

How collaboration can help deliver better heritage projects

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.

[Back to top](#)

[Previous Benefits of cohort working and when to use it](#)

[Next Running effective cohort events](#)