

Cohort Working Best Practice Guide



National Lottery Heritage Fund

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Cohort Working Best Practice Guide

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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 to understand what cohort working entails and to decide when to use it as a technique for programme delivery. The recommendations will help funders to ensure that cohort working processes are effective and work for both grantees and funders.

The insights and recommendations contained 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. A full list of interviewees is included in the appendix, but 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 has been 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 (responsible for overseeing the delivery of grant awards) and ROSS consultants (external experts on the Heritage Fund's Register of Specialist Services) but 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, whilst contributing to, and learning from, the programme.

Collaboration & 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.

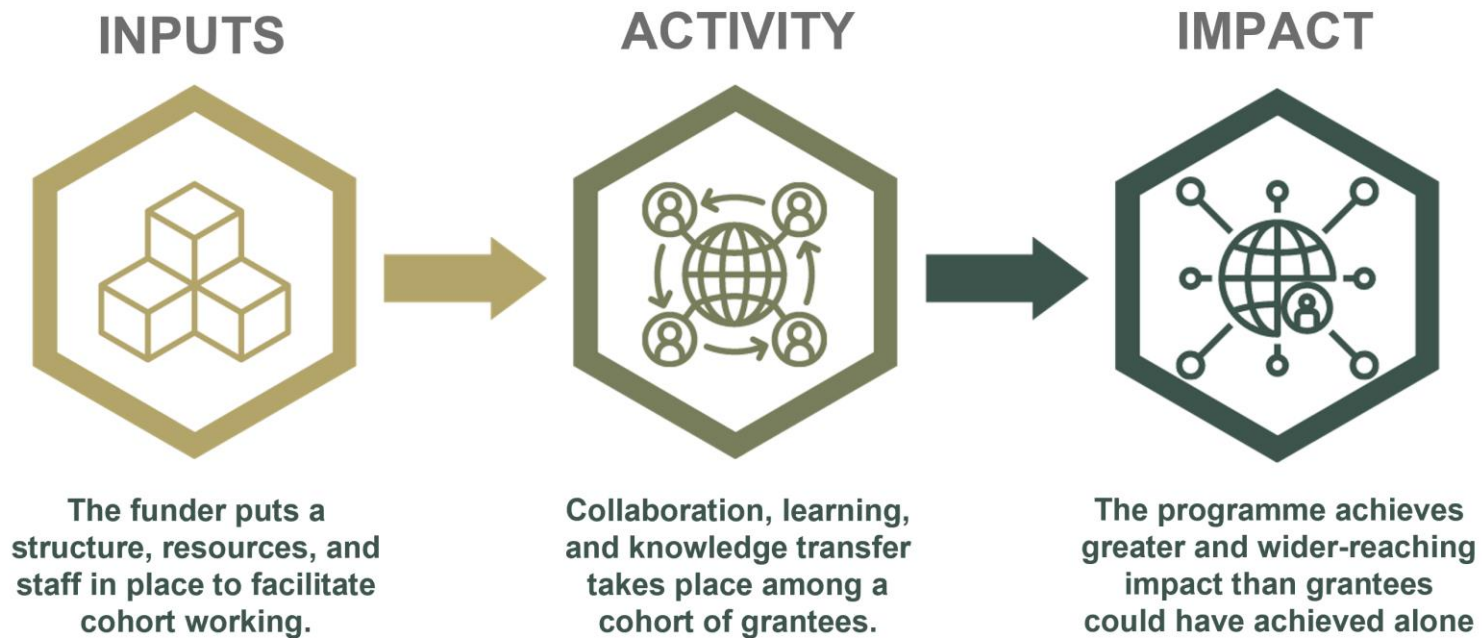
Cohorts usually rely initially on formal mechanisms set up by funders. Those supporting cohort working can encourage knowledge transfer by recognising relevant insights and actively sharing them with other cohort members through these mechanisms.

Informal knowledge sharing amongst 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, 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

Text-only alternative available in [Annex B: The Goal of Cohort Working](#)



Cultural Factors

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 the 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 to make a cohort a natural home for conversation and builds a unique identity. Trialling a wide range of channels; 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 to feel safe sharing their experiences and ideas with others, posing questions or expressing anxieties..

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

Cultural Factors Enabling Cohort Working

Text-only alternative available in [Annex B: Cultural Factors Enabling Cohort Working](#)



Who benefits from cohort working?

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

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

Mutual Benefits for Grantees and Funders

1. 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.

2. 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.

3. 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.

4. 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 (SIMS), and ROSS consultants.

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

5. 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

1. 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 challenging consistently throughout delivery in order to ensure that 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.

2. Improved change management

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

Cohort working also allows funders to steer change more effectively when it is 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, and 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 amongst grantees, with less resistance than may be encountered in traditional grant management approaches.

3. 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.

4. 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

1. Continuous support

Grantees in a cohort can share ideas and seek support on several levels such as through brainstorming with peers; accessing support from specialist advisors (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.

2. 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.

3. 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.

4. 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.

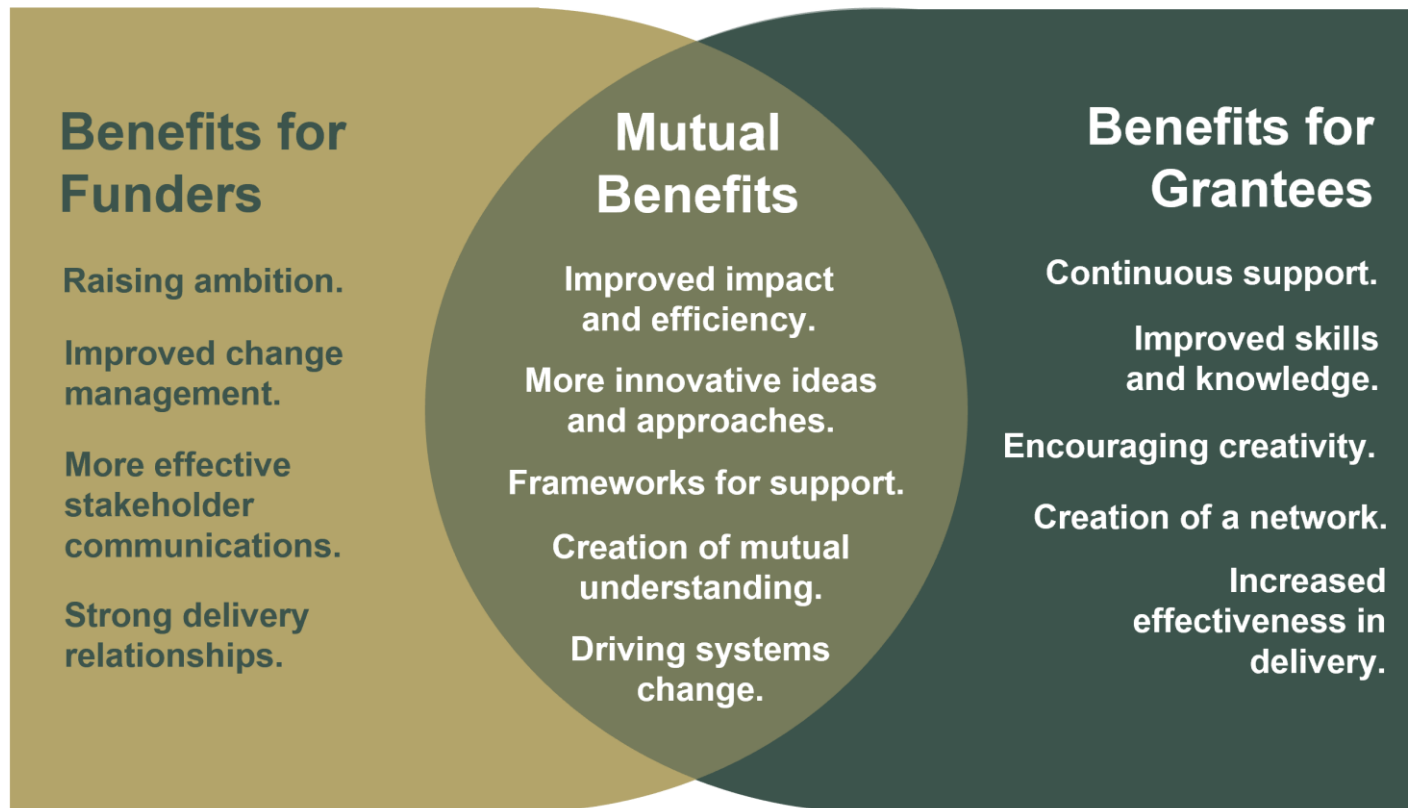
Informal networking between cohort members is a sign of the cohort forming a lasting group.

5. 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.

The Benefits of Cohort Working

Text-only alternative available in [Annex B: The Benefits of Cohort Working](#)



What type of projects are suited to cohort working?

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

High potential benefits

Cohort working is especially effective for:

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

It is also the 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

Cohort working may not be effective for:

Programmes already in delivery phase: It can be challenging to introduce cohort working retrospectively once a

project is under way, as both the project culture and the 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 based on 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 who are 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.

Ideal Beneficiaries of Cohort Working

Text-only alternative available in [Annex B: Ideal Beneficiaries of Cohort Working](#)



Delivering effective cohort programmes

This section outlines recommendations for funders to consider at different stages in the process of setting up and coordinating a cohort. It provides recommendations for the design stage of a cohort working programme, the launch stage, and other considerations to keep in mind throughout the running of the cohort.

Design Stage:

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 the 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 which

is designed to match the requirements of grantees 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, this should include staff, time, and budget. Begin planning for the cohort programme early to reduce risks in the delivery phase and ensure that cohort working will achieve its objectives.
- **Appoint a cohort coordinator** and give careful consideration to wider management structures. The role of the cohort coordinator should be to manage and facilitate the cohort's collaboration and success. The coordinator provides critical cultural and relational support, whilst managing more functional aspects of the cohort programme's design and organisation.
- **Use support staff to further develop cohorts** and prevent siloed working. Having an outside perspective can

help identify gaps in skills and make bridging connections. Support staff could include a team or selection of ROSS consultants, Senior Investment Managers (SIMS), or other specialists who work more closely with the grantees.

Selecting a cohort

Funders hold the responsibility for designing and facilitating cohort working. Consider at the point of award, 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, nature of the organisation, or geographic location can ensure grantees have characteristics in common. Alternatively, choosing cohorts with diverse characteristics can provide different perspectives which may be useful in terms of peer-learning. More diverse cohorts require the funder to think carefully about the 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 the different starting points and capabilities** which grantees bring to the cohort. For example, the proportion of paid staff involved in delivery (as compared to the number of volunteers), grantees' resource levels and the breadth and depth of experience within teams.

Launch Stage:

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 cohort coordinator is with the grantees and their projects, the more easily they will be able to facilitate knowledge sharing.
- **Prioritise experimentation** early in the process to test strategies and adapt communications to suit 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 but is also a useful tool, allowing the cohort coordinator to keep track of grantee details and conversations and 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 formation of self-help groups. In the medium term this reduces the demand for resources and the need for external consultants.
- **Encourage open discussion** about project challenges. Help cohort members to see other projects as collaborators rather than competitors.
- **Allow for informal communication to occur.** Funders should encourage cohorts to form separate groups on their preferred platforms and channels – for example,

WhatsApp or social media – as these can help the cohort to gel and develop momentum.

- **Streamline communications** to ensure engagement can be maintained and grantees do not disengage through becoming overwhelmed. Ensure messaging is concise and organised, with clear actions identified where relevant and conduct reviews to ensure the approach to communication continues to meet grantee needs.

Throughout the programme:

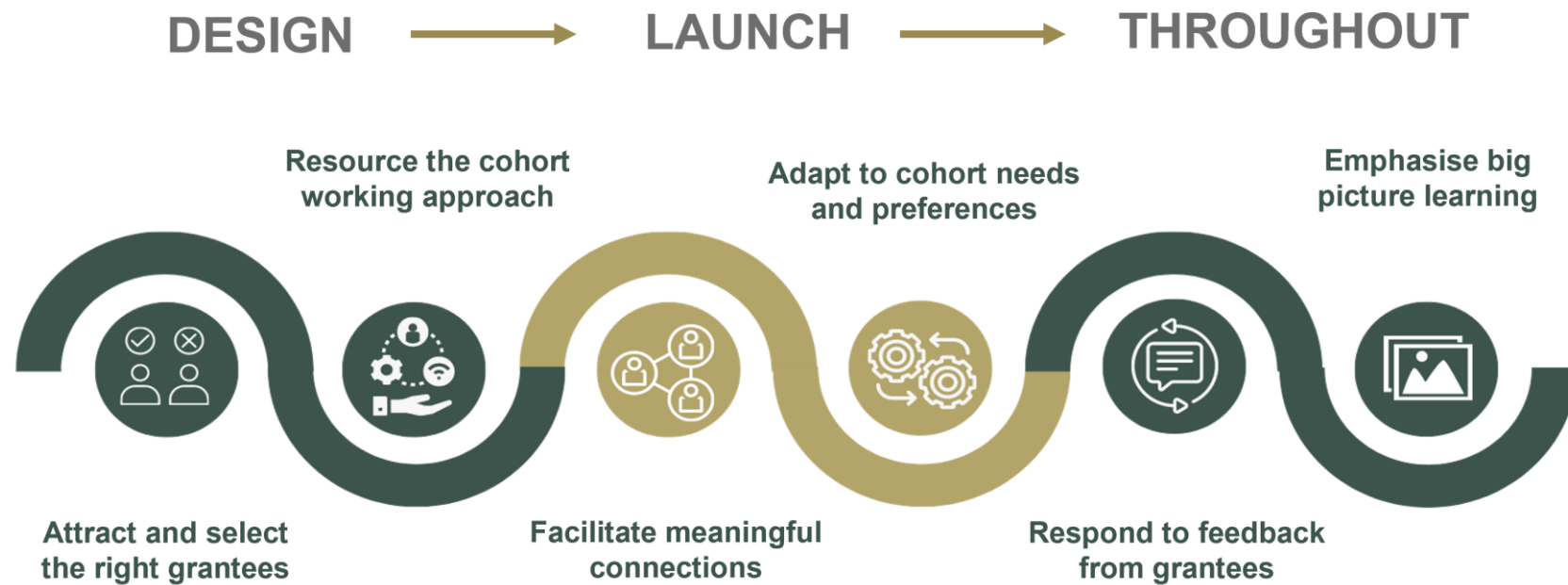
Developing the cohort

- **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 the cohort needs. Circumstances and context can change rapidly, and coordinators need to be able to flex their delivery approach to address changes such as remote working or the introduction of new technology.

- **Invite ideas for development** and try to 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 the cohort working approach. While grantees' contexts may differ, there is a lot to learn from the way other organisations approach different elements of project delivery.
- **Maintain an overview of the programme** and use the cohort coordinator's overview of knowledge, resources or expertise to identify and appropriately manage gaps for grantees who are more focused on their own projects.

Recommendations for Cohort Delivery

Text-only alternative available in [Annex B: Recommendations for Cohort Delivery](#)



Running effective cohort events

The majority of cohort activity will take place through facilitated events. These can include variety of events ranging from regular, short catchups such as informal coffee chats and weekly check-ins to less frequent, half 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 but also 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 this must include the entire cohort. Certain events may only be relevant to grantees of a particular size, location, or sub-sector.
- **Make materials and recordings available online** for grantees. These can be referred back to and viewed by team members who are not able to make the sessions, and/or 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** that is available for events and training. It is important to give cohort participants confidence that cost need not be a barrier, if supplementary funding is available.
- **Evaluate meetings and events** and monitor what works and for who. Secure honest, constructive feedback from participants to ensure meetings and events are valuable. Find out what could be changed in future to improve engagement and ensure successful outcomes – and then act on it.

Recommendations for Cohort Events

Text-only alternative available in [Annex B: Recommendations for Cohort Events](#)



Plan ahead and use time efficiently

Plan out the programme as far in advance as possible and provide clarity on agendas and objectives.



Create opportunities for connection

Plan a range of events including regular check ins, formal learning opportunities, and inspirational site visits.



Provide follow up and wrap around materials

Consider attendance carefully and make provision for engagement in different ways by making materials available online.



Prioritise accessibility and utility

Diversify locations and communicate clearly about financial support available to help with access and engagement.



Respond to and incorporate feedback

Solicit honest feedback about events and adapt future sessions accordingly to address the cohort needs.

Conclusions

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

This best practice guide has outlined what cohort working is and should look like; when and why it should be used; some of the ingredients that make up a successful approach; and how funders and grantees can position themselves to successfully implement cohort programmes.

The core of cohort working is **collaboration, exchange, and mutual support** among a group of grantees.

The goal is for the programme to generate impact that is greater than the sum of its parts. Taking a cohort working approach should lead to wider benefits that would not have been possible to achieve had grantees been funded and delivered their projects in isolation.

It is important to note that cohort working is not well suited for all types of projects and the benefits of cohort working can only be realised if grantees and funders are fully committed to it as a way of working. While cohort working can be resource-

intensive in the early stages compared to other funding approaches, the benefits outweigh the costs when it is implemented effectively.

Where it is appropriate and implemented effectively, with cohort working arrangements grantees can learn and share knowledge, ideas, and experiences in a collaborative setting – bringing true added value to their projects and the wider programme.

Annex A: Contributors

To inform this best practice guide, the evaluation team conducted robust research into the benefits, barriers, and enablers to cohort working, and identified best practice strategies in relation to cohort working.

The research included an in-depth desk-based review of internal documents, a wider review of Heritage Fund programme evaluations to collate lessons learned and compile recommendations, and 10 semi-structured interviews with Heritage Fund staff and external stakeholders.

We would like to thank all programme staff who have contributed evidence to this guide.

From the Heritage Fund:

Drew Bennellick, Head of Land and Nature Policy with programme oversight for Future Parks Accelerator, Landscape Partnerships, Parks for People, Rethinking Parks; **Victoria Bradford-Keegan**, Delivery Director, Future Parks Accelerator; **Josie Fraser**, Head of Digital Policy with oversight for the Digital Skills for Heritage initiative; **Eleanor Potter**, Senior Investment Manager, Future Parks

Accelerator; **Michelle Roffe**, Head of Investment and former Landscape Partnership Programme Manager; **Oluwaseun Soyemi**, Lead on Social Investment with programme oversight for Great Place and Great Place Nations; **Gemma Thorpe**, Head of the Culture Recovery Fund with programme oversight for Heritage for Catalyst Endowments and Heritage Endowments;.

From partner and stakeholder organisations:

Joe Carlin, Project Manager, Reimagine, Remake, Replay at Nerve Centre; **Laura Emmins**, Learning & Networking Officer, High Street Heritage Action Zones at Historic England; **Chris Falconer**, Head of Programmes, Local Trust; **Cath Hare**, Head of Grants and Our Bright Future Programme Manager, The Wildlife Trusts; **Shirley Lundstram**, Head of Programme, Heritage Compass at Cause4; **Vanessa Moore**, Engagement Officer for Rebuilding Heritage, The Heritage Alliance and Insight Manager, The National Lottery Heritage Fund; and **Fiona Skiffington**, Business Support Project Manager, Surviving to Thriving at Museums & Galleries Scotland.

These conversations provided an in-depth understanding of cohort working, and recommendations for best practice regarding across Heritage Fund and wider programmes.

Annex B: Diagram text

The Goal of Cohort Working

This diagram summarises the nature of cohort working as a three stage process:

1. Inputs: The funder puts a structure, resources, and staff in place to facilitate cohort working
2. Activity: Collaboration, learning, and knowledge transfer takes 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

This diagram summarises the five cultural factors that enable successful cohort working:

1. Positive culture: Encouraging collaboration rather than competition between grantees.
2. Buy in at all levels: Ensuring funder and grantee commitment to best practice.
3. Open communication: Creating a natural home for conversation, sharing and exchange.

4. Mutual respect: Fostering deeper connections than traditional funder-grantee relationships.
5. Trusting relationships: Creating an environment of safety where issues and concerns can be resolved.

The Benefits of Cohort Working

This diagram summarises the three sets of benefits:

1. Mutual Benefits: Improving impact and efficiency; More innovative ideas and approaches; Frameworks for support; Creation of mutual understanding; Driving systems change.
2. Benefits for Funders: Raising ambition; Improved change management; More effective stakeholder communications; Strong delivery relationships.
3. Benefits for Grantees: Continuous support; Improved skills and knowledge; Encouraging creativity; Creation of a network; Increased effectiveness in delivery.

Ideal Beneficiaries of Cohort Working

This diagram summarises the three types of grantee organisations most suited to cohort working approaches:

1. Organisations building capacity and skills.
2. Organisations without their own networks.

3. Organisations moving into new sectors.

Recommendations for Cohort Delivery

1. This diagram summarises the key recommendations at the three stages of cohort delivery:
2. Design: Attract and select the right grantees; Resource the cohort working approach.
3. Launch: Facilitate meaningful connections; Adapt to cohort needs and preferences.
4. Throughout: Respond to feedback from grantees; Emphasise big picture learning.

Recommendations for Cohort Events

1. This diagram summarises five areas of recommendations for the delivery of cohort events:
2. Plan ahead and use time efficiently: Plan out the programme as far in advance as possible and provide clarity on agendas and objectives.
3. Create opportunities for connection: Plan a range of events including regular check ins, formal learning opportunities, and inspirational site visits.
4. Provide follow up and wrap around materials: Consider attendance carefully and make provision for.

engagement in different ways by making materials available online.

5. Prioritise accessibility and utility: Diversify locations and communicate clearly about financial support available to help with access and engagement.
6. Respond to and incorporate feedback: Solicit honest feedback about events and adapt future sessions accordingly to address the cohort needs.