

How collaboration can help deliver better heritage projects

Understanding cohort working

Our guide will help you learn more about cohort working and when to use it as part of your delivery programme.

Introduction

Cohort working is a tool for enabling projects and programmes to come together and develop a collaborative community.

This best practice guide is intended to help grantees, funders and wider stakeholders to learn more about cohort working. It aims to help everyone understand what cohort working entails and decide when to use it as a technique for programme delivery. The recommendations will help funders ensure that cohort working processes are effective and work for both grantees and funders.

The insights and recommendations in this guide draw on the experiences of stakeholders who have used cohort working approaches within National Lottery Heritage Fund programmes, and other programmes run by their grantees and partners or by similar funders. Staff were interviewed from programmes ranging from developing local parks and greenspaces, through building digital skills, to helping the heritage sector rebound from the impacts of the COVID-19 pandemic. Interviewees represented a diverse range of roles, including project managers, engagement officers and policy leads. The richness and variety of interviewees' experiences have enabled this guide to detail a comprehensive list of insights and recommendations for effective cohort working.

This guide was developed for the National Lottery Heritage Fund to support cohort working in current funding programmes and inform the Heritage Fund's long-term approach to cohort working within programmes of large-scale investment. The guide refers to Heritage Fund programme staff, including Senior Investment Managers, who are responsible for overseeing the delivery of grant awards, and ROSS consultants, who are external experts on the Heritage Fund's Register of Specialist Services. Similar roles can be found across other organisations and the guidance should be transferable to many different contexts.

What does cohort working achieve?

Cohort working is an approach that generates wider-ranging and more meaningful impact over and above more traditional funding and project management arrangements.

It is used by funders to encourage **collaboration, exchange of ideas and peer support** across a group of grantee projects, driving a **sense of common purpose**.

Cohort working encourages grantees to use their network for support in pursuing their own specific project objectives, while contributing to, and learning from, the programme.

Collaboration and knowledge transfer

Effective knowledge transfer between cohort members can improve delivery, increase innovation and build impact, both within individual projects and across programmes. Grantees can learn from each other, share experiences of things that have gone well and avoid repeating past mistakes.

There are many different types of collaboration and knowledge transfer, both formal and informal.

Cohorts usually rely initially on formal mechanisms set up by funders. Those supporting cohort working can encourage knowledge transfer by recognising relevant insights and actively sharing them with other cohort members through these mechanisms.

Informal knowledge sharing among grantees is also important and can be a sign of the cohort gaining maturity. A high level of engagement across different channels indicates that grantees find cohort working valuable and see potential opportunities for learning.

It is important to remember that not all knowledge transfer is immediately visible. Evidence of knowledge transfer might be raised in passing, for example during check-ins with a cohort coordinator, or surface at later points in programme outputs and evaluations.

The goal of cohort working

1. **Inputs:** the funder puts a structure, resources and staff in place to facilitate cohort working.
2. **Activity:** collaboration, learning and knowledge transfer take place among a cohort of grantees.
3. **Impact:** the programme achieves greater and wider-reaching impact than grantees could have achieved alone.

Cultural factors enabling cohort working

Cultural factors can play an important role in delivering successful cohorts, allowing grantees from different settings to understand what unites them and how they can benefit from working together.

Factors that will influence the success of a cohort include:

Positive culture

Creating a positive culture is essential to encourage an understanding of cohort members as supporters and avoid perceptions of unhealthy competition.

Grantees need to recognise the valuable experience and expertise that others bring to the table to realise the full benefits of cohort working.

Buy-in at all levels

In both funder and grantee organisations, commitment from all levels will ensure cohorts can get the greatest benefit from the approach and allow best practice to become embedded for the longer term.

Open communication

Maintaining open and consistent communication helps make a cohort a natural home for conversation and builds a unique identity. Trialling a wide range of channels, including apps, social media, email and face-to-face contact, allows the cohort to decide what works best for them.

Mutual respect

Cohort working requires a willingness to go beyond the traditional funder-grantee relationship to grow a feeling of mutual respect, and a sense of shared benefit and collaboration between all parties.

Trusting relationships

A culture of trust can help cohort members feel safe sharing their experiences and ideas with others, posing questions or expressing anxieties.

Approaches and activities that will help create these factors are explored further in subsequent sections of the guide.

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Benefits of cohort working and when to use it

Cohort working can benefit grantees and funders in different ways and it is especially suited to certain types of projects and programmes.

Sharing knowledge, skills and ideas can improve projects' ways of working and final outcomes, helping them achieve **greater, more sustainable and resilient impacts**. While cohort working requires more resources than traditional grant making, these long-term, sustainable and innovative benefits are often worth the costs.

This section outlines why and for whom cohort working approaches are useful, exploring mutual benefits and those specifically for funders or grantees.

Mutual benefits for grantees and funders

Improved impact and efficiency

A cohort approach can generate wider-ranging and more meaningful impact for the same amount of investment, by allowing cohort members to be more ambitious and draw on resources and knowledge from each other.

More innovative ideas and approaches

Cohorts provide a space for grantees to brainstorm, spark new ideas and drive creativity where new ways of working are needed. Grantees can encourage each other to push boundaries and promote creative solutions.

Frameworks for support

Cohort working puts in place a structure that encompasses and connects different types and levels of support. The structure, including peer-to-peer support and enabled by a cohort coordinator and support staff, provides a flexible framework to allow the reliable and consistent delivery of support once cohorts are established.

Creation of mutual understanding

Mutual understanding and respect in cohort working builds long-lasting, productive and supportive relationships between funders and grantees, Senior

Investment Managers and ROSS consultants.

Grantees in successful cohorts feel able to express their needs, knowing funders will listen and respond appropriately. Funders are comfortable asking how grantees' aspirations align with the funder's own goals and strategy.

Driving systemic change

Successful cohort working drives systems change by trialling, implementing and embedding change simultaneously across a set of grantees in order to drive progress at a faster rate. Whether grantees are being encouraged to think differently about diversity and inclusion or produce a more innovative method of delivering a skills programme, cohort working promotes and develops new ways of thinking more easily than would occur with traditional grant management.

Benefits for funders

Raising ambition

The traditional funding process of giving grants at the start and monitoring outputs at the end may not always deliver the best outcomes at programme level. Many grantees will need encouragement, monitoring and challenge consistently throughout delivery to ensure objectives are delivered. Cohort working approaches provide structured and consistent support to help them achieve and exceed their original aims.

Where cohort working is appropriate, the initial investment in bringing projects together and building capacity in the cohort will pay off over time through improved collaboration and lasting impacts.

Improved change management

Cohort working approaches require coordination and careful design at the outset but, once established, the management processes can help manage and track change more efficiently.

Cohort working also allows funders to steer change more effectively when required. When a group of grantees works as a cohort, it is easier to ensure they take a coherent approach to change. This is especially important in response to external events such as the COVID-19 pandemic, which forced grantees to adapt quickly. Assessing alternatives across a cohort programme enables a more coherent, and potentially more efficient, approach to change. Clear, centralised guidance applied across a cohort enables more effective implementation.

Cohort working can help develop a culture that is more open to change and can enable funders to drive and manage change among grantees, with less resistance than may be encountered in traditional grant management approaches.

More effective stakeholder communications

Cohort working enables a programme-wide, unified message to be conveyed to internal and external stakeholders, which maximises communications impact.

The volume and diversity of activity within a cohort is also likely to enable a stronger communications presence through access to more communications content, and a wider reach through appealing to a wider range of audiences.

Strong delivery relationships

Successful cohort working builds connections that persist with delivery partners such as coordinators, consultants, partners and experts. This enables funders to grow their network over time, creating and maintaining relationships with a wide range of organisations and stakeholders. Such networks can be useful to inform and shape future programmes.

Benefits for grantees

Continuous support

Grantees in a cohort can share ideas and seek support on several levels, such as brainstorming with peers, accessing support from specialist advisers such as ROSS consultants, and working with groups or individuals through training organised and facilitated by the funder. Investment by cohort members in each other's success can make this support even more valuable.

Improved skills and knowledge

Training, knowledge sharing and skills development can improve grantees' individual technical capabilities in specific areas. New knowledge can come from external sources, but the cohort coordinator and supporting consultants should also tap into the skills, experience and knowledge held within the cohort and ensure learning is shared.

Encouraging creativity

Collaboration helps generate and test ideas, leading to more creative, innovative approaches. When grantees work together, there are more people to bounce ideas off and problems can be looked at from different angles to deliver creative

solutions.

Cohort working also encourages creativity through the reduction of risk. One grantee may pilot an activity, allowing the rest of the cohort to use it as a case study. Risk is reduced and shared, with grantees learning lessons and applying them in the context of their own projects.

Creation of a network

Cohort working strengthens grantees' connections with each other during project development and delivery, but these connections can also persist beyond the programme's lifetime and have legacy impacts on the strength, resilience and connectedness of grantee organisations.

Informal networking between cohort members is a sign of the cohort forming a lasting group.

Increased effectiveness in individual delivery

Drawing on the collective knowledge and experience of the cohort, grantees can avoid mistakes and move more quickly to best practice, enabling them to become more effective and efficient in delivery. With increased efficiency and effectiveness they may be able to achieve more overall with the funding they have secured.

When cohort working is most suitable

Cohort working can benefit both funders and grantees, but the approach may not be right for every programme.

High potential benefits

Programmes seeking innovation and transformation

Cohort working creates a learning environment that encourages the generation and sharing of ideas and provides support for development and implementation. These are ideal conditions to enable change within individual organisations in the cohort. Collectively, this simultaneous change within a group of organisations can become a movement and catalyst for wider change across the sector.

Organisations building capacity and skills

Cohort working is one method of making resources, training, expertise and specialist advice available to grantees for whom such resources would otherwise have been inaccessible or unaffordable.

It is also an ideal environment for learning and so is particularly suited to organisations with a focus on capacity building and skills development as a core part of their project.

Organisations without their own networks

Organisations without existing ties to local or thematic networks, for example if they are geographically isolated, recently established or relatively new to the sector, may benefit from increased opportunities to connect. Cohort working can be especially helpful for such organisations to gain access to specialist knowledge and best practice from more experienced grantees and their wider networks.

Organisations moving into new sectors or areas of work

Those trying to take on new activities can benefit from peer support to build innovation and push boundaries. Support through a cohort may also benefit established projects that share a similar heritage or culture, but which are geographically isolated from other organisations.

Low potential benefits

Programmes already in the delivery phase

It can be challenging to introduce cohort working retrospectively once a project is under way, as both project culture and delivery mechanisms will have been determined. Cohort working should be introduced in the development phases of funding programmes. If cohort working is already in place, it should continue through delivery and will continue to be beneficial to grantees and the overall programme.

Organisations delivering through well-established, tried-and-tested models

Organisations comfortable with their ability to deliver a project efficiently and effectively may not find the emphasis on exchange and innovation inherent in cohort working to be an efficient use of resource. Those with extensive experience in a particular sector and focused on continuing or scaling a particular project without adapting their approach may not feel the need for a cohort.

Organisations looking for short-term impact

Cohort working requires an initial investment of resources and time to produce meaningful results. Organisations facing pressure to generate outputs and measurable impact on a very short timeline or modest budget may not be well positioned to benefit from cohort working.

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Designing, launching and developing a cohort programme

This section outlines recommendations for funders to consider when designing a cohort working programme.

Planning the programme

- **Promote the cohort working approach** to attract applicants who are interested in, and would benefit from, a cohort working model. Attracting the right candidates will be crucial to ensuring engagement.
- **Clearly set out expectations** associated with cohort working: what grantees can expect to gain from it and how they will be expected to contribute.
- **Tailor the programme** specifically to reflect the needs, resources and contexts of grantees. A programme designed to match grantee requirements will be more likely to succeed.
- **Build in extra time for relationship building** at the start of the programme. Cohorts take time to engage and develop. Programme timelines need sufficient leeway to allow for this lead-in period.

Resourcing the approach

- **Commit resources in advance** for cohort facilitation, including staff, time and budget. Begin planning for the cohort programme early to reduce risks in the delivery phase and ensure cohort working will achieve its objectives.
- **Appoint a cohort coordinator** and give careful consideration to wider management structures. The coordinator should manage and facilitate the cohort's collaboration and success, providing critical cultural and relational support while managing more functional aspects of programme design and organisation.
- **Use support staff to develop cohorts further** and prevent siloed working. An outside perspective can help identify gaps in skills and make bridging connections. Support staff could include ROSS consultants, Senior Investment Managers or other specialists who work closely with grantees.

Selecting a cohort

Funders hold responsibility for designing and facilitating cohort working. At the point of award, consider how potential grantees might complement one another in a cohort.

- **Consider commonalities and differences** and take active decisions. Grouping cohorts based on common characteristics, such as size, organisational type or geographic location, can ensure grantees have characteristics in common. Alternatively, diverse cohorts can provide different perspectives useful for peer learning. More diverse cohorts require careful consideration of overall balance and how grantees might interact with and support one another.
- **Consider cohort size** and how this will affect the cohort dynamic. While there is no perfect cohort size, it is advisable to keep cohorts relatively small to maximise the benefits through a small number of meaningful connections.
- **Consider different starting points and capabilities** that grantees bring to the cohort, including the proportion of paid staff compared with volunteers, resource levels, and the breadth and depth of experience within teams.

Launching and developing the cohort

Setting up the cohort

- **Front-load cohort coordinator investment** early in the programme to understand, connect with and engage all grantees. The more familiar the coordinator is with the grantees and their projects, the more easily they can facilitate knowledge sharing.
- **Prioritise experimentation** early in the process to test strategies and adapt communications to the needs and culture of the cohort. Time taken to agree ways of working will pay off in the medium term.
- **Implement a strong information management system**, with careful consideration of data protection. This is essential for security and also allows the coordinator to keep track of grantee details and conversations, providing continuity if there are personnel changes on the funder side.

Facilitating connections

- **Establish open and regular communication** from the outset, using platforms that come naturally to cohort members. Consider establishing a forum for discussing ideas, sharing thoughts or building social links.
- **Identify common ground** within the cohort and use it to facilitate connections between grantees. This will cement the cohort early on and encourage self-help groups to form. In the medium term this reduces

demand for resources and the need for external consultants.

- **Encourage open discussion** about project challenges. Help cohort members see other projects as collaborators rather than competitors.
- **Allow informal communication to occur.** Funders should encourage cohorts to form separate groups on their preferred platforms and channels, such as WhatsApp or social media, as these can help the cohort gel and develop momentum.
- **Streamline communications** to maintain engagement and prevent grantees becoming overwhelmed. Ensure messaging is concise and organised, with clear actions where relevant, and review whether the communication approach continues to meet grantee needs.

Developing the cohort throughout the programme

- **Establish feedback mechanisms** that encourage the sharing of preferences. A structured programme that encourages and incorporates feedback from grantees is more likely to succeed. Support mechanisms should be open and adaptive to change to allow projects to evolve.
- **Adapt the delivery approach** to suit cohort needs. Circumstances and context can change rapidly, and coordinators need to flex delivery to address changes such as remote working or the introduction of new technology.
- **Invite ideas for development** and develop natural conversations about project delivery, sharing challenges and potential alternatives to current approaches.
- **Emphasise big-picture learning** and reiterate the aims and benefits of cohort working. While grantee contexts may differ, there is a lot to learn from how other organisations approach different elements of project delivery.
- **Maintain an overview of the programme** and use the coordinator's overview of knowledge, resources and expertise to identify and appropriately manage gaps for grantees who are more focused on their own projects.

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Running effective cohort events

The majority of cohort activity will take place through facilitated events. These can range from regular, short catch-ups, such as informal coffee chats and weekly check-ins, to less frequent half-day or full-day events, such as themed workshops, webinars or retreats.

Events should be defined based on cohort needs, but cohort coordinators should aim to:

- **Set clear objectives for sessions** to make best use of participants' time. This can include objectives for formal sessions, as well as allocating time for unstructured discussions and networking.
- **Set aside dates for training and conferences** as far in advance as possible to avoid diary clashes. Ask ahead about grantees' priorities, challenges and questions and build these into the agenda.
- **Consider site visits** as an opportunity to inspire grantees through live case studies. Seeing innovative delivery in action can bring ideas to life and trigger possible applications elsewhere.
- **Ensure appropriate attendance** and consider whether the entire cohort needs to attend. Certain events may only be relevant to grantees of a particular size, location or subsector.
- **Make materials and recordings available online** for grantees. These can be referred back to and viewed by team members unable to attend, and by those who wish to review the materials.
- **Diversify locations** for in-person events away from major city centres to improve accessibility for grantees located less centrally.
- **Clearly communicate about financial support** available for events and training. Give participants confidence that cost need not be a barrier if supplementary funding is available.
- **Evaluate meetings and events** and monitor what works and for whom. Secure honest, constructive feedback to ensure meetings and events are valuable. Find out what could change to improve engagement and outcomes, and act on it.

Summary of recommendations

1. **Plan ahead and use time efficiently:** plan the programme as far in advance as possible and provide clarity on agendas and objectives.

2. **Create opportunities for connection:** plan a range of events, including regular check-ins, formal learning opportunities and inspirational site visits.
3. **Provide follow-up and wraparound materials:** consider attendance carefully and enable engagement in different ways by making materials available online.
4. **Prioritise accessibility and utility:** diversify locations and communicate clearly about financial support available to support access and engagement.
5. **Respond to and incorporate feedback:** seek honest feedback and adapt future sessions to address cohort needs.

Conclusion

Cohort working is an effective tool for enabling projects and programmes to come together and allowing collaboration and knowledge sharing to occur naturally.

The core of cohort working is collaboration, exchange and mutual support among a group of grantees. The aim is for a programme to generate impact that is greater than the sum of its parts, creating benefits that would not have been possible if grantees had delivered their projects in isolation.

Cohort working is not suited to every type of project. Its benefits can only be realised when grantees and funders are committed to it as a way of working. It can require greater investment of time and resources in its early stages, but the benefits can outweigh the costs when the approach is appropriate and implemented effectively.

Effective cohort working enables grantees to share knowledge, ideas and experiences in a collaborative setting, adding value to individual projects and the wider programme.

About this publication

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