

Submitted to TCWF 10/08/2014

APPENDIX A

2014 TCWF GRANTS PROGRAM SURVEY

A. YOUR PERCEPTIONS OF TCWF

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 2013. 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 10 minutes. Please have the person who has had the most direct contact with TCWF complete this survey. Your participation in this effort will be most appreciated. Consultant Julia Pennbridge, Ph.D., is conducting this survey with The National Health Foundation (NHF). If any of the questions or sections of this survey are unclear, please contact Daniela Ali, NHF's information technology coordinator, at (213) 538-0748 or at dali@nhfca.org.

1. In your opinion, what three words or phrases best describe TCWF?

- a.
- b.
- c.

Please navigate through the survey using the "Next" and "Previous" buttons at the bottom of each page.

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, CalWellness.org
- TCWF materials, such as funding guidelines and annual reports
- Public presentation from a TCWF staff member (e.g., "Meet the Grantmakers")
- Personal contact with a TCWF staff person
- Previous experience with the Foundation or staff member
- The Foundation Center, GuideStar or another nonprofit resource center
- A TCWF conference or other TCWF-sponsored event
- Online search engine
- I can't remember
- Other

Other (please specify)

3. In 2013, what TCWF communications materials or information did you receive or access?

(Check all that apply.)

- TCWF Annual Report
- CalWellness.org
- CalWellness.org E-alert
- Grantee magazine
- Reflections publications series
- How To Apply* brochure
- CalWellness.org postcard
- News release
- HealthJobsStartHere.org
- CalHealthJobs.org
- Twitter
- CalWellness YouTube channel
- None of the above (Skip to question #11)
- Other

Other (please specify)

4. In 2013, did you read our *How To Apply* brochure?

- Yes
- No

4a. If yes, did you read the online or print version?

- Online
- Print
- Both

4b. Were the application procedures easy to understand?

- Yes
- No

4c. What are your suggestions for improving it?

5. In 2013, did you read our *Annual Report*?

- Yes
- No

5a. If yes, did you read the online or print version?

- Print
- Online
- Both

5b. Was the information useful?

- Yes
- No

5c. If yes, how was it useful?

6. In 2013, did you read our *Grantee* magazine?

- Yes
- No

6a. If yes, did you read the online or print version?

- Online
- Print
- Both

6b. Was the information useful?

- Yes
- No

6c. If yes, how was it useful?

7. In 2013, did you read any issues of our *Reflections* series on lessons learned in philanthropy?

- Yes
- No

7a. If yes, did you read the online or print version?

- Online
- Print
- Both

7b. Was the information useful?

- Yes
- No

7c. If yes, how was it useful?

8. In 2013, did you receive our bi-monthly CalWellness.org e-alerts?

- Yes
- No

8a. Did you read any of our bimonthly CalWellness.org e-alerts?

- Yes
- No

8b. If yes, was the information useful?

- Yes
- No

8c. How was it useful?

8d. How about the frequency with which the E-alerts were sent? Was it:

- Too often
- Just right
- Not enough

9. Of all the TCWF materials you received or accessed, which ones most helped you understand TCWF's grantmaking program and why?

10. How did you access online information about TCWF?

(Check as many as apply)

- Desktop computer
- Laptop computer
- Tablet
- Smartphone

The next question focuses on CalWellness.org.

11. In 2013, did you visit CalWellness.org?

- Yes
- No

11a. 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

11b. 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

Other *(please explain)*

11c. What is your overall assessment of CalWellness.org?

11d. 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.

12. 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 only.)

- Very well
- Moderately well
- A little
- Not at all

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13. How useful were the following in helping you understand them?

(Check one for each communications channel.)

	Very useful	Moderately useful	A little useful	Not useful	Not applicable
CalWellness.org	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>How To Apply</i> brochure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Grantee</i> magazine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Reflections</i> publications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TCWF annual reports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
HealthJobsStartHere.org	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
CalWellness.org E-alert	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
CalHealthJobs.org	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interaction with Foundation staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Any additional comments?

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14. How useful were the following in helping you understand core operating support?

(Check one for each communications channel.)

	Very useful	Moderately useful	A little useful	Not useful	Not applicable
CalWellness.org	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How To Apply brochure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Grantee magazine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reflections series	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TCWF annual reports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interaction with Foundation staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Any additional comments?

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

15. In 2013, approximately how many contacts did you have with TCWF staff, including through the mail, by telephone, by e-mail and through face-to-face contact?

- 0-2
- 3-5
- 6-10
- More than 10

16. Which TCWF department did you interact with MOST?

(Check one only.)

- Communications
- Executive
- Finance
- Grants management
- Grants program
- Reception / administration
- Only mail contact

17. Please rate TCWF staff you interacted with most on the following attributes.

(Check one for each of the following.)

	Strongly agree	Agree	Disagree	Strongly disagree	Don't remember	Doesn't apply
Courteous	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Responsive	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Knowledgeable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Helpful	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accessible	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Any comments?

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Information from the next four questions will help to assess TCWF's grantmaking processes in 2013. First, we ask about your experience with the pre-funding application process and then about the post-approval process.

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

(Check all that apply.)

	Very easy	Easy	Difficult	Very difficult	Don't know	Did not submit in 2013
Preparing a letter of interest (LOI):	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preparing a grant proposal:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Participating in a site visit:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify)	<input type="text"/>					

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

	Very easy	Easy	Difficult	Very difficult	Don't know	Does not apply
Completing progress narrative reports:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Completing final narrative report:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Completing financial reports:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify)	<input type="text"/>					

20. If you received funding, would you prefer to retrieve the required report forms via CalWellness.org?

- Yes
- No
- No preference

21. How can we improve these grantmaking processes?

D. WORKING WITH THE FOUNDATION

The following series of questions applies ONLY to those who were NOT asked to submit a proposal.

22. In 2013, were you asked to submit a proposal?

- Yes
- No

23. Did you receive a denial letter in a timely fashion?

- Yes
- No

24. Did you ask for feedback on your denial?

- Yes
- No
- Don't know/Can't remember

25. Were you able to get feedback?

- Yes
- No
- Don't know / Can't remember

26. Was the feedback useful?

- Yes
- No
- Don't know / Can't remember

E. ADDITIONAL QUESTIONS

27. 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
- Does not apply

If yes, how?

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

- Yes
- No

If yes, how?

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

- Excellent
- Good
- Okay
- Somewhat difficult
- Very difficult
- No working relationship

30. How does your experience working with TCWF compare to working with other foundations?

- Better
- Worse
- About the same
- Does not apply

Please give examples.

As of November 1, 2013, TCWF stopped accepting unsolicited letters of interest to its Responsive Grantmaking Program as part of the transition to its new strategic plan.

31. How would you assess the Foundation's implementation of this change?

- Very well done
- Well done
- Poorly done
- Very poorly done
- Don't remember
- Not applicable

Do you have any other comments about this change?

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

F . ABOUT YOUR ORGANIZATION

33. What is the job or role of the person completing this survey?

34. Please check all of the following that apply to your organization.

- 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 (please specify)

35. In 2013, did your organization submit any online funding requests to other foundations?

- Yes
- No

36. 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
- \$2 million to \$4,999,999
- \$5 million to \$9,999,999
- \$10 million to \$24,999,999
- \$25 million and over \$1 million to \$1,999,999

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