

The California Wellness Foundation 2006 Grants Program Survey Final Report

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Executive Summary

The California Wellness Foundation (TCWF) recently completed its fourth Grants Program Survey. This survey is part of TCWF's continuing interest in determining how grant applicants perceived it and its staff and to assess the usefulness of its materials and website. The ultimate objective is for TCWF to use the findings to improve its philanthropic activities.

For the first time in its Grants Program Survey history, TCWF offered a web-based survey in addition to a traditional paper survey. The surveys were sent via mail or e-mail to all organizations that either applied for funding or were "active" grantees in 2005. As with the previous surveys, findings were extremely positive and showed continued satisfaction with and appreciation for TCWF's philanthropic commitments, staff, communications, and responsive grantmaking program. Examples from the most recent survey include:

- *Philanthropic approach:* Respondents reported that TCWF is a "community minded" foundation that is fully "committed to improving health and social justice." Through its endeavors, TCWF is "making a real difference in healthcare outcomes."
- *Staff:* For many, what sets TCWF apart from other foundations is its staff. In addition to helping them better understand TCWF's funding priorities, respondents enjoyed interacting with TCWF staff and appreciated "...the warm, kind, professional demeanor of...program staff." Respondents agreed that TCWF staff was especially "courteous" (98%) and "knowledgeable" (97%).
- *Communications:* Each Grants Program Survey has revealed a continued increase in the use of TCWF's website. An overwhelming majority (87%) reported having visited the website at least once, with many of them accessing communications materials such as the Annual Report, *Portfolio* newsletter, and *Reflections* publications online. Respondents appreciated being able to access a variety of information "all in one place."
- *Responsive grantmaking program:* Respondents were pleased with both TCWF's funding priorities and its reporting requirements. About four out of every five respondents felt they understood TCWF's funding priorities well, with many emphasizing their appreciation for its core operating support. Three quarters of the respondents noted that the required reports were easy to prepare and that TCWF did not "micro-manage" them in this respect.

As with previous survey findings, the most critical comments were made by unfunded applicants. These respondents requested more timely and clear feedback on the letter of interest and proposal writing process.

TCWF should be commended for not only maintaining, but furthering its excellent reputation. As one respondent stated, "Keep up the good work TCWF!"

INTRODUCTION

In an effort to understand how grant applicants perceived The California Wellness Foundation (TCWF), how they heard about it, how accessible and useful they found its materials and information, how its staff treated them, and how it could improve its philanthropic activities, TCWF worked with the National Health Foundation (NHF) to conduct its 2006 Grants Program Survey. This report presents the findings from that survey. Where appropriate, results of the three previous surveys (1997, 2000, and 2003) are compared. The survey was sent to all organizations that either applied to TCWF for funding or were “active” TCWF grantees in 2005.

METHODS

As has always been the case, the content and format of the previous surveys formed the basis of the new survey. Thus the domains and closed- and open-ended questions of the 2003 Survey were reviewed, and modifications for the 2006 Survey included dropping five questions, modifying seven and adding two (see Appendix A).

For the first time in its Grants Program Survey history, TCWF offered web-based surveys for those with e-mail addresses and traditional paper surveys for those without. The paper surveys were sent with anonymous self-addressed envelopes to be returned to TCWF care of NHF. To prevent duplicate completion of surveys, organizations were given unique IDs 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 2006 Grants Program 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 screenshots of the application are included as Appendix B.

Follow-ups were conducted with both paper and web-based survey recipients. Paper survey recipients were contacted if their surveys were incomplete (e.g., some respondents missed sections of the survey due to the tri-fold design). For web-based survey recipients, NHF was concerned that some e-mail programs were not properly linking to the survey due to the length of the hyperlink. A follow-up e-mail with a shorter hyperlink was sent one week after the initial introduction e-mail to all web-based survey recipients who had not completed the survey. The e-mail encouraged applicants to submit their surveys before the October 2nd deadline. Web-based survey recipients were also notified of the survey deadline extension in a later e-mail. Although paper survey recipients were not notified of the extension, paper surveys were accepted until October 16th, the extended deadline.

Completed paper surveys were entered individually into a SQL database via a web-based data entry application. Web-based surveys were automatically transferred and saved into a 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. More than 50% of the completed paper surveys were checked individually for data accuracy. Quantitative data analyses, including frequency and cross tabulation summaries, were done in SQL. Response percentages were calculated in Excel. All responses to open-ended questions were separately analyzed for content and theme.

RESULTS

The 2006 Survey response rate was 31%, an increase from the 2003 (21%) and 2000 (20%) Surveys and a decrease from the 1997 Survey (37%). Of the web-based surveys, 66 “bounced back,” or were returned due to invalid or inactive e-mail addresses. NHF contacted these organizations and was able to correct 54 e-mail addresses so that only 12 did not receive e-mails with hyperlinks to the web-based survey. These 12 were included in the “did not respond” category below. Fifty-one web-based recipients downloaded PDF versions of the survey, although only seven were received by NHF via fax or mail. The response patterns for the 2006 Survey were as follows:

<u>Number of Surveys Sent</u>		
	Surveys	Surveys (%)
Web-based	873	54%
Paper	746	46%
Total	1,619	100%

<u>Responses*</u>			
	Web	Paper	Web & Paper
Did not respond	403 (45%)	576 (79%)	979 (61%)
No data/Returned “undeliverable”	111 (13%)	19 (3%)	130 (8%)
Incomplete surveys	7 (1%)	1 (0%)	8 (1%)
Completed surveys	365 (41%)	137 (19%)	502 (31%)
Total	886 (100%)	733 (100%)	1,619 (100%)

* 14 paper survey recipients requested web-based surveys and 1 web-based survey recipient requested a paper survey. Percentages do not add to 100 due to rounding.

Data for quantitative questions and text responses for open-ended questions are provided in Appendix C. Summaries of the quantitative and qualitative data are presented below. Where comparable data from any of the previous three surveys are available, the comparisons are presented first followed by the 2006 Survey findings. As shown in the Table of Contents, findings are presented in ten categories ranging from the respondents and their perceptions of TCWF to their experiences of participating in TCWF’s grantmaking process. The major highlights of the data are presented in the Executive Summary.

1. The respondents. (Questions 29 through 32). These data describe the jobs/roles of those completing questionnaires and identify the current statuses of organizations in relation to TCWF, their operating budgets and locations.

Jobs/roles of those completing questionnaires. (Question 29). There were more senior management completing the 2006 Survey (65%) than the 2003 Survey(55%). These included Presidents, Vice Presidents, Chief Executive Officers, Chief Operating Officers, Directors, and Board or Executive Committee Members. The proportion of development staff (Grant Writers, Development Coordinators, and Grants Managers or Officers) completing these surveys was similar to the 2003 Survey (24%) and comprised another 25% of respondents.

Current statuses of responding organizations in relation to TCWF. (Question 30). The proportion of denied organizations continued to decline: 56% for the 2000 Survey, 24% for the 2003 Survey, and most recently, 20% for the 2006 Survey. As with the 2003 Survey, this question allowed respondents to select more than one category, thus 25% fell into a “multi-groups” category. This group included respondents who were, for example, current grantees who were also denied and/or whose funding requests were pending. All other categories of responding organizations’ statuses remained roughly the same, as is shown below:

<u>Statuses of Responding Organizations*</u>			
	2006 Survey	2003 Survey	2000 Survey
Current grantees	40%	40%	37%
Former grantees	10%	11%	17%
Denied applicants	20%	24%	56%
Pending applicants	2%	2%	N/A
Other	3%	2%	N/A
Multiple groups	25%	21%	N/A
No data	2%	N/A	N/A

*Percentages do not add to 100 due to rounding.

Responding organizations’ operating budgets. (Question 31). Generally, TCWF appears to be distributing its grants relatively evenly across small, medium, and larger organizations, with little change in the proportions of each from the 2003 Survey. As in with that survey, the largest category included organizations with operating budgets of \$1 to \$2 million. The number of respondents who chose not to respond to this question dropped from 7% for the 2003 Survey to 4% for the 2006 Survey (see following table). The ranges of operating budgets were modified from earlier surveys, so the responses could not be easily compared.

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

*Percentages do not add to 100 due to rounding.

Responding organizations' locations. (Question 32). The distribution of organizations across California counties has changed little since previous surveys. In the most recent survey, the percentage of Orange County respondents increased above the 5% mark and was included in the table (below) for the first time. The proportion of organizations in Los Angeles County dropped slightly while all others (Alameda, San Diego, San Francisco, Sacramento and Orange Counties) increased slightly.

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

2. Respondents' perceptions of TCWF. (Question 1). These responses were based on an open-ended question that asked respondents for words or phrases that best described TCWF.

As with the 2003 Survey, positive responses to this question overwhelmingly outnumbered negative comments by (16:1 for the 2003 Survey and 24:1 for the 2006 Survey). Respondents described TCWF as being a) "Responsive," b) "Supportive" and c) "Innovative." They also commented on TCWF's d) Size, e) Purpose, f) Communication capabilities, and g) Reputation. As in previous years, an overwhelming

majority of the negative comments were made by unfunded applicants. The overall sense of the responses and the areas they addressed are discussed below.

a) “Responsive.” Nearly 1 out of 10 respondents used the actual word “responsive” to describe TCWF. Others used similar words such as “prompt,” “helpful,” and “efficient.” Respondents generally felt that TCWF was responsive not only to “grantees and potential grantees,” but also to “community” and “healthcare needs.”

b) “Supportive.” Respondents felt that TCWF “support[ed] broad-range health related activities” including “community,” “policy,” “advocacy,” “environment[al],” “organization[al],” and “research” needs. TCWF was also described as “committed” and “dedicated” in its endeavors. Given TCWF’s activities, it’s not surprising that even an unfunded applicant described TCWF as “a blessing.”

c) “Innovative.” “Innovative” was one of the top five words used to describe TCWF. Respondents generally felt that TCWF was a “visionary” in the field and was “creative” and “risk-taking” in its grant making approaches. Others described it similarly, stating that it was “cutting edge” and had a “progressive take on new issues” because it was “open to possibilities” and “creative ideas.”

d) Size. Despite the fact that many respondents felt that TCWF was “large,” many stated that it was “approachable” and “accessible.” Applicants appreciated the fact that its size was a result of it being “well-endowed” and viewed the foundation as being extremely “generous” with its funds.

e) Purpose. Respondents gave both focused and broad descriptions of TCWF’s purpose. As one respondent stated, TCWF is “a voice for those who have the least.” Many echoed this statement by mentioning TCWF’s efforts in “serving [the] under-represented.” Others were less specific and reported on TCWF’s work in “healthcare,” “public health,” and “health systems.”

f) Communication capabilities. Respondents continue to perceive TCWF as having clear communications about its mission and grant making approach. 2006 Survey respondents stated that TCWF was not only “thorough,” but “focused” and “organized.” Applicants viewed TCWF as “easy to communicate with” and also “easily accessible.” As one respondent stated, TCWF has an “excellent communications capacity.”

g) TCWF’s Reputation. TCWF was praised by respondents for being “compassionate,” “understanding,” and “socially responsible.” Furthermore, respondents viewed TCWF as a “leader” with a “solid reputation.” TCWF was described as being an “excellent Foundation” that is “making a real difference in healthcare outcomes.”

h) Critiques. Most critiques were made by unfunded applicants and their comments tended to contradict the majority of the comments described above. For example, despite the fact that most described TCWF as “innovative,” “responsive,” and “large,” unfunded

applicants described it as “out of touch,” “non-responsive,” and “small.” For some respondents, the grant application process was “challenging” and “cumbersome.”

3. How respondents heard about TCWF. (Question 2). As with 2003 Survey respondents, over one third of this survey’s respondents reported that they first heard about TCWF through its website. For this survey, more respondents learned of TCWF through previous experience with TCWF staff (34%) than with the 2003 Survey (29%). It is interesting to note that the biggest change in responses was for “TCWF materials,” which fell by 9% between the 2003 and 2006 Surveys. Dependence on TCWF materials, personal contact with TCWF staff, and presentations by TCWF staff all appeared to have decreased (from 7% to 9%) since the 2003 Survey. However, the decrease in TCWF materials is confusing because many respondents reported accessing materials online and it is unclear how they conceptualize the difference between the website and TCWF materials. The overall pattern for how 2006 Survey respondents came to know about TCWF is as follows:

<u>How Responding Organizations Heard About TCWF</u>				
	2006 Survey	2003 Survey	2000 Survey	1997 Survey
TCWF website	35%	37%	24%	<11%
Previous experience with TCWF staff	34%	29%	N/A	N/A
TCWF materials	23%	32%	46%	52%
Referral by a non-profit	23%	22%	28%	24%
Personal contact with TCWF staff	22%	29%	N/A	N/A
Suggestion from a TCWF member	20%	24%	17%	12%
Referral by grant makers	18%	17%	18%	<11%
Presentation by TCWF staff	14%	21%	20%	12%
Resource center	14%	15%	15%	12%
Articles/ads about TCWF	12%	13%	25%	22%
Can’t Remember	6%	5%	N/A	N/A

4. Accessibility and usefulness of TCWF materials and information. (Questions 3 through 8). As with the past two surveys, respondents were asked about which materials they received or accessed and to comment on specific communications channels: the website, *Information for Grantseekers* brochure, Annual Report, *Portfolio* newsletter, and *Reflections* publications. The 2006 Survey questions expanded on the previous survey questions by also asking if information had been accessed online or in print. Furthermore, respondents were asked how well they understood the two central organizing themes of TCWF’s funding: its priority areas and core operating support.

Information read or accessed. (Question 3). Both the website and Annual Report remain the most received or accessed communications, although these proportions have decreased since the 2003 Survey (website: decreased %5 from 78% to 73%; Annual Report: decreased 11% from 75% to 64%). Also, those receiving TCWF e-mails have more than tripled since the 2000 Survey (from 11% to 39%). “Other” responses included contact with TCWF staff, conferences, trainings, meetings, and letters regarding funding requests. The proportion of respondents accessing or reading the various information sources are as follows:

<u>Materials Received or Accessed</u>				
	2006 Survey	2003 Survey	2000 Survey	1997 Survey
TCWF website	73%	78%	61%	15%
Annual report	64%	75%	73%	56%
Foundation e-mail	39%	17%	11%	Least used
TCWF postcard	35%	N/A	N/A	N/A
<i>Portfolio</i>	31%	42%	39%	N/A
<i>Information for Grantseekers</i>	28%	42%	52%	54%
<i>Reflections</i>	20%	27%	27%	N/A
News release	16%	17%	11%	Unknown
None of the above	6%	Unknown	Unknown	Unknown
Other	5%	Unknown	Unknown	Unknown

Usefulness of communication materials. (Questions 4 through 10). Of the communication materials, the Annual Report continues to be the most read. Although fewer respondents read other communication materials including *Information for Grantseekers*, *Portfolio*, and *Reflections*, over 90% of each publication’s readers found the information useful. The details regarding the readership and usefulness of the various communication materials are discussed below.

Annual Report. (Question 5). Sixty-two percent of respondents read the Annual Report and of those, 95% found the information useful; almost one quarter (24%) reported reading the Annual Report online. Three out of four respondents also gave open-ended feedback on how the Annual Report was useful to them. They stated that its information was “clear, concise, and easy to read” and that it also gave a “good overview of the mission and direction of the Foundation.” Many also enjoyed reading about funded projects because it helped them better understand TCWF’s funding priorities. Some respondents even stated that they used the information to help “shape [their] proposal.”

Information for Grantseekers brochure. (Question 4). The number of respondents who claimed to have read the brochure increased 11% (from 39% to 59%). Most respondents commended the brochure's "straight-forward" approach. In response to recommendations for improvement, one respondent stated, "don't fix something that's not broke!" The *Information for Grantseekers* brochure is not available online, thus information regarding online readership is not available.

Portfolio. (Question 6). Although the proportion reading the *Portfolio* newsletter decreased from between the 2003 and 2006 Surveys (from 45% to 38%), those reporting that the information was useful increased 11% with the 2006 Survey (from 80% to 91%). About three out of every four who read the *Portfolio* did so in print. Of the 61% who gave feedback on the usefulness of the newsletter, many stated that it helped clarify TCWF's "focus and interest," including funding priorities. Others reported that it was valuable in "keeping up to date" on the "Foundation and its activities."

Reflections. (Question 7). Of the above mentioned publications, *Reflections* was the least read (20%). Despite the fact that the *Reflections'* readership continues to fall (13% between the 2000 and 2006 Surveys), the percentage reporting that the information was useful increased 18% (from 78% to 96%). More (43%) people read *Reflections* online than the other publications available online (Annual Report: 24% and *Portfolio*: 27%).

Most useful information. (Question 8). Unlike the questions above, this one asked respondents to comment on the TCWF material that was most useful in helping them understand the grantmaking program. As with past surveys, the website (38%) and Annual Report (22%) were viewed as the most helpful information sources. However, with more and more people accessing various communications materials online, it was difficult to separate respondents' comments on the website from their comments on the materials themselves. For example, thirteen percent of respondents identified more than one information source as being helpful in understanding TCWF's grantmaking program.

5. TCWF Website. (Questions 9 and 10). As with the past surveys, respondents were asked if they had visited the website, how frequently they visited it, and their thoughts about it and how it could be improved.

Frequency of website visits. An overwhelming majority (87%) of respondents reported visiting the website. Of those who had, nearly half of them (47%) visited within the last three to six months, while about one quarter visited monthly and another quarter visited more than six months ago. Four out of every five reported that they regularly visit at least every three to six months. All but two respondents (99.6%) reported that they had internet access at work. Information about when and how often respondents accessed the website was as follows:

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

<u>Frequency of TCWF Website Visits*</u>		
	2006 Survey	2003 Survey
Within the last week	1%	2%
Within the last month	12%	13%
Within the last 3 to 6 months	68%	66%
Other	20%	14%

*Percentages do not add to 100 due to rounding.

What respondents thought of the website. (Question 10). Virtually all comments on respondents' thoughts of the website were positive. They were impressed with both the layout and the content of the website and stated that it was not only "attractive" and "easy to navigate," but also "comprehensive" and "informative" and that it contained an "abundance of information." It was also seen as superior to other websites. For example, one respondent stated that it had "more in-depth information than others," while another stated that TCWF's website "set the standard" and that he/she "just wish[ed] other funder sites were as helpful or useful." Not surprisingly, only 1% of those who had been to the website gave suggestions for improvement. Although their recommendations varied greatly, some ideas included posting links to grantees' or health-related organizations' websites and offering online application capabilities.

6. Respondents' understanding of TCWF's Responsive Grantmaking Program.

(Questions 11 through 13). These questions, which were modified slightly for 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 of funding priorities. (Question 11 and 12). Nearly four out of five respondents felt they understood TCWF's grantmaking program well (55% moderately well and 23% very well). Interestingly, the number of respondents reporting a moderate understanding of TCWF's focus decreased 6% from the 2003 Survey (from 61% to 55%), while the number reporting a very good understanding remained the same (24% for the 2003 Survey, 23% for the 2006 Survey). The 2006 Survey respondents felt that the website was more useful (83% very and moderately useful) in helping them understand TCWF's priority areas than interacting with TCWF staff (73% very and moderately

useful). The patterns regarding the helpfulness of various materials in understanding the Foundation's grantmaking program for the 2006 and 2003 Surveys are listed below.

<u>Usefulness in Understanding TCWF Priority Areas</u>						
	Very useful	Mod. useful	A little useful	Not useful	N/A	No data
TCWF website						
2006 Survey	60%	23%	4%	0%	10%	2%
2003 Survey	49%	28%	5%	1%	6%	17%
Information for Grantseekers						
2006 Survey	34%	18%	4%	2%	40%	2%
2003 Survey	28%	22%	4%	1%	25%	20%
Portfolio						
2006 Survey	11%	21%	10%	3%	52%	2%
2003 Survey	9%	22%	9%	3%	32%	24%
Reflections						
2006 Survey	7%	16%	11%	3%	62%	2%
2003 Survey	6%	14%	9%	3%	41%	28%
Annual Report						
2006 Survey	28%	24%	13%	2%	31%	2%
2003 Survey	25%	28%	12%	2%	16%	17%
Interaction with TCWF staff						
2006 Survey	59%	14%	5%	3%	14%	6%
2003 Survey	59%	11%	3%	4%	9%	4%

Understanding of core operating support. (Question 13). As with the priority areas, respondents felt that the interaction with TCWF staff and the website were most helpful in understanding core operating support (interaction with TCWF staff was 72% moderately and very useful; website was 69% moderately and very useful). Overall, respondents reporting that these information sources were useful in helping them understand core operating support increased slightly.¹ The usefulness of each information source for the 2006 and 2003 Surveys is detailed in the table below.

¹ The percentage reporting that information sources were moderately or very useful increased from an average of 49% across all sources for the 2003 Survey to 52% across all sources for the 2006 Survey.

<u>Usefulness in Understanding Core Operating Support</u>						
	Very useful	Mod. useful	A little useful	Not useful	N/A	No data
TCWF website						
2006 Survey	45%	24%	7%	2%	18%	4%
2003 Survey	30%	25%	11%	4%	9%	20%
Information for Grantseekers						
2006 Survey	24%	20%	8%	1%	44%	3%
2003 Survey	17%	18%	10%	4%	25%	28%
Portfolio						
2006 Survey	6%	16%	12%	4%	59%	3%
2003 Survey	7%	14%	11%	5%	32%	32%
Reflections						
2006 Survey	5%	13%	10%	4%	65%	3%
2003 Survey	6%	9%	9%	5%	39%	33%
Annual Report						
2006 Survey	18%	20%	13%	3%	42%	3%
2003 Survey	14%	20%	14%	4%	20%	28%
Interaction with TCWF staff						
2006 Survey	52%	10%	5%	3%	22%	7%
2003 Survey	46%	12%	4%	4%	13%	21%

7. Interaction with TCWF staff. (Questions 14 though 16). These questions were modified slightly from the 2003 Survey and were asked on three different levels: frequency of interaction, with whom, and how respondents were treated.

Four out of ten respondents reported 0-2 contacts with TCWF staff, either through mail, e-mail, telephone, or face-to-face contact. Not surprisingly, unfunded applicants had the least contact with TCWF. For example, of those who had 0-2 contacts with TCWF 63% were unfunded applicants and 34% were grantees. However, for those with the most contact with TCWF (10 or more) only 1% were unfunded applicants, while 82% were grantees. The others were those who had been both approved and declined or whose grant proposals were pending. Interaction frequencies for all respondents are included in the table below.

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

Of those who had contact with TCWF, many reported interacting with “grants program,” and “grants management” (60% and 30%, respectively). The details on which staff they interacted with most are included in the table below.

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

*Percentages do not add to 100 due to rounding.

Most respondents felt that their interaction with TCWF staff was professional, with more respondents reporting that they either agreed or strongly agreed that TCWF staff was “courteous,” “responsive,” “knowledgeable,” “helpful,” and “accessible” in the current survey than in the previous.² The most agreed upon descriptors of TCWF staff were “courteous” (98%) and “knowledgeable” (97%). Respondents’ perceptions of TCWF’s staff are listed below.

² An average of 95% agreed or strongly agreed that TCWF was “courteous,” “responsive,” “knowledgeable,” “helpful,” and “accessible” for the 2006 Survey compared to an average of 86% for the 2003 Survey.

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

8. TCWF's grantmaking process. (Questions 17 through 19). These questions focused on respondents' ratings of the ease or difficulty of preparing the documents required during TCWF's grantmaking process. The pattern of responses varied depending on whether the documents were required in seeking funds or were required after funding had been received. Overall, respondents found all the documents easy or very easy to prepare.

Documents required in seeking funds. Respondents reported that these documents were the most difficult to prepare. Twenty two percent of respondents reported that preparing the grant proposal was difficult or very difficult. However, only 12% reported that the Letter of Interest (LOI) was difficult (10% difficult and 2% very difficult). Those who commented on how to improve the application processes requested clearer communications and better follow-up on the LOIs. The actual proportions of 2006 Survey responses are as follows:

<u>Ease or Difficulty of Preparing Documents Required in Seeking Funds</u>						
	Very difficult	Difficult	Easy	Very easy	Don't Know	No data
Letter of interest	2%	10%	64%	16%	7%	1%
Grant Proposal	2%	20%	48%	6%	20%	4%

Documents required after funding was received. About three out of every four surveyed grantees stated that preparing the documents required after funding was easy.³ In general, funded respondents stated that the guidelines for completing the reports were “straight-forward” and “user-friendly.” One respondent stated, “I find the requirements for grant applications and reports from TCWF to be a perfect balance between being held accountable and not being micro-managed.”

Ease or Difficulty of Preparing Documents Required After Funding						
	Very difficult	Difficult	Easy	Very easy	Don't Know	No data
Progress narrative report	0%	12%	67%	11%	10%	1%
Final narrative report	0%	12%	58%	9%	18%	2%
Financial reports	1%	10%	66%	10%	11%	3%

9. Denied applicants. (Questions 20 through 23). This section of the survey was designed exclusively for the 24% of respondents who reported that they were not encouraged to submit proposals after submitting letters of interest (LOIs). The proportion of those who stated they received denial letters in a timely fashion (61%) remained unchanged since the previous survey. However, the proportion asking for feedback on their denials increased 6% since the 2003 Survey (from 43% to 49%). Of the 49% who asked for this feedback, nearly 80% received it and of them, 50% reported it was useful.

10. Additional questions. (Questions 27 through 28). This section consisted of two questions: a) how working with TCWF compared to working with other foundations and b) respondents' comments on areas not covered by the survey but which could be improved.

a) Relationship compared to other foundations. (Question 27). More than half (55%) of the respondents felt their experiences working with TCWF were better than with other foundations; this proportion had remained relatively unchanged since the previous survey (58%). Although 35% reported that it was about the same, reports that it was worse increased 8% (from 2% to 10%). However, it should be noted that of the 46 respondents that stated working with TCWF was “worse” than with other foundations, 36 were unfunded applicants.

Those who stated that working with TCWF was better than with other Foundations felt it was due to TCWF's clear communications, accessibility, staff, and funding strategies such as core operating support. For example, one respondent mentioned that TCWF's “staff is more responsive and willing to engage in conversations” than other foundations. Those that felt it was about the same made both positive and negative general statements

³ An average of 73% of respondents reported that the documents required after funding was received were easy or very easy to prepare.

about experiences with various foundations. One respondent stated, “Our experience with TCWF is very positive in every sense and on a par with other wonderful foundations.” However, another stated that “In recent years, foundations have been harder to access simply due to the volume of requests they receive.” Those that described TCWF as worse than other Foundations mentioned issues of accessibility and lack or tardiness of feedback. For example, one mentioned that he/she “had more contact with other foundations,” while another stated that he/she received an “unclear response to proposal letter” and “no feedback.” As was mentioned above, most (36 of 46) of those who reported it was “worse” were unfunded applicants.

b) Areas of potential improvement. This question was completed by 17% of respondents, as compared to 18% and 49% for the 2003 and 2000 Surveys, respectively. However, most of the comments were not comments about potential areas of improvement, but praise for TCWF. As with the 2003 Survey, other recommendations that were provided included the timeliness of feedback and clarity in feedback and funding requirements. Again, the most negative comments were made from unfunded applicants.

Foundation feedback. Many of the unfunded applicants were frustrated with the time necessary to receive feedback from the Foundation as well as with the content of the feedback. Some reported that the application process for TCWF was “longer than usual” and others stated that a quicker response time would be appreciated. Others expressed confusion about why they were either not encouraged to submit LOIs or why their proposals were declined. For example, they stated that applicants want and need a “Clearer understanding of why [their] proposals did not fit parameters” and “more clarity on the types of programs [TCWF] ‘prefers’ to fund.” Still others felt that the Foundation needed to “broaden areas of qualifications” and “not be so narrow in [its] focus.”

Praise for TCWF. The majority of those who responded to this question did not provide recommendations for improvement. Instead, they provided praise for TCWF. As one respondent stated, it’s been “a pleasure doing business with you.” Others expressed similar sentiments, saying that “TCWF is doing an excellent job” and “Keep up the good work TCWF.”

CONCLUSIONS

The 2006 Grants Program Survey revealed a continued increase in applicants’ and grantees’ appreciation of TCWF’s responsive grantmaking program, staff, and communications. Perceptions of TCWF continued to be positive and there were few suggestions for what should be improved. Highlights and implications of these findings are discussed below.

With the introduction of the web-based survey, there was an increase in the proportion of people responding and a decrease in the number of unanswered questions. Findings which include small numbers of “no data” are generally thought to provide a more representative picture of respondents’ perceptions of and experiences with TCWF. For the current survey, this decrease in “no data” was combined with overwhelmingly

positive attitudes. Therefore, TCWF can have a higher degree of confidence in applicants' and grantees' perceptions of it.

Respondents described TCWF as being unique to other foundations because of its responsive grantmaking program. They reported that TCWF was innovative in offering core operating support and that it suggested to them that TCWF respected and trusted their organizations and programs enough to fund what most other philanthropies do not--core operating expenses. In addition, they were extremely appreciative of the fact that they were not "micro-managed" by TCWF in regards to reporting requirements. Many felt that because of TCWF's grantmaking approaches, they were able to devote more time and energy to their programs.

Despite the fact that TCWF was described as a large foundation, many felt that they were given personalized attention by TCWF's "courteous" and "knowledgeable" staff. Interaction with staff was a key factor in how respondents first heard about TCWF and was influential in their understanding of its funding priorities and core operating support. In fact, many respondents were so impressed with staff interactions that they listed staff member's first and last names in their comments.

With each Grants Program Survey, more respondents have accessed information online and communicated with TCWF via e-mail. Respondents were especially pleased with the layout and content of TCWF's "gold standard" website. As the website continues to become a central information source for respondents, the distinction between the usefulness of communications materials themselves and the usefulness of the website is blurred. This is a favorable trend because respondents find the communications materials useful and are pleased with the fact that they can now access them all in one place--the website.

As with all Grants Programs Surveys, it is important to keep in mind that most negative comments were made by unfunded applicants. Unfunded applicants were especially dissatisfied with the Foundation's feedback and had complaints about its timeliness and clarity. Since the 2006 Survey saw a decrease in reports of the usefulness of the LOI feedback (from 63% in 2003 to 49% in 2006), this remains a possible area for improvement.

With the 2006 Grants Program Survey, respondents commended TCWF's commitment to the community and especially to the health related needs of the underserved. Because of its purpose and supportive endeavors, the Foundation was viewed as caring and socially responsible. Virtually all responses were positive. Recommendations for future activities are best summed up by one respondent who simply stated, "Keep up the good work TCWF!"