

Cohort-based Experiences Initiative: Phase III

A project of Gather Consulting & Conscious Builders
in collaboration with The Jim Joseph Foundation

Outcomes & Implementation Evaluation

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Background

Launched in early 2022, the Cohort-Based Experiences Initiative (CBE) – spearheaded by The Jim Joseph Foundation – was developed based on the 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) explore ways to democratize and expand access to cohort experiences within the Jewish communal ecosystem; 2) unlock the power of cohort experiences; and 3) understand the factors contributing to their success. CBE ultimately aims to develop and grow new models and modalities for personal and professional growth in the context of micro-communities.

The planning and implementation of the first phase of the Initiative (January 2022-July 2023), 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.

During the second phase of the initiative (October 2022 - May 2023), more than 120 Jewish professionals participated in 12 cohorts. The subsequent report “Emerging Outcomes and Implementation-focused Reflections” detailed Aleph Cohort members’ perspectives about their experience, along with emerging outcomes related to learning, affirmation, and support. Implementation-oriented insights related to recruitment and facilitation were also included.

The goal of this third phase (June 2023 - June 2024), was to deepen the impact for existing cohorts and hone the model of facilitation. During Phase III, ten of the twelve cohorts from the second phase were led by eight facilitators. (See Appendix A for a complete list of Phase III participants and facilitators by cohort). The cohorts have continued to meet online and have also gathered in-person for either daylong or multi-day retreats..

Background

The third phase of CBE included three cohort types:

Aleph Cohorts

The six Aleph cohorts that were launched in the initial phase of CBE have continued, including: BIPOC Professionals, Event Planners, Jewish Men of Color, Parents, Practitioners, and Roles of Influence. These cohorts, facilitated by the three 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.

Bet Cohorts

Two Bet cohorts – added during Phase II – continued during Phase III: 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.

Gimel Cohorts

The two Gimel Cohorts, Independent Journeymen and “The Group” (Spiritual Founders) have continued. These cohorts were identified through the Bet application process during Phase II. These cohorts were already established and self-facilitated. 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 third phase of CBE. Findings are based on implementation-oriented and outcomes focused data that was collected using multiple methods, including: in-depth qualitative interviews with facilitators (n=8), a 12-question online survey that was administered to all cohort participants, and document analysis.

The survey response rate was 39%: 50 of 129 cohort participants anonymously responded to the survey.

Throughout the report, quotes were edited for readability and were selected to represent the broadest possible variety of voices. No research participant was quoted more than once.

Key Findings

The current report illustrates how the immediate outcomes of participation have continued to evolve over time. In previous evaluative finding, research participants described the benefits of their cohort experience in terms of support, affirmation, and learning. The latest findings illustrate how participants have leveraged those initial benefits.

Over time, support from cohort members has led to **deepened relationships**, the affirmation they experienced has led to their **increased confidence** their learning enabled them to **gain skills, insights, and perspective:**

- ▶ The Cohort experience positively affected most research participants both personally and interpersonally.
- ▶ The most significant aspect of the cohort experience is the relationships that are fostered.
- ▶ Most survey respondent have increased their confidence as professionals.
- ▶ Participation in their cohorts led most survey respondents to learn from others, reflect, and gain insights which they have incorporated into to their work.
- ▶ Cohorts gave research participants perspective about the Jewish communal sector.

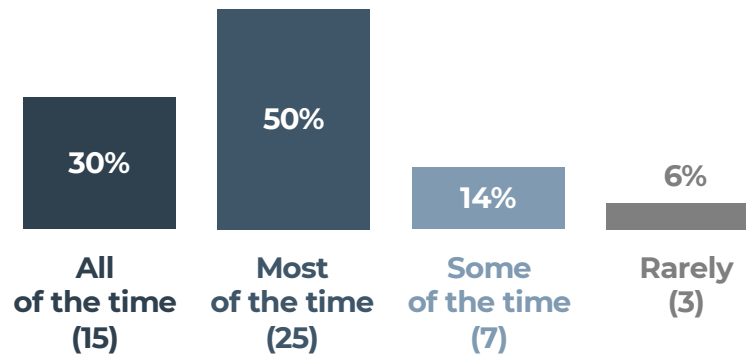
This report also presents information about facilitators' experiences and perspectives, including their suggestions for amplifying outcomes through program enhancements.

Cohort Experiences

Attendance was consistent among most respondents:

80% said they participated all or most of the time.

“How often do/did you typically attend your Cohort’s meetings?”



In eight of the ten cohorts, the number of participants changed: almost every cohort added at least one new person and at least one person opted out. In the two other cohorts, there were no participation changes (e.g. no one joined or stopped participating).

Some groups added participants to strategically achieve greater diversity. Others aimed to recruit more people with their shared identities. One cohort consistently added new participants on an ongoing basis. (They average two new inquiries a month because participants have generated positive word-of-mouth).

While most survey respondents' attendance was consistent, some facilitators mentioned the challenge of low turnout. Facilitators observed that participants opt out for various reasons: participation was logistically too complicated, they did not connect with others in cohort, or they did not find enough value in the gathering to prioritize participation. In one case, a participant left the field, so the content was no longer relevant. One facilitator noted that while participants are committed to the cohort, they choose not to attend sessions when they find the topic less relevant.

Cohort Experiences

The variety of cohorts' goals and approaches illustrates how programming is shaped based on participants' expressed needs and interests.

Facilitators collectively described the wide variety of modalities their cohorts have used during in-person and online gatherings:

Accountability partners	Breakout groups	Chevruta	Creative process	Guest speakers	Informal socializing
Peer-based coaching	Resources and practice sharing	Self-reflection	Spa treatments	Visualization	Discussion based on Jewish texts, books and articles

Cohorts have developed diverse cultures. Some are largely focused on “talking shop”. Their largely collegial relationships are focused on professional development. Others are building a micro-community that supports participants' professional and personal flourishing through the inclusion of emotional vulnerability, spirituality, and Jewish wisdom.

Regardless of the cohorts' cultures or approaches, every facilitator stressed the importance of in-person retreats for the sake of supporting group cohesion. For some cohorts, the ongoing process of

supporting their evolving relationships is the primary outcome. Other cohorts have begun to develop a sense of shared mission and are hoping to identify a project that allows them to collaborate as a group.

Together, facilitators and participants have created environments where almost every respondent (91%) strongly agreed (67%) or agreed (24%) they “feel comfortable expressing emotions in their cohort.” More than half (68%) indicated their cohort experience provided a place to “vent their frustrations.”

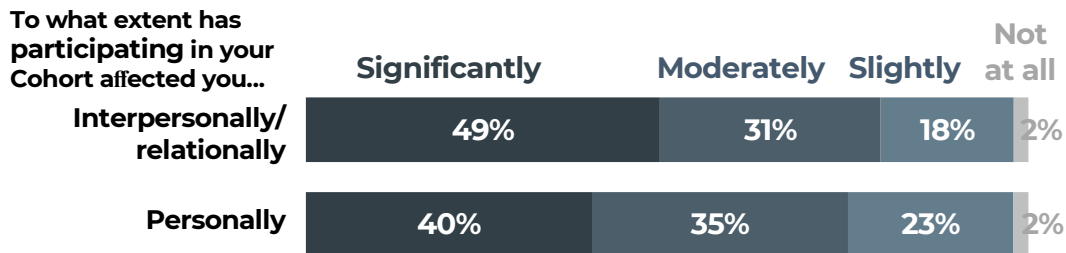
We're giving folks a container and space to connect and learn so they can be better versions of themselves at home and work. – a facilitator

My cohort members aren't looking for intimacy or deep sharing. They are isolated and want feedback. They feel starved for that resource. They want to feel invested in each other's work. – a facilitator

Outcomes

Outcomes for Participants

The Cohort experience positively affected most research participants both personally and interpersonally. Survey respondents described how the experience is enabling them to improve and enrich their professional lives.



The value of this cohort is beyond what I think even the backers of it realized. To not feel isolated is essential, but to be recognized as a whole human, a person with feelings and needs, a family, personal interests or a diagnosis or developments, and celebrated for all of those things. That more than acknowledges us: it motivates and inspires us to grow in ways that will stretch us to create better work environments for future generations.

It is invaluable to know that I have the support and company of a group of leaders in similar positions at any point of the day. Our WhatsApp group pings multiple times a day (and night) with requests for resources, recommendations, vetting other colleagues or programs, advice on navigating new leadership waters, or just seeking solidarity and empathy on a particularly hard day. This group reminds each other of grant deadlines (even while we are technically competing against each other). We advocate for each other and amplify each other's work. We coach each other through anything we might have experience with. ...We gripe about challenging board members, circulate job descriptions, and recommend restaurants. It's like having a group of peers who are completely with you in the work without an ounce of competitiveness. We are each other's biggest champions - - rooting for each one of us to succeed in seeing our missions come to fruition.

Each one of us is navigating personal issues that are affecting our capacity to feel whole and seen at work, and the support that we were able to provide for each other, both emotionally and intellectually, pushed each one of us to be able to grow. That growth shows up in our awareness that we are supported, and that we have the capacity to challenge ourselves with partners who can help to keep us accountable and who can experiment with us. None of us has that in our individual workplaces and it is deeply valuable.

Outcomes

Deepened Relationships

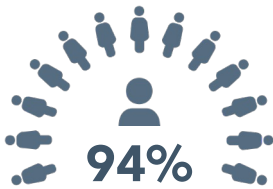
The most significant aspect of the cohort experience is the relationships that are fostered. According to survey respondents, the positive effects of those connections are both professional and personal.



100%

said the cohort experience:
enabled them to connect with colleagues who can relate to their experience.

When I have a question in my new leadership role, I do not have to figure everything out myself or task my advisory committee. This makes me more successful and means I lean very strategically on the advisory committee which makes for continued success and longevity instead of burn-out for all.



94%

said the cohort experience:
expanded their network of support

I have connected with Jewish professionals I would not ordinarily have an opportunity to get to know. These relationships grow exponentially over the course of time and create open doors to mine solutions and strategies as well as continue networking across the Jewish professional sector.



90%

said the cohort experience:
enabled them to feel less isolated

Having a sounding board of other people in the same position as me has been invaluable. They help with problem solving, resource suggestions and sometimes even just to vent to others who understand and are in the same situations as me. Having an outlet like that makes everything so much better.

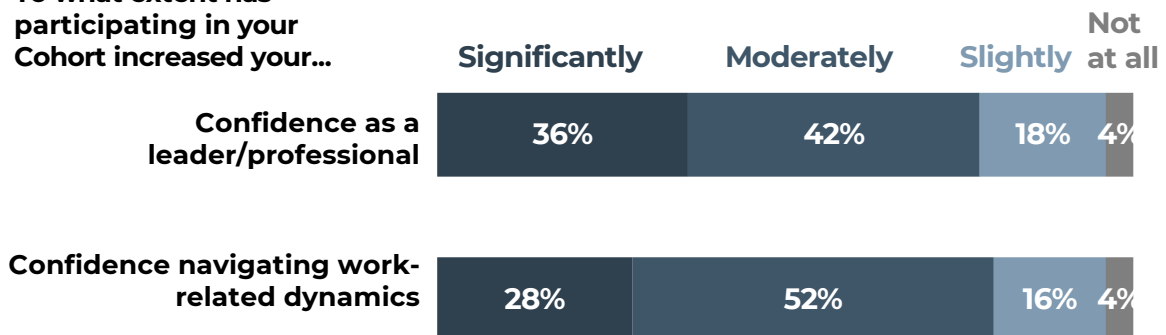
- **80%** of respondents agreed they developed a relationships with someone in their cohort that has deepened over time.
- **74%** agreed their sense of connection as a Cohort has deepened over time.
- **54%** have collaborated with someone in their cohort
- **48%** have developed or deepened organizational partnerships.

Outcomes

Increased Confidence

Most survey respondents have increased their confidence as professionals.

To what extent has participating in your Cohort increased your...



The cohort has not only provided me with an outlet and a group of peers to turn to, it made me realize that I'm good at my job and am a leader in the field, when I'm able to give advice to others.

Through the cohort, I have gained a trusted group of like-minded colleagues who I feel comfortable approaching with challenges or to brainstorm. Personally, being part of the group has boosted my confidence in my own knowledge and approach as I provide support to other cohort members.

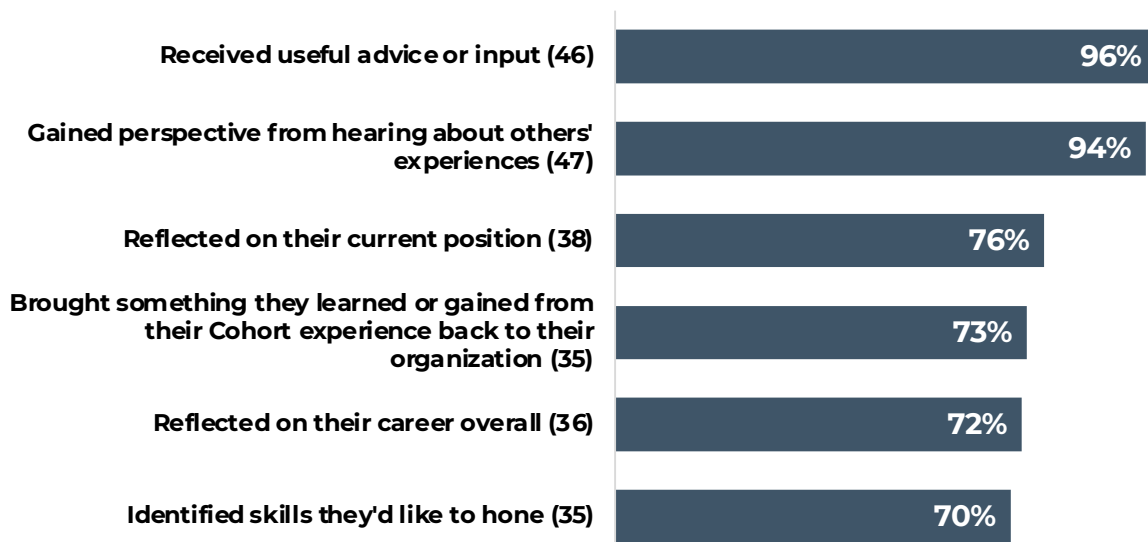
I've developed a greater sense of confidence thanks to the supportive network of peers and have found new "accountabilibuddies" to tackle tasks that normally I'd hesitate to pursue.

Outcomes

Gained skills and insights

Participation in their cohorts led most survey respondents to learn from others, reflect, and gain insights which they have incorporated into to their work.

Because of their Cohort experience, most respondents:



I have and continue to use a number of the tools used by the different facilitators in my own work and even personal life.

My experience in the cohort has helped me to get clearer about the work that I want to do, and has given me access to new collaborators, sources of inspiration, and support along the way.

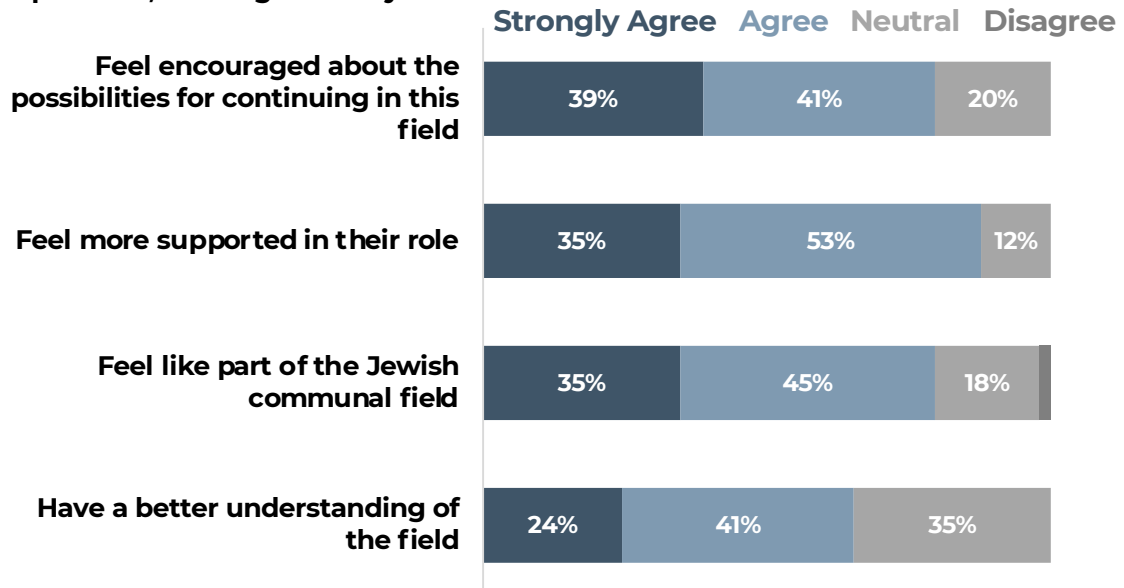
I've appreciated the safe and open space to talk about issues ranging from work to home to work/life balance and the opportunity to disconnect from the hustle of normal life to focus on myself and my professional development needs.

Outcomes

Gained Perspective

Cohorts gave research participants perspective about the Jewish communal sector. Most agreed they feel more supported in their role and more connected to the Jewish communal sector.

Because of their Cohort experience, most agreed they:



The conversations in our group led me to feel more compelled to work full time again in the formal Jewish community. It also helped me to focus in on the importance of work/life balance.

My dedication and hope of continuing to work as a Jewish professional stayed strong thanks to this group. (I have experienced things in my job that would make me want to discontinue my work in Jewish organizations).

Facilitator's Roles

As they did in the Phase II evaluation, facilitators again mentioned ways they have benefited from their role in CBE:

I've learned new ways to bring people together. My communication style has shifted: it used to be very informational and logistical. Now it's more about emotional flourishing and intelligence. I've had to learn that it takes a different touch to really connect with people; that I need to be intentional about their humanity. Also, I'm now more at ease with not being in control. I can hand off things. I used to ask people to facilitate but found out that people want to think with me. They want creative collaboration and debriefing.

This experience has helped me step up my leadership to think about what leading means right now. It's not about being a frontal person who everybody looks toward. People aren't looking for my opinion. They want me to create a container. It's helped me think about things more creatively. This has influenced how I lead in other contexts.

I love the kind of facilitation required for this role. It's doing the work of group dynamics and logistics, but there's also a degree of informality to let community building happen that deeply honors the experience of the group members.

Facilitator's Roles

The variety of the cohorts' origin stories, goals, cultures, and practices has required facilitators to support their cohorts using different approaches. Facilitator also bring very different backgrounds, types of training, and extents of experience working with cohorts to their roles. Some facilitators have worked to create a container for participants and others engage as participant-facilitators. Still others see their role as discussion leaders who provide of high-quality content. Some cohorts use a shared leadership model, where participants take turns facilitating. A couple of facilitators mentioned relying heavily on one or more participants in the group as co-leaders who help design and direct the experience.

Facilitators' roles also vary in concert with how and when they connected with CBE. Through each phase, CBE has experimented with different models of cohort curation and facilitation. Four cohorts are currently facilitated by CBE founders who have shared identities with the groups they curated. Another four are led by facilitators were hired for those roles (and who have shared identities with cohort members). Two other are led by participant-facilitators – were already underway when they

connected with CBE.

Every facilitator mentioned how logistical coordination was a significant component of their role. The design, coordination, and implementation of in-person retreats was a particularly time-consuming aspect of their role. The lack of structural support from CBE necessitated that each facilitator create their own organizational process, which included: arranging retreat logistics, creating forms, developing and proposing the budget, issuing reimbursements, and filing tax documents for sub-contractors.

Every facilitator emphasized the primacy of work supporting relationship building. One facilitator mentioned how they have focused heavily on fostering connections by having check-in phone calls with cohort members, tracking attendance and following up when people are not participating. In addition, they have a weekly, informal zoom space to foster connections outside of structured meetings. Others asserted that devoting more time to various aspects of their roles would enable them to serve their groups more effectively.

Facilitator's Roles

One facilitator shared:

It would be helpful to have 1:1 meetings with everyone once or twice a year. That would allow me to make matches based on my increased understanding about what they need and there would be more accountability to me, which would improve attendance.

While facilitators aim to support their cohorts as effectively as possible, some described how the current payment structure disincentivizes them from spending more time on this work. Most facilitators do not feel adequately compensated for the work required to succeed in their roles.

Several facilitators shared how they remain unclear about the broader goals of the Initiative. One articulated the sentiments of others, saying:

What's the connecting thread across the Initiative? What's the theory of change? I didn't understand it going in and still don't understand what success would look like.

Facilitators collectively articulated how the lack of clarity about the future of CBE is undermining the goals of the Initiative. One asserted:

This is pitched as an ongoing community, so it's not fair to ask cohort participants to show up, build relationships and be vulnerable only to be told this might not continue. I should be planning the future, but we don't know if it's still happening. If they want facilitators to be thoughtful and intentional in their planning, they shouldn't be operating this way.

Another said: "It doesn't help build trust when every 6 months we're back in the conversation about whether this will continue." Still another noted that rather than focusing on what would best serve them, some cohort participants are preoccupied with the idea that they must produce outcomes to prove they are worthy of the continue investment.

Facilitator's Suggestions

Facilitators offered numerous suggestions and made several requests about programmatic enhancements that would enable them to enhance the impact of their work:

- Centralized administrative support for cohort coordination and logistics
- Better understanding of CBE's goals and processes around hiring, vetting, and evaluating facilitators
- A more finely tuned payment model that right-sizes compensation to be more accurately commensurate with the amount work
- Recommended processes for vetting and onboarding new cohort participants
- Documents to support implementation, including:
 - A program description to enable facilitators to share information about CBE more efficiently and uniformly
 - A job description that more completely describes tasks and expectations for facilitators
- Theory of Change to clarify the how and why of CBE
- Sample meeting agendas/templates
- Retreat-related resources such as:
 - Forms for gathering participants' information (including dietary and accessibility needs); liability waivers; and a budget template with predefined spending parameters
 - Pre-vetted retreat sites and caterers
 - Streamlined processes for expense reimbursement and administrative support to pay retreat subcontractors/vendors

Facilitators also offered the following suggestions regarding possible future cohorts:

- Cancer survivors and other's whose health challenges affect their roles as Jewish professionals.
- Black and Latinos folks who want support navigating Jewish spaces
- Professionals who are struggling because their politics about Israel differ from those espoused by organizational leaders.
- Women who are navigating the challenges of leading fast-growing organizations
- Israeli women
- Former CEOs
- Jewish parenting groups expanded to other cities

Moving Forward

This evaluation has illustrated how the Initiative has begun to move toward achieving its goals. CBE has made cohort participation accessible to a broader range of Jewish communal professionals. The relationships fostered have continued to develop over time, and the cohort experience is positively affecting participants' personal and professional lives.

In each phase of the initiative, CBE leaders have used evaluation to identify factors that contribute to the efficacy of the cohort experience. With each phase, they have worked to enhance the Initiative based on lessons learned. In doing so, CBE is successfully developing and growing new models and modalities for personal and professional growth through cohort participation.

As they plan for the next phase of the Initiative, leaders have already begun to

incorporate some of the facilitators' suggestions. For example, the proposed budget includes a line item for administrative and logistics support. CBE leaders recognized that centralizing program coordination will enhance the cohort experience by enabling facilitators to focus on their roles. Project leads are also developing resources to support cohort implementation. This includes the articulation of suggested processes for vetting and onboarding new cohort participants and documents to support retreat planning.

Incorporating these improvements, (along with other programmatic changes based on lessons learned from the current evaluation), promises to continue to move the Initiative toward fulfilling its goals in the next phase.

Appendix A: Participants and Facilitators by Cohort

Aleph Cohorts

BIPOC – Facilitated by Gamal Palmer

Diertra Rieser	Transform For Equality
Rabbi Dr. Isaiah Rothstein	JFNA
Kai Yael Gardner Mishlove	Jewish Social Services of Madison
Kristen Kendrick	AJWS
Whitney Weathers	Upstart
Yolanda Savage-Narva	URJ

Event Planners - Facilitated by Heather Wolfson

Beth Rose	HGF
Briana Holtzman	Foundation for Jewish Camp
Daniel Infeld	Prizmah
Dierdre Munley	JPro
Hillary Lakin	BBYO
Hindy Komin	JCCA
Jamie Light	HGF
Lindsay Matloff	JFNA
Mara Silvers	JFN
Rachel Hochheiser Schwartz	Hillel International
Steven Davis	JFNA

Jewish Men of Color (JMOC) - Facilitated by Gamal Palmer

Aryeh-Or Katz	Creative
Eric Greene	Jewish Social Justice Roundtable
Graie Haggins	Bend the ARc
Nate Looney	JFNA
Robin Washington	The Forward
Terry Wunder	Temple Solel
Yehudah Webster	Kirva

Parents - Facilitated by Catherine Bell

Amy Lakin	Jewish Long Beach
Candice Rosene	JFedLA - LA jBabies & PJ Library
ChayaLeah Sufrin	Beach Hillel
Jami Bachrad	Jami Bachrad Consulting
Johannah Noon	Consultant
Leeron Dvir	Divorce Coach
Lena Shupper	Culinary Judaics Academy
Melissa Garai	HUC-JIR
Noam Raucher	Divorce Coach
Rivka Nehorai	The Neighborhood School
Sara Hahn	Jewish Community Foundation of Los Angeles
Stephanie Bressler	PJ Library
Yechiel Hoffman	Yechiel Hoffman Consulting

Appendix A: Cohort Participants

Aleph Cohorts

Practitioners- Facilitated by Catherine Bell

Adam Lavitt	Jewish Studio Project
Andrew Belinfante	JDC Entwine
Colleen Cruikshank	Schusterman Family Philanthropies
Gavi Elkind	Prizmah
Jeffrey Fingerman	Leading Edge
Jacob Watson	Upstart
Jeni Friedman	Memorial Foundation for Jewish Culture
Jess Balboni	JFNA
Jess Rebeck	Wexner
Julie Finkelstein	Foundation for Jewish Camp
Laynie Soloman	SVARA
Rachel Hodes	Slingshot Fund
Rachel Siegel	Illuminate
Ruthie Warshenbrot	The Wexner Foundation
Sarra Alpert	Avodah
Shamu Sadeh	Hazon-Pearlstone
Shana Bloom	Repair the World
Shane Hankins	Reboot
Stacey Aviva Flint	JFNA

Roles of Influence - Facilitated by Heather Wolfson

Adina Schwartz	JFNA
Ariel Moritz	CRI
Jackie Zais	Gather DC
Jessica Kort	Leichtag
Kate O'Bannon	Repair the World
Laura Herman	JPro
Mikki Pugh	Jewish Women's Archive
Rachel Eisen	Mayyim Hayyim
Roberta Ritvo	Jewish Social Justice Roundtable
Shira Zemel	NCJW

Appendix A: Cohort Participants

Bet Cohorts

Women 45+ - Facilitated by Nancy Kaufman

Aliza Mazor	UpStart
Andrea Hendler	Na'aleh
Daphne Lazar-Price	JOFA
Rabbi Esther Lederman	Union for Reform Judaism
Jamie Allen Black	Consultant
Kai Mishlove Gardner	JSS Madison
Laura Hyman	Genesis Project (Brandeis)
Miryam Kabokov	Eshel
Dr. Sara Shapiro-Plevan	Gender in Equity in Hiring
Shaina Wasserman	SRE Network
Sheryl Parker	Marlene Myerson JCC
Sooji Min-Miranda	ALEPH: Alliance for Jewish Renewal
Susan Wachsstock	Jewish Education Project

Women Founders - Facilitated by Jaime Rappaport

Arielle Mortkowitz	SVIVAH
Dr. Aimee Friedman Baron	I Was Supposed To Have A Baby
Dana Kesel	Sketchpad
Eleyna Fugman	TischPDX
Rabbi Jen Gubitz	Modern JewISH Couples
Rabbi Melanie Levav	Shomer Collective
Dr. Sara Shapiro-Plevan	Gender Equity in Hiring Project
Sarri Singer	Strength to Strength
Tehillah Eisenstadt Feil	Wonder and Repair
Dr. Yardaena Osband	Orthodox Leadership Project

Appendix A: Cohort Participants

Gimel Cohorts

Independent Journeys - Facilitated by Yechiel Hoffman	
Angel Alvarez Mapp	Consultant
Carrie Bornstein	Consultant
Cheryl Pruce	Consultant
Cheryl Weiner	Consultant
Elad Nehorai	Justice Marketeing
Eliana Light	Consultant
Elie Hoffman	Consultant
Emily Aronoff	Dr Emily Celebrates
Jane Tuv	Consultant
Jeremy Markiz	Next Level Rabbinics
Jill Hulnick	Consultant
Jocelyn Orloff	Consultant
Johannah Noon	Consultant
Jonathan Smidt Chapman	Consultant
Jordan Namerow	Consultant
Lisa Colton	See3 Communications
Maya Paley	Maya Paley Consutling
Meredith Lewis	Consultant
Miriam Brosseau	Tiny Windows Consulting
Rachel Zieleniec	Consultant
Robyn Awend	Consultant
Sarah Chandler	Consultant
Sarah Rubinson Levy	Sarah Rubinson Consulting and Contracting
Tal Gale	Consultant
Tikvah Weiner	Consultant
Tova Leibovic-Douglas	Rabbi Tova

The Group (Spiritual Leaders/Founders) - Facilitated by Sara Luria	
Rabbi Adina Allen	Jewish Studio Project
Alicia Jo Rabins	Independent/Girls in Trouble
Benay Lappe	Svara
Dan Libenson	Lippman Kanfer Foundation for Living Torah
Keshira HaLev Fife	Independent/Beloved
Miriam Terlinchamp	Judaism Unbound
Sara Luria	Beloved
Tova Birnbaum	JCC Palo Alto