The Carnegie Project on the Education Doctorate (CPED) focuses on “developing stewards of practice” (Perry & Imig, 2008, p. 44) through EdD programs uniquely different from traditional PhD programs that prepare researchers (Golde & Walker, 2006; Schulman, Golde, Bueschel, & Garabedian, 2006). To achieve differentiation, revitalized EdD programs typically evidence clearly defined scope and sequence of curricula, new knowledge bases and signature pedagogies, research methods appropriate for practitioner scholars, and diverse dissertation formats (Browne-Ferrigno & Jensen, 2012; Gutherie, 2009; Loss, 2009; Perry, 2011). Because most revitalized EdD programs are intended for educational practitioners who are employed full-time, they are often delivered through executive, cohort-based models that are fast-paced, problem-oriented, and applied (Browne-Ferrigno & Muth, 2012).

Using cohorts for program delivery was initially introduced into postsecondary education as a convenient method for scheduling instructor assignments and organizing learning activities (Reynolds & Hebert, 1998; Saltiel & Reynolds, 2001; Yerkes, Basom, Barnett, & Norris, 1995). However, the term cohort does not have a universally accepted definition. Some programs use the word cohort to describe a group of students enrolled in a program during a specific semester or selected from a particular local education agency or other organizational partner with the university. Students may begin but not complete their programs together as an intact community of learners. While progressing through their program, they may also interact with different students in self-selected classes, which results in transient learning environments that can influence group cohesion (Browne-Ferrigno & Muth, 2003).

Conversely, when students remain together throughout their program as a single, identifiable group with few, if any, changes in group composition, the group is called a closed cohort (Norris, Barnett, Basom, & Yerkes, 1996; Saltiel & Russo, 2001). Closed cohorts are typically comprised of 10 to 25 students “who begin and complete a program of studies together, engaging in a common set of courses, activities, and/or learning experiences” (Barnett & Muse, 1993, p. 401). Changes in closed-cohort membership occur only through attrition: Students may drop out of program, but new students generally do not join in-progress closed cohorts. Students participating in a closed-cohort program thus become an intact group of learners who study and work together for a set period of time, usually from one to three years, while completing required coursework.

This guide is intended for faculty and program developers of closed-cohort programs, although those not using the closed-cohort model may find the recommendations informative. The guide presents a comprehensive review of literature on using closed cohorts in higher education programs and tasks required for faculty who assume responsibility as the designated cohort leader.

Benefits of Learning in Closed Cohorts

Using the closed-cohort model of program delivery can enhance students’ professional learning and skill development (Barnett, Basom, Yerkes, & Norris, 2000; Hebert & Reynolds, 1998; Peel, Wallace, Buckner, Wrenn, & Evans, 1998) because the structure provides continuity and opportunities for participants to learn and practice skills in group goal setting,
community building, conflict resolution, and culture management (Browne-Ferrigno & Muth, 2003, 2008; Muth, 2000b, 2002). The closed-cohort structure also supports utilization of long-term developmental activities and point-counterpoint discussions that are difficult to integrate effectively across individual courses over time (Cordiero, Boutiler, Panicek, & Salamone-Consoli, 1993; Guzmán & Muth, 1999).

A successful closed cohort creates a learning environment where all participants experience a sense of belonging (i.e., feel valued and accepted), understand their collective purpose (i.e., share common commitment and goals), and actively and purposefully engage in group learning activities (i.e., recognize value of interdependence and interaction) (Barnett et al., 2000). Further, a successful closed-cohort program can generate student persistence in program completion (Dorn, Papalewis, & Brown, 1995; Norton, 1995; Reynolds & Hebert, 1995) and enhanced learning achievements (Browne-Ferrigno & Muth, 2012; Hebert & Reynolds, 1995) compared to programs delivered as a series of traditional, separate courses that students take whenever desired or available.

Research on student learning within cohorts also suggests positive outcomes on scholarship and reflective abilities (Barnett & Muth, 2008; Burnett, 1989; Hill, 1995), interpersonal relationships (Greenlee & Karanxha, 2010; Horn, 2001), and professional networks (Muth & Barnett, 2001). Because group dynamics can change over time and cohorts develop their own personality, cohort learning is shaped by participants’ beliefs, expectations, and experiences (Donaldson & Scribner, 2003). Impediments to learning can thus emerge (Scribner & Donaldson, 2001; Wesson, Holman, Holman, & Cox, 1996) that must be acknowledged and addressed by faculty and students. Despite instances of increased academic competition (Hill, 1995) and power struggles (Teitel, 1995), the many benefits afforded by cohort delivery appear to counter perceived disadvantages (Browne-Ferrigno & Muth, 2003).

A distinctive difference between course-based programs and closed-cohort programs is the needed emphasis on community building (Barnett & Caffarella, 1992; Basom & Yerkes, 2001; Norris & Barnett, 1994). Cohort leaders and instructors within a well-integrated cohort program often spend considerable time on group-development and peer-interaction activities. Attending to group dynamics assists the cohort’s progress through the important, predictable stages of group development—forming, storming, norming, performing (Maher, 2001; Weber, 1982). These activities may need to be repeated each time a cohort experiences a change in instructors because the introduction of new faculty members creates a different group dynamic, which could potentially threaten the cohort’s learning culture.

With sufficient time and careful attention to group-development activities, a closed cohort can become a community of practice (CoP), which is defined by three fundamental elements: “a domain of knowledge, which defines a set of issues; a community of people who care about this domain; and the shared practice that they are developing to be effective in their domain” (Wenger, McDermott, & Snyder, 2002, p. 27). These communities evolve over time as participants develop expertise through shared learning and knowledge refinement “out of the raw material of [members’] experiences” (Drath & Palus, 1994, p. 3). Engaging actively in a CoP can expand an individual’s opportunities for professional growth and career advancement through sharing of expert knowledge and development of collegial relationships. Closed cohorts functioning as a CoP in which both faculty and students actively participate set the stage for situated-learning opportunities in which novices work with experts to apply theories to practice, develop needed skills, and reflect about experiences and outcomes (Lave & Wenger, 1991; Wenger, 1998).
Need for Cohort Leader

Transforming a closed cohort into a CoP does not simply happen: The process must be carefully constructed, consciously nurtured over time, and carefully maintained and transformed through the collective efforts of all involved. Because creation of a well-functioning learning community is critical to a cohort’s success (Browne-Ferrigno & Muth, 2012; Yerkes, Basom, Norris, & Barnett, 1995), a faculty member must be designated as the cohort leader. Responsibilities assumed by a cohort leader may include (a) working closely with program faculty to assure program is delivered as planned, (b) ensuring that students and instructors assume appropriate responsibilities for shared learning and goal achievement, and (c) monitoring student progress toward timely program completion (Barnett & Muth, 2008; Muth, 2002; Muth et al., 2001; Saltiel & Russo, 2001). Cohort leader responsibilities may also include investigating digital technologies and facilitating discussions about their appropriate uses for cohort collaboration and engagement.

A cohort leader thus becomes instrumental to the success of a closed cohort program, particularly if a goal is to create and sustain a CoP among students and faculty. Further, curriculum integration across a cohort’s lifetime requires a holistic overview not generally required in a course-by-course program. Attention to integration of program plans and goals can lead to curricular coherence and provides explicit connection among learning assessments, standards of practice, and participant responsibilities for learning outcomes and future performance. The cohort leader’s role is thus essential for successful and effective closed cohorts (Browne-Ferrigno & Muth, 2004).

Cohort Leader Responsibilities

Using the closed-cohort model increases faculty workload due to time demands for program faculty collaboration (Muth & Barnett, 2001; Norton, 1995). Some faculty perceive these demands as disadvantages, despite reported benefits for using the closed-cohort model, such as predictable course scheduling, easy student enrollment and greater retention, opportunities for creativity and flexibility in instructional and assessment strategies (Barnett et al., 2000). Thus, the decision to use the closed-cohort model of program delivery must be supported by everyone involved.

Professors who assume responsibility for coordination of a closed-cohort program must be comfortable with high levels of ambiguity. They must understand from the outset that program plans serve as guidelines—and that change is an omnipresent partner. Serving as a cohort leader also requires multiple organization and leadership skills (e.g., strategic thinking, visioning, patience, organization, diplomacy, advocacy), but most especially adaptability because program modifications will probably be required. The sections below describe various responsibilities assumed by a cohort leader—as reported by professors who served as both cohort instructors and cohort leaders in programs that were successful.

Working with Faculty Colleagues

A major responsibility of a cohort leader is coordination of faculty activities. If using the closed-cohort model is new to a university, the dean needs to be apprised of required faculty commitments. The department chair needs to be actively engaged in discussions during the program design and development phase and kept apprised of program progress throughout implementation. A cohort leader may be assigned the task of identifying and recruiting prospective faculty. Before committing to serve as cohort instructors, professors need to understand that they will be working as members of an instructional team that
shares a common vision about desired outcomes and that student learning in a closed-cohort program is viewed across multiple semesters, rather than during a single course.

During the planning and development phase, the instructional team must engage in candid conversations about relinquishing ingrained notions of individualistic academic freedom, typical for professors when delivering traditional courses. Thus, developing group norms to support their working together effectively is strongly advised. Involved faculty must commit to participate in all cohort-faculty meetings where they discuss openly what is working and what is not working and collaboratively make needed curricular or assessment changes. New faculty joining an in-progress closed cohort need a formal orientation that includes review of the instructional team norms and cohort norms.

Prior to the launch of a new closed cohort, the instructional team typically develops a broad program syllabus that articulates the overarching program goals and objectives (i.e., what students are expected to know and be able to do at program end). Course syllabi thus become a sequence of developmentally appropriate units of study with expected learning outcomes, activities, and assignments that support achievement of the program goals and objectives. A cohort leader typically facilitates these activities and assures decisions are written in the program syllabus, distributed to all involved, and saved for future reference.

To achieve program goals, cohort instructors must conduct ongoing assessments of cohort progress and modify instruction or assignments, if necessary, to address the learning needs of cohort participants. When programmatic changes are made, everyone must be informed in writing. Thus, maintaining regular and timely communication with the cohort instructional team and cohort members is another task assumed by a cohort leader.

**Managing Virtual Learning Environments**

Cohort-based executive models of program delivery that integrate traditional face-to-face class sessions and online learning activities are called hybrid or distance-learning programs. Successful utilization of diverse technology platforms such as learning management systems for course development and student engagement (e.g., Blackboard, BrainHoney, Canvas, Moogle) and virtual meetings (e.g., Adobe Connect Pro, Google Hangout) requires faculty expertise. Depending on available support services for distance learning at the university, a cohort leader may assume responsibility for assuring faculty are properly prepared to use effectively the adopted or recommended technology tools.

**Working with Field-Based Mentors**

If formal job-embedded learning experiences (e.g., internships, practica) are a component of the program, then the cohort leader typically assumes responsibility for working with field-based mentors or practitioners who support cohort members. Coordinating and monitoring these experiences may require site visits to discuss progress with students and their mentors. Depending upon mentoring expertise among field-based personnel and university professors, a cohort leader also may design and implement mentor-training sessions or develop clinical-practice handbooks that clarify for all involved the minimum expectations and procedures for the field-based learning experiences. If more than one university-based supervisor is involved, then the cohort leader ensures that effort is equitably allocated and expectations are consistency maintained.
**Working with Institutional Partners**

When a cohort program is delivered through a formal partnership (e.g., two postsecondary institutions, a university department and local education agency), a concisely written partnership agreement is required. Careful attention to distribution of responsibilities among institutional stakeholders and occasional appraisal to monitor completion of responsibilities help ensure that cohort program goals, objectives, and tasks are accomplished on a timely basis. Although these responsibilities are typically assigned to the cohort leader, some tasks can be distributed among university faculty, graduate assistants, and partner personnel. If tasks are assumed by others, a cohort leader must stay appraised of task accomplishment and maintain accurate records because accountability for a partnership-based cohort’s success typically rests squarely upon the cohort leader.

**Managing External Funding and Program Evaluation**

When a cohort program is underwritten by external funds, a cohort leader may be designated as the individual responsible for budget accounting and performance reporting to the funding agency. Because both formative and summative evaluations (i.e., annual progress reports, final report) are generally required for funding, the cohort leader may assume responsibilities as the project’s principal investigator, which requires adherence to the university’s requirements for approved human subjects research.

When cohort programs are delivered through partnerships with other institutions or agencies, the cohort leader typically serves as the key liaison or frontline leader if the university is the host institution. When cohort programs are funded through external sources, the cohort leader may serve as the principal investigator. Without management or oversight in these unique circumstances, a program’s reputation can be damaged if learning and instructional experiences are viewed as haphazard or if program goals are not achieved. An unsuccessful cohort program can also jeopardize future partnerships or external funding.

**Impact of Leadership on Cohort Success**

Using a closed-cohort model of program delivery requires a cohort leader to attend to three critically important objectives:

- **curriculum integration**, the continuous focus on instructional components to ensure that they are developed and combined into an integrated whole;
- **program coherence**, the ongoing assessment of cohort progress to ensure that program parts are logically interconnected and delivered congruently and harmoniously; and
- **shared responsibility**, the collaboration of all cohort participants to ensure that learning goals and program objectives are achieved. (Browne-Ferrigno & Muth, 2004, p. 86)

The literature review below supports the work responsibilities described by experienced cohort leaders presented above and provides additional recommendations for designing and implementing a successful cohort program.

**Curriculum Integration: Seamless Interconnections**

The cohort leader guides the group— instructors and students alike—as they incorporate various instructional strategies, including integrated course content, team teaching, problem-based learning, reflective strategies, and case studies (Hill, 1995; Martin, Ford,
Murphy, Rehm, & Muth, 1997; Yerkes, Basom, Norris, & Barnett, 1995). Use of online learning adds nuances to instructional strategies with which cohort leaders must become familiar, and program faculty and students may need training on how to use technology. Another important consideration when designing an effective cohort program is the selection of “present experiences that live fruitfully and creatively in subsequent experiences” (Dewey, 1938, p. 27). The program syllabus (i.e., written scope and sequence of curricula) developed collaboratively by the instructional team thus needs to be reviewed regularly to assure that learning activities align with program goals and that expected learning outcomes are being or can be achieved. The cohort leader must facilitate these processes.

By integrating group research projects into the curriculum, students learn the power of collaborative inquiry and the importance of careful use of data and reflection (Barnett & Muth, 2008; Churchill, 1996; Geltner, 1994). By developing small-group and whole-class activities, cohort faculty can help students learn the challenges of group dynamics and practice leadership skills (Browne-Ferrigno & Muth, 2012; Muth et al., 2001). Longitudinal assignments (e.g., small-group projects, presentations, inquiry projects) require students to share resources and responsibilities, gain peer support and feedback, work through conflict, and seek agreement through consensus. Authentic assessments help attune learning to professional practice (Bransford, Brown, & Cocking, 2000; Bransford & Schwartz, 1999) and require cohort leaders and instructional team members to match assessments to practice expectations, and if relevant, relate them to state and national standards.

**Program Coherence: Learning Objectives**

Using the cohort model effectively requires the cohort leader to engage faculty in identifying and implementing critical elements that generate optimum learning experiences (Barnett et al., 2000; Muth, 2002; Saltiel & Russo, 2001). Cohort instructors often need to reshape their perceptions about content coverage within individual courses to focus on learning gained through a coordinated scope and sequence across the entire program. Collaborative program development means that the “onus of responsibility is upon all faculty to contribute and explain why their content and ideas need to be included” (Cordiero et al., 1993, p. 27) and to substantiate how they support program goals and make connections to practice (Muth, 2000a, 2000b; Muth et al., 2001). Thus, determination of desired cohort outcomes requires extensive deliberation during program development to ensure that cohort activities are aligned with what is to be learned, how it is to be learned, what processes are to be used, and what faculty and students should do. A cohort leader needs both formative and summative data to ensure that program goals are achieved, which requires engagement by cohort instructors in the design and implementation of formative learning assessments and ongoing progress checks.

**Shared Responsibility: New Roles for Cohort Success**

An effective cohort leader also cultivates shared responsibility for learning that typically requires dissolution of traditional instructor and student roles (Cordiero et al., 1993) and development of group-learning roles as members of a CoP that includes experts and novices. Over time, cohort participants assume greater responsibility for their learning—both as individuals and as members of groups—and regularly make known their requests for changes in instructional delivery or learning assessments (Barnett et al., 2000; Blaschke, 2012). Cohort instructors thus serve as facilitators, mentors, and occasionally mediators during cohort meetings that more closely resemble professional-development seminars and workshops than traditional higher-education lecture classes.
Group learning does not emerge simply by grouping students together (Basom, Yerkes, Norris, & Barnett, 1995; Browne-Ferrigno & Muth, 2008; Hannafin & Land, 1997). A cohort leader needs to guide and support program instructors in creation and maintenance of inviting, risk-safe learning conditions and understanding the progressive stages of cohort transformation (Geltner, 1994; Maher, 2001). During the planning phase of a new cohort program, the cohort leader and instructors need to develop strategies and feedback mechanisms to assess the status of collaborative learning at various stages throughout program delivery.

**Serving as Cohort Leader: Benefits and Opportunities**

Serving as a cohort leader may seem overwhelming, even for experienced cohort instructors, because the most difficult task is time management. A professor who assumes the role of cohort leader is seldom relieved from other teaching, research and publishing, or service obligations. The challenge thus becomes finding a workable balance across these professional responsibilities, ideally through creating opportunities to overlap professional tasks required of a cohort leader.

Several benefits from serving as a cohort leader can emerge and provide professional growth and new insights for a professor contemplating the role. One is the opportunity to work closely with colleagues, at one’s university and perhaps at others, in examining and sharing experiences with cohorts. Working in and studying about the effectiveness of cohorts and cohort leadership creates unique CoPs within the academy. Additionally, when professors work together to create and implement a new cohort program, they often also change the culture of a department into one based on collegiality and shared responsibilities for all program outcomes. Such working coalitions, within or across programs, can produce research opportunities—funding proposals, research papers, publications—that can help professors address a primary expectation in university work. Research on closed cohorts has diminished in recent years, particularly with regard to use of closed-cohort models in doctoral programs.

Perhaps the most significant benefit from serving as a cohort leader is getting to work closely with students. The regular interactions between cohort participants and a cohort leader can develop into trusting, collegial relationships that enhance professional practice for both. When students feel safe to share honestly without repercussions on performance measures, they often disclose what works effectively to enhance their professional growth and what does not. A cohort leader can use these findings to improve program delivery.

Serving as a cohort leader requires organizational skills, clear understanding of the responsibilities necessary to coordinate long-term learning throughout a program, and strong commitment to assuring a cohort program is successful. The cohort’s success—as measured by curriculum integration, program coherence, and shared responsibility—rests squarely upon the shoulders of a cohort leader. Although this work can be demanding, frustrating, and at times disappointing, the benefits far outweigh any disadvantages.

**References**


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