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 2005. 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 October 2, 2006. 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 Jennifer Ricards, NHF’s project coordinator, at (213) 538-0743 or at jricards@nhfca.org.

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 & 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,” TCWF-sponsored events)
   □ Personal contact with a TCWF staff person
   □ Previous experience with the Foundation or staff member
   □ The Foundation Center or a local nonprofit resource center
   □ I can’t remember
   □ Other (Please explain.)

   __________________________________________
   __________________________________________
   __________________________________________
3. In 2005, what TCWF communications materials or information did you receive or access? (Check all that apply.)

☐ TCWF Annual Report
☐ www.tcwf.org website
☐ Foundation e-mail
☐ Portfolio newsletter
☐ Reflections publications series
☐ Information for Grantseekers brochure
☐ TCWF postcard
☐ News release
☐ None of the above
☐ Other (Please explain.) ______________________

4. In 2005, did you read our Information for Grantseekers 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 it? __________________________________________

5. In 2005, 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 2005, did you read our Portfolio newsletter?  ☑ 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 2005, 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.

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

10. In 2005, 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 month  □ Within the last 3 to 6 months  □ 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 it? __________________________________________________________
    ________________________________________________________________________________________________
    ________________________________________________________________________________________________
    ________________________________________________________________________________________________

    If yes, what are your suggestions for improving it?____________________________________________________
    ________________________________________________________________________________________________
    ________________________________________________________________________________________________

C. TCWF GRANTMAKING PROGRAM

Over the last five years, 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.)

<table>
<thead>
<tr>
<th></th>
<th>Very useful</th>
<th>Moderately useful</th>
<th>A little useful</th>
<th>Not useful</th>
<th>Not Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="http://www.tcwf.org">www.tcwf.org</a> website</td>
<td></td>
<td></td>
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<tr>
<td>Information for Grantseekers brochure</td>
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<tr>
<td>Portfolio newsletters</td>
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<tr>
<td>Reflections publications</td>
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<tr>
<td>TCWF annual reports</td>
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<tr>
<td>Interaction with Foundation staff</td>
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</tbody>
</table>

Any additional comments?________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

If yes, what are your suggestions for improving it?________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
13. How useful were the following in helping you understand core operations support? (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>
<th>Not Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="http://www.tcwf.org">www.tcwf.org</a> website</td>
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<td>Information for Grantseekers brochure</td>
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<td>Interaction with Foundation staff</td>
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<tr>
<td>Any additional comments?</td>
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</tbody>
</table>

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 2005, 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.)

<table>
<thead>
<tr>
<th>Qualitative Attribute</th>
<th>Strongly agree</th>
<th>Agree</th>
<th>Disagree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Courteous</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Responsive</td>
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<tr>
<td>Knowledgeable</td>
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<tr>
<td>Helpful</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Accessible</td>
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<td></td>
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</tbody>
</table>

Any comments? ____________________________________________

_________________________________________________________________________________________________
Information from the next three questions will help to assess TCWF’s grantmaking process.

17. After you submitted a Letter of Interest, were you encouraged to submit a full proposal?
   - [ ] Yes  [ ] No  [ ] Don’t know or can’t remember

18. Based on your involvement with TCWF, how would you rate the following aspects of TCWF’s grantmaking process? (Check all that apply.)

<table>
<thead>
<tr>
<th></th>
<th>Very difficult</th>
<th>Difficult</th>
<th>Easy</th>
<th>Very easy</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letter of Interest</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
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<td>[ ]</td>
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<tr>
<td>Grant Proposal</td>
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<tr>
<td>Progress Narrative Reports</td>
<td>[ ]</td>
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<tr>
<td>Final Narrative Report</td>
<td>[ ]</td>
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</tr>
<tr>
<td>Financial Reports</td>
<td>[ ]</td>
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<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

__________________________________________________________________________________________________

__________________________________________________________________________________________________

__________________________________________________________________________________________________

D. WORKING WITH THE FOUNDATION

Please complete the following series of questions ONLY if you were NOT encouraged to submit a proposal. If you were asked to submit a proposal, please skip to question #27.

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

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

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

23. Was the feedback useful?  [ ] Yes  [ ] No  [ ] Don’t know or can’t remember

24. 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?

__________________________________________________________________________________________________

__________________________________________________________________________________________________

__________________________________________________________________________________________________

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

__________________________________________________________________________________________________

__________________________________________________________________________________________________

__________________________________________________________________________________________________

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

   - [ ] Excellent  [ ] Good  [ ] Okay  [ ] Somewhat difficult  [ ] Very difficult
**E. ADDITIONAL QUESTIONS**

27. How does your experience working with TCWF compare to working with other foundations?
   - Better
   - Worse
   - About the same
   Please give examples: ____________________________________________
   _____________________________________________________________

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

**F. ABOUT YOUR ORGANIZATION**

29. What is the job/role of the person completing this survey?
   _____________________________________________________________

30. 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
   _____________________________________________________________

31. Please indicate which range best characterizes the total operating budget of your organization for its most recent fiscal year.
   - Up to $199,999
   - $200,000 to $349,000
   - $350,000 to $499,999
   - $500,000 to $999,999
   - $1 million to $1,999,999
   - $2 million to $4,999,999
   - $5 million to $9,999,999
   - $10 million to $24,999,999
   - $25 million and over
   _____________________________________________________________

32. Please name the California county in which your organization is headquartered.
   _____________________________________________________________

THANK YOU FOR TAKING THE TIME TO COMPLETE THIS SURVEY.  
PLEASE RETURN BY OCTOBER 2, 2006 TO:  

TCWF Grants Program Survey  
c/o National Health Foundation  
Attn: Jennifer Ricards  
515 S. Figueroa Street, Suite 1300  
Los Angeles, CA 90071