

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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