

2003 Grants Program Survey

Introduction

In an effort to understand how grant applicants perceive The California Wellness Foundation (TCWF), how they heard about it, how accessible and useful they find its materials and information, how its staff treats them, and how it could improve its philanthropic activities, TCWF worked with the National Health Foundation to conduct its 2003 Grants Program Survey. This is a report of the findings from that survey and, where possible, also compares these findings to those from the previous two surveys conducted in 1997 and 2000. Questionnaires for the survey were mailed to every organization that received and/or applied for funding from TCWF in 2002.

Method

The 2003 survey is a significantly revised version of the 2000 survey: it contains 38 questions, 14 of which were newly added and 13 which were modified. The survey was distributed to 2,326 recipients.

As with the previous two surveys, the 2003 survey included both closed and open-ended questions. The surveys were mailed with anonymous, self-addressed envelopes to be returned to a P.O. box temporarily obtained for this purpose. Follow-up was done once by TCWF and was sent via e-mail only to respondents with e-mail addresses (1,070). Respondents were asked to return completed surveys within three weeks. The cut-off date for accepting completed surveys was extended one week.

Completed surveys were entered into an Access database. More than 50% of the surveys (270) were checked individually for data accuracy, and the rest were checked using a 10% random sample. Quantitative data analyses, including frequency and cross tabulation summaries, were done in Excel. All responses to open-ended questions were separately analyzed for content and theme.

Results

Of the 2,326 surveys that were mailed out, 487 were returned. Of these, eight were received after the deadline and one claimed to have had no direct experience with the Foundation. These surveys, therefore, were not included in the final tally. Results analyses have been conducted on the 478 surveys that were returned valid and on time; and thus this report is based on a 21% response rate, compared to a 20% response rate in 2000 and 37% in 1997. Data summaries of the quantitative and qualitative data are presented below. Where comparable data from the previous two surveys were available, the comparison is presented first and then followed by the 2003 findings. The findings are presented in 10 major categories that essentially begin by discussing the respondents and their perceptions of TCWF; moving through their views of the Foundation's communication channels and their experiences working with TCWF; and ending with their other comments. The major points and highlights of the data are presented in the [Executive Summary](#).

1. The respondents. (Questions 34 through 38). These data describe the jobs/roles of those completing questionnaires; identify the current statuses of organizations in relation to TCWF; and describe the types of organizations responding to the survey, including their operating budgets and locations.

Jobs/roles of those completing questionnaires. (Question 34). Respondents were asked to identify the title of the person who completed the survey. More than half of the surveys were completed by senior management members (55%). These include presidents, CEO's, vice presidents and directors. Development staff (grant writers, development coordinators and managers) comprised another 22% of respondents. Other roles included program staff (14%) and other (1%). Almost 9% of respondents did not disclose this information.

Current statuses of responding organizations in relation to TCWF. (Question 35). This question was revised for the 2003 survey, so a direct comparison with 2000 results was difficult. The revision allowed respondents to report in more than one category; thus, one-fifth (21%) fall into a "multiple groups" category. This group includes respondent who were, for example, current grantees that have also been denied and/or whose funding requests were pending at the time they completed the survey questionnaire. Nevertheless, it is clear that the proportion of respondents who were current grantees increased since 2000 and the proportion who were denied decreased. The available data are shown below:

Status:	2003	2000	% Difference
Current grantees	40%	37%	3%
Former grantees	11%	17%	- 6%
Denied applicants	24%	56%	-32%
Pending applicants	2%	n/a	n/a
Other	2%	n/a	n/a
Multiple groups	21%	n/a	n/a

Types of responding organizations. (Question 36). Although the 2003 survey included more "type of organization" options, the

pattern of responding organizations was found to be similar to that of the 1997 and 2000 surveys. For example, in all three surveys, the top three types of responding organizations were human services agencies, community-based health organizations and other. However, the proportions of respondents changed somewhat, with human services organizations becoming the most frequent respondents.

Type of Organization:	2003	2000	1997
Human services agency	18%	13%	11%
Community-based health organization	16%	34%	26%
Other	9%	11%	9%

Other responding organizations were from education (7%), youth services (6%), public policy/advocacy (6%) and community clinics (6%). Each of the 14 other groups identified, represented between 0.4% to 5%.

Responding organizations' operating budgets. (Question 37). In 2003, the ranges of operating budgets were modified from the 2000 survey, so the responses could not easily be compared. Generally, TCWF appears to be distributing its funds relatively evenly across small, medium and larger organizations. It is noteworthy that in 2003, more respondents (7%) than in 2000 (3%) chose not to disclose this information. The 2003 responding organizations had operating budgets as follows:

Organizations' Operating Budgets:	2003
Up to \$200,000	13%
\$200,000 to \$350,000	9%
\$350,000 to \$500,000	7%
\$500,000 to \$999,999	13%
\$1 million to \$1,999,999	15%
\$2 million to \$4,999,999	12%
\$5 million to \$9,999,999	7%
\$10 million to \$24,999,999	8%
\$25 million and over	9%
No data	7%

Responding organizations' locations. (Question 38). These have changed little in comparison to 2000. Los Angeles continues to head the list:

County:	2003	2000	1997
Los Angeles	27%	24%	34%
Alameda	9%	7%	Unknown
San Francisco	8%	10%	8%
San Diego	7%	7%	8%
Sacramento	5%	5%	6%

The proportions of respondents from Los Angeles and Alameda Counties increased from 2000 while the proportions from other counties remained the same. The proportions of respondents from outside California decreased to 1% in 2003, compared to 2% in 2000, but this remains lower than in 1997 (8%).

2. Respondents' perceptions of TCWF. (Questions 1 and 2). These were based on open-ended questions that asked for the immediate word associations respondents made with TCWF and how they compared this foundation with others.

Describing TCWF in three words. (Question 1). As in the previous two surveys, respondents were asked to provide three words or phrases that best describe TCWF. Positive responses overwhelmingly outnumbered the negative by 16 to 1. The overall sense of them and the areas they addressed are discussed below. Most positive responses centered around two words: a) "responsive" and b) "innovative." The remaining comments generally fell into five domains: c) size and purpose, d) communication capabilities, e) the Foundation itself, f) Foundation staff and g) critiques.

a) **Responsive.** Many respondents actually used the word "responsive" to describe TCWF, while others used words that are either similar or related such as "helpful," "caring," "considerate," "attentive," and "involved." Respondents appear to feel respected and valued by TCWF and, in turn, to value TCWF's approach and philosophy. For example, many describe TCWF as "responsive to [the] health needs of California and the organizations that serve them" and, more specifically, they see TCWF as responsive to "unique communities and local concerns."

b) **Innovative.** TCWF was often described as "bold" and "risk-taking" in its grantmaking approach. The majority of respondents felt TCWF was a "trend setter" and "open to innovative ideas." TCWF was also seen as "forward," "adventurous" and "cutting

edge” in its funding process and strategies. Although “always looking for new ideas,” TCWF does not lose sight of reality, as described by one respondent as “visionary yet pragmatic at the same time.”

c) Size and purpose. Respondents generally viewed TCWF as a “big” and wealthy foundation with lots of resources. Some respondents associated TCWF with being “huge” or “vast,” and others thought of TCWF as “large in terms of funding as well as operations.” Most respondents seemed aware of TCWF’s purpose in the community, often associating TCWF with “health prevention” and “health and wellness.” Many were more specific in terms of the communities which TCWF serves, generally using words such as “underserved” and “diversified;” they see TCWF as a foundation that “addresses the health needs of the underserved.” Others tended to focus on the bigger picture and see TCWF as “CA health guardians,” a “statewide” foundation that is “committed to the health and well being of California.”

d) Communication capabilities. Respondents perceived TCWF as having clear communications about its mission and grantmaking approach. They felt that TCWF was “articulate” and “straightforward.” In addition, TCWF’s written communications and materials were often complimented as “thorough” and “excellent written and Internet materials.” Many respondents saw TCWF as having a “high profile;” that is, it is well-known because of its communications capabilities and is “clearly visible” in the funding community.

e) The Foundation itself. Many comments concerning the Foundation stressed its professional approach to grantmaking. Several respondents saw TCWF as being “thorough” and “dependable;” others saw it as having a “leadership role,” being an “advocate for health” and a “leader in community health funding.” TCWF’s approach to grantmaking was discussed as “comprehensive,” “encompassing,” “flexible” and “generous.” All together, respondents felt that TCWF has an “excellent reputation” and is “well-respected” in the community.

f) Foundation staff. Most positive comments throughout the survey concerned TCWF staff and are discussed in more detail later in the report. Answers to Question 1 were typically single words such as “supportive,” “concerned,” “friendly,” “courteous” and “respectful.” Not only were foundation staff described in glowingly congenial terms, they were also described as being “knowledgeable,” “competent,” and “intelligent.” Respondents felt that the staff is “dedicated” to helping and is “committed” to bringing social change to their communities.

g) Criticism. The few critical comments came primarily from organizations that had been denied funding. For example, some described the foundation as too “distant” and “impersonal.” A few felt that TCWF is unclear in its grantmaking approach and “bewildered about how to accomplish its mission.” These were clearly organizations that believed their projects fully met TCWF’s funding guidelines. Others saw TCWF as being “bureaucratic” and “exclusive” in its grantmaking and described its processes as “slow” and “competitive” and/or “difficult to understand the criteria for approving projects for funding.”

On the other hand, several of the organizations that had been denied funding were positive about TCWF. They felt heard by the Foundation and understood why they had not been funded. They felt that staff were “very efficient in following through with a grant request keeping us informed even though it was just an LOI” (Letter of Interest) and “very accessible staff who told me why a full proposal was not encouraged and urged me to rethink our needs.”

How TCWF compares with other foundations. (Question 2). In both 2003 and 2000, respondents were asked whether, and how, TCWF differs from other foundations. In both years, almost two-thirds (65%) reported that it does differ. However, when asked to describe how, the ratio of positive to negative comments doubled in 2003 to 8:1 compared to 4:1 in 2000. Both types of comments are summarized below.

Positive comments. These responses generally centered on TCWF’s core operating support and its staff. One in four positive comments concerned TCWF’s commitment to core operating support, with respondents grateful that TCWF recognizes the “real needs” that this funding supports. Several related this unusual approach to grantmaking to TCWF’s role as a leader among foundations and one that “sets the standards” for other foundations. They recognized this as the center of TCWF’s uniqueness, a grantmaking strategy that is “practically unknown elsewhere.” Many also complimented the staff on how they “risk getting their hands dirty.” Compared to other foundations, respondents viewed TCWF’s staff as “more human and willing to share information to help grantees’ success” and a few simply thought that TCWF has an “amazing staff!”

TCWF was also perceived as having more “open, direct and responsive” communication channels than other foundations and, as a result, “they don’t make promises they can’t fulfill.” Compared to other foundations, TCWF was seen as being “different in their grantmaking” process, which is, as one respondent described, “much more efficient than some and works within tighter, more realistic timeline for the grantees.” Other foundations are reported as taking “too long to respond and require[ing] extensive paperwork.”

Negative comments. Only one out of every nine comments was negative and involved the same overall areas as the positive. For example, among these mainly dissatisfied applicants, program directors were described as “much less accessible,” “not returning phone calls,” and as having assistants that “appear to be guard dogs/gate keepers.” To these respondents, TCWF staff was more “impersonal” than other foundations’ staffs, and its communications were inadequate; for example, “what [TCWF] poses as funding guidelines and interest areas differ from what they fund.”

3. How respondents heard about TCWF. (Question 3) This question was asked in 1997 and 2000, although for 2003 the response options were slightly modified. With today’s expanding technology, it is no surprise that in 2003 more respondents learned about TCWF through its website (87%) than in 2000 (24%) and 1997 (<11%). Since 2000, the TCWF website has become the most frequently cited source — outranking “TCWF materials,” which ranked first in the two previous surveys. Two information sources added in 2003, “personal contact with TCWF staff” and “previous experience with TCWF staff” (29% each), now rank as the third most frequently reported information sources, thereby indicating the Foundation’s history and integration into health philanthropy in California. The largest decrease in ways respondents learned about TCWF was seen in “Articles/ads about TCWF” (13% in 2003, compared to 25% in 2000 and 22% in 1997). The overall pattern for how 2003 respondents came to know about TCWF is as follows:

Source of Information:

	2003	2000	1997
TCWF website	37%	24%	<11%
TCWF materials	32%	46%	52%
Personal contact with TCWF staff	n/a	29%	n/a
Previous experience with TCWF staff	29%	n/a	n/a
Suggestion from a TCWF member	24%	17%	12%
Referral by nonprofits	24%	22%	28%
TCWF staff presentation	21%	20%	12%
Referral by grantmakers	17%	18%	<11%
Resource center	15%	15%	12%
Articles/ads about TCWF	13%	25%	22%
Can't remember	5%	n/a	n/a

4. Accessibility and understandability of TCWF materials and information. (Questions 4 through 8). As with the 2000 survey, respondents were asked about the materials they received or accessed and to comment on specific communication channels: the website, Annual Report, *Information for Grantseekers* brochure, *Portfolio* and *Reflections*. They were also asked how well they understood the two central organizing themes of TCWF's funding: its priority areas and its "core operating" approach.

Information read or accessed. (Question 4). In 2000, respondents were asked to comment on the materials they received; in 2003, they were asked to comment only on the materials they had read during the previous year. As in 2000, although many materials were available, respondents tended to focus on the website* (78% in 2003 vs. 61% in 2000) and the Annual Report (75% vs. 73% in 2000) as their main sources of information. The proportions of respondents in 2003 accessing or reading the various information sources are as follows:

* **Note:** All materials published by TCWF are also placed on its website, thus these questions are not exactly parallel.

Sources of information:			
Communications Channel	2003	2000	1997
TCWF website	78%	61%	15%
Annual report	75%	73%	56%
<i>Portfolio</i>	42%	39%	n/a%
<i>Information for Grantseekers</i> brochure	42%	52%	54%
<i>Reflections</i>	27%	27%	n/a
Foundation e-mail	17	11%	least used
News release	14	17%	unknown

Helpfulness of materials received or accessed. (Question 5) As in 2000, respondents identified the TCWF website and Annual Report as the most helpful information sources, although the proportion finding the TCWF website most helpful increased (from 28% in 2000 to 47% in 2003) while those finding the Annual Report most helpful decreased (from 25% in 2000 to 21% in 2003). The *Information for Grantseekers* brochure was the third most helpful (13%). Fewer than 6% of the respondents found any other materials helpful.

Comments about the helpfulness of the various information sources were divided into these areas: a) overall usefulness, b) what they wanted from information sources, and c) why the website and Annual Report were most useful.

a. **Overall usefulness.** While some respondents argued that all of TCWF's communication materials were helpful at different points in the process of educating themselves about different foundations and developing LOIs, others were equally clear that no materials can substitute for personal contact with staff. Still others — typically those who were denied funding — suggested that none of TCWF's materials were helpful.

b. **What was wanted from information sources.** At the most general level, those seeking funds wanted to understand what the Foundation is supporting and to accurately assess their organizations' chances of being funded. Having decided that their organization/program might be funded, they needed to understand how to approach the Foundation. For those with Internet access, and comfortable with using it, both kinds of information were available in one place. For those using printed materials, they needed to consult more than one document. Thus, those using the website tended to like it a lot, while those not using the website had to rely on the Annual Report and *Information for Grantseekers* brochure. The *Portfolio* and *Reflections* publications, although described as helpful by some, were much less frequently commented on.

c. Why the website and Annual Report were most helpful. Those who commented on the helpfulness of communication channels in understanding TCWF's grantmaking program most frequently commented on its website. They liked its comprehensiveness, "it had all the information I needed — on guidelines, focus areas, philosophy and grants given," that it is "clearly written," and "attractively presented," and "easily navigated and brief." Several respondents admitted preferring this information source because "it's always available," because they can "assume it has the most current information," and because it's "easy to bookmark and refer to" and "doesn't get filed in a pile."

Reasons for the helpfulness of the Annual Report mirror those for the website. Several respondents reported that it helps them understand which organizations and programs have been funded, TCWF's philosophy and funding priorities and that it provide lists of grantees. It provides "excellent coverage of the types of programs funded," a "good overview of priorities," and "a clear statement of goals."

The *Information for Grantseekers* brochure provides much more detailed information about how to apply. Respondents reported that this brochure was helpful because it "is very detailed and informational," "targets those seeking funds" and "is short and specific."

In addition to asking general questions about the helpfulness of various TCWF information sources, respondents were also asked about specific sources: a) the *Information for Grantseekers* brochure, b) *Portfolio and Reflections*, and c) the TCWF website.

Information for Grantseekers Brochure. (Question 6). Respondents were asked if they had used the *Information for Grantseekers* brochure in 2003, if the application procedures were easy to understand, and if they had any suggestions for its improvement. While the number of respondents who claimed to use the brochure decreased in 2003 (39%) compared to 2000 (56%), those finding it easy to understand increased to 95% in 2003 from 90% in 2000. Respondents were so positive about the Grantseekers brochure that few suggested improvements, and one in three suggested that it should be left as is. Others wanted even more simplification; for example, "the simpler, briefer and clearer, the better." One environmentally conscious respondent suggested, "use recycled paper/material."

Portfolio and Reflections. (Questions 7 and 8). Respondents, as in 2000, were asked if they had read these publications and if and how the information was useful. Slightly more respondents claimed to have read *Portfolio* in 2003 (45%) than in 2000 (42%), but those who found it useful decreased to 80% from 88% in 2000. When asked how *Portfolio* was useful to them, the majority said it helped to "learn about other programs that were funded and to learn about the directions in which the foundation funds." Others used *Portfolio* to learn about TCWF priorities and interest areas and for updated information ("What's New") about the Foundation.

Besides the News Release, *Reflections* seems to be the least read material of TCWF's publications; only one quarter (25%) have read it (compared to 33% in 2000). Of them, 78% found the information useful in learning about TCWF's "philosophy" and "focus issues" and to give them a "broad perspective on philanthropy issues [that] highlight TCWF's stance." Some felt that it "helped [them] understand the 'big picture' the role the Foundation plays in countering the devastating effect of recession on low-income populations." Several respondents said it allowed them to "stay current" with TCWF's interest and values and helped in their strategic planning processes.

TCWF website. (Questions 9 and 10). Respondents were asked when they last visited the website, how frequently they visited it, what they thought of it, and how it could be improved. Almost all respondents (98%) had access to the Internet at work, and the proportion (86%) accessing TCWF's website more than doubled from 2000 (36%.) Of those visiting TCWF's website, about four out of five visited it within the "last 3 to 6 months." Information about when and how often respondents access the website is as follows:

Visited TCWF website:	
Within the last week	9%
Within the last month	19%
Within the last 3 to 6 months	55%
More than 6 months ago	17%
Frequency of visits:	
At least once a week	2%
At least once a month	13%
At least once every 3 to 6 months	66%
Other	14%

Comments on what respondents thought of the website were generally positive, and suggestions for its improvement were few and practical.

What respondents thought of it. As in 2000, most comments about the website were overwhelmingly positive; some examples included "very good" or "good," "easy to navigate," "easy to access," "informative," "helpful," "excellent," "user-friendly," "well-organized" and "useful." One respondent summarized them by reporting that TCWF's website is "superior to other grantmaker websites in content, organization and aesthetics." Others commented that the layout is "crisp," "consistent," and has "good balance of information about grantees and TCWF." A few less enthusiastic comments included that the website is "a little too generic," "a bit dense visually," "a little confusing," and it is "difficult to find information."

Suggestions for improvement. Only 15% of all respondents provided suggestions, but they were useful and practical. The most common “suggestion” was the request that the website provide staff contact information. One respondent, who apparently had spent a lot of time looking for this information, wrote: “If the Foundation does not want contact and prefers going through the LOI, proposals, then just say so...[there’s] nothing more frustrating than wasted efforts.” Technical suggestions included having “links to other foundations,” “links to TCWF grantees,” and “making sure all the links work.” Comments about graphics and colors were contradictory, with some wanting more graphics and colors and others suggesting that “fancy graphics or images slow downloading process.” A few respondents requested that a “text-only option” be provided on the home page, and several suggested a “sample proposal be made available,” an “ideal” sample proposal, “one that TCWF would like to see from applicants” or even “a typical proposal that fits the guidelines.” Two respondents found some website information redundant and suggested having “someone outside the Foundation review the website for usability, clarity and repetition.”

Respondents’ understanding of TCWF priority areas and core operating support. (Questions 11 and 12). These were new questions in 2003, which asked respondents how well they understood TCWF’s funding priority areas and core operating support and how its various information materials helped this understanding. Most respondents (85%) felt they understood TCWF’s funding priority areas either very well (24%) or moderately well (61%). Fewer respondents (72%) felt they understood TCWF’s core operating support approach very well (34%) or moderately well (38%). Of all the communication channels TCWF provides, one surpassed all others in helpfulness: interaction with staff. Respondents reported first their interaction with staff and second the website, were very or moderately useful in helping them understand TCWF’s priority areas and core operating support. These findings are shown in the table below:

Helpfulness in Understanding TCWF Priority Areas:							
	Very useful	Moderately useful	A little useful	Not useful	N/A	No data	% Total
TCWF website	49%	28%	5%	1%	6%	17%	100%
Information for Grantseekers brochure	28%	22%	4%	1%	25%	20%	100%
Portfolio newsletter	9%	22%	9%	3%	32%	24%	100%
Reflections publications	6%	14%	9%	3%	41%	28%	100%
TCWF Annual Reports	25%	28%	12%	2%	16%	17%	100%
Interaction with Foundation staff	59%	11%	3%	4%	9%	14%	100%
Helpfulness in Understanding TCWF Core Operating Support:							
	Very useful	Moderately useful	A little useful	Not useful	N/A	No data	% Total
TCWF website	30%	25%	11%	4%	9%	20%	100%
Information for Grantseekers brochure	17%	18%	10%	4%	25%	28%	100%
Portfolio newsletter	7%	14%	11%	5%	32%	32%	100%
Reflections publications	6%	9%	9%	5%	39%	33%	100%
TCWF Annual Reports	14%	20%	14%	4%	20%	28%	100%
Interaction with Foundation staff	46%	12%	4%	4%	13%	21%	100%

Respondents generally appreciated that TCWF provides core operating support, saying they were “grateful to TCWF for being one of few foundations” to do so, and “more foundations should follow TCWF’s lead.” As with their understanding of the priority areas, respondents reported that their interaction with staff helped them most in understanding core operating support: “Foundation staff explained the concept well,” and they “understood much better after talking to staff.”

The difference in understanding of TCWF’s priority areas versus its core operating support approach was seen in several comments. For example, respondents reported that, “although useful, it is a hard concept,” and “we were still unsure when we sent our letter of interest whether or not our services were an appropriate match.” It seemed that several respondents heard about core operating support through the survey and went to the website for a definition. They did not find it; as one respondent wrote, “I was unaware of the COS ... I went right to your website - I entered the phrase into the search box and a list of funded agencies came up, so I still don’t know about this.”

In addition to having an inadequate understanding of core operating support, respondents appeared not to understand the relationship between it and TCWF's funding priority areas. Many seemed to think that these are two separate ways of getting funds from TCWF. Those who felt they understood these concepts and the relationship between them, often attributed their understanding to interaction with staff; e.g., "interaction with staff is actually, when you get down to it, the most helpful in being able to clearly match goals and priorities of our organization with the Foundation;" or "personal contact with [TCWF] staff is second to no other means of understanding;" and "there is no substitute for 'human contact'."

5. Contacting staff. (Questions 15 through 17). These questions were asked on three levels: a) the types of interaction (mail, telephone, e-mail, face-to-face), b) with whom the contact was made and c) how the respondent was treated. Some similar questions were asked in 1997 and 2000 surveys. In the 2003 survey, most respondents (88%) had mail contact with TCWF, and the fewest (50%) had e-mail contact. Only 52% of the respondents having mail contact were current grantees, compared with 69% of those with e-mail contact. More than half (58%) had experienced face-to-face contact with TCWF staff and, not surprisingly, 71% of whom were current grantees. The frequency of the different types of contact are summarized below:

Contact With Staff:			
	% Total respondents	Current Grantees	Denied Applicants
Mail	88%	52%	30%
Telephone	80%	58%	23%
E-mail	50%	69%	13%
Face to face	58%	71%	14%

When asked which departments they interacted with most, more than half (53%) said the program department; the next most frequently reported interaction was with grants administration (44%). The proportion of respondents reporting they were treated courteously decreased slightly in 2003 (90%) compared with 2000 (96%) and 1997 (94%). However, TCWF staff was described as responsive (86%), knowledgeable (88%), helpful (85%) and accessible (81%).

Interaction With TCWF Staff:						
	Strongly agree	Agree	Disagree	Strongly disagree	No data	% Total
Courteous	70%	20%	0%	0%	10%	100%
Responsive	66%	20%	4%	1%	9%	100%
Knowledgeable	67%	21%	2%	0%	10%	100%
Helpful	66%	19%	4%	1%	10%	100%
Accessible	56%	25%	6%	2%	11%	100

As these data show, respondents rated their interactions with TCWF staff very highly. Several commented on specific staff, e.g., "X is extremely knowledgeable and approachable;" while others commented on how much they appreciated the staff's approach, e.g., "[Their] consultative approach was appreciated... other foundations approach with more arrogance and do not seem to appreciate the limitations we operate under." The few criticisms focused on staff being "inaccessible," "not willing to meet face-to-face," and not returning telephone calls. The overall nature of the responses in this section may be summarized in the following quote: "Staff are busy but once they return a phone call, they are very helpful."

6. TCWF grantmaking process. (Questions 18 through 21) These questions focused on respondents' ratings of the ease and difficulty of preparing the documents required during TCWF's grantmaking process (LOI, proposal, progress reports, financial report, and final narrative report). Responses were categorized into two groups: a) documents required in seeking funds and b) documents required after funding had been received. None of the documents was considered very difficult to prepare by more than 3% of the respondents.

Documents required in seeking funds. Four out of five respondents (87%) agreed that LOIs are either easy (71%) or very easy (16%) to prepare. Fewer (64%) found proposal preparation easy (57%) or very easy (7%). Respondents who are perhaps more experienced grant proposal writers felt that "preparing proposals and reports is never 'easy' but TCWF's requirements are no more onerous than other foundations," and that "all grants require a lot of work." One respondent appreciated that the proposal "required us to be very precise in our thinking — excellent!" In short, as one respondent wrote, "there's no easy way to request large sums of other people's money!"

Documents required after funding had been received. The overwhelming majority of current and former grantees reported that the progress reports (86%), financial reports (84%) and final reports (87%) were easy or very easy to prepare. Not surprisingly, these respondents described TCWF's grantmaking process as "clear," "straight forward," "appropriate." Even those who reported finding these documents challenging to prepare stated that the process, because of its nature, was "challenging rather than difficult," "not daunting – but they require effort and thought;" nevertheless, TCWF's process was described as "humane."

Approximately one-third of respondents (32%) answered the question about if and how TCWF can improve its grantmaking

process. Of them, one in three felt that the current process “works fine,” is “straight forward,” is “manageable” and “necessary.” A few even thought that TCWF “did an excellent job of streamlining information” and that “it’s the best grantmaking process.” Suggestions for improvement were few, they included:

- a) quicker turnaround time (“3 months is too long between the submission of an LOI and getting a response”);
- b) clearer funding guidelines (“tighten your guidelines and be more specific about what you do and do not fund”);
- c) more detailed reasons for denial (“more concrete feedback”); and
- d) reports should be simple and available electronically.

7. Submitting funding requests online. (Questions 26 and 27). These questions were designed to explore the feasibility of allowing applicants to submit their proposals and other documents via the Internet. Two-thirds (66%) had experience with online proposal submissions and their experiences ranged from “love it” to “terribly hard.” However, 82% said they would be interested in applying to TCWF for funding online if it was available. Reasons for making online submissions available centered on efficiency and being environmentally responsible. For example, respondents thought that online submissions are “easier,” “very efficient,” “require less resources, i.e. time copying, postage,” and allow “more time to meet deadlines.” Even some without experience commented that since “business is run via computer with data and statistics already available,” it would be an “efficient method.” A few environmentally conscious individuals believed that the online process would “save trees.”

There were as many respondents interested in applying to TCWF for funding online, as there were those who saw this as posing many problems. Problems cited included limited space and flexibility and being impersonal. Several respondents commented that online submissions are “cumbersome because not all documents required are available online” [e.g. financial audits and IRS determination letters]. They also stated that online application restricts applicants’ creativity, as “some questions have complicated answers that cannot be answered with a simple click box.” Others noted that online application eliminates the human factor because it does not “allow [applicants] to build personal relationships or to have contact with the staff,” which is needed to “understand the foundation culture.” Several simply commented that “computer glitches can be frustrating.” Regardless of whether they have had good or bad experiences with online submission, respondents agreed that it must include: 1) confirmation of receipt, 2) the ability to see what is required ahead of time, 3) the ability to save and complete at a later time, 4) interactive applications that have been carefully debugged and 5) “keep it simple!” A few respondents suggested having online submission “as an option, not a requirement.”

8. Denied Applicants. (Questions 22 through 25). This section of the survey was designed exclusively for respondents whose LOIs were denied. A similar question in the 2000 survey was not restricted to denied applicants and therefore could be compared. Of those whose LOIs were denied (146), regardless of whether they were also current or former grantees), the overwhelming majority (61% or 2 to 1) said they received denial letters in a timely fashion. Fewer than one-half (43%) of those who were denied asked for feedback, another 38% did not, and the remaining did not know or remember whether they had requested feedback. Of those asking for feedback, 73% received it and 2 out of 3 of them thought it was useful; the remaining 25% did not receive the feedback they asked for. Descriptive comments from denied applicants were generally negative, and most comments fell into two categories: funding guidelines and priorities and denial feedback.

Funding guidelines and priorities. Denied applicants often reported that TCWF’s guidelines are “unclear” and that the “areas funded are defined more broadly than what is actually funded.” They often suggested that TCWF be specific about “what fits into [its] criteria for funding” and “what [TCWF] actually considers funding.” Because the website is the first point of contact and the place where many got most of the information about TCWF, respondents suggested that it should contain “clarity regarding the qualifications [necessary] to receive funding.”

Denial feedback. These respondents reported that the feedback TCWF gives on denials is too “vague,” “ambiguous,” and seemed “rehearsed.” They felt that for the effort they put into their LOIs and proposals, TCWF should at least provide a “more specific reason for a rejection” and “more constructive criticism.” Others felt that they would appreciate more “concrete feedback with the opportunity to resubmit.”

9. Working with the Foundation. (Questions 28 through 31). Answers to these questions describe respondents’ (current and former grantees) experiences working with TCWF; if and how their relationships with TCWF benefited them; and whether their funding had been worth the effort required to get it. Only the responses of current and former grantees are reported in this section.

Relationship compared to other foundations (Question 28). More than half (58%) of the respondents stated that their experiences working with TCWF were better than with other foundations; only 2% report they were worse. Not surprisingly positive comments outnumbered the negative 16 to 1. This is double that of 2000 (8 to 1) and four times that of 1997 (4 to 1).^{*} About half of those saying their working relationships with TCWF were better felt this is because of the “excellent quality” of TCWF staff, its grantmaking processes and clear communications.

*** The fact that more respondents in the 2003 survey are current grantees (50% compared with 37% in 2000 and <30% in 1997) may account for some of this increase in positive to negative comments.**

Compared to other foundations, TCWF staff were described as more “accessible,” “knowledgeable,” “professional,” “helpful” and “interested.” They were found to be “sympathetic” to grantees and have a “good understanding of programs and what an organization could realistically accomplish,” or more simply, “they get it!” Respondents also believed that the “welcoming, approachable” attitude that TCWF staff displays “relieves the anxiety of seeking funding and follow up reports.”

Other respondents were grateful for TCWF’s grantmaking process, which they described as “streamlined,” “straightforward,” “consistent,” “less haggling,” “timely” and was not made “to have organizations jump through hoops.” This included the fact that TCWF gives “lump sum” payments “upfront” instead of “annual outlays” like other foundations and that TCWF communications approach is “concrete,” “direct and ongoing” and supports giving “good clear, straight answers.”

Only 5% of the comments in this section (compared to 10% in 2000) were negative, and they primarily centered on “poor communication” and demanding processes. For example, respondents reported that TCWF staff are “uninvolved,” that it “seems difficult for TCWF to articulate its core values except in loose concept,” and that “site visits and reporting are almost as bad as

government grants — extensive oversight is cumbersome for grantees.”

Non-monetary contribution. (Question 29). Almost half of the current and former grantees (45%) felt that TCWF has contributed to their organizations above and beyond the grant dollars they received. These benefits included “guidance,” “recognition,” “collaboration,” and “referrals” to other funders. Guidance came in the form of “advice,” and “support” from staff which ranges from “encouragement” and “ideas” to more direct involvement like “providing keynote speakers at annual meeting” to “hosting site visits for students.” Others reported that funding from TCWF allowed them to receive more “exposure,” “publicity” and “validation” with other funders. Because of the “weight [the] TCWF name carries,” they are able to “leverage more dollars” and have their “credibility enhanced.” The collaboration and networking facilitated by TCWF which “bring [them] together” and establish “a common thread” among them, provide a major benefit. Groups such as the “Women’s Health Collaboration” help build “stronger bonds” and “coalitions” between organizations and allow them to reap the benefits of “networking.” Respondents also believed that TCWF advocates for nonprofits, and often “connects [them] to other funders,” and “recommends” and “advises” about potential funding opportunities.

Difficulties in working with TCWF. (Question 30). Respondents were asked whether TCWF was difficult to work with and whether working with TCWF made things difficult for them. Slightly more than a quarter (27%) of the respondents answered this question, and one in three said they had no difficulties working with the Foundation. Their responses ranged from a simple “no” to stronger comments like “never!” or “a thousand times no.” These respondents describe their TCWF interactions as “cooperative” and “pleasant.”

Respondents who reported difficulties working with TCWF primarily attributed them to staff changes that they considered “disruptive,” often “requiring reestablishment or adjustment of the grantor-grantee relationship,” and not being able to access staff (“hard to get a hold of,” “have to go through ‘gatekeepers’” and “haven’t responded to e-mails”). Several felt that TCWF’s funding cycles were difficult because they were “limited” and they wished there were more Board reviews each year. Others reported more personal frustrations — e.g. “less money than originally discussed” and “we were asked to collaborate with another organization who did not want to collaborate with us.”

Was it worth it? (Question 31). Most respondents (79%) reported that the benefits they received from TCWF funding were definitely worth the cost of obtaining them; 2% felt they were somewhat worth it, none said the funding obtained was not worth the effort and 19% left this question blank. Overall, respondents felt that TCWF presents “a refreshing change” from other foundations with “arrogance” and “attitude” that make them “run through hoops.”

10. Additional questions. (Question 32 to 33). As with the 2000 survey, these questions were designed for respondents’ comments on areas that were not covered by the survey but areas in which they would like to see improvements.

Areas of potential improvement. (Question 32). This question was completed by far fewer (18%) respondents in 2003 than in 2000 (49%), and one out of every four comments referred to seeing no areas for potential improvement, stating that TCWF should “keep doing what you are doing.” The remaining comments fell into four general areas: timeliness of feedback, clarity in funding requirements, clarity in feedback and miscellaneous.

Timeliness of feedback. Respondents who were frustrated by the grantmaking process took this opportunity to again complain that “time between submittal and approval is very long.” One reported waiting “almost 6 months” to get feedback from an LOI, and another suggested that the response timeline should be “shortened” because “time is money and if the idea does not fit, [we] need to look elsewhere.”

Clarity in funding requirements and strategies. Other, primarily unfunded, respondents felt that TCWF only funds large and established organizations. Their comments included: “Simply let new nonprofits know that they probably won’t get funding” and “only large ‘glamorous’ nonprofits need apply.” Others felt that it would help them to know TCWF’s planned distribution (by percentage) by geographic areas, so that if it is “too low in my area I need not apply.”

Clarity in feedback. Several respondents requested that TCWF offer more “constructive criticisms” when denying funding because such comments are “highly valuable to growing agencies.” They felt that the reasons for their denial were “not adequately explained,” suggested that TCWF “indicate the weakness of the LOI so the applicant will learn lessons,” and would “appreciate more responsiveness ... on denial postcards.”

Miscellaneous. Scattered responses concerned staffing, distribution of funds, and the survey itself. Some respondents suggested hiring more experienced program officers, ones who have “been in the trenches,” and to make it possible for applicants to have “more communication with program officers.” Others recommended spreading funds “around the state” and “not just concentrating in LA,” in addition to increasing funding for specific issues — e.g., “women’s health,” “mental health,” “violence,” and “underserved population.”

Although the respondents were not asked to comment on the survey itself, several reported that it was “comprehensive,” that they were grateful for the effort, and remarked that “thought contributed to the ‘ease’ of this survey.” Others thanked TCWF for soliciting their opinions and allowing them to give feedback. Two recommended that TCWF: 1) “provide a larger envelope” and 2) “Do the next survey online!”

Other thoughts. (Question 33). Only 30% responded to this question compared to 44% in 2000 and their comments can be categorized as: 1) recommendations, 2) criticisms and 3) thanks. As in 2000, the responses were overwhelmingly positive, with 20 positive for each negative (compared to 33 to 1 in 2000). Each is discussed in turn.

Recommendations. Many of the recommendations repeated suggestions and comments already discussed in this section. Additional ideas are presented below:

- “Be more flexible with core expense.”
- [Provide more] “technical assistance.”
- “Specify [changes in] funding ranges as economy changes.”
- “Focus funding in small rural counties.”

“Have a meeting with [applicants] who were declined in order to help them write stronger grants.”

Criticisms. There were a total of six negative comments, all of which were from unfunded respondents and worth mentioning to make the point that applicants who were denied funding felt that they had no “connection” to TCWF and therefore did not believe it was interested in their views. As one frustrated, denied applicant wrote, “Why do you care what we think when you’re not interested in funding us?”

Thanks. Most “other thoughts,” however, were positive and appreciative. Respondents thanked TCWF for its funding, grantmaking process, commitment to the community and its wonderful staff. Below are comments that sum up the overall “gestalt” of these responses:

“We are extremely grateful and honored to be a TCWF grantee. Thank you.”

“The leadership of TCWF in providing COS — thus responding to the greatest need and making the greatest positive impact in current circumstances — is much appreciated. We hope other foundations follow this example.”

“What a great org; so positive, helpful and encouraging.”

“TCWF has educated us about the foundation world and helped make important contacts. Thank you, core support is wonderful!”

“TCWF is great and has been willing to take risks that others won't. I hope this trend continues. TCWF is a leader in philanthropy and not a follower. This is refreshing.”

“TCWF makes a very significant contribution to thousands of lives in California. Good work, good philosophy.”

“Appreciated statewide advocacy efforts on behalf of uninsured, low-income clients.”

“Appreciate TCWF's level funding despite their endowment shrinking.”

“Thank you for your funding and for the integrity with which you clearly approach your grantmaking mission.”

“Your style of providing grants and technical assistance increases the opportunities of the most in need to be served more effectively.”

Conclusions

As with the survey conducted three years ago, respondents' comments about TCWF in the 2003 survey were overwhelmingly complimentary. They considered its philanthropic approach innovative, its staff exemplary, its communications clear and concise, and its grantmaking process fair. Clearly, TCWF has a solid and extremely positive reputation.

Without doubt, TCWF stands apart in California's philanthropic world because of its willingness to provide core operating support. Many respondents commented positively and enthusiastically on the uniqueness of this approach. However, although it was understood and appreciated by many, this approach and its relationship to the Foundation's funding priority areas were not fully comprehended by many respondents. Some seem to consider it essentially as another priority funding area rather than as an approach within funding areas.

While TCWF's commitment to core operating support differentiates it from other foundations, this is not the only reason TCWF is perceived to be different from and better than other foundations. It is also different because its staff was found to be more knowledgeable and committed, its communications more direct and accessible, and its grantmaking process less onerous. Several respondents wrote about a sense of belonging to the TCWF family.

As with the previous survey findings, most of the critical comments about TCWF were made by unfunded applicants. However, in the 2003 survey, even unfunded applicants positively commented on the LOI and proposal writing processes and how much they had learned from them. Nevertheless, fewer than half of them asked for feedback on their unfunded requests. Almost two-thirds of those that did receive feedback reported that it was useful. This seems to be an area where TCWF could perhaps improve. Training staff to cope with inappropriate and unfundable requests, particularly those dealing with LOIs, may reduce this minimal, but persistent level of complaint. That said, it must be recognized that no staff and system can satisfy everyone all of the time. TCWF's current staff and system are clearly satisfying most of the applicants most of the time.

As already mentioned, TCWF was complimented on its communications, particularly on its website. Almost all respondents had Internet access at work, and more of them were relying on TCWF's website as their primary information channel. While all have Internet access, it was not clear how many respondents had e-mail capabilities. However, it might be possible for TCWF to address complaints that “staff is hard to reach” by more effectively using e-mail.

Finally, TCWF should be congratulated for continuing to conduct its applicant/grantee satisfaction surveys. The fact that the Foundation is asking for feedback is viewed extremely positively by most respondents. Those who took the time to complete the survey were pleased to share their ideas and give their opinions. For them, their experiences of and with TCWF were powerful and exciting. As one respondent put it, “Thank you. It has been a great ride.”