2010 Grants Program Survey

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

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

A. YOUR PERCEPTIONS OF TCWF

1. In your opinion, what three words or phrases best describe TCWF?
   a. ____________________________________________________________
   b. ____________________________________________________________
   c. ____________________________________________________________

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

2. How did you hear about TCWF? (Check all that apply.)
   - Referral by another nonprofit organization
   - Referral by another grantmaker or corporate-giving program
   - Suggestion from a member of your organization
   - Articles about TCWF or TCWF-sponsored advertisements
   - Visiting TCWF’s website
   - TCWF materials such as funding guidelines and annual reports
   - Public presentation from a TCWF staff member (e.g., “Meet the Grantmaker”)
   - Personal contact with a TCWF staff person
   - Previous experience with the Foundation or staff member
   - The Foundation Center, GuideStar or a nonprofit resource center
   - A TCWF conference or other TCWF-sponsored event
   - I can’t remember
   - Other (Please explain.)
   ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________
3. In 2009, what TCWF communications materials or information did you receive or access? (Check all that apply.)

☐ TCWF Annual Report
☐ TCWF website
☐ Foundation e-mail
☐ TCWF newsletter/magazine
☐ Reflections series
☐ How To Apply brochure
☐ TCWF postcard
☐ News release

☐ Public Education Campaign website: HealthJobsStartHere.com
☐ None of the above
☐ Other (Please explain.)

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

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

What are your suggestions for improving them? ________________________________________________________________
__________________________________________________
__________________________________________________

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

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

Was the information useful? ☐ Yes ☐ No

If yes, how was it useful? ________________________________________________________________
__________________________________________________
__________________________________________________

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

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

Was the information useful? ☐ Yes ☐ No

If yes, how was it useful? ________________________________________________________________
__________________________________________________
__________________________________________________

7. In 2009, did you read any of our Reflections publications series on lessons learned in philanthropy? ☐ Yes ☐ No (If no, please skip to question #8.)

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

Was the information useful? ☐ Yes ☐ No

If yes, how was it useful? ________________________________________________________________
__________________________________________________
__________________________________________________

8. Of all the TCWF materials you received or accessed, which ones most helped you understand TCWF’s grantmaking program and why? ________________________________________________________________
__________________________________________________
__________________________________________________
The next two questions focus on TCWF’s website, which was redesigned in May 2009.

9. Do you have Internet access at your workplace? □ Yes □ No (If no, please skip to question #10.) □ Don’t Know
If yes, do you have high-speed Internet access? □ Yes □ No □ Don’t Know
What percentage of your organization’s staff has high-speed Internet access? ________________________________

10. In 2009, did you visit our website? □ Yes □ No (If no, please skip to question #11.)
If yes, when did you last visit? (Check one only.)
□ Within the last week □ Within the last 3 to 6 months
□ Within the last month □ More than 6 months ago
How often do you visit? (Check one only.)
□ At least once a week □ At least once a month □ At least once every 3 to 6 months
□ Other (Please explain.): ______________________________
If yes, what is your overall assessment of our website? ____________________________________________
________________________________________________________________________________
If yes, what are your suggestions for improving it? ____________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________

C. TCWF GRANTMAKING PROGRAM

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

11. TCWF’s grantmaking program is centered around eight health issues and special projects. How well do you feel you understand TCWF’s funding priorities? (Check one.)
□ Very well □ Moderately well □ A little □ Not at all

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

<table>
<thead>
<tr>
<th>Communications 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.CalWellness.org">www.CalWellness.org</a> website</td>
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<tr>
<td>How To Apply brochure</td>
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<td>Grantee magazine</td>
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<td>Reflections series</td>
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<td>TCWF Annual Report</td>
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<tr>
<td>Public Education Campaign Website: HealthJobsStartHere.com</td>
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<tr>
<td>Interaction with Foundation staff</td>
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Any additional comments? ________________________________
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13. How useful were the following in helping you understand core operating support? (Check one for each communications channel.)

<table>
<thead>
<tr>
<th>Resource</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>
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<td>HealthJobsStartHere.com</td>
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<td>Interaction with Foundation staff</td>
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Any additional comments?
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________________________________________________________________________
________________________________________________________________________

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

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

☐ 0-2
☐ 3-5
☐ 6-10
☐ More than 10

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

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

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

<table>
<thead>
<tr>
<th>Quality</th>
<th>Strongly agree</th>
<th>Agree</th>
<th>Disagree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Courteous</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Responsive</td>
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<td></td>
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<tr>
<td>Knowledgeable</td>
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<tr>
<td>Helpful</td>
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<tr>
<td>Accessible</td>
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Any additional comments?
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________________________________________________________________________
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________________________________________________________________________
Information from the next four questions will help to assess TCWF’s grantmaking processes in 2009. First we ask about your experience with the pre-funding approval process and then about the post-approval process.

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

<table>
<thead>
<tr>
<th>Aspect</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>Preparing a letter of interest (LOI)</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>Did not submit in 2009</td>
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<tr>
<td>Preparing a grant proposal</td>
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<td>☐</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>Not asked to submit in 2009</td>
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<tr>
<td>Participating in a site visit</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Does not apply</td>
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<tr>
<td>Other (Please specify.)</td>
<td>_______________</td>
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</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Very difficult</th>
<th>Difficult</th>
<th>Easy</th>
<th>Very easy</th>
<th>Don’t know</th>
<th>Does not apply</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completing progress narrative reports</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>Completing final narrative report</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Completing financial reports</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>Other (Please specify.)</td>
<td>_______________</td>
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</tbody>
</table>

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

☐ Yes  ☐ No  ☐ No preference

20. How can we improve these grantmaking processes?

____________________________________________________

__________________________________________________________________________________________________

__________________________________________________________________________________________________

D. WORKING WITH THE FOUNDATION

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

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

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

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

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

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

☐ Yes  ☐ No  If yes, how?________________________________________

________________________________________

________________________________________

________________________________________
26. Are there ways in which TCWF has been difficult to work with or made things difficult for you?
   □ Yes  □ No  If yes, how?
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

27. Overall, how would you characterize your working relationship with TCWF?
   □ Excellent  □ Good  □ Okay  □ Somewhat difficult  □ Very difficult

E. ADDITIONAL QUESTIONS

28. How does your experience working with TCWF compare to working with other foundations?
   □ Better  □ Worse  □ About the same
   Please give examples: _______________________________________
   __________________________________________________________
   __________________________________________________________

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

F. ABOUT YOUR ORGANIZATION

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

31. Is your organization: (Check all that apply.)
   □ A current grantee of the Foundation?
   □ A former grantee?
   □ An unfunded applicant that submitted an LOI?
   □ A current applicant awaiting a Foundation decision?
   □ Other ________________________________________________

32. 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

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

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

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