

Three-year case study of national organizations participating in a nutrition cohort: A unique funder-initiated learning collaborative

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Abstract

Improving food access is a complex challenge, and a broad range of U.S. nonprofit organizations are working to create positive change. In an attempt to amplify the impact of a single organization, foundations have begun funding collaboratives of multiple, high-achieving organizations. This three-year

case study documents the successes, challenges, and recommendations of the funder-initiated but grantee-driven Nutrition Cohort. The Cohort, initiated and funded by a foundation, includes six nutrition-focused member organizations, and was evaluated by a university partner (Tufts University). Study data from three annual waves of collection

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were triangulated using (1) key informant interviews with Cohort members and Foundation staff, (2) a survey of Cohort members, and (3) review of documents about or created by Cohort organizations. Over the study period the primary reported success of the Cohort was its commitment to work together as a “learning collaborative.” Crucial changes over the study period included enhanced trust and relationship building and promising shifts in perceptions surrounding the necessity of meeting attendance. This study also highlights additional benefits of the Cohort’s formation and growth across the three-year period, including organizational capacity building, improved fundraising strategies, and enhanced community impact. Study findings have implications for the practice of food systems development and may provide guidance for other foundations interested in starting similar collaboratives.

Keywords

Nonprofit Organization; Learning Collaborative; Nutrition Education; Food Access; Grantee-Driven; Case Study

Introduction and Literature Review

Foundations represent prominent sources of funding for enhancing the development and expansion of nonprofit organizations (Grønbjerg, Martell, & Paarlberg, 2000). In an attempt to strengthen the impact of single organizations, foundations across the U.S. have begun funding “collaboratives” of high-achieving organizations that have a shared vision or common goals. For example, foundations will connect organizations in a specific sector and treat them as an “investment cluster,” with the goal of encouraging synergy among grantees (Braverman, Constantine, & Slater, 2004).

Funder-initiated collaboratives can vary in terms of the foundation’s expectations for grantee commitment, accountability, and reporting (Chaidez-Gutierrez & Fischer, 2013; Fairfield & Wing, 2008). For example, the Robert Wood Johnson Foundation convenes over 120 representatives from national nonprofit organizations annually for a three-day Culture of Health Partners Workshop to encourage “in-depth exchange, engagement, and action” (Robert Wood Johnson

Foundation, 2016). Other foundations have utilized collaborative strategies to bolster grantees’ capacity to meet foundation expectations (Wade, Kallemeyn, Ensminger, Baltman, & Rempert, 2016). For example, the Robert R. McCormick Foundation formed and funded an evaluation learning community in which grantees shared ideas regarding dashboard tools and reporting systems, ultimately reporting a sense of community during the process (Wade et al., 2016). Other strategies include “innovation platforms,” commonly used in agricultural research, which allow stakeholders, often with different backgrounds, to engage in learning and to work collaboratively to solve common problems in their field (Nederlof, Wongtschowski, & van der Lee, 2011; Pali & Swaans, 2013).

Foundations have also attempted to implement a “collective impact” model, whereby multiple organizations or entities embrace a common agenda, but this can be challenging given the importance of the grantees initiating this agenda and then cultivating a working relationship over time (Kania, Hanleybrown, & Splansky Juster, 2014). A successful example in the food systems area is food policy councils, which can provide a supportive conduit for nonprofit organizations to broaden their food access initiatives (Santo, Yong, & Palmer, 2014). The importance of dedicating sufficient time when working with multiple organizations can be overlooked by funders, so there needs to be a greater level of early grantee involvement if the goal is to achieve large-scale social change (Easterling, 2013).

While there is versatility in funder-driven collaborative models, there exists as well a deficit of empirical literature to demonstrate how foundations can successfully form collaboratives and effectively support their grantees through this structure. In this paper, we explore the case of a three-year funder-initiated, grantee-driven collaborative, the Nutrition Cohort (hereafter referred to as the Cohort).

Formation of the Nutrition Cohort

Throughout the U.S., food access and nutrition education have become central to the work of many food-oriented nonprofit organizations, with

efforts ranging from school gardens to farmers' market incentives for purchasing fruits and vegetables (Anderson, 2013; Kobayashi, Tyson, & Abi-Nader, 2010). In 2012, an independent, private foundation (hereafter referred to as the Foundation) with a core focus in nutrition provided two-year grants to support 42 organizations in the domains of food access and nutrition education in low-income communities. During the first round of awards, it became evident to Foundation personnel that a cluster of six organizations were similar in their mission, vision, leadership, scope, and reach. They were small to mid-sized organizations that were highly innovative and influential in these domains.

In 2014, the Foundation provided funds to a cluster of six food-oriented nonprofit organizations that collectively have a national scope (Table 1). These organizations focus on food access ($n=3$: FA1, FA2, FA3) and nutrition education ($n=3$: NE1, NE2, NE3), and were chosen in part because they were at a similar stage of organizational growth. Using a unique approach, the Foundation paired three years of capacity-building funding for each grantee with a request to participate in the Cohort collaboration. The chief executive officers/executive directors for each organization served as the primary members of the Cohort.

At the inception of the first year of funding, the Foundation suggested a variety of ways in which the Cohort could work together along the spectrum of collaboration, ranging from informal networking to collective impact. While the funder provided these suggestions, the intention was for

the leadership of the Cohort organizations to build trust and decide as a group what type of collaboration might be most beneficial for members and their organizations.

Although the organizations had similar missions, at the onset the Cohort members were not necessarily familiar with the work of each other's organizations. A third-party consulting agency was hired to facilitate trust-building and planning exercises to guide the Cohort towards a plan for their time together. During their first few meetings, the Cohort discussed which approach would be most feasible and helpful to their organizations at that point in time. The group ultimately decided on a learning collaborative structure for the duration of the funding period to help each organization achieve increased scope, impact, and sustainability. In order to assess the formation process and final impact of the Cohort, the Foundation decided to simultaneously engage an evaluation focused on the chief executive officers/executive directors of each of the six organizations. A university partner (Tufts University) with expertise in nutrition and evaluation was funded at the same time as the Cohort and followed the group through the three-year collaboration.

The objective of this paper is to provide an intrinsic case study of the three-year (December 2014–December 2017) funder-initiated, grantee-driven collaborative. We aim to describe the evolution of the Cohort by synthesizing accounts of the successes, challenges, and lessons learned that the members reported based on their experience.

Table 1. Overview of Nutrition Cohort Member Organizations at the Time of Initial Funding (2014) and End of Funding Period (2017)

Organization	Years in Operation (2014)	2014 Operating Budget (in millions of US\$)	2017 Operating Budget (in millions of US\$)
Nutrition Education 1	<5	\$9.2	\$15.5
Nutrition Education 2	5–10	\$1.9	\$1.8
Nutrition Education 3	5–10	\$1.5	\$3.0
Food Access 1	5–10	\$3.2	\$5.8
Food Access 2	>10	\$9.2	\$10.2
Food Access 3	5–10	\$4.8	\$6.6

Applied Research Methods

Case Study Approach and Triangulation of Three Data Sources

An intrinsic case study approach (Baxter & Jack 2008; Stake, 1995; Creswell, 2013) was used to assess the Cohort. Three data sources were triangulated to assess Cohort successes, challenges, and lessons learned during its formation and evolution: (1) yearly key informant interviews regarding Cohort member perceptions of motivation, successes and challenges, benefits of participation, and future directions (Table 2); (2) a 41-item survey, and (3) document reviews of a variety of sources including relevant e-mails, phone and in-person meeting minutes, and other records documenting the exchange of information within the Cohort across the three years. The results presented are a synthesis of the data from the three sources, which were collected annually from the Cohort members. The key informant interviews are the predominant source of information, as they provided the richest insight into Cohort member perspectives across the collaboration.

Key Informant Interviews

Key informant interviews were conducted with the six Cohort members at the end of each year and the Foundation managing director and grants manager were interviewed at the end of Year 1. Key informant interview questions were developed, based on a script by Caulum, Outar, Shardlow, Thomas-Tielke, & Tulpule, to evaluate the effectiveness of a food access coalition (Caulum et al., 2013). The question domains for Cohort member interviews are presented in Table 2. Interviews with the Foundation during Year 1 addressed similar areas but were adapted to include topics such as motivation for starting the Cohort, facilitation strategies, perspective on future plans, and successes and challenges. Questions were semistructured and facilitated by a moderator who was a member of the university research team.

Each interview was audiotaped and transcribed verbatim. Two researchers independently reviewed and coded a portion of the transcripts to assess inter-rater reliability. Researchers also implemented peer de-briefing throughout this process to identify emerging themes. The inter-rater reliability was

Table 2. Cohort Member Key Informant Interview Question Domains

Question Domain	Time Point Assessed	Topic Areas Addressed
Motivation	• Year 1	<ul style="list-style-type: none"> • Organization's interest in applying for funding • Individual/organizational role in Cohort
Cohort Successes and Challenges	• Years 1 & 2	<ul style="list-style-type: none"> • Development of common vision • Cohort's short-term goals • Cohort's long-term goals • Cohort members' levels of investment • Major success(es) of Cohort • Major challenge(s) of Cohort
Benefits of Participation	• Years 1, 2, & 3	<ul style="list-style-type: none"> • Development of new and/or strengthening of current relationships • Implementation of new projects and/or ideas with other cohort members
Future Direction	• Years 1, 2, & 3	<ul style="list-style-type: none"> • Concerns about the Cohort • Vision for Cohort moving forward (i.e., structure, funding, staffing) • Achievements Cohort is capable of
Overall Experience	• Year 3	<ul style="list-style-type: none"> • Willingness to be involved in a similarly structured Cohort again • Impact on food and nutrition issues as a Cohort • Advice to other organizations considering joining a Cohort • Reflection on convening topics

80%-100% across all domains; thus remaining transcripts were coded independently. Predominant themes were identified using an inductive and deductive content analysis approach with QSR International's NVivo 10 software (QSR International, Melbourne, AU) (Fereday & Muir-Cochrane, 2006).

After documenting themes and identifying key quotes from Cohort and Foundation members, the evaluation team conducted a member check-in phase with the Cohort and Foundation partners. Since key informant interviews were the focal point of this case study, the evaluation team requested that participants review their statements to ensure accurate representation of their views.

Survey

At the end of each year, a survey was also administered to the six Cohort members within the same month as the key informant interviews using Qualtrics software (Qualtrics, Provo, Utah). The blinded 41-item survey was developed by the university partner with input from the Foundation and the third-party consulting agency. The surveys assessed each Cohort member's perception of (1) the mission, strategy, and goals of the Cohort; (2) his/her role within the Cohort given his/her professional background in nutrition and/or food access and administrative leadership experience; (3) the benefits of participation in the Cohort; and (4) during just the Year 1 survey, the value of the third-party consulting agency as a Cohort facilitator. Questions used a five-point Likert scale to assess the extent to which the Cohort members agreed or disagreed with a statement. Survey data were downloaded and tabulated for all six Cohort members across response categories. The university researchers were blinded to the identity of the respondents for all survey questions so as to not bias interpretation of these data.

Document Reviews

Minutes from phone and in-person meetings and relevant e-mails were captured across the three years to document information exchanges and decision-making processes. Additionally, Cohort members were asked to record instances of peer-

to-peer communication, collaboration, and successes in a shared Google Doc to catalog interactions outside organized Cohort meetings. These documents were also coded in NVivo 10, utilizing the coding scheme developed for the key information interviews, and an inductive approach was used to identify additional themes.

Results

Funder Perspective During Year 1

Interviews with the Foundation managing director and grants manager at the end of Year 1 addressed their role in the evolution of the Cohort and perceived successes and challenges, as this was the critical period for defining Cohort mission and goals.

Role of foundation

During the initial (Year 1) interviews, the two Foundation members agreed on three major roles that evolved over the course of the first year: investor, connector, and learner. As an "investor," the Foundation was financially supporting the specific needs of each grantee, as well as the Cohort-determined goals. As a "connector," the Foundation facilitated the trust- and relationship-building of the Cohort members through e-mail forums and formal Cohort meetings. Serving as a "learner," Foundation members noted:

We want to listen and learn from them. In terms of the development of this case study, whether the outcome is positive or negative—we would share that with other funders or grantees in the field to say "this is an approach we tried and we think it worked or didn't work."

Throughout the first year, the Foundation evolved in terms of its relationship with the Cohort. Early in the year, the Foundation and the third-party consultant were heavily involved in orchestrating phone calls and planning the meeting topics in a way that promoted relationship-building within the Cohort. The Cohort's shift to a peer learning collaborative halfway through the first year prompted the role

of the Foundation to become more administrative as Cohort members assumed responsibility for deciding the frequency of meetings, identifying meeting topics, designing the agenda, and facilitating the day-long events.

Challenges and successes

The first four to five months of the funding period represented a challenging time for the Foundation in terms of re-affirming that the Cohort members, and not the Foundation, would be driving the agenda. The Foundation leaders explained that they had an initial idea for the Cohort to pursue a collective impact project in the community, considering the strengths of each Cohort organization. However, this suggestion dissipated quickly during preliminary Cohort conversations. The Foundation recognized that the Cohort members may not have had the capacity to pursue a collective impact project during the three-year grant period; if they did, it should develop more organically and likely would require more time. As a result, the Foundation had to prove that it did not have any further expectations or ulterior motives for what the Cohort would accomplish. This outcome after Year 1—clarification that the format would be a learning collaborative rather than collective impact—was ultimately viewed as a success. The establishment of overall trust among the group and Cohort members was viewed as a major accomplishment by the Foundation.

Grantee Perspective

In terms of the grantee perspective, findings from Years 1 and 3 are emphasized since those time periods were most transformative for the Cohort. Year 1 was critical for identifying the mission and goals of the Cohort. Year 3 reflections focused on the overall experience and next steps for the Cohort's work. No new themes emerged during the Year 2 interviews, as by this time the learning collaborative structure had been established, and the focal point throughout the year was Cohort member engagement in the meeting topics agreed upon during Year 1.

Evolution of Cohort Culture

Cohort structure and facilitation

One of the crucial structural components from Cohort members' perspective was the importance of their collaboration being driven by Cohort members (i.e., grantee-driven) and not by the funder. One member shared that at the first meeting there was a brief moment of funder-created pressure around whether the groups were ready to dive into a collective impact project together. The member said: "My view of the world is partnerships never work when they are forced, so all you can do is invite people to the table and see what unfolds" (NE1).

The vision for a collective impact project then took more of a backseat to the process of trust-building among the members and allowing for space to see what would unfold. The Cohort members reported valuing the focus of initial conversations about each organization's work and where connections existed. Understanding one another's operating styles and establishing a structure that supported the innate leadership qualities of the Cohort leaders was integral (FA3). Another member emphasized that the Cohort consisted of CEOs and pressed the importance of a structure in which none of the members felt subordinate (FA2).

By the end of Year 1, the learning collaborative model had taken shape and was sustained across Years 2-3. The members decided that the learning collaborative would focus future in-person meetings on six topics of major interest: (1) fundraising and funding models, (2) effective board development, (3) succession planning and management, (4) employee performance management and development, (5) technology and communications, and (6) the national nutrition policy landscape.

Importantly, all six of the Cohort members reported that they felt like everyone in the Cohort had a voice in decisions from Year 1 (Blinded online survey: $n=4$ strongly agree; $n=2$ agree) through Year 3 ($n=3$ strongly agree; $n=3$ agree), which was necessary for developing and sustaining goals. The strength of the learning collaborative approach leveraged each member's experience and

leadership qualities as they co-facilitated the meeting topics. One member reflected on how well this method worked during the first learning session about fundraising, saying that, as a result, all the members felt more at ease digging deeper into these topic areas and being accountable during future meetings (NE2).

Relative to other aspects of the Cohort facilitation, two members felt that having a third-party facilitation partner during Year 1 was not essential to the progress that happened (FA2, NE1). During Years 2-3 this was addressed for the remaining meetings, as Cohort members either individually or with another Cohort partner embraced organizing and leading each meeting topic. Another suggestion for future work during this timeframe was that there be one or two designated “executive administrators” dedicated to ensuring that information is flowing and that work continued to be done between meetings.

Ultimately, the Cohort praised the Foundation’s management approach and candidness throughout the course of the grant period, particularly its openness to the grantees trying new and innovative ideas (FA2). One member (FA1) credited the Foundation with being more successful at bringing collaborators together than any other funder-initiated effort in which this member had worked. Three Cohort members (FA2, NE1, NE2) were in agreement that the small size of the Cohort was appealing as it enhanced the ability to form a trusting learning community. This sentiment was expressed at the end of the grant period as well. One member shared during the Year 3 interview, “It was a refreshing experience to not have the Foundation direct the interactions of the Cohort members, and it was amazing to see what came out of it. There was a lot of learning that happened out of that openness and flexibility on the part of the Foundation” (NE2).

Investment of members and drivers of Cohort activity

All six Cohort members described themselves as personally invested in the Nutrition Cohort, with the same distribution of responses during Year 1 and Year 3 ($n=3$ strongly agree; $n=3$ agree). A member stated that when the group was together, every member took the work very seriously.

Another exclaimed, “everyone is on fire and really motivated, and I get re-energized from this group” (FA2). Members also described how the meetings and other Cohort member interactions permeated the activities of their organizations. One member (NE3) explained that the meetings and sessions influenced day-to-day organizational activities, and another shared how topic areas became infused into conversations with staff internally (FA2).

Developing common vision

During preliminary phone calls with each Cohort member in Year 1, many expressed the desire to develop a common vision for the group. By the end of the first year, however, members were divided as to whether or not a common vision was achieved and what it entailed. Four members (FA2, FA3, NE2, and NE3) expressed that they did not feel that there truly was a shared common vision yet, and two members (FA1, NE1) considered the decision to become a Cohort-driven learning collaborative as the common vision of the Cohort. Members (NE1, NE2) also referred to the common vision as a broader goal of improving the food system beyond the grant timeframe and funding: “A big picture vision that we’re all working to achieve outside the bounds of the grant is a food system that is just, equitable, sustainable, and healthful” (NE1). Despite the discordance of Cohort members around defining a common vision, there was an apparent commitment to learning from each other and a recognition that they may share certain goals that could not fit in the three-year timeframe of the Cohort.

Challenges

Initial lack of clarity during Year 1

A major challenge encountered during the first year was lack of clarity surrounding what the Cohort would accomplish during the funding period, described by one member as “general murkiness” (NE2). Cohort members connected this lack of clarity to both the application process and initial meetings in terms of what their commitment to the Cohort would look like. However, as the members reflected on the culmination of the first year, many

agreed that the direction of the group was more clearly defined:

During the initial discussions, we were not 100 percent sure how we were going to go about tackling some of these issues that we had laid on the table—that we wanted discussion, discourse, and learning—and now it seems a little more tangible and doable. (NE2)

All Cohort members agreed that planning and relationship-building during the first year was essential before reaching a point where they were working towards concrete goals. Ultimately, initial lack of clarity set the stage for more in-depth discussions to identify what members wanted to get out of their experience.

Interestingly, three Cohort members themselves claimed to be the biggest skeptics due to the lack of clarity, but by the end of the three-year grant period their views were vastly different:

Probably my major reflection is that initially I was the greatest skeptic about the potential of this Cohort to really accomplish much of value for those of us involved. That attitude has really shifted. I have found great value in participation and am actually sad that the formal part of this has come to an end. I found that I was really looking forward to meetings and found that the formal and informal interactions with others to be valuable. (FA1)

Organizational capacity and time

The perspectives of the Cohort members on their organizational capacity and availability to engage with the Cohort changed from Year 1 to Year 3. During Year 1, the members expressed challenges involving their capacity as organization leaders and lack of time, especially as the latter affected travel and attending meetings in person. Five of the six members spoke about their concerns balancing the priorities of serving their own organizations with being able to prepare for and attend meetings properly. One member explained:

The only challenge I see is related to the organizational capacities of each of the organizations and how that allows people to prepare for gatherings, be on the phone calls, and make it to the gatherings in 100% good shape to really dive in and devote. (FA3)

This member also felt that some of the organizations were truly “capacity-strapped” while others were able to devote more time and thought to actively participating in cohort exercises (FA3).

However, the feeling of lack of time and capacity shifted by the end of Year 3. Four of the Cohort members stated that they truly desired more time, not only to discuss the meeting topic at hand, but also to spend time together learning and exchanging ideas (NE1, NE3, FA1, FA2). Two members pressed the importance of being “present” during meetings (NE3 and FA2), both in terms of in-person attendance and engagement. Although the meetings were conducted in person, Cohort members occasionally participated through video conferencing. One member explained that this option took away from the dynamic to such an extent that physical attendance should be required for meetings (FA2). Another shared that they wished they had spent more time with the other Cohort members, instead of using time between presentations to take phone calls and send email (NE3).

Successes and Benefits

Fostering personal connections

At the beginning of the first year, many Cohort members expressed different ideas as to how a successful Cohort might look, including traits such as trust, communication, commitment, and coordination. There was variation in the extent and depth of prior relationships among members, with some members having working relationships and others having never met. By the end of the first year, new relationships emerged and existing ones strengthened. The members’ perspectives were in alignment regarding the benefit of the relationship-building aspect of the Cohort:

There are cross-connections that are happening that we may not have thought about otherwise. All of us see each other as partners and committed players in this space, and there are relationships that have developed... There is no hesitation picking up the phone or emailing somebody and saying, "hey, I need this, I need you to make an introduction for me," which I don't think was there across all six organizations when we started. So that in and of itself is a huge benefit to all organizations that are a part of the Cohort. (NE2)

Not only were these personal connections important for promoting comfort and trust within the Cohort, but members also discussed using these relationships as a springboard for enhancing their organization's community impact. By Year 3, the members collectively expressed that the personal connections developed truly enhanced their overall experience with the Cohort and that they hoped to sustain these relationships after the funding period. One member shared that it was beneficial to get peer support with the many concerns and stresses that often come with running a non-profit, saying "I feel that there is now a solid, strong connection between me and the other Executive Directors" (FA2). Another indicated that they left the Cohort experience "feeling deeply grateful for the relationships [they've] built, and know that those folks will be there for [them] if ever in a time of need" (NE1).

Bolstering community impact

During Year 1, many members indicated that a natural "big picture" goal for the Cohort would be to achieve an aligned vision for changing food system policy, advocacy, and programming. One member echoed this at the end of the first year: "If we combined strengths of each of our organizations, and coordinated them in a meaningful way, it could be something that actually moves the field forward faster" (FA3). The Cohort's perceptions of their ability to make an impact remained throughout Year 3, with potential to extend beyond the funding period:

I think that this will have a lasting effect that will be very good for the work, and what happens in different cities and communities throughout the country. The reach of these groups is incredible. These bonds are really significant. (FA2)

Additionally, the Cohort-facilitated connections yielded substantive gains for many members across the three years. Table 3 highlights the types of successes that were achieved by one or more Cohort members as a result of these networks, including organizational capacity building, funding opportunities, and formal Cohort collaborations. In nutrition education, one member stated that Cohort members were serving as outreach partners for their national awareness month and were also planning to attend and present at their organization's national conference (NE2). Another member (NE3) shared that a deeper collaboration formed when one Cohort member's organization (NE1) incorporated volunteers from the other partner's organization into their program schools (NE3). From the food access-focused organizations, one leader (FA1) discussed a budding partnership (with FA2) focused on distributing healthy foods to small convenience stores and bodegas that are WIC-certified. The interest in pursuing policy initiatives during Year 1 was substantiated during Years 2-3, as Cohort members expressed joint support of policy approaches involving nutrition incentives as part of the next Farm Bill (Table 3), and dedicated a substantial portion of their final Cohort meeting to topics of current policy engagement.

Sharing and teaching

The central success of the Cohort was the formation of the peer learning collaborative during Year 1, which provided a foundation for teaching and sharing both within and out of meetings across Years 2-3. All Cohort members reported that they implemented new ideas and changed aspects of how they run their organizations as a result of participating in the Cohort. They immensely valued the opportunity to learn from other leaders in the food system movement facing similar personal and organizational challenges and opportunities. One







leader explained:

All of the leaders are going through similar issues. The Foundation is really generous in the support they are offering to provide a forum for these leaders to convene and discuss some of the things that organizational leaders or Executive Directors do not have

the opportunity to discuss unless you have relationships on your own and time to be able to pursue one-on-one conversations. (NE2)

The Cohort members mutually appreciated that meetings served as a formal setting for peer-to-peer education that prioritized topics which they

Table 3. Nutrition Cohort Member Accomplishments During Years 1–3

Type of Outcome	Examples of Accomplishments			
	Year 1	Year 2	Year 3	
Organizational Capacity Building	Enhanced administrative systems through new connections to potential IT partners, marketing firms, and job candidates			
	Shared resources (e.g., evaluation tool for school meals)			
	Participated in another Cohort member's board meeting and offered strategic support			
Funding Opportunities	Facilitated introductions to new potential foundation funders			
	Identified SNAP-Ed funding opportunities for existing initiatives	Worked together to raise funds for a member's initiatives		
	Strengthened government support through connection with state-level department of education	Submitted joint proposal to a community food funder		
Formal Cohort Collaborations	Explored new collaborations (e.g., a healthy food incentives initiative for smaller stores/ bodegas, a new food access pilot project in sports stadiums.)			
	Provided promotion and participated in other cohort members' events (e.g., conferences, month of awareness)			
	Facilitated a member's expansion into program schools located in new city	Support of policy strategy for next Farm Bill involving nutrition incentives		
	Made progress on a project based on mini-grant from state partner		Three Cohort members co-authored a report about food access	Expressed that Cohort members forged stronger bonds with other organizations that will continue after grant period

chose themselves because they would benefit members individually and collectively. One member stated a personal, Cohort-related goal of taking responsibility for his own learning and sharing his experience and insights with other members:

I really see my role as helping the Cohort to grow into a catalyst for greater effectiveness and change in the food system, because all of us are getting better at our work by sharing what we know and what challenges we're experiencing. (FA1)

Members reported that the trust built during the first months of the Cohort was integral to the fundraising meeting discussions that required sharing personal perspectives. Comparing Year 1 to Year 3, the Cohort members either strongly agreed (Year 1, $n=4$; Year 3, $n=3$) or agreed (Year 1, $n=2$; Year 3, $n=3$) that they were comfortable expressing their point of view even if others might disagree. Half ($n=3$) of the members strongly agreed that they were comfortable bringing up new ideas at meetings during Year 1, which was comparable for Year 3 ($n=4$). Two members (FA2, NE2) said that valuable fundraising advice and resources (e. g., funders' contact information) were shared with an openness that would not have been possible without the foundation of trust. One member added that they were excited about this sharing opportunity given the typically competitive climate of working in this field (FA2).

At the culmination of the funding period, Cohort member responses regarding which meetings were most beneficial to their organizations varied from member to member. Though members unanimously agreed that all meetings were constructive, they identified distinct topic areas that were particularly helpful in terms of the status and unique needs of their organizations. For example, one member (FA1) indicated that the topic of board development was helpful because their organization had lacked a development director or department, and by the end of the Cohort period, they had implemented one. Another member (NE2) learned of a new fundraising model—fee-for-service—that was “way different” from other

models this member had encountered. This member conveyed a hope to work deeper with the other Cohort members to consider piloting this model. And a member (NE1) stated that while succession planning was not a topic that their organization had done any work about prior to the Cohort, they now have an organization-wide process in the works for building a strong pipeline of leaders ready to step into higher-level administrative roles.

Ideas for Future Funder-Initiated Cohorts

At the end of Year 3, five of the Cohort members conveyed ideas about what they would have done differently, broadly falling into two areas: more efficiently identifying the central goals for the Cohort as a learning collaborative, and addressing the structure and allocation of meeting time. Two members (NE2 and NE3) stated that the initial months of the Cohort were an unusual time, figuring out what they wanted to do; they felt that through this discovery process they lost a lot of valuable learning time. One of the members remarked, “I am a person that needs clarity. What are we doing? What are our goals?” (NE2), and the other said, “Had I known more going in, I may have lined myself up better” (NE3).

Regarding the meeting structure and time allocation, two members had distinct opinions regarding internal staff presence at meetings. One Cohort member (FA2) wished that staff hadn't been present all the time because it tended to shift the dynamic of the meetings and suggested that perhaps staff be present for only half of the meetings. Another member (NE1) believed that other staff should have been able to attend with analogous members of other Cohort organizations. As for time for meetings, it was suggested (FA1) that more time—perhaps one and a half to two days, rather than only one—be dedicated to meetings to cover the breadth of content. They also noted that meetings needed to be paced differently, due to the intensive nature of the content.

Long-term Goals and Sustaining Relationship After Funding Period

The overall perspective of the Cohort was that a strong network was established with meaningful

personal relationships and collaborations continuing to evolve as a result of this work. However, it was believed that there was a narrow likelihood that the Cohort would continue as a formal learning collaborative with an established meeting structure. The members did not collectively delineate long-term goals at the final meeting: “We all just agreed that it would be valuable for us to continue to connect and find ways to continue working together” (FA3). One member spoke about time and capacity barriers to continue formally meeting as a group sharing; “The reality of it is that we are very busy and so without having a structure, it seems highly unlikely that the six directors would stay in touch as a group” (NE2). However, this member added, “even if we don’t see each other frequently, the trust that we built over the past three years will continue to connect us.”

Discussion

The evolution of this funder-initiated model revealed successes and challenges from the perspective of both the funder and grantees. How this Cohort was initially envisioned, formed, and evolved, represents an innovative but replicable model for converging the strengths of organizations that share an analogous goal of addressing food access and/or nutrition education. Lessons learned throughout this three-year process are important to share, particularly to foundations interested in pursuing a collaborative model.

An important aspect of the relationship between a grantee and funder is achieving an alignment of perspectives (Buteau, Chaffin, & Gopal, 2014). Considering the formation and beginning stages of the Cohort, the Foundation developed the capacity-building grant mechanism and conveyed a pragmatic rationale for this approach. However, the grantees shared that during the application process there was not adequate communication about the vision for the Cohort. The lack of clarity during the application process persisted during the first few months of the Cohort’s existence, presenting a challenge for both the members and the Foundation. Regardless of the type of collaborative relationship, it is integral that the grantee and foundation achieve an alignment of perspectives (Buteau et al., 2014),

which can be challenging when different players are involved (Fairfield & Wing, 2008). Despite this initial lack of clarity and challenge to establishing goals, both the Foundation and the grantees immensely valued the formation of trust in the following months upon which they could build.

Interestingly, the grantees shifted their perspectives towards the challenge of time commitment and travel from Year 1 to Year 3. Over the course of the funding period, the Foundation made concerted efforts to plan meetings around the Cohort members’ schedules and base meetings in convenient locations, but during Year 1 a few Cohort members felt that it would have helped to have had flexible meeting options, such as webinars. By Year 3, they acknowledged the importance of in-person meetings and found physical presence immensely valuable. Further, some said that they wished for more time to explore meeting topics. The meaningful personal connections and collaborations that evolved from in-person participation may suggest that virtual learning models are not conducive to in-depth member engagement. For example, a virtual learning collaborative consisting of webinars, conference calls, and online surveys, which was found to be successful for promoting quality improvement in other settings (John et al., 2014), may not be effective for this type of Cohort.

The major success expressed by the Foundation and grantees was the formation of trust and being able to share openly with one another. Ultimately, this level of trust served as the basis for forming a learning collaborative and evolved across the three years to become a feature of the Cohort that all members immensely valued. The importance of these characteristics to the Cohort success is supported by evidence from community coalition research, which shows that determinants of member satisfaction include shared decision making and a positive organizational climate (Butterfoss, Goodman, & Wandersman, 1996). The benefits of the learning collaborative also extended to other staff of Cohort organizations. The value of these topics went beyond the meeting space and impacted how the Cohort members run their organizations.

As for the future of the Cohort, it appears that these relationships will continue to evolve and lead

to other types of collaborations, specifically collaborations aimed at boosting community impact and making progress with salient food systems issues. The group agreed, however, that it would be difficult to continue having formal meetings as a learning collaborative without the infrastructure guided by the funder. Consensus on this topic was primarily established at the final Cohort meeting, which may not have provided sufficient time to identify what sorts of options for sustainability were feasible or desirable. However, it appeared that members were highly confident that they would sustain the personal connections they had established. This is consistent with other public health literature that has identified factors including a history of collaboration, a clear vision and clear operation guidelines, and sufficient funding as key factors that contribute to the sustainability of collaboratives (Rog et al., 2004).

Lessons Learned

The formation of the Nutrition Cohort as a funder-initiated but grantee-driven collaborative may be an effective model in food systems development and public health. This in-depth case study provides insights for bringing together organizations with proven models for success and similar goals for addressing food access and nutrition education on a national scale. There are four primary recommendations this study identified for those considering a funder-initiated collaborative model:

1. The application phase can help potential members better comprehend what their involvement may entail.

The Foundation did not know at the time of the application what form the Cohort would take, as it was meant to be grantee-driven. However, having general expectations delineated during the application process could help the members plan accordingly for their potential commitment. The application phase could also serve as an opportunity to obtain feedback from participants up front regarding preferences for meeting content and structure.

2. Carefully consider the organizations that will be working together.

The Foundation excelled at selecting a group of

organizations that were similar in their scope, reach, leadership, and vision in the areas of nutrition education and food access. The combination of the organizations' record of success and desire to increase capacity positioned them as ideal candidates for this type of cohort. The Foundation had funded many of these organizations in the past, bolstering their confidence in their leaders' capacity to work together effectively.

3. Keep the size of the cohort small and identify how to structure meetings in a way that complements the dynamics of the group.


The size of the Nutrition Cohort was perceived to be a major advantage, especially in terms of its effect on supporting partnerships formed across the grant period. Another important feature enhancing the success of this type of collaborative was dedicating sufficient time to meetings, emphasizing in-person attendance, and critically evaluating how to engage other members of the Cohort organizations most effectively.

4. Dedicate sufficient time to relationship and trust-building.

Before conversations about the mission and goals of the Cohort occurred, the members needed to establish a foundation of trust to allow for comfortable, realistic, and transparent working relationships. It was essential that the funder did not try to steer the Cohort in any specific direction during this initial phase. The establishment of the Cohort as a learning collaborative towards the end of the first year was perceived as a central success, and feedback from the Cohort members supports the perception of the model's merits. Building off the leadership of the group and continuing with a Cohort-driven approach worked well for the members. The funder put the onus on the grantees to spearhead each meeting topic and incorporate other Cohort members to ensure peer-to-peer learning. An important aspect of the learning-collaborative direction was that it was manageable and realistic for the Cohort to accomplish. It was quickly realized that a more long-term project would not be achievable, so more feasible goals were established in order not to set the Cohort up for failure.

Conclusion

Culminating with the development of a learning collaborative, this case study of the Nutrition Cohort's evolution highlights lessons learned and the makings of a successful model for a grant period and beyond. Though the beginning stages of the Cohort were challenging for both the grantees and the funder, the development of trust both among the Cohort members and between the Cohort and the funder represented a major success. The funder-initiated, grantee-driven learning collaborative model supports two promising outcomes for the Cohort members: applying what they learn from one another to strengthen and

expand the work of their respective organizations, and strengthening personal relationships and exploring potential collaborations for community impact during the Cohort period and beyond. 

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