

Cohort-Based Experiences Initiative: Phase II

A project of Maven Leadership Consulting
in collaboration with The Jim Joseph Foundation

Emerging Outcomes & Implementation-focused Reflections

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Background

Launched in early 2022, the Cohort-Based Experiences (CBE) Initiative – spearheaded by The Jim Joseph Foundation in collaboration with Maven Leadership Consulting – was developed based on that belief that cohort participation can lead to learning, connection, and enrichment that can ultimately contribute to employee retention within the Jewish communal sector. The Initiative was designed to: 1) unlock the power of cohort experiences; 2) understand the factors contributing to their success; and 3) explore ways to democratize and expand access to cohort experiences within the Jewish communal ecosystem.

The planning and implementation of the first phase of the Initiative (January 2022-July 2022), was documented by Meredith Woocher, PhD on behalf of Rosov Consulting. Documentation of the Aleph Cohorts demonstrated “the importance of momentum, trust, and reputation

for cohorts to succeed.” Conversely, Woocher also observed that uncertainty about the future of the cohorts disrupted the momentum of trust and relationship building that contributes to the impact of the experience.

More than 120 Jewish professionals participated in 12 cohorts during the second phase of the initiative, which took place between October 2022 and May 2023.

Based on lessons learned, the CBE team made several programmatic adjustments. A new model of recruitment was explored, which relied on crowdsourcing and self-identification. In addition, external facilitators were trained to lead the Bet Cohorts. The CBE team continued to support Aleph Cohorts’ professional development. Two Gimel Cohorts were also supported.

CBE included three cohorts types during the first two phases:

Aleph Cohorts	Bet Cohorts	Gimel Cohorts
Seven Aleph cohorts were launched in the initial phase of CBE, including: BIPOC Professionals, Event Planners, Israel Dialogue, Jewish Men of Color, Parents, Practitioners, and Roles of Influence. These cohorts, facilitated by the CBE program leaders, provided valuable insights and feedback that informed the development of the Initiative. During the second phase of CBE, Aleph Cohorts were granted professional development funding, enabling them to further advance their collective work.	There was a total of three Bet cohorts: Choosing Judaism, Founders, and Women over 45. These cohorts were curated through an application process that aimed to attract participants with diverse identities and affinities. External facilitators were trained to guide and support the Bet Cohorts. Like the Aleph Cohorts, participants in the Bet Cohorts were led through an experiential arc across three sessions.	The two Gimel Cohorts, Independent Journeymen and “The Group” (Spiritual Founders), were identified through the Bet application process. These cohorts were already established and self-facilitated, exhibiting their proactive commitment to peer learning and collaboration. CBE provided funding to support their continued growth and development.

Methods

This report presents key findings based on a mixed-method study designed to provide insights about the second phase of CBE. Findings are based on implementation-oriented data collection focused on lessons learned related to recruitment and facilitation. The array of emerging outcomes for Aleph Cohort participants was also explored. In addition, written reflections were gathered to document the Gimel Cohorts' implementation and reflections.

To facilitate the validation of findings through cross-verification, data was collected using multiple methods, including: in-depth qualitative interviews, a 12 question online survey, and document analysis. The insights included in this report are drawn from interviews with the CBE team, Cohort Bet Facilitators, and select Cohort Aleph participants (n=13). Findings are also based on a survey of all Aleph Cohort participants. The survey response rate was 64%: 36 of the 56 Aleph Cohort participants responded to the survey. Most survey respondents were actively involved in their cohorts: more than half of respondents (59%) participated most (15) or all of the time (6). Another 36% (13 respondents) participated some of the time and 2 said they rarely participated.

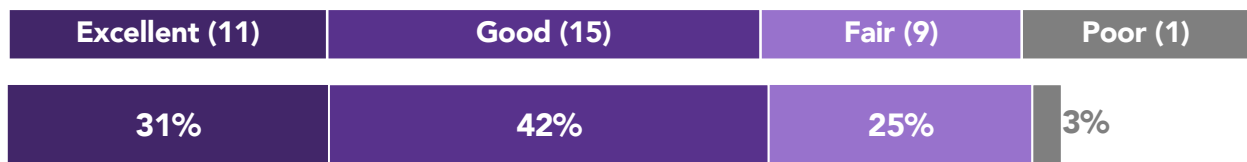
Findings

These findings reflect the aggregated perspectives of research participants, including: the CBE leadership team, external facilitators, and Aleph Cohort members. The first section includes Aleph Cohort members' perspectives about the cohort experience, along with emerging outcomes related to learning, affirmation, and support. The next section presents implementation oriented insights related to recruitment and facilitation. The final section offers concluding reflections.

Throughout the report, quotes were edited for readability and were selected to represent the broadest possible variety of voices.

Aleph Cohort Experience

Most Aleph Cohort survey respondents described their overall experience in positive terms.



The majority of Aleph Cohort survey respondents agreed they:

Felt well matched with the people in their cohort

83%

Were impressed by the high caliber of other participants

74%

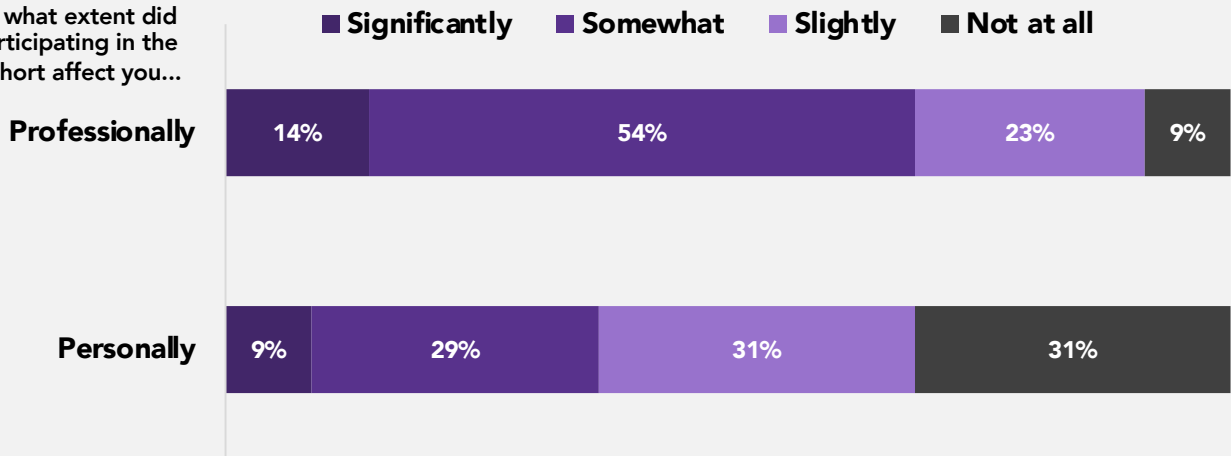
Would like to continue participating in the Cohort

71%

Emerging Outcomes

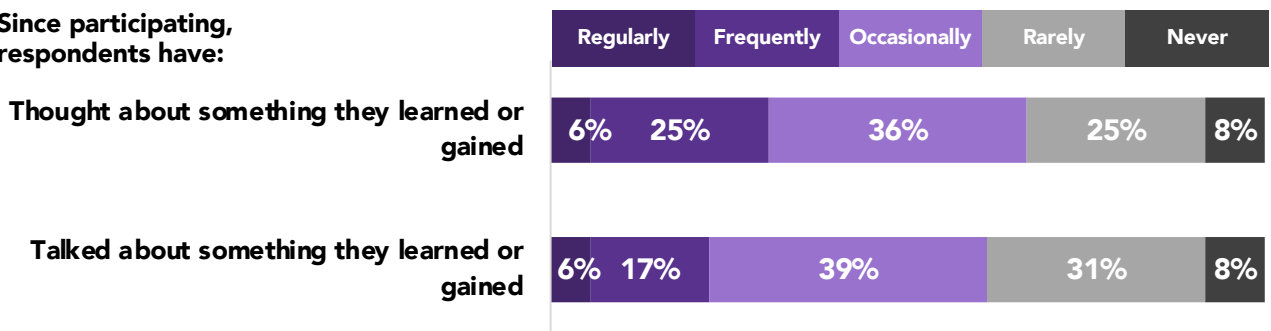
For most respondents, the affects of their Aleph Cohort experience were both professional and personal.

To what extent did participating in the Cohort affect you...



The experience has remained salient for the majority of Aleph Cohort respondents. They have continued to think and talk about something they learned or gained from their cohort experience with some frequency.

Since participating, respondents have:



Aleph Cohort Emerging Outcome: Learning



Research participants shared how participating:

- Expanded their understanding of the Jewish organizational landscape
- Helped them recognize there is a place for themselves in the Jewish communal sector beyond their current position
- Helped them to think more strategically based on hearing others articulate their decision making processes
- Informed their decision making
- Increased inter-organizational coordination
- Supported them to manage up and cultivate boundaries
- Informed their budgetary processes
- Enabled them to bring the collective expertise of the cohort back to their organizations

Each session gave me something to think about, something new I learned, a new way of looking at things. It also grew my network and strengthened relationships with networks I already had.

Professionally, the insights that I've gathered and trends we've discussed have informed my work and have provided important data to back up my proposals and ideas for how to strengthen our work.

I was able to share Jewish communal trends with my president and COO that reinforced what we were experiencing as a result of knowledge I gained in the cohort.

As a result of participating, I have been able to approach my role more effectively with the understanding of the integrator vs. visionary dynamic and I am coming away with resources from colleagues to revise our organization's annual review process.

I learned of different resources that I shared with others in my organization. I thought about things that were shared at times and that helped me to feel supported and part of a community overall.

Being able to share my experiences with those who are less further along in their journeys was very fulfilling to me personally, as I appreciate being able to help others when I'm able. Creating new connections and feeling comfortable reaching out to those connections when I have a question has helped professionally.

More than half of respondents have applied something they learned.

59%

Aleph Cohort Emerging Outcome: Affirmation



Research participants shared how participating:

- Helped them feel seen, recognized, acknowledged, and supported, when they previously felt overlooked
- Showed them that their colleagues have shared experiences, face common challenges and are asking similar questions
- Reminded them that their knowledge, experience, and expertise is useful and valued by their colleagues
- Brought a level of professionalism to their role
- Encouraged them to continue in the field
- Decreased their imposter syndrome
- Increased their confidence

Being in community with others who have similar roles and experience levels to me has made me more confident in my own skills and expertise, and has helped me to position myself more strongly within my organization and to think about what else I might do in the future.

This group made me feel more confident in my position -- I now have a place to better understand industry norms, brainstorm, network and bring back real data to my organization.

The cohort was an affirming experience in that we realized we're not the only ones dealing with certain issues in our organizations. The challenges I face are shared by others. It's relieving to hear the advice from colleagues in a non-judgmental setting to gain a better grip on how to deal with our obstacles at work.

Participating in the cohort increased respondents':



Because of their cohort experience, the majority of respondents agreed they:

Have a better understanding of the field

69%

Feel encouraged about the possibilities for continuing in this field

69%

Aleph Cohort Emerging Outcome: Support



Research participants shared how participating:

- Provided a support network outside of their organization
- Enabled them to serve as resources for one another
- Decreased their sense of isolation
- Encouraged them to reach out to one another to ask for advice and share resources
- Increased their comfort expressing vulnerability
- Helped them feel supported, seen, and heard
- Gave them a sense of belonging

I really appreciated having the support, knowledge and guidance of my colleagues.

I connected/reconnected with some members of the group whose professional and personal experiences were resonant with me, and we have stayed in touch and made plans to speak and get together outside of the formal cohort experiences.

The majority of respondents indicated they experienced several outcomes related to relationship-building.

Participating enabled respondents to:	Strongly Agree		Agree
	40%	49%	
Learn from other participants	40%	49%	89%
Expand their network	34%	51%	85%
Connect with colleagues who can relate to their experience	49%	37%	86%
Receive or offer useful advice or input	34%	46%	80%
Feel more supported as leaders/professionals	23%	54%	77%

The majority of respondents agreed they:

Would feel comfortable contacting someone in the group to ask advice

97%

Slightly more than half of respondents agreed they:

Have developed a new relationship they expect will continue

57%

Recruitment

The Aleph Cohort was identified by the CBE team in collaboration with the Jim Joseph Foundation. In most cases, CBE team members relied on their networks to identify Aleph Cohort participants. Participants in the Practitioners cohort were Jim Joseph Foundation grantees or were already previously engaged through similar efforts. Based on lessons learned from the recruitment of the Aleph Cohort, the CBE team created a more user-driven process for curating the cohorts, which included an RFP and application process.

Recruitment was a positive experience for some members of both Aleph and Bet Cohorts. Some felt honored to be invited. They commented about the prestige of being part of an Initiative being funded by the Jim Joseph Foundation and led by respected leaders in the field. Several respondents spoke about the positive experience of being selected as part of a group that is seldom recognized, acknowledged, or supported.

Issue salience – how much people cared about the group or topic – was a strong driver of voluntary participation. A research participant shared:

I wanted a group of people who understood my job. I wanted to learn what other people do, to share ideas,

and learn how they handle situations. I also wanted a support system and a place to benchmark. We want to be on par with other organizations and now I have people to go to for perspective.

People from both cohorts described relational dynamics – with the facilitators, leaders, and/or funders – that obliged them to participate. About a quarter of respondents (28%) agreed they felt external pressure to participate. Despite that, they also recognized the benefit of participation. A research participant explained: **“It felt a little foisted on me, but it was beneficial more than costing.”** Another asserted, **“I felt like I couldn’t say no, but I figured there would be people I would learn from.”**

Respondents who felt obliged to participate tended to have less clarity about the topic or goals.* A research participant shared:

We were there because we love the facilitator and not because we knew what was going on. It wasn’t a waste of time, but we never went in knowing what was going to happen.

* The sample size is not large enough to draw any statistically significant comparisons.

Recruitment

Another said:

This project was something I wasn't necessarily interested in, nor was I matched well. The group is focused on a topic that is not what interests me. Given the funder, I did not feel comfortable expressing that this feels outside of my immediate needs.

The lack of clarity about the future of the Initiative limited the CBE team's ability to communicate specific details about the commitment and timeline during recruitment. Several Aleph Cohort research participants admitted they were unsure of what they were opting into. In fact, three Aleph Cohort participants responded to the request to complete the survey about their cohort experience with confusion. They were unaware that they were part of a cohort. A respondent explained:

The invitation was confusing. I didn't understand what it was and why I was part of it. I liked the people in theory. But there were no goals. We kept being

told it was an experiment. The facilitator kept asking us what we should do. But the cohort didn't make any sense.

A research participant recommended more explicitly articulating and communicating a **"more well-defined criteria about who was recruited to the group, beyond geography and relationship to the convener, along with a clearer sense of purpose and commitment across the group."**

Another said:

I think a clearer "opt-in" process was needed. I appreciate the facilitator's openness in saying that the group could be whatever we wanted it to be, but it didn't seem like anyone in the group had much time to really think about that question and it wasn't entirely clear to me why the group was established in the first place.

Others recommended that the invitation to participate include more details about the time commitment, the intentions, and curriculum.

Facilitation

Many Aleph Cohort respondents praised the facilitation of their experience. They described how strong facilitation helped to create an atmosphere where they could express vulnerability, which was key to their professional and personal growth.

The majority of respondents agreed:

They felt comfortable asking questions.

97%

They felt comfortable sharing their perspectives.

97%

The topic discussed were relevant to them.

81%

The facilitation pushed the group from an informal collection of professionals who occasionally met to ask each other tactical questions into a true community of practice. I appreciated their skills drawing out insights and pushing us toward strategic conversation.

The facilitation was smooth and encouraged ample participation. The other participants felt like true peers. The brainstorming and takeaways felt productive and additive.

The facilitation of the cohort was excellent. They held the space very well and I appreciated learning from their example during the sessions.

Facilitation

Research participants from the Aleph Cohorts provided several suggestions to enhance the cohort experience. The relationship building aspect of the cohort was particularly well received. Most research participants expressed their interest in continuing to meet. Others expressed their desire for more opportunities for building relationship. Several opined that meeting in person would deepen the impact, noting how relationship development enhances the depth of learning.

I'm really craving a meaningful cohort experience and I don't think they need to be fully in person, but the fully virtual nature made it harder for me to feel connected and engaged.

I crave a real group that meets for the long term and goes through supporting each other in the challenges we're facing because working in small Jewish nonprofits is very difficult, resource strapped, and there are other challenges.

It was nice to be connected with other folks doing related work across the Jewish field but I didn't feel like we built any substantial depth of relationship. For me, that's one of the elements that has the most significant impact on my cohort experience -- I'm always more likely to be present and I get a lot more out of the learning.

Research participants also pointed to some necessary logistical refinement such as: faster and more efficient communication and better coordination over time zones. Some mentioned the struggle to generate discussion topics and pointed for the need for strategies to enrich and enliven their conversations. A few shared that spotty attendance made it difficult to establish rapport and to build enough trust to enable authentic sharing. Still others described the lack clear parameters about participation and program length as impediments.

The need for greater clarity about the goals of the Initiative was a frequently offered critique. A research participant asserted, **“It's up to you” doesn't feel like a gift to overburdened people.**” Another, who pointed to the lack of

clarity around the goals of the endeavor, poignantly noted that cohort formation is a process rather than an outcome. Notably, while some respondents were unclear about the program goals, more than half (61%) agreed the goals were clarified over time.

In the second phase of the Initiative, the continued uncertainty about the future of the cohorts (which is inextricably linked to the financial sustainability of the Initiative), continued to disrupt the momentum of trust and relationship building that contributes to the impact of the experience.

Facilitation

The external facilitators made positive connections with cohort members and appreciated the opportunity to support people whose work they value. They commented about the importance of having a strong sense of connection with the members of their cohort based on their shared affinities and identities. **“It was a space to support people whose pain points I’m familiar with,”** one shared. The open-ended nature of the Initiative was a relatively novel experience for the facilitators, whose work with cohorts has typically been more results driven.

They noted that the types of facilitation needed varied from session to session and across cohorts. Some cohorts focused on the practical aspects of professional development while others spent more time expressing emotional vulnerability. Some cohorts needed more flexibility to enable and empower them to shape their experience. Others needed more structure so they could feel supported and nurtured.

The resources provided by the CBE team were helpful to the external facilitators. They articulated the value of having a structure they could tailor and adapt, and used the session wireframes to varied extents. They especially appreciated the communication templates. One suggested that the facilitators’ agenda should include prompts about supporting accessibility, such as reminders to record and provide close captioning.

The external facilitators expressed their interest in continuing to work with their cohorts and to take on this role with additional cohorts. The experience facilitating Beth Cohorts reinforced their confidence in their abilities and fueled their drive to foster community building and support group process. They expressed their interest in developing a community of practice or network among the facilitators and hoped to debrief about the experience with the other facilitators. To support their success, they articulated the need for clearer delineation of roles, expectations, and articulated outcomes

Based on their experience, facilitators offered the following recommendations:

- The first session should be solely dedicated to bringing everyone’s voices into the room and providing orientation about the goals and the process. The session should focus exclusively on cultivating relationships and providing context.
- During the third session, use prompts to fuel visioning about experience. Instead of “what worked and what would have worked better?” ask: “What did the space make possible for you, and what could it make possible?”
- Offer an additional session for a facilitated conversation to enable participants to reflect on a question or topic that emerged organically for the group.

Concluding Reflections

These findings point to several characteristics and dynamics that amplify the efficacy of cohort experiences, corroborating the Center for Creative Leadership's conclusions about key elements of particularly powerful cohort-based learning experiences (Designing for Networked Leadership, 2021).

To enhance the Cohort experience overall, consider:

Recruitment

- Launching new cohorts with enough lead time for participants to plan for CBE to be part of their professional development strategy
- Recruiting participants based on user-driven interests and issue salience, as well as shared identities and affinities
- Attending to power dynamics inherent in the recruitment process
- Determining the possibilities for continuing the cohorts before recruitment, to ensure that potential cohort members have a full understanding of the opportunity

Facilitation

- Tailoring facilitation to the specific needs and dynamics of each cohort
- More clearly articulating programmatic goals and logistical expectations
- Clarifying expectations for participants', facilitators', and leaders' roles
- Providing ongoing, outside facilitation and administrative support to ensure the sustainability of the cohorts
- Meeting more consistently to amplify the themes that emerge across sessions and make the learning arc more evident
- Meeting in-person at any point in the experience to deepen the impact