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 in 2002. 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 April 25, 2003. Your participation in this effort will be most appreciated.

The National Health Foundation (NHF) is conducting this survey on our behalf. If any of the questions or sections of this survey are unclear, please contact Quinnie Le, NHF’s data manager, at (213) 538-0743 or at qle@nhfca.org.

A. YOUR PERCEPTIONS OF TCWF

1. In your opinion, what three words or phrases best describe The California Wellness Foundation?
   a. __________________________________________________________________________
   b. __________________________________________________________________________
   c. __________________________________________________________________________

2. Are there ways in which TCWF differs significantly from other foundations with which you interact? (Check which applies.)
   ❑ Yes   ❑ No
   If yes, please describe.
   __________________________________________________________________________
   __________________________________________________________________________

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

3. 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,” TCWF-sponsored events)
   ❑ Personal contact with a TCWF staff person
   ❑ Previous experience with the Foundation or staff member
   ❑ Foundation Center or a local nonprofit resource center
   ❑ I can’t remember
   ❑ Other (please explain)
   __________________________________________________________________________
   __________________________________________________________________________
4. In 2002, what TCWF communications materials or information did you receive or access? (Check all that apply.)
   - The California Wellness Foundation Annual Report
   - www.tcwf.org website
   - Foundation e-mail
   - Portfolio newsletter
   - Reflections publications series
   - Information for Grantseekers brochure
   - News release
   - None of the above
   - Other (please explain) ________________________________

5. Of these materials, which ones most helped you understand TCWF’s grantmaking program and why?
_________________________________________________________________________________________________
_________________________________________________________________________________________________

6. In 2002, did you use our Information for Grantseekers brochure?  Yes  No (If no, please skip to question #7.)
   If yes, were the application procedures easy to understand?  Yes  No
   What are your suggestions for improving it?
_________________________________________________________________________________________________
_________________________________________________________________________________________________

7. In 2002, did you read our Portfolio newsletter?  Yes  No (If no, please skip to question #8.)
   If yes, was the information useful?  Yes  No
   If yes, how was it useful?
_________________________________________________________________________________________________
_________________________________________________________________________________________________

8. In 2002, did you read any of our Reflections publications?  Yes  No (If no, please skip to question #9.)
   If yes, was it useful?  Yes  No
   If yes, how was it useful?
_________________________________________________________________________________________________
_________________________________________________________________________________________________

The next two questions focus on TCWF’s website, which is an important communications channel.

9. Do you have Internet access at your work?  Yes  No  Don’t know

10. In 2002, 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
    - More than 6 months ago
    If yes, 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 it?

_________________________________________________________________________________________________
_________________________________________________________________________________________________

What are your suggestions for improving it?
_________________________________________________________________________________________________
_________________________________________________________________________________________________
In recent years the Foundation has emphasized new priority areas and making grants for core operating support as part of its grantmaking program. Questions #11 through 14 focus on this aspect of TCWF’s funding.

11. How well do you feel you understand TCWF’s funding priority areas? (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.)

<table>
<thead>
<tr>
<th>Communication Channel</th>
<th>Very useful</th>
<th>Moderately useful</th>
<th>A little useful</th>
<th>Not useful</th>
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<td>Any additional comments?</td>
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</table>

13. How well do you feel you understand TCWF’s “core operating support” approach to grantmaking? (Check one.)
   - [ ] Very well
   - [ ] Moderately well
   - [ ] A little
   - [ ] Not at all

14. How useful were the following in helping you understand this approach? (Check one for each communications channel.)

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</table>

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

15. In 2002, what kinds of and how many contacts did you have with TCWF staff? (Check all that apply.)
   - [ ] Mail contact? Yes
   - [ ] No
   - [ ] Telephone contact? Yes
   - [ ] No
   - [ ] If yes, how many?
   - [ ] 1
   - [ ] 2 to 3
   - [ ] 4 to 5
   - [ ] More than 5
   - [ ] E-mail contact? Yes
   - [ ] No
   - [ ] If yes, how many?
   - [ ] 1
   - [ ] 2 to 3
   - [ ] 4 to 5
   - [ ] More than 5
   - [ ] Face-to-face contact? Yes
   - [ ] No
   - [ ] If yes, how many?
   - [ ] 1
   - [ ] 2 to 3
   - [ ] 4 to 5
   - [ ] More than 5
16. Which department did you interact with MOST? (Check one only.)
   - [ ] Reception/Administration
   - [ ] Communications
   - [ ] Finance
   - [ ] Grants Administration
   - [ ] Programs
   - [ ] Executive Office
   - [ ] Other __________________________________________

17. The persons you interacted with most were: (Check one for each of the following.)
   - [ ] Strongly agree
   - [ ] Agree
   - [ ] Disagree
   - [ ] Strongly disagree

   Courteous
   Responsive
   Knowledgeable
   Helpful
   Accessible

Any comments? __________________________________________

We want to facilitate TCWF’s grantmaking process. The next four questions address this issue.

18. Did you submit a Letter of Interest to TCWF during 2002?  [ ] Yes  [ ] No

19. Were you encouraged to submit a full proposal?  [ ] Yes  [ ] No  [ ] Don’t know or remember

20. How would you rate the following aspects of TCWF’s grantmaking process?

   Letter of Interest
   Proposal
   Progress Narrative Reports
   Final Narrative Report
   Financial Reports
   Other __________________________________________

   Very difficult
   Difficult
   Easy
   Very easy
   Don’t know

21. Are there any ways we can improve these processes?

   __________________________________________
   __________________________________________

   Please complete the following four questions ONLY if you were not encouraged to submit a proposal. If you were asked to submit a proposal, please skip to question #26.

22. Did you receive a denial letter in a timely fashion?  [ ] Yes  [ ] No  [ ] Don’t know or remember

23. Did you ask for feedback on your denial?  [ ] Yes  [ ] No  [ ] Don’t know or remember

24. Were you able to get feedback?  [ ] Yes  [ ] No  [ ] Don’t know or remember

25. Was the feedback useful?  [ ] Yes  [ ] No  [ ] Don’t know or remember
The Foundation is exploring the feasibility of allowing applicants to submit funding requests online. To help with our exploration, please answer the following questions.

26. Would your organization be interested in applying to TCWF for funding online (through the Internet)?
   - [ ] Yes
   - [ ] No
   - [ ] Don’t know

27. Has your organization applied to other funders online?
   - [ ] Yes
   - [ ] No
   - [ ] Don’t know or remember

   Any comments?

   __________________________________________________________________________
   __________________________________________________________________________
   __________________________________________________________________________

D. WORKING WITH THE FOUNDATION

If you were denied funding in 2002 or your request is pending, skip to question #32.

28. How does your experience working with TCWF compare with working with other foundations?
   - [ ] Better
   - [ ] Worse
   - [ ] About the same

   Please give examples:____________________________________________________________________________________
   __________________________________________________________________________

29. Has TCWF contributed to your organization in any way above and beyond the grant dollars received?
   - [ ] Yes
   - [ ] No
   - [ ] Don’t know

   If yes, in what ways?____________________________________________________________________________________
   __________________________________________________________________________
   __________________________________________________________________________

30. Are there ways in which the Foundation has been difficult to work with or made things difficult for you?

   __________________________________________________________________________
   __________________________________________________________________________

31. Do you feel the benefits from TCWF funding have been worth the costs/effort required to obtain them?
   - [ ] Definitely
   - [ ] Somewhat
   - [ ] Not really
   - [ ] Not at all

   If “Not really” or “Not at all,” please give examples:_______________________________________________________
   __________________________________________________________________________
   __________________________________________________________________________

E. ADDITIONAL QUESTIONS

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

   __________________________________________________________________________
   __________________________________________________________________________

33. Do you have any other thoughts you would like to share?

   __________________________________________________________________________
   __________________________________________________________________________
F. ABOUT YOUR ORGANIZATION

34. What is the job/role of the person completing this survey?
____________________________________________________________________________________________________

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

☐ A current grantee of the Foundation?        ☐ A former grantee?
☐ An unfunded applicant that submitted a Letter of Interest?  ☐ A current applicant awaiting a Foundation decision?
☐ Other ______________________________________

36. Please read the entire list and check the ONE category that BEST describes your organization.

☐ Community-based Health Organization        ☐ Human Services Agency
☐ Community Clinic                            ☐ National Organization
☐ Community Development Organization          ☐ Philanthropic Association
☐ Community Organizing Group                 ☐ Professional Membership Organization
☐ Consortium/Coalition                        ☐ Public Policy/Advocacy
☐ Educational Institution/Organization        ☐ Research Center/Institute
☐ Faith-based Organization                    ☐ Statewide Organization
☐ Family Planning/Reproductive Health Organization ☐ Technical Assistance Provider
☐ Foundation (Health Funder)                  ☐ Youth Organization
☐ Government                                  ☐ Other: (Please explain.)_________________________
☐ Hospital                                    ____________________________________

37. 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

38. Please name the California County in which your organization is headquartered.
____________________________________________________________________________________________________

THANK YOU FOR TAKING THE TIME TO COMPLETE THIS SURVEY.
PLEASE RETURN BY APRIL 25, 2003 TO:

Grants Program Survey
The California Wellness Foundation
P.O. Box 711116
Los Angeles, CA 90071