

## Case Study: In-Person Cohort (Erie, PA - 2023)

# The Formation Project

### At A Glance

- In-person cohort in Erie, Pennsylvania
- 11 participants total, in two small groups.
- Peer-facilitation, rotating week-to-week or biweekly depending on small group.
- Ran for one year from January - December 2023.
- Facilitated with support from the Cathedral of Saint Paul, an Episcopal congregation with a broader vision for spiritual community.
- The first ever in-person Formation Year cohort!



## Why We Made It

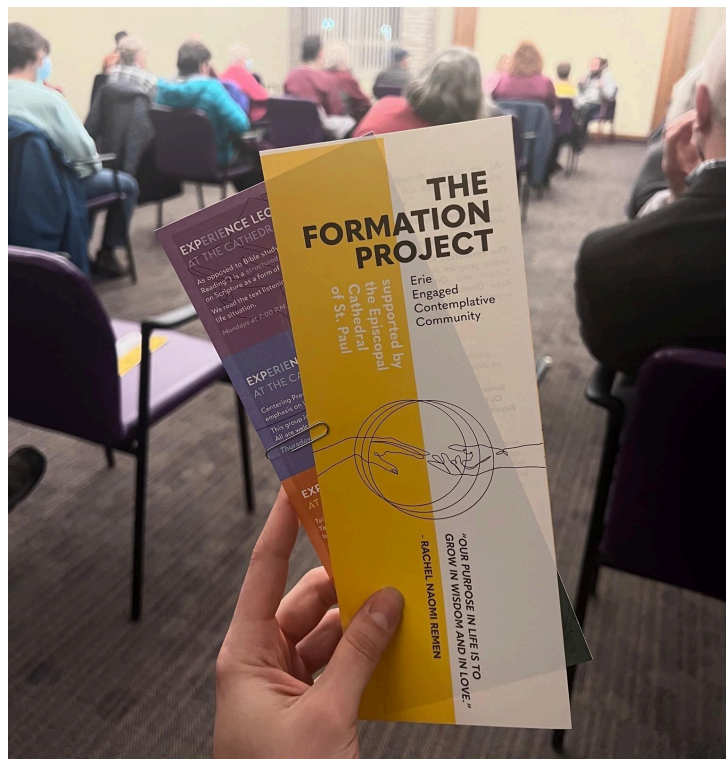
There were two concurrent streams that brought together the possibility of this first-ever in-person Formation Year cohort. The first was the Formation Project (FP) Stewardship Team, which had named and prioritized adaptation and iteration into its future. After two successful online cohorts, we wanted to see how this could continue to evolve in various contexts. Additionally, one of the biggest pieces of feedback we heard from participants in the first two virtual cohorts was a significant interest in trying it as an in-person experience.

The second was local serendipity, where a group of spiritual leaders and conveners had been discussing what “third spaces” for spiritual community might be possible in Erie, PA.

Part of both conversations, as a steward of Formation Project and as a local convener of spiritual dialogue, Katie Gordon brought the container of FP into Erie through a local partnership with Rev. Melinda Hall, the Dean of the Episcopal Cathedral. Together, Katie and Melinda wanted to offer a container for spiritual deepening that would meet the desires of those within religious communities as well as those outside of them. With the partnership of the Cathedral and their in-kind resources offered—from branding and marketing to hosting gatherings—the project got off the ground quickly.

The local iteration was announced at an event held at the Cathedral and facilitated by Katie, a conversation with Adam Bucko of the Center for Spiritual Imagination, on “Contemplative Renewal and Spiritual Community in the 21st Century.” This event, and the launch of the Formation Project, was wrapped up in a new effort called the “Erie Engaged Contemplative Community.”

Through interest built at events, as well as through additional networking and outreach from Katie and Melinda over the previous year, the Formation Year officially began in January 2023.



## What It Was

In January 2023, we launched the in-person cohort--“FP-Erie Journey”--with 15 people interested. We created an online form for people to express an interest and commitment to these first three months of discernment, and the form was hosted on [a landing page website via the Cathedral of St. Paul](#) (along with an FAQ). As an interspiritual or interfaith project partnered with an Episcopal church, we sought to clarify language at every step of the way to indicate this was not a project of Christian formation, but broader spiritual formation. This showed up in the language on the website, which was adapted from the Formation Project’s website, as well as in the initial gatherings to clarify who and what this was for.

The January meeting introduced participants to the concept of the Formation Project, as we found that it needed explanation and illumination far beyond a website alone. After that, one person dropped out with the clarity that this was not what he expected. From there, a solid group of 14 people were in discernment for the following three months.

January’s meeting also began the journey by introducing participants to each other, and to the first “bridge” of discernment. From there, each monthly meeting--in February, March, and April--took the participants through the three bridges of discernment, and into committing to formation. The season of discernment gatherings flowed as such:

### **January: Beginning the journey**

- **By Friday, January 27:** Commit to the 3-month “discernment” period by responding to the online commitment form
- **Sunday, January 29, 5:30-7pm:** Welcome and beginning together

### **February: Bridge 1 - Gather Your People**

- **Thursday, February 23, 5:30-7pm:** Share reflections on Bridge 1

### **March: Bridge 2 - Coming Home To Yourself**

- **Wednesday, March 22, 5:30-7pm:** Share reflections on Bridge 2

### **April: Bridge 3 - Committing to Formation**

- **Wednesday, April 19, 5:30-7pm:** Share reflections on Bridge 3
- **By Wednesday, April 26:** Commit to the following 9-month “Formation” period by sharing your “Letter On Yes”

After the season of discernment, and through our monthly gatherings, a solid group rapport had been built and we found that many wanted to continue developing these relationships. Between the desire to continue building relationships, and the core impulse to tend to our own spiritual lives, twelve people committed to the Formation period. Two of the people who did not commit to the Formation period decided not to because they were either too busy, or due to a conflict of interest with their congregants being in the program as well.



In small group design, two changes emerged, based on local realities and relationships:

- 1) Without facilitators, the small groups became self-facilitated where members of each group were basically member-facilitators.
- 2) With the limited capacity yet deep desire of many participants, the small groups were initially scheduled as bi-weekly instead of weekly.

In late April and early May, coordinators Katie and Melinda polled participants for their availability to construct small groups. Taking into account varied preferences among the twelve participants, they initially proposed three groups of four members, but with one group's lack of initiative, it became two groups of six members.

The two small groups began meeting in May, with a clear outline of meetings offered so that each group could functionally run on its own and self-facilitate themselves. Katie created [this spreadsheet to support the process](#).

Twelve people began the Formation Period, and one person dropped within the first couple months due to a conflict of availability. At the beginning of each cycle of Formation (Inner, Outer, Beyond), a large group gathering was hosted to bring the two small groups together. These often had playful themes (i.e., “dress like a pirate” for a summer potluck—see below), and were opportunities for us to continue to develop friendships while also sharing across our groups how it was going. Kids were welcomed at these potlucks. Hosting rotated between the two small groups, and the location varied across the city in public parks and in people's homes.

Eleven people, in two groups, finished the Formation Year in December 2023 with a beautiful closing ritual and release into our continued individual formation journeys.



## Who Joined

The people who joined represented various faith or spiritual affiliations. Several already had a relationship to a faith community (in these cases, a church or a monastic community), but sought something more out of their spiritual lives, particularly something more co-creative in spirit, and so joined the cohort. A few identified as spiritual but not religious, and had varying types of relationship to organized religion—from disinterest to anger. What they all had in common was a desire to focus more intentionally on their spiritual or communal lives, and to heal or grow their relationship with the sacred. One strong thread of connection between participants was a focus on nature or earth-based spiritualities, as well as trauma-informed experiences like AA.

The ages of participants ranged from their 20s to their 70s, with most falling in the range of late-20s to early-40s. It was mostly white, mostly Christian or Christian-raised, and a generally well-educated group of participants. Several identified as LGBTQIA+ and the majority of participants were women.

Through the large group meetings, in the discernment period and then throughout the formation period, the friendships in the larger group grew all year long. Belonging to a group of people sharing a journey together seemed to be a powerful glue to sustain the participants.



## The Structure

The structure of the Formation Year was largely the same as the previous online cohorts. We began with three months of discernment, followed by nine months of formation, culminating in a commitment (at participants' discretion) to continue living into this new way of being once the pilot ended.

There were some differences from the previous cohorts, though, especially in the small groups, as well as in the added dynamics of being an in-person cohort in which participants are living overlapping and interconnected social lives.

Below are a few learnings to especially uplift, including pros, cons, and recommendations, based on peer facilitation, weekly meetings, and other in-person elements or challenges.

### **I. Peer Facilitation**

Peer facilitation was a wonderful way of centering and practicing one particular member's practices. The flavor of facilitation that each person brought helped other members get to know that person even better, and it also emboldened each participant with agency or authority over teaching their practices and holding space for others. However, peer facilitation also placed a burden onto participants to not only prepare for their own work, but also prepare for the group space as well. Many were new to facilitation, and some found it to be a stressful add-on to the experience. Without the consistency of one facilitator's strength of clarity and purpose, the arc of going from meeting to meeting could feel disjointed.

In one group, right off the bat, they established the order through which facilitation would rotate regularly. This kept it clear and easy-to-follow. The other group decided on facilitation meeting-to-meeting, and often found the participants reluctant to volunteer.

#### ***Recommendation: find a skilled, core facilitator.***

My recommendation is to devote the time and resources to finding a skilled, core facilitator for each group. This allows participants to fully engage with their own work for the year, and will keep the groups moving forward steadily and in a container of reliability and trust. However, if a cohort does decide to do peer facilitation, I suggest agreeing at the beginning to how that will work and what will be expected of each facilitator, perhaps with some training involved, so then the year can proceed as smoothly as possible. In either scenario, I recommend the opening and closing practices coming from a member of the group so that members can get to know each other through the embodiment of shared—and varied—practice together.



## II. Weekly over Bi-Weekly Meetings

Bi-weekly meetings, as in meetings that occurred every other week, were scheduled so that even those who had busy schedules could join a group. Committing to four hours of meeting a month felt more possible than eight hours of meeting a month. This enabled more people to say “yes” to formation. However, within a couple months of bi-weekly meetings, one group decided to switch to weekly meetings, giving us an interesting control group and case study within the experiment.

The group that met weekly reported that they were able to build up a deeper commitment and momentum in their own individual work, and in their group experience. The consistency of weekly meetings meant that it was less of a big deal if you missed one meeting, and the reliability of week-to-week became something that members greatly benefited from. Across the board, participants in the weekly group said the weekly rhythm was essential.

Meanwhile, the bi-weekly group struggled to build up energy, and while each meeting on its own was often deep and probing, the energy fizzled by the next time they met. By the end of the year, and hearing from the other group, the bi-weekly group by-and-large craved the accountability and accompaniment offered through weekly meetings.

### ***Recommendation: Keep the weekly rhythm.***

Accommodating to the “busy” schedules and compromising on the weekly meetings de-centered what is supposed to be centered in this experience—the devotion to one’s becoming. While requiring weekly meetings from the on-set may have meant fewer people participated in the program, it also would have deepened the experience across the board. Weekly accountability is core to this program’s effectiveness.



### **III. In-person elements and challenges:**

**1. Interpersonal dynamics.** By nature of being a local cohort that was built through word-of-mouth, there were many pre-existing relationships among the group. There were three partnered relationships at the beginning, and one pair broke up in the midst of the Formation Year. There were several friendships, which meant some participants were in a small group with the people they had “gathered” as their people for Bridge 1 of discernment. Some were colleagues or congregants together, which raised issues when job transitions happened. Basically, life happens throughout the year—and in a local cohort, with one’s personal life overlapping with the group experience, it is likely that some events may impact the group experience. Some interpersonal mediation was needed, which felt messy and imperfect, but throughout the year individuals took the breaks or made the changes they needed to in order to maintain the commitments they wanted in their lives.

**2. Group size.** Each group started with 6 participants, which proved to be just a little too big. 4-5 seems to be a better size for a small group experience, plus one facilitator who is holding the space (without actively participating in the prompts of each meeting).

**3. Project coordination.** Hosting the discernment meetings, coordinating the large-group gatherings, being on call with questions regarding the flow of the meetings, responding to interpersonal needs, sending email reminders for each cycle, creating the resources and outlines for meetings: all this and more was necessary to ensure the Formation Year was able to unfold. One dedicated coordinator is essential, and two would be ideal, to translate the structure of the Formation Project into a smoothly run in-person experience.

#### **Recommendation: In-person is worth it.**

While the in-person experience held complexities—as all human relationships do, especially when embodied!--the FP-Erie Journey was overall a success. Participants reported significant personal growth and transformation, naming the accountability of a small group and the power of a covenant as the tools which enabled this to happen. When asked on a scale of 1-10, *How likely would you be to recommend the Formation Project to a friend?* – The average of the responses was 8.9. It required a significant amount of work to pull off, and a great deal of mature, responsible spiritual leadership to lead the project well. The result was individual spiritual transformation, a greater sense of belonging, and a clearer sense of purpose in the participants’ lives.



## *Testimonials from FP-Erie Journey Participants*

“The Formation Project is a great experience in letting go of expectations.”

“The Formation Project is a well thought out safe space where folk can be themselves and explore their personal spirituality while supporting others on their spiritual journeys.”

“I ended Formation Project in a different space than when I started. Questions I didn’t even consciously know I had were being responded to inside myself and inside the group. I got to practice presence, patience, commitment and compassion. Formation is a time to pay closer attention to life and respond to it in a timely concourse fashion with reflection.”

“Through the Formation Project I was able to give and receive from fellow seekers an affirming presence that reflected where I am and where I am going. With the loving accountability in my group I was challenged to look inside and thus was able to further reveal to myself who I am.”



## **Acknowledgements**

The 2023 Cohort was initiated and hosted by Katie Gordon, project coordinator from the Formation Project, and Rev. Melinda Hall, Dean of the Episcopal Cathedral in Erie, PA. It was supported financially by the Crestwood Foundation, with in-kind donations from the Cathedral of Saint Paul. Each of the participants also contributed a great deal to the year’s success—from showing up and trusting the process, to facilitating small group meetings or large group gatherings. It truly felt like a co-created community, with each person offering their gifts and energy into the small groups and the collective. This was a place for formation that continues to have ripple effects for our individual lives and our spiritual communities in Erie, PA.

This case study was written by Katie Gordon, who also facilitated the in-person experience and participated in a small group cohort. Survey answers from participants informed this case study.