

The California Wellness Foundation
2010 Grants Program Survey Final Report

Submitted by

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The California Wellness Foundation 2010 Grants Program Survey

Executive Summary

The California Wellness Foundation (TCWF) recently completed its fifth Grants Program Survey. Approximately every three years since 1997, TCWF has conducted these surveys to determine how grants applicants perceive it and its staff, and to assess the usefulness of its materials and website. TCWF uses the findings to improve its philanthropic work.

For this survey TCWF distributed web-based and paper surveys to more than two thousand organizations that had either applied for funding or were “active” grantees in 2009. As in previous surveys, this survey’s findings confirmed TCWF’s continuing “excellent reputation;” they showed considerable satisfaction with and appreciation for TCWF’s funding approach, staff, communications (particularly its website), and its leadership in philanthropy. Examples of the 2010 respondents’ perceptions and experiences include:

Funding approach: According to respondents, TCWF’s approach “values diversity” and was “creative” and “community oriented.” It was widely praised for its core operating support and multi-year funding, because they signified that TCWF “values what it takes to run a program/organization...” Similarly, its application requirements and grant management processes are “much better than most other grantors for ease of application and management.” Overall, TCWF’s funding approach was seen to be “holistic in seeking and supporting solutions.”

Staff: More respondents than in the past reported that staff was courteous, knowledgeable, responsive and helpful, describing them as “deeply caring,” yet having “realistic expectations.” Respondents also described them as providing “overall support, not just funding,” and being responsive to different groups—communities, non-profits and public health needs—and different issues, ranging from “requests for feedback” to, e.g., problems of “teens,” the “elderly” etc., and “emerging needs and research.”

Website: More respondents than ever before reported visiting the website and described it as most useful in helping them understand TCWF’s responsive grantmaking program. This is because it is “information rich and easy to access (doesn’t clutter my office)” and because they “Love the new look,” describing it as “Clear, concise, easy to navigate,” and “Fabulous! Simple and well designed.”

Leadership in health and wellness philanthropy: Once again, respondents noted and valued TCWF’s role as a leader, describing it as “progressive,” and being “visionary,” “strategic,” “a trend setter.” Its support for advocacy was seen as exemplifying its commitment “to ending health disparities;” it was commended for providing “excellent opportunities for health and wellness education,” and valued for its willingness to collaborate and to “share ideas/programs.” As one respondent wrote, TCWF was “a leader who is willing to learn and teach.”

Some unfunded respondents, although fewer than in past surveys, criticized TCWF’s funding process and staff. Primarily, they wanted more time with staff. Those new to fund-raising wanted to understand better why their requests were denied; the more sophisticated felt their own and their organizations’ experiences and capabilities had not been thoroughly assessed and thus were not properly appreciated.

TCWF again received accolades for its funding approach, staff and communications. As one respondent commented, TCWF is able to “see [the] big picture without losing sight of the individual’s needs.” Another put it more succinctly: “TCWF Gets It!”

INTRODUCTION

Approximately every three years since 1997, The California Wellness Foundation (TCWF) has conducted a survey of its Grants Program in order to understand how grant applicants perceived the Foundation, how accessible and useful they found its materials and information, how staff treated them, and how its philanthropic activities could be improved. As with its previous surveys, TCWF worked with consultant Julia Pennbridge, PhD, for its 2010 Grants Program Survey. In turn, Dr. Pennbridge asked the National Health Foundation to be responsible for the technical aspects of conducting the survey online.

This report presents the findings from the 2010 Survey. Where appropriate, results of the four previous surveys (1997, 2000, 2003 and 2006) are compared. The survey was sent to all organizations that either applied to TCWF for funding or were active TCWF grantees in 2009.

METHODS

As in the past, the content and format of the previous surveys were followed for the 2010 survey. Thus the domains and closed- and open-ended questions of the 2006 Survey were reviewed. Question modifications included updating document names (e.g. *How to Apply* brochure, *Grantee* magazine), adding the Public Education Campaign website option where appropriate, expanding two questions and adding a new one. The 2010 Survey is provided in Appendix A.

TCWF distributed both web-based and traditional paper surveys for the first time in 2006. It followed the same approach in 2010. The paper surveys were sent with anonymous self-addressed envelopes to be returned to TCWF, care of Julia Pennbridge. To prevent duplicate completion of surveys, organizations were given unique identification numbers that were used to label both paper and web-based surveys. Web-based surveys were sent from an e-mail account created specifically for the 2010 Survey. Each web-based survey recipient received an e-mail with a unique URL hyperlink to their organization's survey. Details regarding web-based survey features and screen shots of the application are provided in Appendix B.

Follow-ups were conducted with both paper and web-based survey recipients. Paper survey recipients who had returned incomplete surveys were contacted by telephone. For web-based survey recipients, a follow up e-mail was sent to those who had neither logged on nor completed the survey one week after the initial e-mail with the hyperlink. A second e-mail was sent one week later, again to those who had neither logged on nor completed the survey, to inform them that the completion deadline had been extended from January 26th to February 2nd. Paper survey recipients were not notified of the completion deadline extension, however paper surveys were accepted through February 2nd.

Completed paper surveys were entered by hand into a SQL database via a web-based data entry application; almost 66% of these entries were checked for accuracy. Web-based surveys were automatically transferred and saved into the SQL database as end-users navigated through the survey. Because web-based surveys were automatically entered into the database and programmed safety features prevented respondents from answering questions not applicable to them, web-based surveys were not checked for data accuracy. Quantitative data analyses,

including response rates, frequencies and cross-tabulation summaries, were conducted in Excel. All responses to the open-ended questions were separately analyzed for content and theme.

RESULTS

More than two thousand (2,030) surveys were distributed for the 2010 Survey compared to 1,619 in 2006. Slightly more (58%) surveys were distributed electronically compared to 2006 (54%), and slightly fewer by mail (42% versus 46%). Eighteen mail survey recipients requested links to online surveys and one recipient of the e-mailed surveys requested a paper survey.

In 2006, 54 e-mails “bounced back” because of incorrect or inactive e-mail addresses, none bounced back for the 2010 survey. However, 16 mailed surveys were returned because they could not be delivered and three were returned blank because no one in the organization knew anything about requesting or receiving funds from TCWF in 2009.

The 2010 Survey overall response rate was higher than in 2006 (36% compared to 31%). The distribution data and response rate patterns for the 2010 Survey were as follows:

<u>Number of Surveys Distributed</u>		
	Surveys (#)	Surveys (%)
Web-based	1,181	58
Paper	849	42
Total	2,030	100

<u>Response Rates</u>			
	Web	Paper	Web & Paper
Did not respond	453 (38%)	665 (80%)	1118 (55%)
No data/Returned "undeliverable"	93 (8%)	20 (2%)	113 (5%)
Incomplete surveys	54 (4%)	17 (2%)	71 (4%)
Completed surveys	598 (50%)	130 (16%)	728 (36%)
Total	1,198 (100%)	832 (100%)	2,030 (100%)

This report provides summaries of the findings from each section of the survey. Comparable data from the previous four surveys are included in the discussion where they are available. The Table of Contents delineates ten categories ranging from a brief description of the respondents themselves to their suggestions for improving TCWF's grantmaking process. The major highlights of the data are presented in the Executive Summary.

1. The respondents. (Questions 30 through 33). These questions generated descriptive data about the jobs/roles of the individuals completing the questionnaire and about their organizations. The organizational data identified current statuses in relation to TCWF, operating budgets and where headquarters were located.

Jobs/roles of those completing questionnaires. (Question 30). The trend reported in 2006, toward more senior management completing the Survey continued in 2010. More than three-quarters (78%) of the 2,030 respondents were senior management compared to almost two-thirds (65%) in 2006 and just over one half (55%) in 2003. Senior management included Presidents, Vice Presidents, Chief Executive Officers, Chief Operating Officers, Directors and Board or Executive Committee Members. The proportion of development staff (Directors of Development, Grant Writers, Development Coordinators and Grants Managers or Officers) decreased in 2010 to 18%, compared to 25% and 24% in the 2006 and 2003 Surveys respectively.

Current statuses of responding organizations in relation to TCWF. (Question 31). For the 2010 Survey, the proportions of reporting current and former grantees increased (7% and 11% respectively); for unfunded applicants, the proportions decreased slightly (2%) compared to 2006. For current grantees and unfunded applicants, the 2010 Survey proportions continued trends that began in 1997. The data showing these patterns are presented in the following table.

<u>Statuses of Responding Organizations*</u>				
	2010 Survey	2006 Survey	2003 Survey	2000 Survey
Current grantees	53%	40%	40%	37%
Former grantees	21%	10%	11%	17%
Unfunded (denied) applicants	18%	20%	24%	56%
Pending applicants	4%	2%	2%	N/A
Other	4%	3%	2%	N/A
Multiple groups	16%	25%	21%	N/A
No data	0%	2%	N/A	N/A

*Percentages do not add to 100 due to rounding

Responding organizations' operating budgets. (Question 32). Since the 2003 Survey, when the response options for this question were expanded, TCWF has maintained relatively even distribution of its funding across small, medium and large organizations. As in the two previous surveys, the largest category in the 2010 Survey included organizations with operating budgets of \$1- to \$2 million. Among 2010 respondents, almost half (47%) of the funding went to organizations with budgets between \$500,000 and \$5 million, these data continued a trend of slowly increasing over the last three surveys (44% in 2006 and 40% in 2003). The proportions of all the categories have remained relatively unchanged since 2003.

<u>Responding Organizations' Operating Budgets</u>			
	2010 Survey	2006 Survey	2003 Survey
Up to \$199,999	10%	13%	13%
\$200,000 to \$349,999	11%	10%	9%
\$350,000 to \$499,999	9%	10%	7%
\$500,000 to \$999,999	16%	13%	13%
\$1 million to \$1,999,999	17%	17%	15%
\$2 million to \$4,999,999	14%	14%	12%
\$5 million to \$9,999,999	8%	8%	7%
\$10 million to \$24,999,999	8%	7%	8%
\$25 million and over	6%	8%	9%
No Data	0%	4%	7%

Responding organizations' locations. (Question 33). The distribution of responding organizations across California counties in the 2010 Survey remained relatively unchanged from previous surveys. In every survey since 2000, the proportions responding from Los Angeles County have been the highest at about one-quarter, ranging between 24% and 27%. In the 2006 and 2010 Surveys, the next top five responding organizations were in Alameda, San Francisco, San Diego, Sacramento and Orange counties.

<u>Responding Organizations' Locations</u>					
	2010 Survey	2006 Survey	2003 Survey	2000 Survey	1997 Survey
Los Angeles	27%	24%	27%	24%	34%
Alameda	9%	10%	9%	7%	Unknown
San Francisco	9%	9%	8%	10%	8%
San Diego	8%	10%	7%	7%	8%
Orange	6%	6%	Unknown	Unknown	Unknown
Sacramento	6%	7%	5%	5%	6%

2. Respondents' perceptions of TCWF. (Question 1). As in all previous surveys, these responses were based on an open-ended question asking respondents for words or phrases that best described TCWF. Responses to the 2010 Survey continued the trend, first documented in 2003, of positive responses to this question overwhelmingly outnumbering critical comments (29:1 in 2010 compared to 24:1 and 16:1 for the 2006 and 2003 Surveys respectively). For the 2010 Survey, responses primarily fell into one of three areas: TCWF's reputation, its funding approach and staff professionalism. As always, there were some negative comments; they are summarized at the end of this section.

TCWF's reputation. Respondents described TCWF as having an "excellent reputation," being "ethical" and "honest" and being a "progressive" leader in health philanthropy. According to respondents, it "focuses on too often ignored health related issues" and "is an influential, statewide, health and wellness focused" foundation. Part of its positive reputation was also based on its commitment. TCWF was perceived as being committed to "improving [the] health and wellness of Californians," "to ending health disparities," and "to the common good," and to supporting advocacy for "health and wellness including for the underserved."

Two other frequently mentioned aspects of TCWF's reputation included its size and its educational approach. Many comments focused on the size of TCWF's endowment; they are best represented by "BIG" (sic) and "wealthy," and by descriptions of it as an "incredible resource." The Foundation's educational approach was also highly valued, as shown by the following comments: TCWF provides "excellent opportunities for health and wellness education," and is "great at bringing grantees together for conferences" that provide "learning and collaborative opportunities." It was acknowledged as "developing new leaders" by playing an "important role in preparing individuals from disadvantaged backgrounds to enter the health care professions."

Approach to funding. According to 2010 respondents, TCWF's funding was distinctive in three ways: what and how it funds, its innovative funding approach and its community approach. Many respondents described TCWF as a "generous" funder and, as in past years, commented on its willingness to provide core operating support and multi-year funding. To respondents, this type of funding showed TCWF "values what it takes to run a program/organization," was "in for the long haul," and was "an essential community partner." Respondents reported that TCWF's funds were distributed through a process that was "organized," "even and fair," "transparent," and "user friendly."

The Foundation's funding approach was most frequently described as "innovative," but it was also described as "forward thinking," "cutting edge," and "out-of-the-box," with one respondent writing it was "creative—[I] love the Executive Director sabbatical program." In addition to its innovative approach, TCWF was also seen to fund "a broad range of issues," to be "holistic in seeking and supporting solutions," and to be able "to see [the] big picture without losing sight of the individual's needs." Along with its comprehensive and innovative approach, TCWF's funding approach was also perceived as "thorough," "thoughtful," "results oriented," and "up-to-date on research and issues."

Finally, TCWF's funding is also distinctive because of its engagement with communities. It was described as "community friendly," "grass roots," and as being committed to "building healthy communities." It was perceived to be "engaged with communities" and committed to "providing a voice to the disenfranchised." The Foundation was also seen as having its "ear to the ground," and being "in sync [with]," and "attuned to changing community health needs." Equally important to respondents, this commitment showed that TCWF "values diversity." Diversity was also seen in its "staff, programs and approaches," which "strive for cultural competency."

TCWF staff professionalism. As in 2006, the 2010 Survey respondents were extremely positive about TCWF staff and described them as "diligent," "knowledgeable," "dedicated" and "efficient & effective but easy to work with." Other frequently reported descriptors were "supportive," "responsive," and "understanding."

According to many respondents, support from TCWF staff goes "beyond grant making," providing "overall support not just funding." One respondent wrote that TCWF staff was "profoundly supportive." They were also described as "very helpful," "involved," willing to "build relationships," and thereby becoming "a most important partner."

Respondents typically described TCWF staff as being "accessible," "approachable," and "always available to talk," but they also saw them as being responsive to many different constituencies on a broad range of issues. Different constituencies included "the health care needs of diverse communities," "the needs of non-profits," and "public health advocacy." Issues ranged from "our requests for feedback," to "the needs of communities," and to "emerging needs, research, [and] directions."

TCWF staff understanding, which included being caring and concerned, was mentioned by many respondents. Staff was seen as "deeply caring," "compassionate," and "humanitarian," while also "having realistic expectations." As a result, they were reported to understand "real community and agency needs," "the challenges of managing non-profits" and "the need for public policy and political strategies."

Negative comments. Although they were four times more likely than grantees or pending applicants to critique TCWF, most unfunded applicants made complimentary comments. Their critiques can be grouped as follows: unclear funding priorities, inaccessible staff and the difficulty of getting funds. Not surprisingly, many critiques contradicted one another. For example, TCWF's funding priorities were described as "poorly defined," "too specific," and having "guidelines [that are] too broad. Notions of staff inaccessibility were seen in comments describing staff as "distant," "impersonal—[I] didn't feel heard," "a bit arrogant," and "not interested in developing strong relationships with potential grantees." The difficulty of getting funds was differently perceived by respondents from small and large organizations. Respondents from small organizations particularly seemed to feel that it was "hard to get funds," because TCWF "made large grants to large organizations," "play[ed] favorites," and that "you need a contact within the foundation if you're a small organization." At the same time, respondents from large/national organizations felt that because staff would not meet with them and/or their request had been denied, their status and experience were neither sufficiently valued nor taken into account.

3. How respondents heard about TCWF. (Question 2). In 2010, as in 2006, respondents most often reported hearing about TCWF through previous experience with TCWF staff and TCWF's website. The proportions reporting for all the communications channels, except one, remained essentially unchanged. The proportion reporting personal contact with TCWF staff increased slightly to 28% in 2010 from 22% in 2006. The overall pattern for how 2010 Survey respondents came to know about TCWF was as follows:

<u>How Responding Organization Heard About TCWF</u>					
	2010	2006	2003	2000	1997
	Survey	Survey	Survey	Survey	Survey
Previous experiences with TCWF staff	35%	34%	29%	N/A	N/A
TCWF website	34%	35%	37%	24%	<11%
Personal contact with TCWF staff	28%	22%	29%	N/A	N/A
Referral by a non-profit	26%	23%	22%	28%	24%
Suggestion from organization's member	24%	20%	24%	17%	12%
TCWF materials	22%	23%	32%	46%	52%
Referral by grant makers	18%	18%	17%	18%	<11%
Articles/ads about TCWF	14%	12%	13%	25%	22%
Presentation by TCWF staff	12%	14%	21%	20%	12%
Through a non-profit resource center	11%	14%	15%	15%	12%
TCWF-sponsored event	6%	N/A	N/A	N/A	N/A

4. Accessibility and usefulness of TCWF materials and information. (Questions 3 through 8). As in all but the first Grants Program Survey, respondents were asked about which Foundation materials they received or accessed and to comment on specific communications channels: Annual Report, Foundation e-mail, *How to Apply* brochure, Newsletters/Magazines (*Portfolio/Grantee*) and *Reflections* publications, whether they read them online or in print and which provided the most useful information.

Materials/information read or accessed. (Question 3). As in the previous two surveys, the website and Annual Report were the most received or accessed communications. However, in 2010, the proportion receiving or accessing the Annual Report had remained unchanged since 2006 (63% in 2010 and 64% in 2006) and had increased slightly for the website from 73% in 2006 to 80% in 2010. The proportions of those receiving Foundation e-mails and those receiving or accessing *Portfolio/Grantee* increased. In 2010, 56% received Foundation e-mails compared to 39% in 2006, and 43% received or accessed *Portfolio/Grantee* compared to 31% in 2006. *Reflections* was the only communications channel that was received or accessed by fewer respondents in 2010 (12%) than in 2006 (20%).

Materials/Information Received or Accessed

	2010 Survey	2006 Survey	2003 Survey	2000 Survey	1997 Survey
TCWF website	80%	73%	78%	61%	15%
Annual Report	63%	64%	75%	73%	56%
Foundation e-mail	56%	39%	17%	11%	Least used
<i>Portfolio/Grantee</i> (newsletter/mag.)	43%	31%	42%	39%	N/A
TCWF postcard	33%	35%	N/A	N/A	N/A
<i>How to Apply</i> brochure	29%	28%	42%	52%	54%
News release	20%	16%	17%	11%	Unknown
<i>Reflections</i>	12%	20%	27%	27%	N/A
Other	6%	5%	Unknown	Unknown	Unknown
Public Ed. Campaign website	4%	Unknown	Unknown	Unknown	Unknown
None of the above	3%	6%	Unknown	Unknown	Unknown

Efficacy of communication materials. (Questions 4 through 8). Of the four informational communications that can be read online or in print, the Annual Report continued, in the 2010 Survey, to be the most read. No matter which publications respondents read—Annual Report, *How to Apply* brochure, *Portfolio* or *Grantee* and *Reflections*—almost all of them (≥90%) found their information useful. The details regarding the readership and usefulness of each document are discussed below.

Annual Report. (Question 5). While the proportions of respondents reading the Annual Report remained unchanged between 2010 (63%) and 2006 (62%), many more of them read it online in 2010 (39% versus 24%). No matter how they read it, almost all (94%) found its information useful and almost three-quarters (73%) of them commented on why. They found it “informative” and “helpful” because “it was clear in what your goals were and how you met them,” “it was interesting to note the breadth and depth of the Foundation’s investments throughout the State,” and “it gave an overview to the focus and stability of TCWF.” It was also “useful” in providing information about TCWF’s funding priorities, the scope of projects and programs it supports, and about “other grantees.” It was hard to pick one quote to represent the range of responses; here are some of them:

- “The Annual Report helped [us] understand [TCWF’s] funding priorities and philosophy for giving.”
- “It gives me a deeper understanding of TCWF; about its initiative and funding strategies, its assets, and highlight of successful programs and the organizations that it funds.”
- “I got a better sense of the broader work of the foundation outside of my area of work and learned about efforts that gave me a better picture of who is doing what in California.”
- “...let me know what others in the community were doing so I didn’t replicate efforts”
- “...gave [me] perspective on potential community partners.”

- “The Annual Report was useful because it provided a list of the current grantees. This helped our organization determine if we were a good fit with the Foundation.”

How to Apply brochure. (Question 4). The proportions of respondents who claimed to have read the brochure in 2010 and 2006 were similar (48% and 49% respectively). The 2010 Survey findings show that many respondents only accessed TCWF’s information via its website and we do not know how many accessed this brochure online. Almost all 2010 respondents (97%) reported the brochure’s information was easy to understand and only 20% commented on how to improve it. Of them, two-thirds either wrote “none,” or comments such as “I wish other grantmaking organizations had materials that were similar in content” and “Not much to say here—I’ve found the Wellness application procedures to be thorough but noticeably less cumbersome than those of some other foundations.”

The few suggestions for improvement fell into one of three groups—unclear brochure language, the application process and core operating support. Criticisms of the brochure’s lack of clarity also included requests for the inclusion of “a timeline and criteria for decision making,” and “inclusion of examples of recent special projects that have been funded.” Those commenting on the application process suggested “a sample of a letter of interest would be useful for those of us who have never written one,” “speed up the process,” and to provide “more ways to identify, contact and speak with project officers.” A few, and many fewer than in 2006, commented on their confusion about core operating costs. Two quotes capture these comments:

- “The information for core operating grants is misleading. The feedback from the staff is totally different from the brochure,” and
- “We got a little confused about whether a core operating grant is required to be in one of the eight priority areas. To our way of thinking, core operating is for general expenses, but the eight priorities suggest we need to propose a project.”

Grantee. (Question 6). Publication of the *Portfolio* newsletter ended in January 2009 with the first edition of *Grantee* magazine coming out the following May. The proportion of respondents that reported reading *Grantee* (as compared to *Portfolio* in the 2006 Survey) remained relatively unchanged (34% in 2010 and 38% in 2006). However, the proportion reading online increased slightly from 27% in 2006 to 34% in 2010. Similar proportions reported that *Grantee*’s information was useful (92%) as reported for *Portfolio* in 2006 (91%). Of those who had read *Grantee*, 91% found its information useful. Like the Annual Report, *Grantee* was viewed as “informative,” however some respondents felt its information was “the same as the Annual Report.” Others appreciated the more detailed information *Grantee* provided, for example:

- “Good ideas for best practices from other agencies.”
- “It provided information on concepts, strategies, etc., used by other grantees to overcome challenges and meet objectives. It also provides several resources to network with.”
- “It was great to see grantees interviewed and seeing how they are coping with the downturn.”
- “[I was] inspired by [the]cover story—used as example in many meetings/speeches.”

Reflections. (Question 7). In both 2010 and 2006, *Reflections* was the least read publication (20%) and the most read online. The proportion reading it online increased from 46% in 2006 to 61% in 2010. However, the percentage reporting its information was useful decreased slightly (90% in 2010 from 96% in 2006). In 2010, 60% of those who had read it commented on why it was useful. They found it “educational,” and “informative.” More detailed comments included:

- “[It provides] information of trends in the field and suggests strategies our organization can develop to increase capacity and sustainability.”
- “The case studies were useful, particularly the examples of strategic and fund development planning, community engagement for advocacy, and capacity building for financial stability.”
- “We have used some of the data from their studies in other grant applications and concept papers.”
- “Good to see the funder’s point of view.”

<u>Efficacy of Communications Materials</u>		
	2010 Survey	2006 Survey
Annual Report		
Read	63%	62%
Read online	39%	24%
Found information useful	94%	95%
How to Apply brochure		
Read	48%	49%
Found easy to understand	97%	97%
Grantee/Portfolio		
Read	34%	38%
Read online	34%	27%
Found information useful	92%	91%
Reflections		
Read	20%	20%
Read online	61%	46%
Found information useful	90%	96%

Most useful information. (Question 8). This open-ended question asked respondents to comment on which TCWF material most helped them understand the Foundation’s grantmaking program. In 2010, the proportion reporting the website increased slightly from 2006 (from 38% to 44%). At the same time, the proportion reporting the Annual Report was most useful remained relatively unchanged (22% in 2006; 24% in 2010).

The website was typically described as most useful because it is “information rich and easy to access (doesn’t clutter my office),” and “it gives me most information in the shortest time.” Those finding the Annual Report most useful explained it provided the “best overview of TCWF’s work,” has a “straightforward outline of program areas and application instructions,” and it

“outlines the foundation’s overarching commitment to health care in California as well as its wide range of grant commitments.” One respondent bridged the gap between these two groups by explaining “The website provides a lot of information that was extremely helpful prior to applying to TCWF. The Annual Report provided a better financial overview of TCWF.”

5. TCWF website. (Questions 9 and 10). Respondents were asked about Internet access at their workplaces, whether and how frequently they had visited TCWF’s website, and their thoughts about how it could be improved.

Internet access and frequency of website visits. (Questions 9 and 10). As in 2006, 99% of all respondents reported having Internet access at their workplaces. Almost all of them (97%) had high-speed Internet access and four out of five respondents (84%) worked in organizations where all employees had such access. The overall proportions for responses to when they last visited and how frequently they visited the website were little changed from 2006 as shown in the table below:

<u>Last Visited TCWF Website</u>			
	2010 Survey	2006 Survey	2003 Survey
Within the last week	11%	6%	9%
Within the last month	24%	24%	19%
Within the last 3 to 6 months	47%	47%	55%
More than 6 months ago	18%	23%	17%

<u>Frequency of TCWF Website Visits</u>			
	2010 Survey	2006 Survey	2003 Survey
At least once a week	2%	1%	2%
At least once a month	16%	12%	13%
At least once every 3 to 6 months	67%	68%	66%
Other	15%	20%	14%

What respondents thought of the website. (Question 10). Ninety percent (90%) of the respondents reporting they had visited TCWF’s website answered an open-ended question asking for their assessment of the site. Of them, 97% made positive comments about it. They liked the layout and design: “Attractive, user friendly, informative,” “Love the new look,” “Intuitive layout, vibrant colored visuals,” “Clear, concise, easy to navigate,” and “Fabulous! Simple and well designed.” Other comments included:

- “Excellent site, helpful information. Has a very warm, positive, people centered tone.”
- “The redesigned website is much more efficient to use, e.g., desired information is easier to obtain.”
- “Very informative website. Good multi-lingual functionality. Foundation lingo section is also useful for grantees. Well organized with useful information at my finger tips.”

In the 2006 Survey, only 1% of respondents who had been to the website gave suggestions for improving it. In the 2010 Survey, 43% did; this was over 250 responses, which fell primarily into five categories, including “Miscellaneous.” The other four categories were Desired Functionalities, Website Structure Improvements, New Information Requests, and Expanded Information Requests. Because there are so many suggestions, they have been summarized (duplicates have been removed) and are provided in a separate document.

6. Respondents’ understanding of TCWF’s Responsive Grantmaking Program. (Questions 11 through 13). These questions, which remained unchanged from the 2006 Survey, asked respondents how well they understood TCWF’s funding priority areas and how well TCWF’s various information materials helped them understand the priority areas and core operating support.

Understanding funding priorities. (Questions 11 and 12). In the 2010 Survey, the proportion of respondents reporting they well understood TCWF’s funding priorities (84%) returned to the 2003 Survey level (85%), after a slight dip in 2006 (78%). There was little change since 2006 for most of the responses about materials usefulness. In both surveys, the top three communication channels were the website, interaction with TCWF staff and the *How to Apply* brochure. The proportions reported for two of these (website and interaction with TCWF staff) remained relatively unchanged between 2010 and 2006 (website: 84% and 85%; staff interaction: 73% and 74% in 2010 and 2006 respectively). The proportions for the *How to Apply* brochure increased slightly in 2010 (60%) compared to 52% in 2006. A review of the patterns regarding the usefulness of various materials and interactions with staff in understanding TCWF’s funding priorities for the last three surveys are presented below:

<u>Usefulness in Understanding TCWF Priority Areas</u>						
	Very useful	Mod. Useful	A little useful	Not useful	N/A	No data
TCWF website						
2010 Survey	61%	23%	6%	0%	10%	0%
2006 Survey	60%	23%	4%	0%	10%	2%
2003 Survey	49%	28%	5%	1%	6%	17%
How to Apply brochure						
2010 Survey	40%	20%	6%	1%	33%	0%
2006 Survey	34%	18%	4%	2%	40%	2%
2003 Survey	28%	22%	4%	1%	25%	20%
Annual Report						
2010 Survey	31%	26%	11%	3%	28%	0%
2006 Survey	28%	24%	13%	2%	31%	2%
2003 Survey	25%	28%	12%	2%	16%	17%
Grantee magazine						
2010 Survey	16%	20%	10%	2%	52%	0%
2006 Survey	11%	21%	10%	3%	52%	2%
2003 Survey	9%	22%	9%	3%	32%	24%
Reflections						
2010 Survey	7%	13%	11%	3%	65%	0%
2006 Survey	7%	16%	11%	3%	62%	2%
2003 Survey	6%	14%	9%	3%	41%	28%
Public Ed. Campaign website						
2010 Survey	6%	8%	8%	4%	74%	0%
Interaction with TCWF staff						
2010 Survey	63%	11%	5%	2%	19%	0%
2006 Survey	59%	14%	5%	3%	14%	6%
2003 Survey	59%	11%	3%	4%	9%	4%

Understanding core operating support. (Question 13). The website, interactions with staff and the *How to Apply* brochure were also reported as the most useful for understanding core operating support. In 2010, all three communications channels showed increases in usefulness since 2006. The website and interactions with TCWF staff showed slight increases. They were 8% for the website (from 69% to 77%) and 7% for interactions with TCWF staff (from 62% to 69%). The *How to Apply* brochure showed an 11% increase (from 44% to 55%). A review of the patterns regarding the usefulness of various materials and interactions with staff in understanding TCWF's core operating support for the last three surveys are presented below:

<u>Usefulness in Understanding TCWF Core Operating Support</u>						
	Very useful	Mod. Useful	A little useful	Not useful	N/A	No data
TCWF website						
<i>2010 Survey</i>	52%	25%	7%	2%	15%	0%
<i>2006 Survey</i>	45%	24%	7%	2%	18%	4%
<i>2003 Survey</i>	30%	25%	11%	4%	9%	20%
<i>How to Apply brochure</i>						
<i>2010 Survey</i>	33%	22%	7%	2%	36%	0%
<i>2006 Survey</i>	24%	20%	8%	1%	44%	3%
<i>2003 Survey</i>	17%	18%	10%	4%	25%	28%
Annual Report						
<i>2010 Survey</i>	23%	24%	10%	5%	38%	0%
<i>2006 Survey</i>	18%	20%	13%	3%	42%	3%
<i>2003 Survey</i>	14%	20%	14%	4%	20%	28%
Grantee magazine						
<i>2010 Survey</i>	11%	16%	10%	5%	58%	0%
<i>2006 Survey</i>	6%	16%	12%	4%	59%	3%
<i>2003 Survey</i>	7%	14%	11%	5%	32%	32%
Reflections						
<i>2010 Survey</i>	6%	11%	9%	5%	69%	0%
<i>2006 Survey</i>	5%	13%	10%	4%	65%	3%
<i>2003 Survey</i>	6%	9%	9%	5%	39%	33%
Public Ed. Campaign website						
<i>2010 Survey</i>	3%	8%	7%	6%	77%	1%
Interaction with TCWF staff						
<i>2010 Survey</i>	58%	11%	2%	3%	25%	0%
<i>2006 Survey</i>	52%	10%	5%	3%	22%	7%
<i>2003 Survey</i>	46%	12%	4%	4%	13%	21%

7. Interaction with TCWF staff. (Questions 14 through 16). These questions centered on the frequency of TCWF/Respondents' interactions, with whom they most interacted and how they were treated. Interactions included mail, e-mail, telephone or face-to-face.

In 2010, one-third (34%) of respondents reported 0-2 contacts, a slight decrease from 2006 (40%). Not surprising, unfunded applicants had less contact. However in 2010, 39% of those reporting 0-2 contacts were unfunded applicants while in 2006 the proportion was 63%. As would be expected, of those reporting most contacts with TCWF (more than 10), almost all were grantees. Contact frequencies for all respondents are included in the table below:

<u>Number of Contacts with TCWF</u>		
	2010 Survey	2006 Survey
0-2	34%	40%
3 to 5	37%	36%
6 to 10	21%	17%
More than 10	9%	7%

Of those who had contact with TCWF, patterns of whom they interacted with most were relatively unchanged since 2006. As would be expected, respondents most interacted with grants program staff (56% in 2010 and 60% in 2006) and grants management (34% in 2010 and 30% in 2006). Data details are presented in the table below:

<u>TCWF Staff Interacted with Most</u>		
	2010 Survey	2006 Survey
Communications	2%	3%
Executive	3%	3%
Finance	0%	0%
Grants Management	34%	30%
Grants Program	56%	60%
Reception/Administration	5%	5%

In each survey since 2003, more respondents have reported that TCWF staff is “courteous,” “knowledgeable,” “responsive,” “helpful,” and “accessible.” In the 2010 Survey, 94% or more reported agreeing or strongly agreeing with these descriptors. Also, in 2010 as in 2006, the most agreed upon descriptors were “courteous,” (99%) and “knowledgeable” (98%). The relevant data are presented in the table below:

<u>Interaction with TCWF Staff</u>					
	Strongly Agree	Agree	Disagree	Strongly Disagree	No data
Courteous					
2010 Survey	82%	17%	0%	0%	0%
2006 Survey	73%	25%	1%	1%	1%
2003 Survey	70%	20%	0%	0%	10%
Knowledgeable					
2010 Survey	79%	19%	1%	0%	0%
2006 Survey	70%	27%	2%	1%	1%
2003 Survey	67%	21%	2%	0%	10%
Responsive					
2010 Survey	79%	18%	3%	0%	0%
2006 Survey	67%	28%	4%	1%	0%
2003 Survey	66%	20%	4%	1%	9%
Helpful					
2010 Survey	78%	18%	4%	1%	0%
2006 Survey	68%	26%	4%	1%	1%
2003 Survey	66%	18%	4%	1%	10%
Accessible					
2010 Survey	71%	23%	4%	1%	0%
2006 Survey	60%	31%	7%	2%	2%
2003 Survey	56%	25%	6%	2%	11%

One-quarter (25%) of 2010 respondents provided additional comments on their staff interactions. As expected given the responses above, these comments were overwhelmingly positive. Half (50%) reiterated answers to previous questions; for example, “very accessible,” “very courteous,” many wrote “great staff,” and phrases such as “TCWF is amazing in service and staff.” Other examples of the overall enthusiasm for TCWF staff include “Drama free and ego free!” “Compared to any other foundation, TCWF is tops!” and “Awesome, engaged...invested.”

8. TCWF’s grantmaking process. (Questions 17 through 20). These questions asked respondents to rate the ease/difficulty of participating in TCWF’s grantmaking process, how this process could be improved and whether they preferred to retrieve required reporting forms online. Two-thirds (67%) of the respondents answering the last of these questions preferred to access required reporting forms through the website and one-quarter (25%) had no preference.

Ease/difficulty of pre-approval funding process. (Question 17). Components of this question included preparing a letter of interest (LOI), preparing a grant proposal and participating in a site visit. As in 2006, similar proportions reported preparing the LOI and the grant proposal were difficult (proposal: 21% in 2010, 22% in 2006; LOI: 14% in 2010, 12% in 2006). In 2010, four out of five respondents (83%) found participating in the site visit easy or very easy. Although a few comments concerned the lack of acknowledgement that TCWF had received their LOIs, most

centered on complimenting the process, e.g., “a very reasonable process,” “much better than most other grantors for ease of application and management,” and the staff, e.g., “good direction from staff facilitate the process,” “TCWF program officer and staff made it as easy as possible.” Even those who described aspects of the process as difficult were complimentary, e.g., “difficult in a positive way” and “TCWF make it feel easy but it is not an easy experience.”

<u>Pre-funding Approval Process</u>						
	Very Difficult	Difficult	Easy	Very Easy	Don't Know	No data
Letter of Interest						
<i>2010 Survey</i>	1%	13%	61%	24%	2%	0%
<i>2006 Survey</i>	2%	10%	64%	16%	7%	1%
Grant Proposal						
<i>2010 Survey</i>	0%	21%	55%	20%	3%	0%
<i>2006 Survey</i>	2%	20%	48%	6%	20%	4%
Participating in Site Visit						
<i>2010 Survey</i>	0%	7%	55%	28%	10%	0%

Ease/difficulty of post-approval funding process. (Question 18). In 2010, there were slight increases in the proportions of respondents reporting that completing the progress narrative reports and financial reports was easy or very easy—83% in 2010 and 78% in 2006 for the progress narrative reports; for the financial reports, 82% in 2010 and 76% in 2006. There was a larger increase in this response for the final narrative reports, from 67% in 2006 to 80% in 2010.

Several of the additional comments from respondents clarified that they had not arrived at this stage of their grants. Others wanted us to understand that they did not like the choices the questions gave them because “it’s never truly easy.” However, this is “only because a lot of effort is involved, not because TCWF made it difficult.” Others wanted us to know that they appreciated the process, “[the] TCWF reporting process is very easy and straight forward, yet holds the grantees accountable, which is important,” and “staff make this process very streamlined by sending early reminders, providing all needed materials electronically and in print, and being readily available to answer questions.”

<u>Post-funding Approval Process</u>						
	Very Difficult	Difficult	Easy	Very Easy	Don't Know	No data
Progress Narrative report						
2010 Survey	0%	9%	66%	17%	8%	0%
2006 Survey	0%	12%	67%	11%	10%	1%
Final Narrative Report						
2010 Survey	0%	9%	64%	16%	10%	1%
2006 Survey	0%	12%	58%	9%	18%	2%
Financial Narrative Report						
2010 Survey	1%	10%	64%	18%	8%	0%
2006 Survey	1%	10%	66%	10%	11%	3%

Suggestions for improving the grantmaking process. (Question 20). Respondents provided many suggestions for improving this process. They can be categorized into four groups: TCWF staff, the process, online capabilities and suggestions for expanding the grant areas. Respondents wanted staff to be more accessible, particularly “prior to LOI submission”—they wanted more feedback “on the process and on our reports,” and more interaction “with multi-year grantees.” Suggestions for improving the process requested TCWF “speed up the process,” particularly between “LOI submission and proposal request,” and between “proposal submission and final decision.” Many respondents also requested “more feedback on denied applications,” and on “why proposals were not requested,” because being told there were “too many applicants” was “too vague.” Suggestions involving online capabilities included:

- “Using more e-mails than snail mail.”
- “Sending reminders of scheduled reports.”
- “Making all forms [including the budget page] downloadable and also available in Word”
- “Making all required reports available.”
- Provid[ing] the abilities to “access request status,” to “up-date previously submitted information,” and to “submit forms, proposals and reports electronically.”
- “Please include information on your budget modification process so that we don’t have to return funds.”

Finally, many respondents suggested areas into which they would like TCWF to expand its funding. After removing several suggestions that seemed somewhat self-serving, those remaining are summarized in the table below:

Suggestions for Expanding Grantmaking Areas

Geographic areas	Rural areas
	Small and medium counties
Increased funding in current areas	Priority areas in health
	Violence prevention by adding "and victim services."
	For "small community-based organizations"
	For "core operating grants"
	For "programs/projects that are demonstrating consistent impact."
Specific areas	Holistic health
	Mental health
Miscellaneous	Consider vision/glasses for children up to age 18 years of age
	More efforts to help fund coalitions that have emerged as a result of TCWF funding
	Mini-grants during a major 3-year grant cycle to respond to other newly identified needs

9. Denied applicants. (Questions 21 through 27). This section of the survey was intended for the 18% of respondents who reported that, after submitting letters of interest (LOIs), they were not encouraged to submit proposals. Forty percent (40%) stated they had received denial letters in a timely fashion, which represents a considerable decrease compared to 2003 and 2006 (61% and 60% respectively). However, in 2010, 41% answered this questions with "don't know" or "can't remember" compared to 10% in 2006. The proportion asking for feedback on their denials remained relatively unchanged from 2006, while the proportions reporting they were able to get feedback and that it was useful increased. The proportion saying they were able to get feedback increased 9% (from 78% to 87%) and the proportion reporting the feedback was useful increased 28% (from 50% to 78%).

Denied Applicants' Experiences

	2010 Survey	2006 Survey	2003 Survey
Received denial letter in timely fashion	40%	60%	61%
Asked for feedback	52%	49%	43%
Able to get feedback	87%	78%	80%
Found feedback useful	78%	50%	50%

Also in this section, 12% reported that there were ways in which TCWF had been difficult to work with or made things difficult for them. Explanations were that the process was too slow (“slow pace”), there was not enough interaction with program staff (“too impersonal”), not enough explanation for denial (“unclear why we were not funded”) and lack of clarity about what exactly TCWF funds (“improve guidelines”). However, many were satisfied with their relationships with TCWF; almost half (49%) reported they were “excellent,” and almost one-third (31%) reported they were “good.”

10. Additional questions. (Questions 28 and 29). These two questions requested information about how respondents compared their working relationships with TCWF with those of other foundations and their suggestions for improvements in areas not covered by the survey.

Relationship compared to other foundations. (Question 28). In 2010 and the two previous surveys, more than half the respondents (55% or more in each year) reported their relationships with TCWF were better than with other foundations. The proportions reporting their relationships were about the same or worse remained relatively unchanged. Of the 50 individuals who felt working with TCWF was worse than with other foundations, 37 (74%) were unfunded applicants. (In the 2006 Survey, the equivalent figure was 78%.)

<u>Relationships with TCWF Compared to Other Funders</u>			
	2010 Survey	2006 Survey	2003 Survey
Better relationships	59%	55%	58%
Worse relationships	7%	10%	2%
Relationships about the same	33%	35%	No data

Almost half (47%) of those responding to this question also provided written examples. Most of them reiterated positive attributes already described, for example, “staff accessibility, helpfulness and responsiveness,” “flexibility,” “streamlined application procedures,” “core support,” and “educational opportunities.” Other comments included:

- “Far, far better. Very pleasant and accessible staff, easy to follow guidelines and LOI/proposal submission guidelines, timely responses to submitted LOIs/proposals, culture that thoroughly respects its clients and potential clients.”
- “Grant requirements/statements of work are much simpler and straightforward than other foundations. There’s a lot less bureaucracy to wade through, and the program officers are very helpful in guiding the application process.”
- “More collaborative, less adversarial feeling.”
- “Much better!! TCWF rocks!”

- “Others tend to micro-manage and TCWF does not.”
- “Staff are [sic] easier to work with, the website is more user friendly and easier to access than others and we are provided with the tools and resources we need.”
- “Staff are [sic] more responsive than contacts at other foundations. Also, while the foundation has clear priority areas they are willing to listen to applicants’ ideas and are able to fund innovative work.”
- “TCWF, above all others, seems truly focused on assisting the grantee agency to accomplish its mission to serve the community.”
- “TCWF guidelines and requirements are generally more straightforward than other funding agencies.”

Areas of potential improvement. (Questions 29). In 2010, this question was completed by fewer respondents (35%) than in 2000 (49%) but by more than in 2003 (18%) and 2006 (17%). However, more than two-thirds (68%) of the comments were not about potential areas of improvements, but praise for TCWF. Another 10% repeated requests, criticisms or suggestions that have already been discussed. Distinct recommendations in response to this question are summarized in the following table:

<u>Suggestions for Other Improvements*</u>
<p><i>Increase interaction among grantees</i></p> <ol style="list-style-type: none">1. Facilitate collaboration and information sharing within portfolio.2. I think it might be of interest to have a gathering of other grantees doing similar work to share information and expertise on how to work in this difficult economy.3. Maybe an annual meeting per region with all of the grantees to ask some of the same questions.4. Regional meetings among grantees will be helpful.5. Some more opportunities for cross-fertilization--helpful to learn what is in common across different topics but impacting the same populations--I don't know what is in your violence portfolio but it might be informative for our pregnancy prevention.6. TCWF funds such diverse and interesting groups of organizations. An opportunity to interact or learn from each other would be great. Suggestions include: case studies, networking opportunities, support/network groups.7. The Foundation funds several different projects in Sacramento. We learned by happenstance that partners of ours were funded by Wellness. I think it would be good if Wellness helped link together folks who are funded by them in one locality.
<p><i>Funding</i></p> <ol style="list-style-type: none">8. While multi-year funding is much appreciated, things do change over the course of 3 years. It would be helpful to have a mid-point check-in to evaluate whether the grantee would like to modify/update the proposed work.9. Program staff needs to check with key health organizations for the purpose of working together...we know our community and without program staff in our community there is a disconnect.

*All suggestions are quoted directly from written responses.

Suggestions for Other Improvements (continued)

Funding (continued)

10. I would like to have a clearer answer of whether or not the grant is renewable after our 3 year funding period.
11. Instead of denying grant proposals, make smaller grants to new organizations.

Education

12. At a convening, encourage each grantee to bring a student or junior members of the group to learn and participate.
13. If TCWF is a public foundation, then there is a learning process that each staff of TCWF can either help with or not. If TCWF wants orgs. to reapply after a no, then be sure to help them learn.
14. More outreach would be helpful, e.g., at meet the funders type events.
15. Nurture organizations along to provide for the growth of services.

Staff

16. I would welcome the opportunity to stay in closer conversation about emerging areas of collaboration with program staff.
17. When dealing w/groups and collaborations to improve communities, TCWF should be part of meetings (unannounced in some of them) and observe.
18. A bit more hands on...especially in rural communities or with organizations that have never received TCWF funding.

CONCLUSIONS

As with previous surveys, 2010 Survey findings confirmed that TCWF had an excellent reputation and was highly valued for its distinctive funding approach and outstanding staff. Its funding process was perceived to be “organized,” and “even and fair,” and its funding was described as meeting the needs of different constituencies—from communities to non-profits to public health—on different issues, from service delivery to education to research. Also, TCWF’s commitment to diversity, both in its funding and its own staffing and approach, reinforced perceptions of its “grass roots” orientation and “community-based” approach. Outcomes of the survey process and their implications, along with highlights of the findings, are discussed below.

Ever sensitive to the impact of the ‘digital divide’ on its grantees and applicants, TCWF mailed its 2006 Grants Program Survey to those for whom it did not have e-mail addresses and made it available online to those for whom it did. This two-arm distribution approach resulted in a higher response rate and fewer unanswered questions for the online survey. The same distribution strategy was used and similar results seen for the 2010 Survey. The only difference was that in 2010 the response rate for the online surveys was even higher and for mailed surveys even lower.

Whether such findings suggest that TCWF should consider conducting future Grants Program Surveys entirely online is unclear. The higher response rates for online surveys combined with two other factors support such a decision while at least one other argues against it. The supporting

factors are that increasingly TCWF's surveys are more likely to be completed by senior management and that four out of five 2010 Survey respondents worked in organizations where all employees had Internet access. Organizations providing Internet access to their staffs will first provide it to their senior managers, the very staffs that seem most likely to complete Grants Program Surveys. The contradictory factor is that those responding to mailed surveys were almost five times more likely to be unfunded applicants. In order not to bias future surveys against denied applicants, TCWF staff would have to obtain e-mail addresses from every applicant.

Only two, small, potential areas where TCWF's grantmaking process could be improved emerged from the 2010 Survey. These concerned unfunded applicants; they reported not receiving denial letters in a timely fashion and not knowing they could request feedback. The proportion responding that they had received timely denial letters decreased considerably from the 2003 and 2006 Surveys (although in 2010 the proportion not knowing or not remembering also increased). Not only did respondents claim they had not received timely denial letters, many wrote in open-ended questions that they had never heard their LOIs had been received and that they were unaware they could request feedback. Staff should certainly review their activities in these areas to see whether they can be improved.

Highlights of the findings were seen in staff receiving even more compliments than in past surveys and in an apparently increased understanding of TCWF's funding approach. Respondents clearly better understood what the Foundation wanted to fund under core operating support. They also both appreciated TCWF's new website and had many suggestions for making it even better.

Since the 2003 Survey, respondents have been increasingly complimentary in rating their interactions with TCWF staff. In the 2010 Survey even higher proportions than in 2006 or 2003 strongly agreed that staff was courteous, knowledgeable, responsive, helpful and accessible. Staff was also perceived to provide "overall support not just funding," to be "deeply caring," and as "having realistic expectations." At the same time they were described as being "Efficient and effective but easy to work with," "Drama free and ego free," and "Awesome, engaged...invested."

Questions about how well respondents understood TCWF's core operating support were first included in the 2003 Survey. Responses in that year revealed a great deal of confusion among respondents about this funding approach. Some confusion was still evident in 2006; however, in 2010 it had considerably dissipated. In this most recent survey, a few respondents remained unclear about core operating support, but on the whole this much-appreciated aspect of TCWF funding was better and more clearly understood.

Increased understanding about TCWF's core operating support may be related to two other changes in the quantitative findings for the 2010 Survey. These findings came from one question completed by all respondents and another designed for unfunded applicants only. All respondents were asked to provide their statuses *viz a vis* TCWF and fewer described themselves as unfunded applicants, which continued a trend that began in 2003. In contrast, increasing proportions of unfunded applicants reported they received feedback on their denials and, most important, found that feedback useful. The decreasing proportion of unfunded applicants suggests this group is less angry at TCWF than they have been in the past (particularly in the 1997 and 2000 Surveys); very

angry and very happy grantees and applicants are the most likely to respond! The increasing proportion of unfunded applicants saying they found the feedback about why they were denied useful suggests program staff was doing a better job of explaining what TCWF wants to fund. This latter point is reinforced by the fact that several written responses showed unfunded applicants understood that their requests did not “fit” within TCWF’s funding priorities. In previous years, such comments rarely occurred.

Respondents had a variety of communications channels through which they could access information about TCWF and its Responsive Grantmaking Program and they described all TCWF publications—the Annual Report, *How to Apply* brochure, *Grantee, Reflections*—as useful. However, TCWF’s website was the most useful in helping respondents understand the Foundation’s priority areas and core operating support. The website received rave reviews and practically all the written comments about its redesign and current functioning were extremely complimentary, e.g., “Love the new look,” “Fabulous! Simple and well designed,” and “Clear, concise, easy to navigate.”

The most surprising findings came from responses to an open-ended question requesting suggestions for how the website could be improved. In the 2006 Survey, 16% of respondents who had visited the website answered this question; in the 2010 Survey, 43% did. There were so many suggestions they could be grouped into four distinct categories, plus miscellaneous. The distinct categories centered on suggestions for a) new website functionalities respondents would like to have, b) ways of improving the website’s structure, c) content areas respondents would like to be added and d) current content areas they would like to see expanded. The resulting findings were too long to be included in the body of this report and were added as an Appendix.

Findings from the 2010 Grants Program Survey again recognized TCWF as a leader in health philanthropy and continued a trend that began in 2003 of increasing proportions of applicants and grantees positively describing and commenting upon its exemplary staff, distinctive and innovative funding approach and outstanding website. As in the past, its overall approach was described as “comprehensive,” “results-oriented,” and “far sighted.” One respondent wrote that TCWF “has the ability to see the big picture without losing sight of the individual’s needs,” or, as another respondent put more succinctly, “TCWF Gets It.”

Appendix A:

2010 GRANTS PROGRAM SURVEY

2010 Grants Program Survey

The California Wellness Foundation (TCWF or the Foundation) is interested in receiving comments from grant applicants and recipients about their experiences working with the Foundation's Grants Program. We hope to receive feedback that will help us enhance our responsiveness to organizations that seek funding. Your comments will be kept confidential, which is why we have not asked for your name or that of your organization. The survey is designed to be completed in approximately 20 minutes. Please have the person who has had the most direct contact with TCWF complete this survey. If you have more comments, please feel free to attach additional sheets. Return your completed questionnaire in the enclosed addressed, stamped envelope postmarked by January 26, 2010. Your participation in this effort will be most appreciated.

Consultant Julia Pennbridge, Ph.D., is conducting this survey with The National Health Foundation. If any of the questions or sections of this survey are unclear, please contact Julia Pennbridge at (310) 821-7921.

A. YOUR PERCEPTIONS OF TCWF

1. In your opinion, what three words or phrases best describe TCWF?

- a. _____
- b. _____
- c. _____

B. SOURCES OF INFORMATION ABOUT THE FOUNDATION AND ITS GRANTMAKING PROGRAM

2. How did you hear about TCWF? (Check all that apply.)

- | | |
|---|--|
| <input type="checkbox"/> Referral by another nonprofit organization | <input type="checkbox"/> Previous experience with the Foundation or staff member |
| <input type="checkbox"/> Referral by another grantmaker or corporate-giving program | <input type="checkbox"/> The Foundation Center, GuideStar or a nonprofit resource center |
| <input type="checkbox"/> Suggestion from a member of your organization | <input type="checkbox"/> A TCWF conference or other TCWF-sponsored event |
| <input type="checkbox"/> Articles about TCWF or TCWF-sponsored advertisements | <input type="checkbox"/> I can't remember |
| <input type="checkbox"/> Visiting TCWF's website | <input type="checkbox"/> Other (Please explain.) |
| <input type="checkbox"/> TCWF materials such as funding guidelines and annual reports | _____ |
| <input type="checkbox"/> Public presentation from a TCWF staff member (e.g., "Meet the Grantmaker") | _____ |
| <input type="checkbox"/> Personal contact with a TCWF staff person | _____ |
| | _____ |

3. In 2009, what TCWF communications materials or information did you receive or access? (Check all that apply.)

- | | |
|---|--|
| <input type="checkbox"/> TCWF Annual Report | <input type="checkbox"/> Public Education Campaign website:
HealthJobsStartHere.com |
| <input type="checkbox"/> TCWF website | <input type="checkbox"/> None of the above |
| <input type="checkbox"/> Foundation e-mail | <input type="checkbox"/> Other (Please explain.) |
| <input type="checkbox"/> TCWF newsletter/magazine | _____ |
| <input type="checkbox"/> <i>Reflections</i> series | _____ |
| <input type="checkbox"/> <i>How To Apply</i> brochure | _____ |
| <input type="checkbox"/> TCWF postcard | _____ |
| <input type="checkbox"/> News release | _____ |

4. In 2009, did you read our *How To Apply* brochure? Yes No (If no, please skip to question #5.)

If yes, were the application procedures easy to understand? Yes No

What are your suggestions for improving them? _____

5. In 2009, did you read our Annual Report? Yes No (If no, please skip to question #6.)

If yes, did you read the online or print version? Online Print

Was the information useful? Yes No If yes, how was it useful? _____

6. In 2009, did you read our *Grantee* magazine? Yes No (If no, please skip to question #7.)

If yes, did you read the online or print version? Online Print

Was the information useful? Yes No If yes, how was it useful? _____

7. In 2009, did you read any of our *Reflections* publications series on lessons learned in philanthropy?

Yes No (If no, please skip to question #8.)

If yes, did you read the online or print version? Online Print

Was the information useful? Yes No If yes, how was it useful? _____

8. Of all the TCWF materials you received or accessed, which ones most helped you understand TCWF's grantmaking program and why? _____

The next two questions focus on TCWF's website, which was redesigned in May 2009.

9. Do you have Internet access at your workplace? Yes No (If no, please skip to question #10.) Don't Know
If yes, do you have high-speed Internet access? Yes No Don't Know

What percentage of your organization's staff has high-speed Internet access? _____

10. In 2009, did you visit our website? Yes No (If no, please skip to question #11.)
If yes, when did you last visit? (Check one only.)

- Within the last week Within the last 3 to 6 months
 Within the last month More than 6 months ago

How often do you visit? (Check one only.)

- At least once a week At least once a month At least once every 3 to 6 months
 Other (Please explain.): _____

If yes, what is your overall assessment of our website? _____

If yes, what are your suggestions for improving it? _____

C. TCWF GRANTMAKING PROGRAM

Since 2001, TCWF has been implementing its Responsive Grantmaking Program. The following three questions focus on this topic.

11. TCWF's grantmaking program is centered around eight health issues and special projects. How well do you feel you understand TCWF's funding priorities? (Check one.)

- Very well Moderately well A little Not at all

12. How useful were the following in helping you understand them? (Check one for each communications channel.)

	Very useful	Moderately useful	A little useful	Not useful	Not applicable
www.CalWellness.org website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How To Apply brochure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grantee magazine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reflections series	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TCWF Annual Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public Education Campaign Website: HealthJobsStartHere.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interaction with Foundation staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Any additional comments? _____

13. How useful were the following in helping you understand core operating support? (Check one for each communications channel.)

	Very useful	Moderately useful	A little useful	Not useful	Not applicable
www.CalWellness.org website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How To Apply brochure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grantee magazine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reflections series	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TCWF Annual Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public Education Campaign Website: HealthJobsStartHere.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interaction with Foundation staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Any additional comments? _____

We would like to know how satisfied you were with your interactions with TCWF staff. The next series of questions addresses this goal.

14. In 2009, approximately how many contacts did you have with TCWF staff, including through the mail or by telephone, e-mail or face-to-face contact?

- 0-2
- 3-5
- 6-10
- More than 10

15. Which staff did you interact with MOST? (Check one only.)

- Communications
- Executive
- Finance
- Grants Management
- Grants Program
- Reception/Administration

16. The persons you interacted with most were: (Check one for each of the following.)

	Strongly agree	Agree	Disagree	Strongly disagree
Courteous	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Responsive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Knowledgeable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Helpful	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accessible	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Any additional comments? _____

Information from the next four questions will help to assess TCWF's grantmaking processes in 2009. First we ask about your experience with the pre-funding approval process and then about the post-approval process.

17. Based on your involvement with TCWF, how would you rate the following aspects of our pre-funding approval process?

	Very difficult	Difficult	Easy	Very easy	Don't know
Preparing a letter of interest (LOI) <input type="checkbox"/> Did not submit in 2009	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preparing a grant proposal <input type="checkbox"/> Not asked to submit in 2009	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participating in a site visit <input type="checkbox"/> Does not apply	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (Please specify.) _____					

18. Based on your involvement with TCWF, how would you rate the following aspects of our post-approval process?

	Very difficult	Difficult	Easy	Very easy	Don't know	Does not apply
Completing progress narrative reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Completing final narrative report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Completing financial reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (Please specify.) _____						

19. If you received funding, would you prefer to retrieve the required report forms via our website?

Yes No No preference

20. How can we improve these grantmaking processes? _____

D. WORKING WITH THE FOUNDATION

Please complete the following series of questions ONLY if you were NOT asked to submit a proposal in 2009. If you did submit a proposal, please skip to question #28.

21. Did you receive a denial letter in a timely fashion? Yes No Don't know or can't remember

22. Did you ask for feedback on your denial? Yes No Don't know or can't remember

23. Were you able to get feedback? Yes No Don't know or can't remember

24. Was the feedback useful? Yes No Don't know or can't remember

25. Are there ways in which TCWF or its staff have added value to your work above and beyond the grant dollars you received?

Yes No If yes, how? _____

26. Are there ways in which TCWF has been difficult to work with or made things difficult for you?

Yes No If yes, how? _____

27. Overall, how would you characterize your working relationship with TCWF?

Excellent Good Okay Somewhat difficult Very difficult

E. ADDITIONAL QUESTIONS

28. How does your experience working with TCWF compare to working with other foundations?

Better Worse About the same

Please give examples: _____

29. Do you have comments about areas of potential improvement that were not covered by this survey?

F. ABOUT YOUR ORGANIZATION

30. What is the job/role of the person completing this survey? _____

31. Is your organization: (Check all that apply.)

A current grantee of the Foundation? A current applicant awaiting a Foundation decision?
 A former grantee? Other _____
 An unfunded applicant that submitted an LOI?

32. Please indicate which range best characterizes the total operating budget of your organization for its most recent fiscal year.

Up to \$199,999 \$2 million to \$4,999,999
 \$200,000 to \$349,000 \$5 million to \$9,999,999
 \$350,000 to \$499,999 \$10 million to \$24,999,999
 \$500,000 to \$999,999 \$25 million and over
 \$1 million to \$1,999,999

33. Please name the California county in which your organization is headquartered. _____

Thank you for taking the time to complete this survey. Please return by January 26, 2010 to:

TCWF Grants Program Survey, c/o Julia Pennbridge, Ph.D.
1137 Grant Avenue • Venice, CA 90291

Appendix B:

WEB BASED SURVEY FEATURES & SCREENSHOTS

Web-Based Survey Features & Screenshots

E-mail surveys were sent from an e-mail account created specifically for the 2010 Grants Program Survey. Recipients received an e-mail with unique URLs (hyperlinks) to their organization's survey. Web-based surveys were sent from an account created specifically for the 2010 Grants Program Survey. Recipients received an e-mail with unique URLs (hyperlinks) to their organization's survey. To prevent duplicate survey completion, hyperlinks included main web-addresses to the survey followed by organization-specific IDs and a random string of twenty letters and numbers. They could be forwarded within organization so that different staff could complete different survey sections. Web survey features included a) a main page that allowed users to skip to different survey sections, b) information on the percentage of the survey that had been completed, c) highlighted "skipped" questions, d) data safety features that prevented users from answering not applicable questions, and e) a downloadable, printable PDF version of the survey which included the organizations unique ID. Also, participants could exit the web-based survey and return to it at any time.

Screenshots of the web-based survey are included on the following page.

Web-based survey: Main menu shows some survey features (e.g., PDF download section, percentage of survey completed, and links to various sections of the survey).

The screenshot shows the main menu of the 'The California Wellness Foundation 2010 GRANTS PROGRAM SURVEY'. The header is blue with the foundation's name and a 'Main Menu' button. Below the header, there are links for 'INSTRUCTIONS', 'DOWNLOADS', and 'START SURVEY'. A section titled 'SURVEY SECTIONS' lists six options: A. Your Perceptions of TCWF, B. Sources of Information About the Foundation and its Grantmaking Program, C. TCWF Grantmaking Program, D. Working With the Foundation, E. Additional Questions, and F. About your Organization. Contact information for Julia Pennbridge and Alessandra Tanoue is provided. The survey progress is shown as 'Survey 0% Completed'. The footer contains copyright information for the National Health Foundation.

The California Wellness Foundation
2010 GRANTS PROGRAM SURVEY Main Menu

[INSTRUCTIONS](#)
[DOWNLOADS](#)
[START SURVEY](#)

If you want to access individual sections of the survey, click the section below:

SURVEY SECTIONS

- A. [Your Perceptions of TCWF](#)
- B. [Sources of Information About the Foundation and its Grantmaking Program](#)
- C. [TCWF Grantmaking Program](#)
- D. [Working With the Foundation](#)
- E. [Additional Questions](#)
- F. [About your Organization](#)

Consultant Julia Pennbridge, Ph.D., is conducting this survey with The National Health Foundation. If any of the questions or sections of this survey are unclear, please contact Julia Pennbridge at (310) 821-7921.

If you have technical problems accessing or completing the survey, please contact Alessandra Tanoue at (213) 538-0791 or via e-mail at atanoue@nhfca.org.

Survey 0% Completed

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Web-based survey: Multi-choice question.

The California Wellness Foundation
2010 GRANTS PROGRAM SURVEY Main Menu

B. SOURCES OF INFORMATION ABOUT THE FOUNDATION AND ITS GRANTMAKING PROGRAM

2. How did you hear about TCWF? (Check all that apply.)

- Referral by another nonprofit organization
- Referral by another grantmaker or corporate-giving program
- Suggestion from a member of your organization
- Articles about TCWF or TCWF-sponsored advertisements
- Visiting TCWF's website
- TCWF materials such as funding guidelines and annual reports
- Public presentation from a TCWF staff member (e.g., "Meet the Grantmaker")
- Personal contact with a TCWF staff person
- Previous experience with the Foundation or staff member
- The Foundation Center, GuideStar or a nonprofit resource center
- A TCWF conference or other TCWF-sponsored event
- I can't remember
- Other (Please explain.)

Previous Page Survey 0% Completed Next Page

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Web-based survey: Safety feature will not allow respondent to fill out “if yes” questions without first selecting “yes.”

The California Wellness Foundation
2010 GRANTS PROGRAM SURVEY

Main Menu

B. SOURCES OF INFORMATION ABOUT THE FOUNDATION AND ITS GRANTMAKING PROGRAM

10. In 2009, did you visit our website?

Yes

No (If no, please skip to question #11.)

If yes: When did you last visit?

Within the last week

Within the last month

Within the last 3 to 6 months

More than 6 months ago

How often do you visit?

At least once a week

At least once every 3 to 6 months

Other (Please explain.):

If yes, what is your overall assessment of our website?

If yes, what are your suggestions for improving it?

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Web-based survey: Liker Scale question.

The California Wellness Foundation
2010 GRANTS PROGRAM SURVEY [Main Menu](#)

C. TCWF GRANTMAKING PROGRAM

12. How useful were the following in helping you understand the eight health issues and special projects? (Check one for each communications channel.)

	Very useful	Moderately useful	A little useful	Not useful	Not applicable
www.CalWellness.org website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How To Apply brochure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Grantee magazine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reflections series	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TCWF Annual Report	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Public Education Campaign website: HealthJobsStartHere.com	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interaction with Foundation staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Any additional comments?

[Previous Page](#) **Survey 0% Completed** [Next Page](#)

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Web-based survey: Feature allows user to skip directly to unanswered question.



