, Gamal J. Palmer, Seth Linden, and Rachel Brodie z”l – began their planning with a period of thoughtful research and reflection as they conducted a review of recent research on cohort-based professional development and interviewed twenty-six key informants with expertise in creating and facilitating cohorts. From this exploration emerged critical insights that were incorporated into the design of the initial cohorts, including: the importance of emphasizing diversity, equity and inclusion, an area in which the Jewish professional world is still lacking; the desire by many professionals for content that both nurtures their sense of mission and builds practical skills; the role of familiarity and prestige in successful recruitment; and the value of keeping cohorts small and organized around shared roles, experiences, and affinities. After presenting these findings to the Jim Joseph Foundation and engaging Foundation staff in a valuable conversation about the benefits of targeting various populations, the Maven Team solidified plans to launch cohorts for six groups of Jewish professionals: 1) *Roles of Influence* – those in positions of influence in their organizations (but not the top leader), 2) *Event Planners* - Individuals who are responsible for the execution of large-scale convenings in Jewish nonprofits, 3) *Practitioners of CBEs* – Professionals who themselves create and run cohort-based experiences, 4) *Parents* – new parents with young children at risk of leaving the field based in the greater Los Angeles area, 5) *DEI/BIPOC* - People of color who lead DEI efforts within Jewish organizations, and 6) *Israel Dialogue* - Senior leaders who are seeking a space to have honest and open conversations about Israel and the Israeli-Palestinian conflict.

The CBE facilitators mostly tapped their networks to find cohort participants, either directly recruiting people they had connections to and felt would be a good fit or asking their connections to recommend others (the exception was the Practitioners cohort, as many of the participants were “pre-selected” as Jim Joseph Foundation grantees or already previously engaged through similar efforts). While this proved to be an effective and efficient strategy for launching most of the cohorts quickly (the BIPOC and Israel Dialogue groups launched later than the others to accommodate participants’ availability), relying on personal connections does limit the circle of invitees. In later stages, the network could be expanded through more publicity and a social media presence, using a “snowball strategy” of tapping the networks of the initial participants and increasing the number of facilitators, each of whom would have their own networks (as will be discussed further in the “Looking Ahead” section). With all of these strategies, a certain level of trust and comfort may need to be established in order to launch cohorts. Invitees have to weigh the potential benefits against the time and effort required, as well as the risks that come with being open and vulnerable with one’s professional peers. As Seth Linden noted during a Maven Team recruitment discussion, “*What’s driving people to say yes is that they trust the four of us, and they are thirsting for nourishment and connection in their professional lives and community.*” Gamal Palmer reflected on how recruiting for the DEI/BIPOC and Israel Dialogue cohorts highlighted the challenges these groups face in their work, leading them to be both eager for connection and cautious about the commitments they are willing to make:

For the DEI/BIPOC group, I reached out to people I knew and asked them who else should be included. Because people didn’t know exactly what this was, they were a little hesitant to recommend others. Folks are so overstretched right now, with a lot happening in the field in terms of DEI and engaging Jews of Color. How it all gets communicated is very important, particularly with a DEI group. People want to know how is this model different than an “old boys’ club” or in-crowd?

With the Israel Dialogue group, we’ve learned that this is a really nuanced and tender space – everyone is under-resourced, and capacity is really low. We finally got them engaged [at the end of August], and it took more work and time than I anticipated. People are asking who should be in the room, who is safe for them to be in the room with. Some are on completely different sides of ideological lines. Bridge building is a new thing in the Israel conversation, and the field is reorienting. Other convenings have been attempted, and they have not worked out, leading to frustration and skepticism. What these professionals are doing is hard and not always respected.

Cohort Implementation and Experience

A Hunger for Connection

The experience of the six pilot cohorts has confirmed the central principle of the CBE: Jewish professionals across the field are hungry for opportunities to connect with similarly situated peers and colleagues. As facilitator Heather Wolfson noted, “*I’ve never had so many people be responsive to Doodle polls or show up on time for meetings in my life,*” an informal (but highly telling) indication that for many the CBE opportunity met a need for community and connection that they may not

have even realized they had. Many participants reflected (in final session recordings or as reported by facilitators) that meeting as a cohort for even a few times has helped them feel “less alone” as professionals and more supported and valued in their roles. Gamal Palmer shared that for the members of the BIPOC cohort, *“The impact of this experience was feeling heard, feeling part of a community, feeling appreciated, and feeling that they are not alone. The work they are doing - holding the weight of helping institutions understand and implement needed change – is really hard, and this cohort makes them feel like what they are trying to do is possible. They feel their own power and intelligence.”*

As the above quote highlights, feeling supported in community is not merely a nice “side perk” for professionals, but can be fundamental to one’s professional identity and sense of self-esteem. When professionals see their own concerns and needs shared by others, it validates that these issues are real and worthy of attention. One member of the Event Planners cohort expressed this idea poignantly in the group’s final session, also noting the rarity of being recognized as a specific professional group with unique experiences and interests: *“I want to thank everyone for their vulnerability and being open about your struggles. You all are amazing and hearing your struggles was a relief, like therapy. Thank you to Heather for making us feel that way. I was shocked that someone thought about us – we’re never thought of as a group.”* Another event planner also expressed gratitude for the opportunity to create community among professionals who are often somewhat isolated within their own organizations:

The trust we’ve developed has to do with this network that we’ve created that none of us has otherwise, because within our organizations we’re often the only ones that do what we do. We might have a team, but at a senior level we’re the only ones. Our supervisors and peers don’t know what we do. So coming into this group of people we do know made me feel very comfortable being vulnerable and trust them automatically because it was a network I never had before.

The sense of “trust” described above is of course a critical element of successful cohorts and communities, and a theme that was woven throughout the reflections of cohort participants and facilitators. A striking success of this cohort experiment is that all the groups seemed to reach a high level of trust and comfort very quickly, within one or two sessions. While much of this was due to the skills of the facilitators (as will be explored further in later section) there were also structural elements that people identified as important for trust-building: small groups, consistency of participation, being at similar levels professionally, and – for some groups –having shared personal identities and experiences in addition to being Jewish professionals:

- *I had brought up trust - for me it's because of the smaller group and also because of who's here. The same small group of us has met several times and so I feel like I know I can say something and be vulnerable and get support here. (Event Planners)*
- *Our organization sizes and seniority are the same, so I didn't feel intimidated by anyone. I felt I had something to learn from everyone and something to offer to everyone. There was no hierarchy. This was so well-built in that way. (Roles of Influence)*

- *I think that the more that the groups can be gathered or connected by things outside of their Jewish professional role, the stickier that can be. Like the parents' group, where they were also Jewish professionals, but the conversations were about being working parents and how to negotiate that. Or Gamal's group - outside of their Jewish work they have their BIPOC identity to connect them in addition to their professional identity. So that's something interesting for us to think about going forward. (Seth Linden)*

Emergent Content

Although prior to launching the cohorts the Maven Team envisioned that Jewish content would be woven throughout the experience, Rachel Brodie's tragic passing meant that she was only able to contribute to the opening session of each cohort. Building on the concept of the *Aish Tamid*, the eternal flame, Brodie's "My Fire" exercise asked participants to contemplate a series of evocative images of light and fire – a sunset, a campfire, fireworks, a rocket, a match almost touching a candle wick, smoldering ashes, a lantern nearly extinguished. They identified the images that most resonated with them and reflected in writing and through text study on the questions, "Beyond any specific title or particular role you've held, what do you feel is your calling? If you were to think about your calling as a fire burning within you, what is that fire like right now?" Based on the feedback from facilitators, this exercise was highly effective at getting people into the spirit of cohort-building and the feeling that this was a safe community for honest sharing, and quickly surfaced for many how fired up or burnt out they were currently feeling about their professional lives.

The decision not to attempt to replace Rachel's role on the Team may have contributed to the content of subsequent sessions being less scripted and more emergent. While this approach may not have been the intention from the beginning, the facilitators ultimately felt that it enhanced the cohort experiences by allowing them to be shaped primarily by the knowledge and interests of the participants. As Seth Linden noted, "*What stands out is that people just love the time to be together, and it almost doesn't matter what the content is. If you put people who respect one another, who know one another - or even have just heard of one another - in a room together, they love it, because there's so much expertise in that room.*" Heather Wolfson expanded on the idea that the professional learning and development "magic" emerges from the minds and hearts being brought together:

We had walked into this experiment with the assumption that we needed robust content, Jewish content, as part of each session. What we've discovered is that they don't need lots of content, but a loose structure and container that we hold them in. We don't need educators during these first three sessions. The magic will happen when the groups decide what kind of professional development they want. The loose arc is building community, letting them discover and explore their fire and their passion, and then supporting the community that's created.

Most of the cohorts' second sessions involved structured exercises that encouraged participants to engage with each other around work-related challenges. One facilitator invited participants to send in case studies from their workplaces in advance to be discussed in breakout groups. Another paired up participants and asked them to identify one thing they were currently wrestling with in

their organization and offer each other advice about these struggles. Another strategy was the continued use of visuals as discussion prompts - asking parents to share a photo of their family, or practitioners a photo of a cohorts they had led – and envisioning what might be depicted by similar photos in 5, 10, or 20 years.

The final sessions were mostly used for brainstorming about whether and how the group might keep going and what participants would want from these continued connections. One member of the Practitioners' group shared that the learning from fellow cohort members had indeed been the most valuable part of the experience, and the piece that they most hoped would continue:

I have so much to learn from you all - and we have so much to learn from each other – about facilitation, about how we show up in the room, and how we create space regardless of who is there. I'm eager to continue learning with you all about how we continue to create immersive and meaningful educational opportunities regardless of the external challenges that might be unique to one cohort or another.

The group's facilitator, Seth Linden, echoed this idea in his reflection about keeping the groups participant-centered rather than filling them with structured content or bringing in other contributors: *"I love that we haven't brought in outside folks. The expertise lies within the room. This approach elevates those voices and gives space for confidentiality and vulnerability. It creates stickiness when people can learn from each other."*

Creating a Supportive Container

The fact that the Cohort-Based Experiment was so participant-centered meant that the groups required especially skilled facilitation, as it's actually harder to design and guide such experiences successfully than to provide frontal teaching or highly scripted content. As Heather Wolfson explained, the CBE facilitators thought about how to create a "container" that would make participants feel welcomed and valued from the first moments:

There were certain things that we wanted to feel very polished from the start. For example, before the first meeting I collect everybody's bios and then format them into a document for everyone – not just a Word doc, but designed with Canvas. And the four of us made a video to introduce ourselves and the project so that people will see all of our faces - because we know we won't all be with all the groups – which will give people a sense of the larger project and make it feel more real. So as we're thinking about creating the container and making it feel special or prestigious, things like formatting bios into a nice document, having consistency, having a rhythm, I think are important.

Participants in the Roles of Influence and Event Planners cohorts validated these strategies, as they reflected during the final session on how elements of the facilitation had contributed to the groups' impact:

- *There's a consistency here which was helpful in deepening relationships. The fact that this was scaffolded and there was a process we were going through was helpful. (Event Planners)*
- *The way the sessions were run set a good tone for us, with the music, the way the boards were set up. The space felt different in a way that made me want to engage. It didn't feel like every*

other Zoom meeting, and it made me come into the space differently. The intentionality and tone setting from the outset helped us come in with the right mindset. (Roles of Influence)

A question the facilitators encountered during the CBE was whether to encourage (or even require) participants to connect with each other in some way between sessions. In other words, could the cohort “container” be enlarged to include times and spaces beyond the scheduled group meetings? Gamal Palmer shared in a team meeting that he planned to include these between-session connections in his cohorts and felt that *“The cohort commitment should include “mandatory” one-on-one connections in between meetings, opportunities to talk to each other, maybe learn in chavruta. I think it’s important for creating safety and stickiness.”* Other cohorts tried to extend the connections after the three meetings through voluntary “meet-ups.” While the attendance at these was fairly small, the facilitators felt that they helped “keep the momentum going” while plans for more formal next steps were still being figured out.

While the initial vision for the CBE was that after three sessions with a facilitator the cohorts would be launched and able to continue on their own, at the closing sessions a number of participants shared that they both wanted the connections they had made to continue and knew that without some kind of active facilitation and support it was unlikely to happen. As one member of the Roles of Influence cohort explained, *“At this point, we still need outside facilitation. We’re at capacity in our jobs, so to self-organize would be difficult. We’re also not connected enough to do that at this juncture. It was such an opportunity to be able to be facilitated in this way.”* An Event Planner similarly reflected, *“We want to keep meeting, and continuing to have a facilitator is tremendously helpful. We get busy and things fall off. With a facilitator, there isn’t the pressure to self-organize, and there’s still someone to hold us accountable.”* Despite the genuine desire for connection that many professionals feel, the time-crunched realities of their lives and work may simply make it too difficult for most (other than those who are exceptionally motivated) to develop or continue cohorts and networks on their own.

Overall, the CBE demonstrated the importance of momentum, trust, and reputation for cohorts to succeed and to have a positive impact on participants. The reputation of the CBE facilitators made participants trust that their investment of time and energy in the cohorts would be worthwhile, which in turn created the momentum to keep the sessions going, which then - in a virtuous cycle - created more connections and trust among participants and between participants and facilitators. However, this virtuous cycle can be disrupted by uncertainty about the future of the cohorts and whether participants’ investments and goals will ultimately be fulfilled. As Seth Linden explained, *“A challenge to this initiative, at times, has been the various delays and back and forths that we’ve encountered. Are we continuing? If so, in what capacity, and at what budget? That has ripple effects on the participants with whom we are building relationships. The facilitator needs the trust and respect of the participants, and the reputation of our words and promises matter.”*

Looking Ahead

Continuing and Deepening

As the Cohort-based Experiences Experiment leaders and funders plan for the initiative's "Beta" stage, the path forward could take two possible directions. The first is maintaining and deepening the connections forged during the first six cohorts. This could happen through online modalities, including additional facilitated Zoom sessions, participant-led virtual "meet-ups," more informal ongoing communication through WhatsApp, Facebook, or other social media platforms, etc. However, all of the groups also expressed a desire to connect in person, either locally (as the Parents' group already has), at a national conference, or in pairs or smaller groups. One member of the Event Planner's cohort suggested as a next step, *"I'd like to have the opportunity to see conferences outside the Jewish community and with other Jewish groups, to see what is happening in a variety of spaces and is best and new and innovative practices. I would love to travel with colleagues to visit programming and hear from other major programmers to learn from them."* In thinking about where the CBE could go in the future, Seth Linden envisioned *"A gathering, maybe next summer or next fall, where all of our groups could come together for a weekend. They could all meet and do their own thing for part of the time, and then we could bring them all together into one big network. That could be really powerful."* Obviously, making such in-person connections happen would require funding to be built into the initiative's budget. However, the fact that the desire for in-person connection seems to be so pervasive among cohort participants – echoing the feelings of many professionals after these years of curtailed gatherings – suggests that the return on investment for enabling them to build and deepen relationships face-to-face could be significant.

Scaling and Expanding

The other direction for advancing the CBE – one that was a core goal from the beginning – will be to grow the number of cohorts and thus expand the ability to connect and support a diverse range of Jewish professionals. The exact plans for how best to scale up are still being developed, but a promising path may be a "train the trainer" model, in which the three current cohort facilitators tap their networks to recruit other professionals who can plan and lead cohorts. This would both leverage the time and expertise of the Maven Team across vastly more cohorts than three individuals could lead on their own and allow new cohorts to benefit from the same connections and familiarity that these facilitators brought to the six pilot groups. As Heather Wolfson explained, *"These groups I'm facilitating I really resonate with – I do event planning, I was in a role of influence. So I have a certain level of empathy and understanding about where the participants are coming from. And I would say that is the case for five out of our six groups [all but Israel Dialogue professionals]."* While it may not be a requirement that facilitators have that kind of empathy and connection with cohort participants, there is a feeling among them that it meaningfully enhances the experience. Seth Linden reflected, *"If we create another parent group or local group, I think it would be good to have someone locally facilitate who knows the participants the way I knew mine. Especially in those groups, it's such a relational process. If people know the facilitator, it really helps them feel more comfortable and open up more."*

Creating a “Meta-Container” for The Cohort Project

However the CBE evolves and expands in the next stage, the logistical and structural demands of the initiative will expand as well. Therefore, just as the facilitators created containers for the professional growth of the cohort participants, there will need to be an organizational “meta-container” for the CBE that can serve the needs of all of the cohorts under its umbrella. One critical element of such an organizational container is dedicated administrative support. As Gamal Palmer explained, *“One of our key lessons learned from this phase is that we need admin support so that we as the initiative leaders can focus on imagining and problem-solving. The administrative piece is crucial, but it’s just not the best use of our skill sets. We bring the experience we have and want to be able to lean into that and step into that side of our brains.”* Another need is for better communications platforms and channels to aid in publicizing the CBE and recruiting new participants, and eventually to serve as a virtual, interactive space for cohorts to enhance their connections. Finally, there is the question of where the CBE will ultimately live organizationally, perhaps once it has moved out of the experiment phase. If a national organization ... were to be a fiscal sponsor, that could not only help ensure sustainability, but also provide an important link to communities across the country. As Seth Linden noted, *“[A national organization] might have a birds’ eye view of local communities. They could help identify local facilitators or coaches who we would train, which would be a really powerful way to provide professional development for local groups.”*

Conclusion

Whatever directions the CBE takes in its next phases, the pilot stage has shown that there is indeed a significant need and market for expanded access to cohort-based experiences in the Jewish professional and educational world. The CBE demonstrated that creating successful cohorts does not have to involve an extensive application process, months of frequent meetings, or major financial investment to provide professionals with meaningful peer connections and opportunities for growth. The CBE will continue to explore how the process of launching cohorts can be further streamlined and democratized through a “train the trainer” model for facilitators and identifying groups within communities or professional networks that already have connections to be built upon. By leveraging the expertise of the CBE Team (e.g., through training new facilitators) and hybrid modalities that combine virtual connection with occasional in-person gatherings, Jewish communal leaders and funders could make cohort-based professional development an expectation rather than an exception for Jewish professionals across the country. In addition to strengthening organizations and communities, this could help address the emotional health and well-being challenges that so many are experiencing today. As Seth Linden neatly summed up the CBE experience, *“In these times of uncertainty, it’s just great to be surrounded by and be in relationship with people who share similar experience to you.”*