

Grantee and Declined Applicant Perception Report[®]

PREPARED FOR
The California Wellness Foundation

May 2017



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EFFECTIVE PHILANTHROPY

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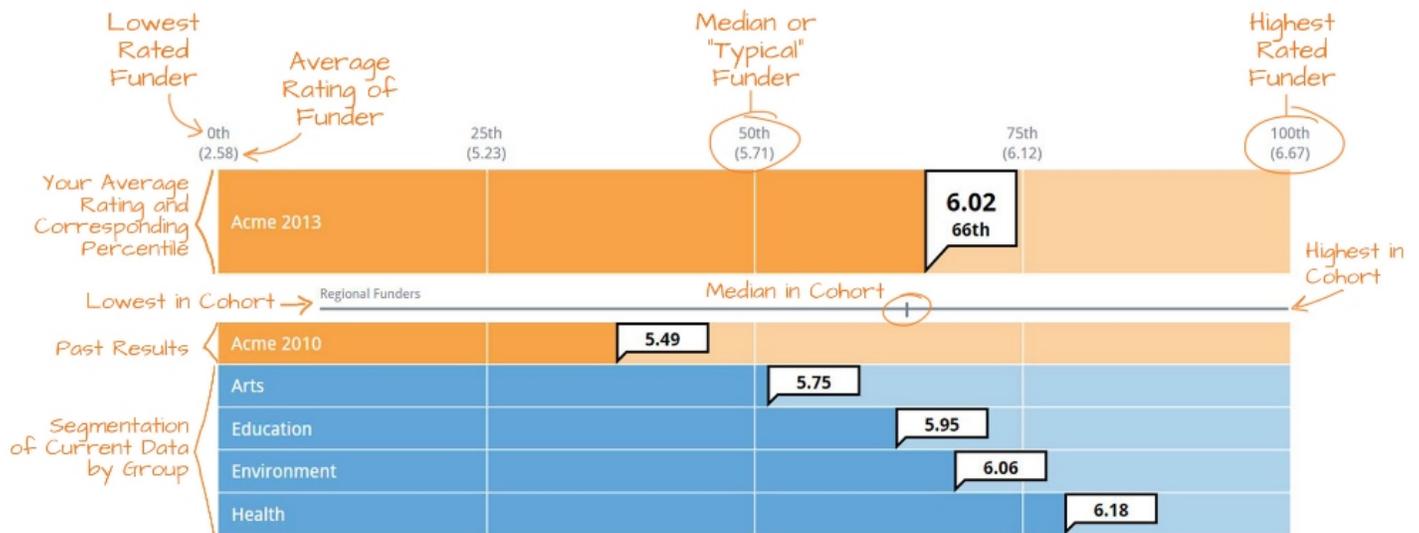
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The online version of this report can be accessed at cep.surveymresults.org.

Interpreting Your Charts

Many of the charts in this report are shown in this format. See below for an explanation of the chart elements.



Missing data: Selected grantee and declined applicant ratings are not displayed in this report due to changes in the survey instrument, or when a question received fewer than 5 responses.

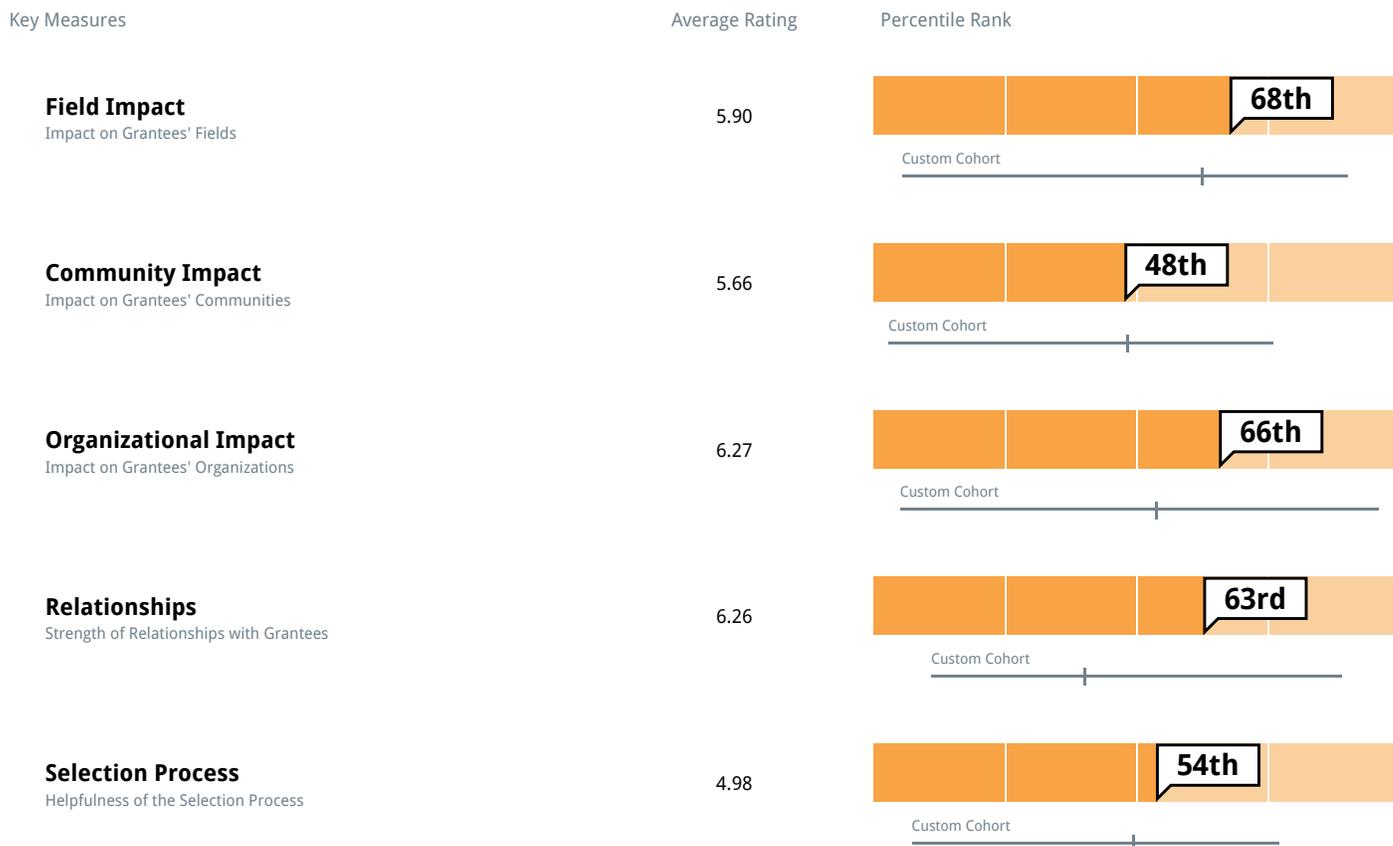
STATISTICAL SIGNIFICANCE OF CHANGES OVER TIME

CEP compares your past ratings to your current ratings, testing for statistically significant differences. An asterisk in your current results denotes a statistically significant difference between your current rating and the previous rating.



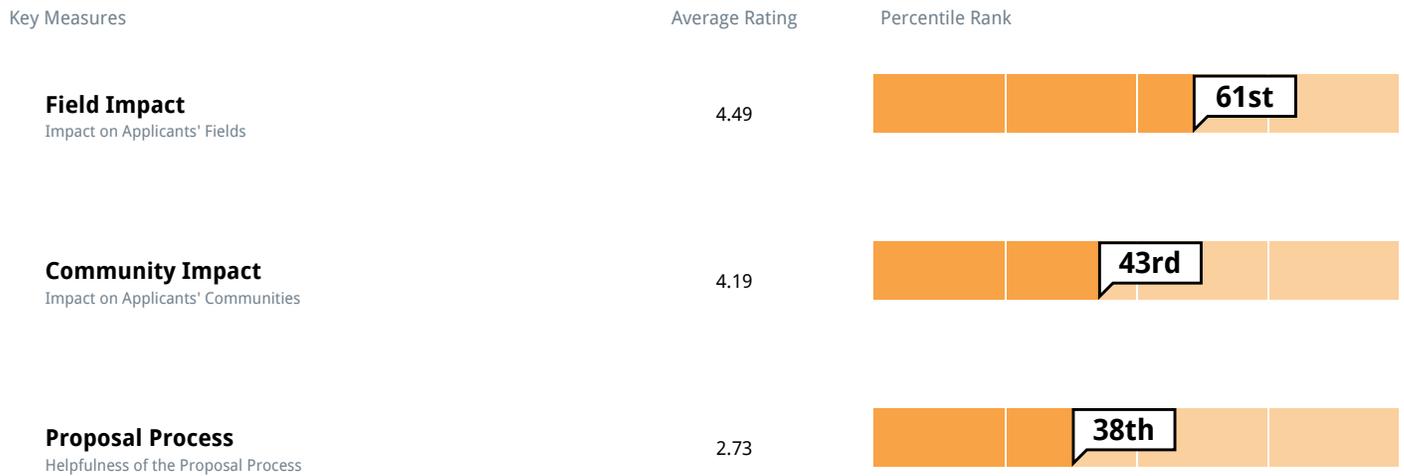
Key Grantee Measures

The following chart highlights a selection of your key grantee results. Each of these data points corresponds to an individual survey measure that is displayed with additional detail in the subsequent pages of this report.



Key Applicant Measures

The following chart highlights a selection of your key applicant results. Each of these data points corresponds to an individual survey measure that is displayed with additional detail in the subsequent pages of this report.



Grantee Word Cloud

Grantees were asked, "At this point in time, what is one word that best describes the Foundation?" In the "word cloud" below, the size of each word indicates the frequency with which it was written by grantees. The color of each word is stylistic and not indicative of its frequency. Eighteen grantees described Cal Wellness as "supportive," the most commonly used word.



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Applicant Word Cloud

Applicants were asked, "At this point in time, what is one word that best describes the Foundation?" In the "word cloud" below, the size of each word indicates the frequency with which it was written by applicants. The color of each word is stylistic and not indicative of its frequency. Eleven applicants described Cal Wellness as "foundation," the most commonly used word.



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Survey Population

Grantee Survey Methodology

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
Cal Wellness 2017	February and March 2017	277	202	73%

Survey Year	Year of Active Grants
Cal Wellness 2017	January 2016 - January 2017

Throughout this report, The California Wellness Foundation's survey results are compared to CEP's broader dataset of more than 40,000 grantees built up over more than a decade of grantee surveys of more than 250 funders. The full list of participating funders can be found at <http://www.effectivephilanthropy.org/assessments/gpr-apr/>.

In order to protect the confidentiality of respondents results are not shown when CEP received fewer than five responses to a specific question.

Subgroups

In addition to showing Cal Wellness's overall ratings, this report shows ratings segmented by Grantee Portfolio. The online version of this report also shows ratings segmented by Grantee Portfolio, Grantee Request Geographic Region and Grantee Fund Type.

Grantee Portfolio	Number of Responses
Bridging the Gaps in Access and Quality Care	75
Expanding Education and Employment Pathways	47
Opportunity Fund	37
Promoting Healthy and Safe Neighborhoods	37
Other	6

Grantee Request Geographic Area	Number of Responses
County Specific	128
Nationwide	3
Statewide	67

Grantee Grant Type	Number of Responses
Advancing Wellness Grants	71
Responsive Grantmaking	131

Applicant Survey Methodology

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
Cal Wellness 2017	February and March 2017	672	275	41%

Survey Year	Application Year
Cal Wellness 2017	January 2016 - January 2017

Throughout this report, The California Wellness Foundation's applicant survey results are compared to CEP's broader dataset of more than 4,000 declined applicants, from surveys of more than 50 funders.

In order to protect the confidentiality of respondents results are not shown when CEP received fewer than five responses to a specific question.

Subgroups

In addition to showing Cal Wellness's overall ratings, this report shows ratings segmented by Applicant Portfolio. The online version of this report also shows ratings segmented by Applicant Portfolio, Applicant Request Geographic Region and Applicant Fund Type.

Applicant Portfolio	Number of Responses
Bridging the Gaps in Access and Quality Care	65
Expanding Education and Employment Pathways	73
Opportunity Fund	38
Promoting Healthy and Safe Neighborhoods	83
Other	14

Applicant Request Geographic Area	Number of Responses
County Specific	232
Nationwide	7
Statewide	29

Applicant Grant Type	Number of Responses
Advancing Wellness Grants	196
Responsive Grantmaking	79

Comparative Cohorts

Customized Cohort

Cal Wellness selected a set of 13 funders to create a smaller comparison group for the grantee data that more closely resembles Cal Wellness in scale and scope.

Custom Cohort

Barr Foundation

Blue Shield of California Foundation

Bush Foundation

California Healthcare Foundation

Lumina Foundation for Education, Inc.

Marguerite Casey Foundation

Missouri Foundation for Health

New York State Health Foundation

Surdna Foundation, Inc.

The California Endowment

The California Wellness Foundation

The Colorado Health Foundation

Weingart Foundation

Standard Cohorts

CEP also included 16 standard GPR cohorts to allow for comparisons to a variety of different types of funders.

Strategy Cohorts

Cohort Name	Count	Description
Small Grant Providers	36	Funders with median grant size of \$20K or less
Large Grant Providers	72	Funders with median grant size of \$200K or more
High Touch Funders	32	Funders for which a majority of grantees report having contact with their primary contact monthly or more often
Intensive Non-Monetary Assistance Providers	28	Funders that provide at least 30% of grantees with comprehensive or field-focused assistance as defined by CEP
Proactive Grantmakers	62	Funders that make at least 90% of grants proactively
Responsive Grantmakers	60	Funders that make at most 10% of grants proactively
International Funders	38	Funders with an international scope of work

Annual Giving Cohorts

Cohort Name	Count	Description
Funders Giving Less Than \$5 Million	55	Funders with annual giving of less than \$5 million
Funders Giving \$50 Million or More	53	Funders with annual giving of \$50 million or more

Foundation Type Cohorts

Cohort Name	Count	Description
Private Foundations	140	All private foundations in the GPR dataset
Family Foundations	62	All family foundations in the GPR dataset
Community Foundations	35	All community foundations in the GPR dataset
Health Conversion Foundations	30	All health conversation foundations in the GPR dataset
Corporate Foundations	20	All corporate foundations in the GPR dataset

Other Cohorts

Cohort Name	Count	Description
Funders Outside the United States	22	Funders that are primarily based outside the United States
Recently Established Foundations	60	Funders that were established in 2000 or later

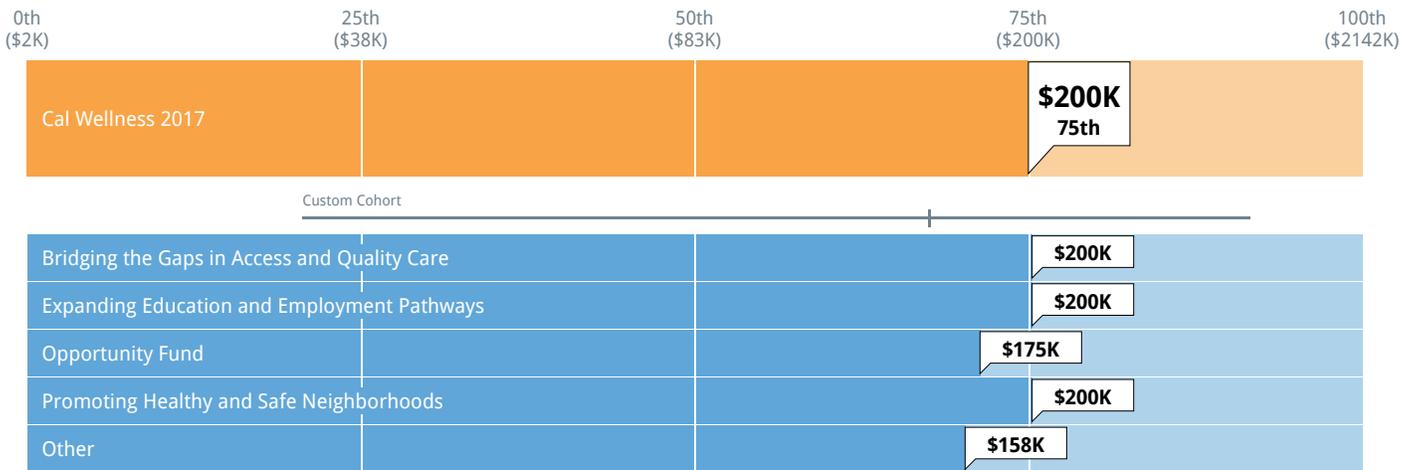
Grantmaking and Application Characteristics

Foundations make different choices about the ways they organize themselves, structure their grants, and the types of grantees they support. The following tables show some of these important characteristics. The information is based on self-reported data from funders, grantees, and applicants, and further detail is available in the Contextual Data section of this report.

Grant Size

Grantee Responses

Median Grant Size



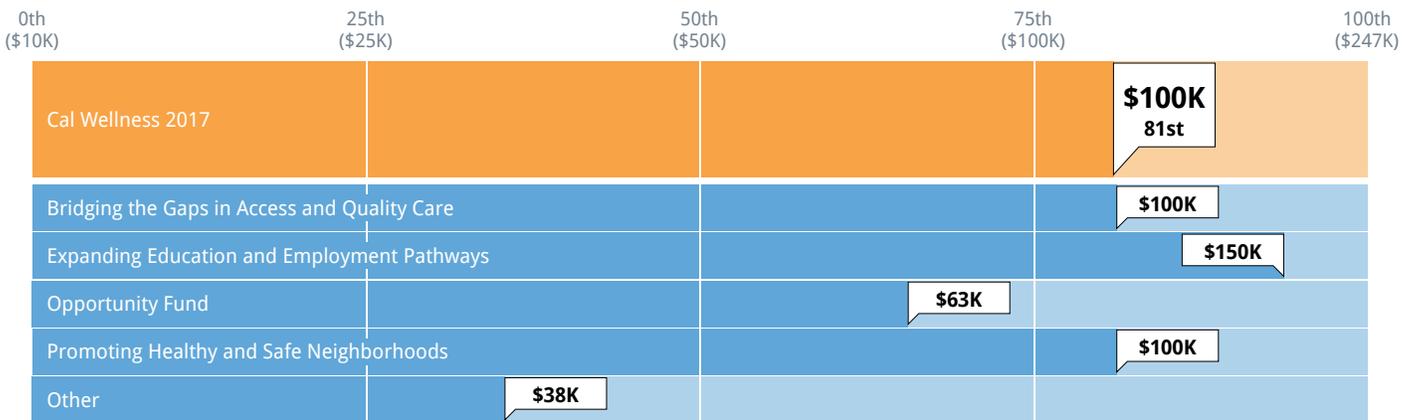
Cohort:

Past results: On Off

Subgroup:

Applicant Responses

Median Grant Request Size



Cohort:

Past results: On Off

Subgroup:

Grantee/Applicant Budget

Grantee Responses

Median Organizational Budget



Cohort:

Past results: On Off

Subgroup:

Applicant Responses

Median Organizational Budget



Cohort:

Past results: On Off

Subgroup:

Type of Grant Awarded/Requested

Type of Grant Awarded	Cal Wellness 2017	Average Funder	Custom Cohort
Program / Project Support	48%	65%	59%
General Operating / Core Support	47%	21%	32%
Capital Support: Building / Renovation / Endowment Support / Other	0%	6%	2%
Technical Assistance / Capacity Building	1%	4%	5%
Scholarship / Fellowship	2%	2%	1%
Event / Sponsorship Funding	0%	2%	2%

Type of Grant Requested	Cal Wellness 2017	Average Funder
Program/project support	59%	71%
General operating	34%	11%
Scholarship or research fellowship	1%	1%
Technical assistance/capacity building	1%	5%
Event/sponsorship funding	2%	1%
Capital support: building/renovation/endowment support/other	2%	11%

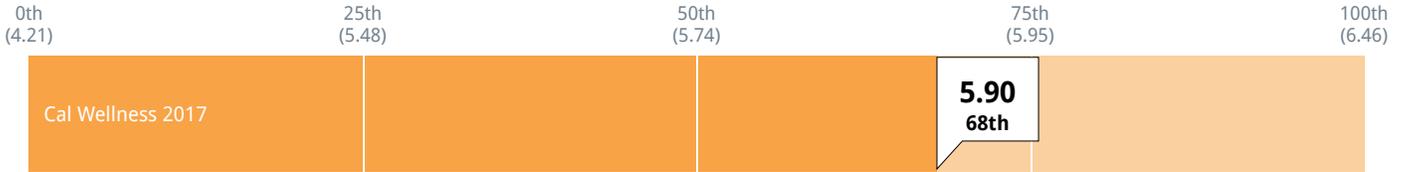
Program Staff Load	Cal Wellness 2017	Median Funder	Custom Cohort
Dollars awarded per program staff full-time employee	\$2.8M	\$2.6M	\$3.3M
Applications per program full-time employee	13	31	35
Active grants per program full-time employee	28	33	42

Impact on and Understanding of Fields

Grantee Ratings

“Overall, how would you rate the Foundation’s impact on your field?”

1 = No impact 7 = Significant positive impact



Custom Cohort

Bridging the Gaps in Access and Quality Care	6.07
Expanding Education and Employment Pathways	5.77
Opportunity Fund	5.59
Promoting Healthy and Safe Neighborhoods	5.97
Other	6.17

Cohort: Custom Cohort

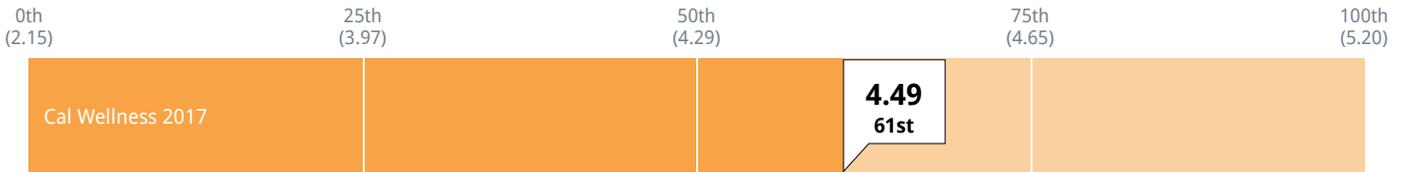
Past results: On Off

Subgroup: Grantee Portfolio

Applicant Ratings

“Overall, how would you rate the Foundation’s impact on your field?”

1 = No impact 7 = Significant positive impact



Bridging the Gaps in Access and Quality Care	4.22
Expanding Education and Employment Pathways	5.03
Opportunity Fund	4.57
Promoting Healthy and Safe Neighborhoods	4.47
Other	3.00

Cohort: None

Past results: On Off

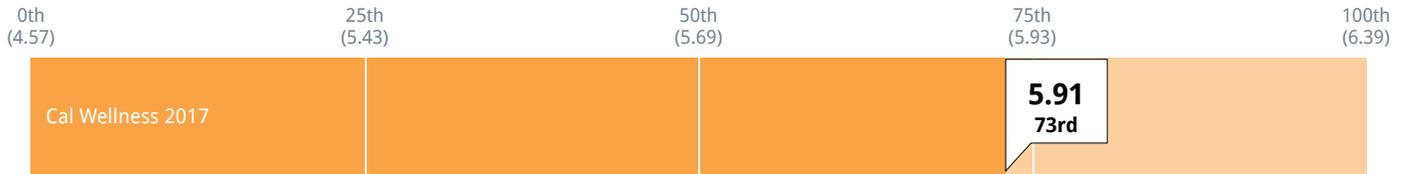
Subgroup: Applicant Portfolio

Understanding of Fields

Grantee Ratings

“How well does the Foundation understand the field in which you work?”

1 = Limited understanding of the field 7 = Regarded as an expert in the field



Custom Cohort

Bridging the Gaps in Access and Quality Care	5.97
Expanding Education and Employment Pathways	6.02
Opportunity Fund	5.83
Promoting Healthy and Safe Neighborhoods	5.83
Other	5.17

Cohort: Custom Cohort ▼

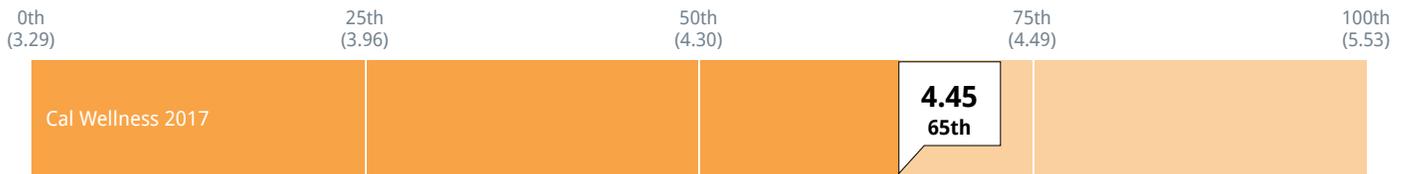
Past results: On Off

Subgroup: Grantee Portfolio ▼

Applicant Ratings

“How well does the Foundation understand the field in which you work?”

1 = Limited understanding of the field 7 = Regarded as an expert in the field



Bridging the Gaps in Access and Quality Care	4.38
Expanding Education and Employment Pathways	4.84
Opportunity Fund	4.82
Promoting Healthy and Safe Neighborhoods	4.14
Other	3.62

Cohort: None ▼

Past results: On Off

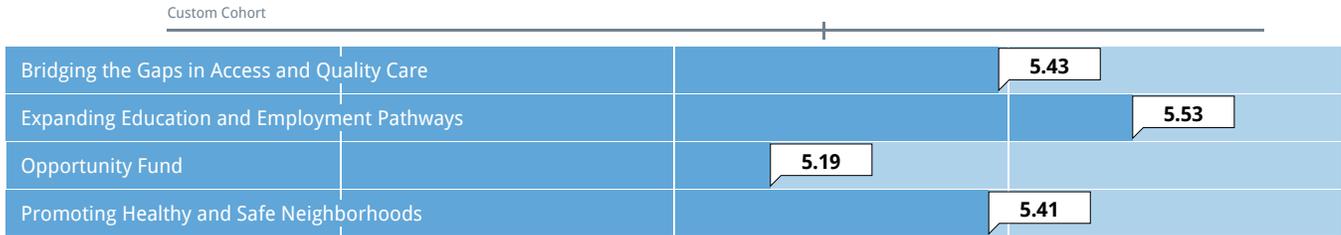
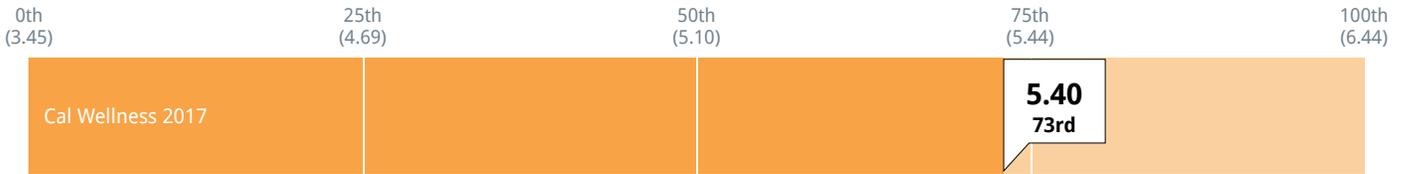
Subgroup: Applicant Portfolio ▼

Advancing Knowledge and Public Policy

Grantee Ratings

“To what extent has the Foundation advanced the state of knowledge in your field?”

1 = Not at all 7 = Leads the field to new thinking and practice

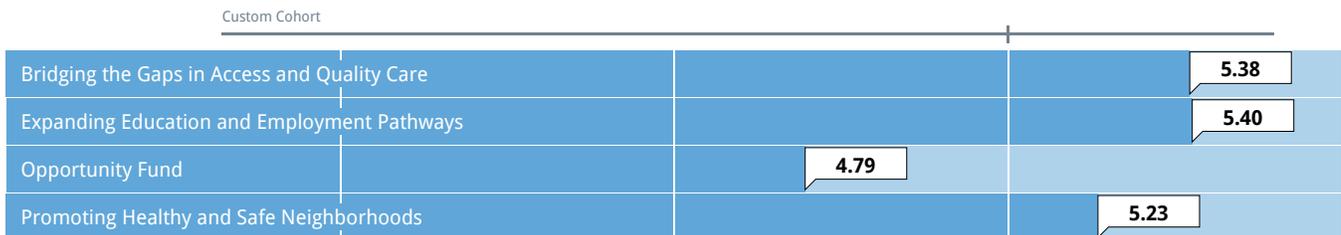
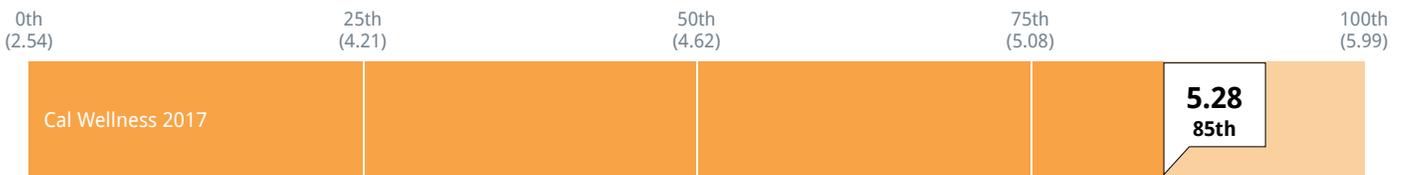


Cohort: Past results: On Off Subgroup:

Grantee Ratings

“To what extent has the Foundation affected public policy in your field?”

1 = Not at all 7 = Major influence on shaping public policy



Cohort: Past results: On Off Subgroup:

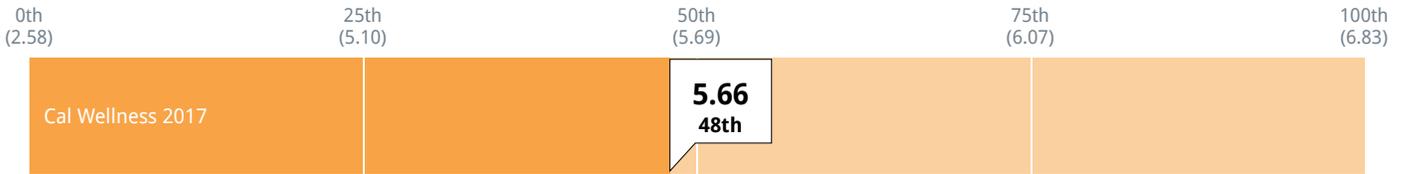
*Subgroups with less than 5 respondents are not displayed to protect respondent confidentiality.

Impact on and Understanding of Local Communities

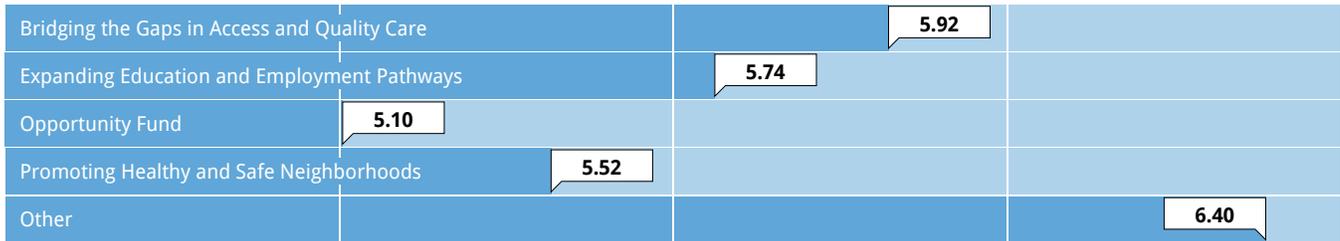
Grantee Ratings

“Overall, how would you rate the Foundation’s impact on your local community?”

1 = No impact 7 = Significant positive impact



Custom Cohort



Cohort: Custom Cohort

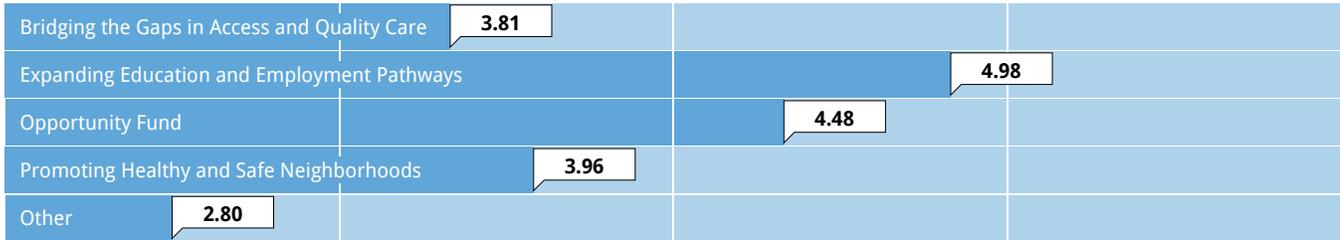
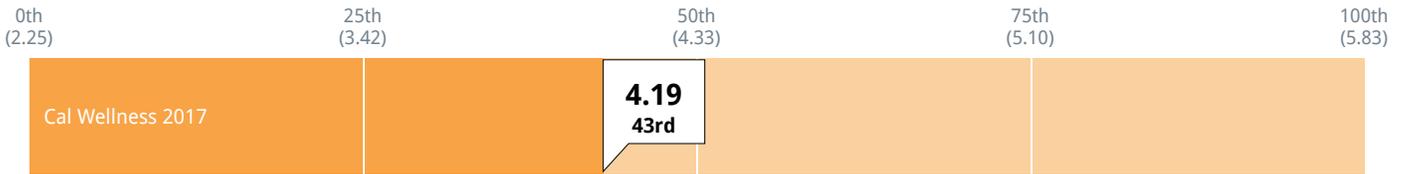
Past results: On Off

Subgroup: Grantee Portfolio

Applicant Ratings

“Overall, how would you rate the Foundation’s impact on your local community?”

1 = No impact 7 = Significant positive impact



Cohort: None

Past results: On Off

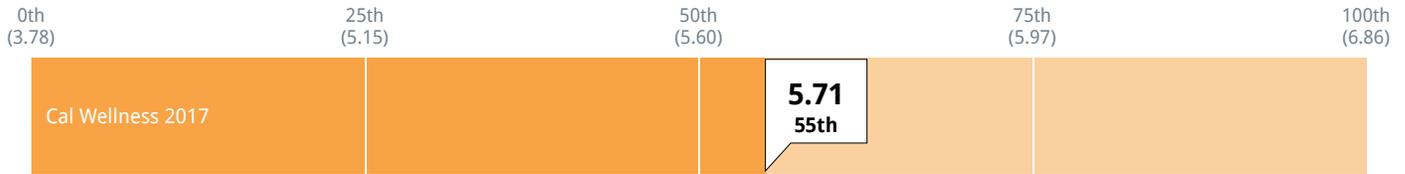
Subgroup: Applicant Portfolio

Understanding of Local Communities

Grantee Ratings

"How well does the Foundation understand the local community in which you work?"

1 = Limited understanding of the community 7 = Regarded as an expert on the community



Custom Cohort

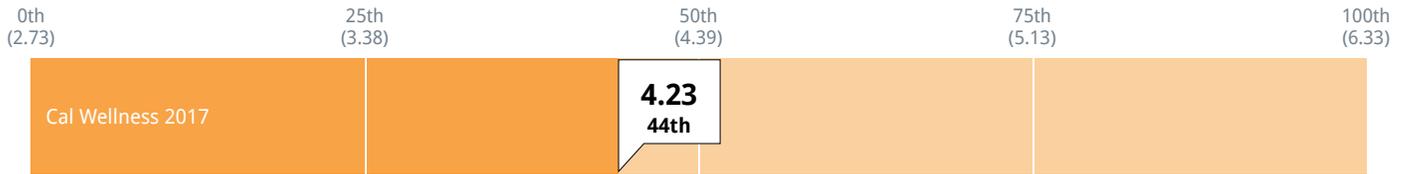
Category	Score
Bridging the Gaps in Access and Quality Care	5.83
Expanding Education and Employment Pathways	5.85
Opportunity Fund	5.68
Promoting Healthy and Safe Neighborhoods	5.40
Other	5.40

Cohort: Past results: On Off Subgroup:

Applicant Ratings

"How well does the Foundation understand the local community in which you work?"

1 = Limited understanding of the community 7 = Regarded as an expert on the community



Category	Score
Bridging the Gaps in Access and Quality Care	3.98
Expanding Education and Employment Pathways	4.81
Opportunity Fund	4.34
Promoting Healthy and Safe Neighborhoods	4.10
Other	3.00

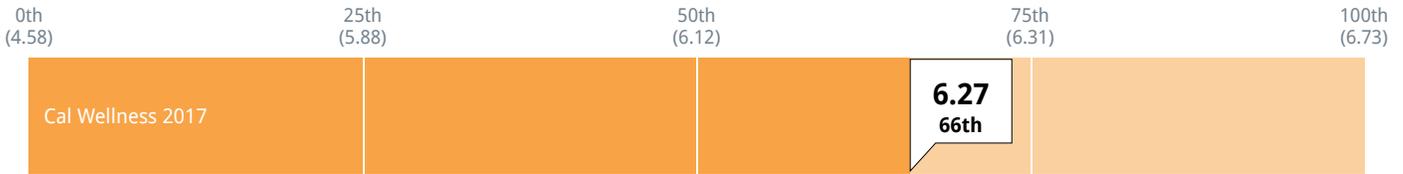
Cohort: Past results: On Off Subgroup:

Impact on and Understanding of Organizations

Grantee Ratings

“Overall, how would you rate the Foundation’s impact on your organization?”

1 = No impact 7 = Significant positive impact



Custom Cohort

Bridging the Gaps in Access and Quality Care	6.32
Expanding Education and Employment Pathways	6.20
Opportunity Fund	6.22
Promoting Healthy and Safe Neighborhoods	6.41
Other	5.83

Cohort: Custom Cohort

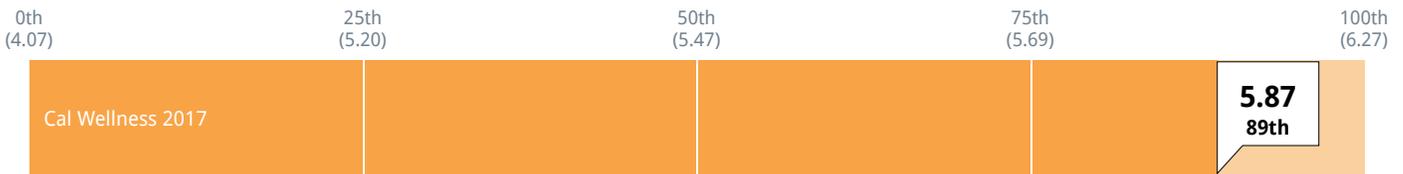
Past results: On Off

Subgroup: Grantee Portfolio

Grantee Ratings

“How much, if at all, did the Foundation improve your ability to sustain the work funded by this grant in the future?”

1 = Did not improve ability 7 = Substantially improved ability



Custom Cohort

Bridging the Gaps in Access and Quality Care	5.84
Expanding Education and Employment Pathways	5.86
Opportunity Fund	5.89
Promoting Healthy and Safe Neighborhoods	5.94
Other	5.83

Cohort: Custom Cohort

Past results: On Off

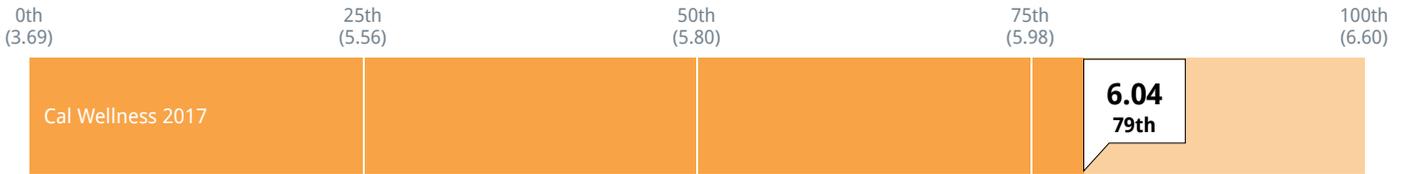
Subgroup: Grantee Portfolio

Understanding of Organizations

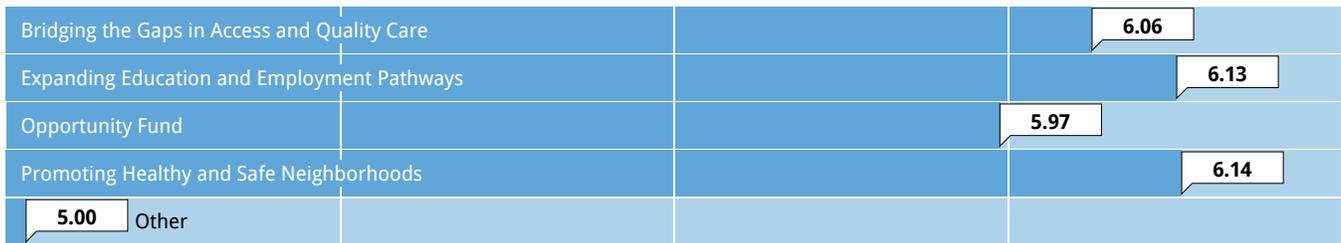
Grantee Ratings

“How well does the Foundation understand your organization’s strategy and goals?”

1 = Limited understanding 7 = Thorough understanding



Custom Cohort



Cohort: Custom Cohort

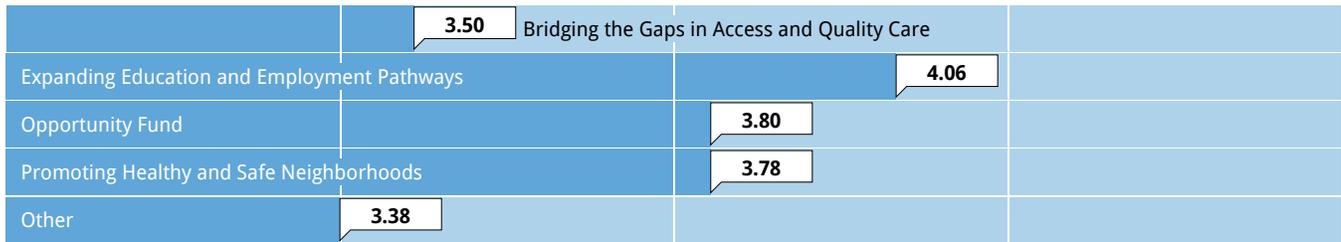
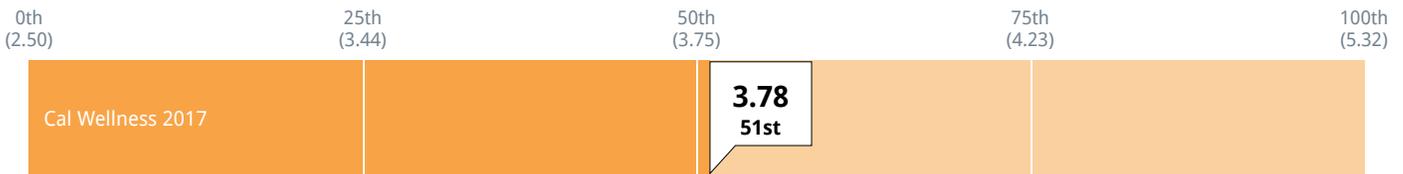
Past results: On Off

Subgroup: Grantee Portfolio

Applicant Ratings

“How well does the Foundation understand your organization’s strategy and goals?”

1 = Limited understanding 7 = Thorough understanding



Cohort: None

Past results: On Off

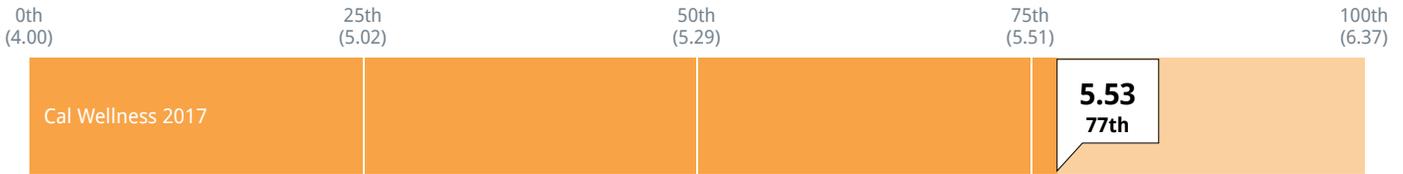
Subgroup: Applicant Portfolio

Grantee and Applicant Challenges

Grantee Ratings

How aware is the Foundation of the challenges that your organization is facing?

1 = Not at all aware 7 = Extremely aware



Custom Cohort

Bridging the Gaps in Access and Quality Care			5.53
Expanding Education and Employment Pathways			5.58
Opportunity Fund		5.38	
Promoting Healthy and Safe Neighborhoods			5.67
Other		5.20	

Cohort: Custom Cohort ▼

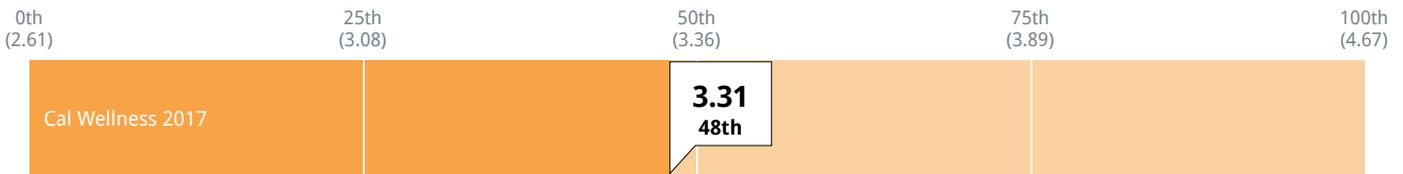
Past results: On Off

Subgroup: Grantee Portfolio ▼

Applicant Ratings

How aware is the Foundation of the challenges that your organization is facing?

1 = Not at all aware 7 = Extremely aware



Bridging the Gaps in Access and Quality Care		3.41	
Expanding Education and Employment Pathways			3.68
Opportunity Fund	3.03		
Promoting Healthy and Safe Neighborhoods		3.09	
Other	2.92		

Cohort: None ▼

Past results: On Off

Subgroup: Applicant Portfolio ▼

Interactions

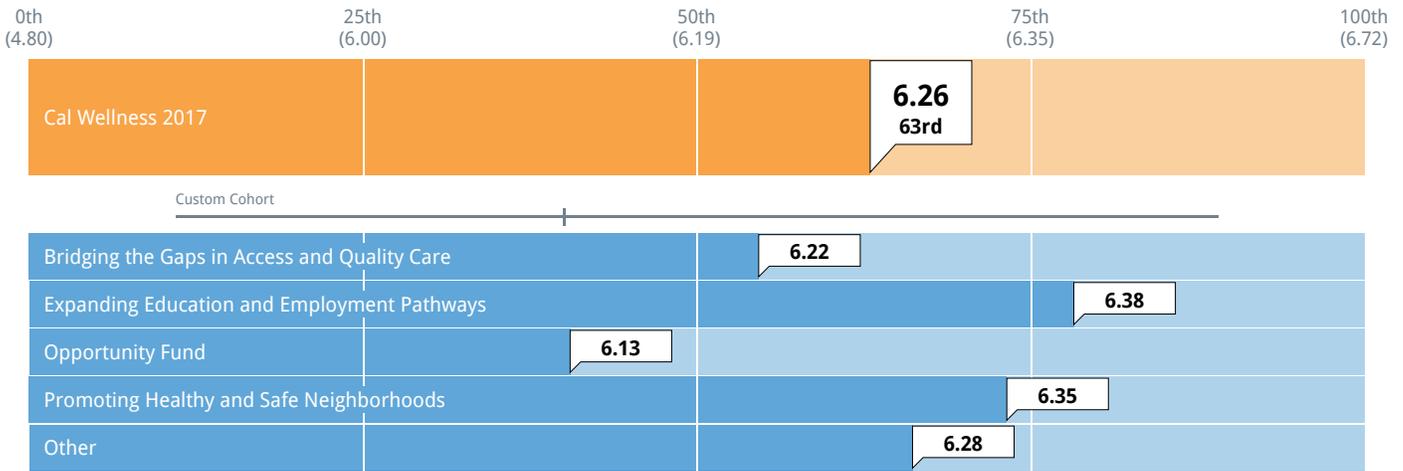
The quality of interactions and the clarity and consistency of communications together create the larger construct that CEP refers to as “relationships.” The relationships measure below is an average of grantee ratings on the following measures:

1. Fairness of treatment by the foundation
2. Comfort approaching the foundation if a problem arises
3. Responsiveness of foundation staff
4. Clarity of communication of the foundation’s goals and strategy
5. Consistency of information provided by different communications

Grantee Ratings

Funder-Grantee Relationships Summary Measure

1 = Very negative 7 = Very positive



Cohort:

Past results: On Off

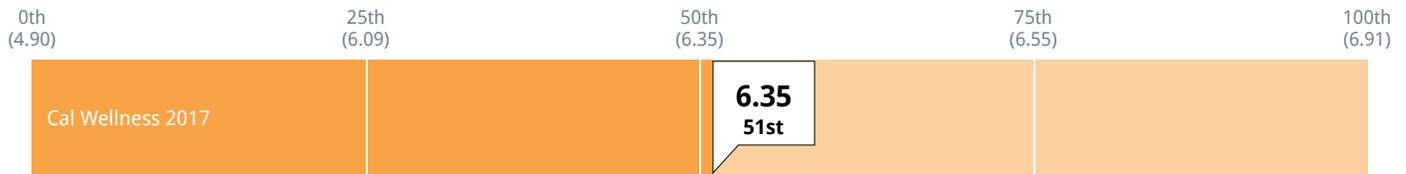
Subgroup:

Responsiveness

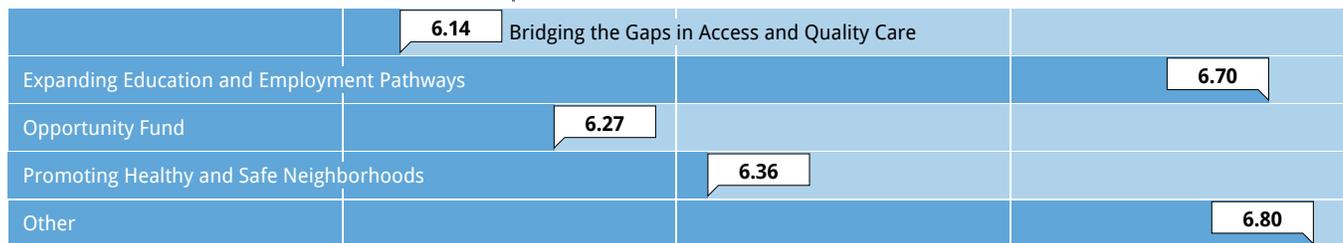
Grantee Ratings

“Overall, how responsive was the Foundation staff?”

1 = Not at all responsive 7 = Extremely responsive



Custom Cohort



Cohort: Custom Cohort ▼

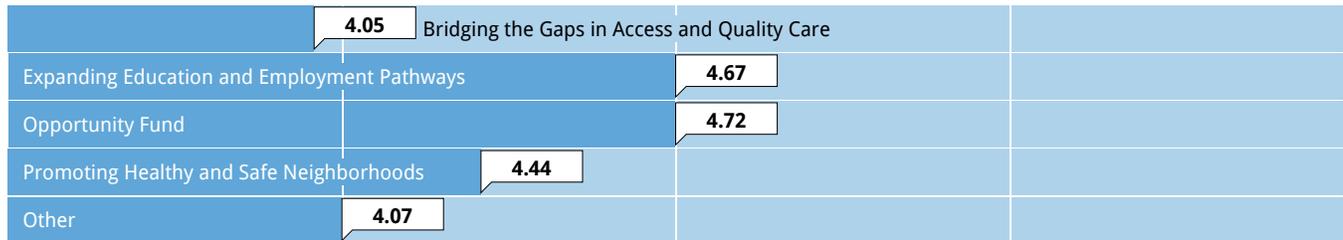
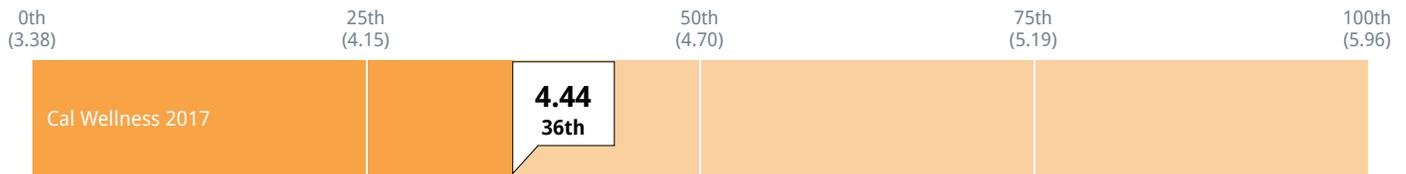
Past results: On Off

Subgroup: Grantee Portfolio ▼

Applicant Ratings

“Overall, how responsive was the Foundation staff?”

1 = Not at all responsive 7 = Extremely responsive



Cohort: None ▼

Past results: On Off

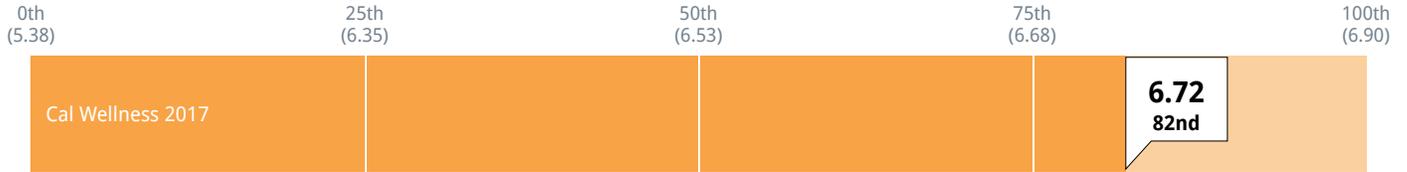
Subgroup: Applicant Portfolio ▼

Fairness

Grantee Ratings

“Overall, how fairly did the Foundation treat you?”

1 = Not at all fairly 7 = Extremely fairly



Custom Cohort

Bridging the Gaps in Access and Quality Care	6.62
Expanding Education and Employment Pathways	6.83
Opportunity Fund	6.73
Promoting Healthy and Safe Neighborhoods	6.72
Other	7.00

Cohort: Custom Cohort

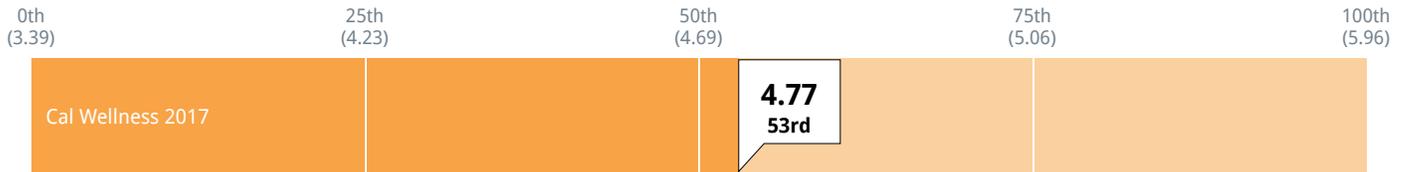
Past results: On Off

Subgroup: Grantee Portfolio

Applicant Ratings

“Overall, how fairly did the Foundation treat you?”

1 = Not at all fairly 7 = Extremely fairly



Bridging the Gaps in Access and Quality Care	4.46
Expanding Education and Employment Pathways	4.93
Opportunity Fund	5.31
Promoting Healthy and Safe Neighborhoods	4.63
Other	4.85

Cohort: None

Past results: On Off

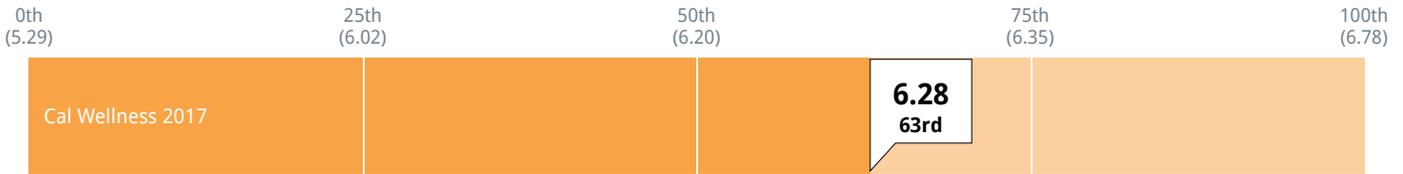
Subgroup: Applicant Portfolio

Comfort and Accessibility

Grantee Ratings

“How comfortable do you feel approaching the Foundation if a problem arises?”

1 = Not at all comfortable 7 = Extremely comfortable



Custom Cohort

Bridging the Gaps in Access and Quality Care	6.11
Expanding Education and Employment Pathways	6.38
Opportunity Fund	6.36
Promoting Healthy and Safe Neighborhoods	6.46
Other	6.17

Cohort: Custom Cohort

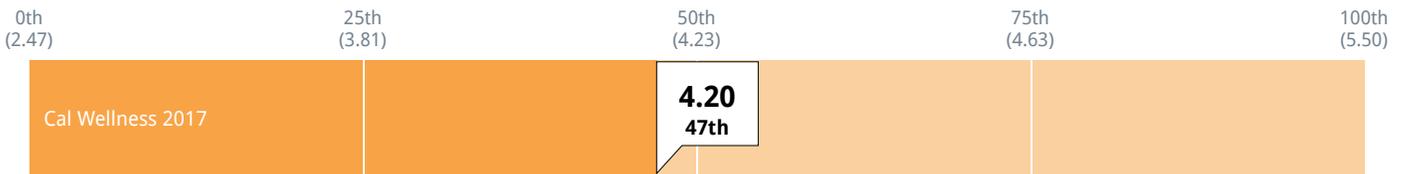
Past results: On Off

Subgroup: Grantee Portfolio

Applicant Ratings

“How accessible do you believe the Foundation is to applicants?”

1 = Some organizations are favored over others 7 = Everyone has equal access



Bridging the Gaps in Access and Quality Care	3.97
Expanding Education and Employment Pathways	4.49
Opportunity Fund	4.54
Promoting Healthy and Safe Neighborhoods	4.06
Other	3.36

Cohort: None

Past results: On Off

Subgroup: Applicant Portfolio

Grantee Interaction Patterns

Grantee Responses

"How often do/did you have contact with your program officer during this grant?"

Frequency of Contact with Program Officer	Cal Wellness 2017	Average Funder	Custom Cohort
Weekly or more often	2%	3%	3%
A few times a month	6%	11%	11%
Monthly	5%	15%	14%
Once every few months	64%	52%	53%
Yearly or less often	23%	18%	19%

Frequency of Contact with Program Officer (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Weekly or more often	3%	4%	0%	3%	0%
A few times a month	7%	4%	5%	8%	0%
Monthly	7%	4%	8%	0%	0%
Once every few months	56%	70%	57%	78%	67%
Yearly or less often	28%	17%	30%	11%	33%

Grantee Responses

“Who most frequently initiated the contact you had with your program officer?”

Initiation of Contact with Program Officer	Cal Wellness 2017	Average Funder	Custom Cohort
Program Officer	13%	15%	17%
Both of equal frequency	50%	50%	49%
Grantee	37%	35%	34%

Initiation of Contact with Program Officer (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Program Officer	11%	19%	17%	3%	17%
Both of equal frequency	48%	58%	40%	66%	0%
Grantee	41%	23%	43%	31%	83%

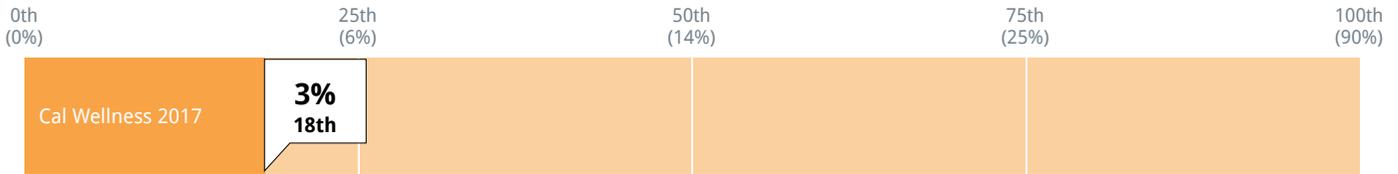
Grantees who interact with the Foundation monthly or more often rate significantly higher on several measures throughout the report including the Foundation's understanding of grantees' goals and strategies, awareness of grantees' challenges, and the Foundation's transparency.

Contact Change and Site Visits

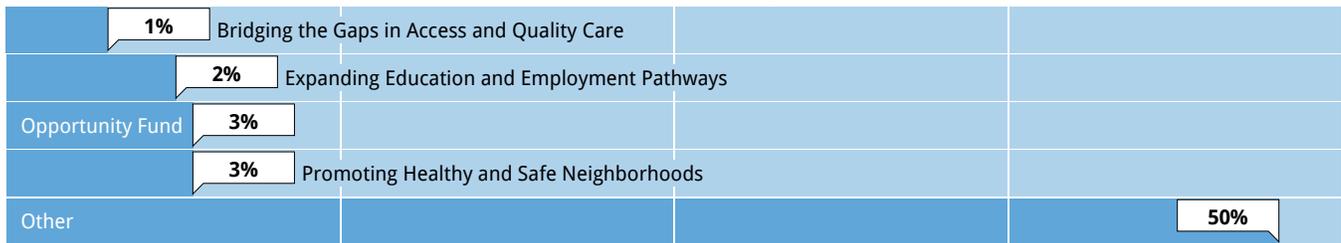
Grantee Ratings

“Has your main contact at the Foundation changed in the past six months?”

Proportion of grantees responding 'Yes'



Custom Cohort



Cohort: Custom Cohort

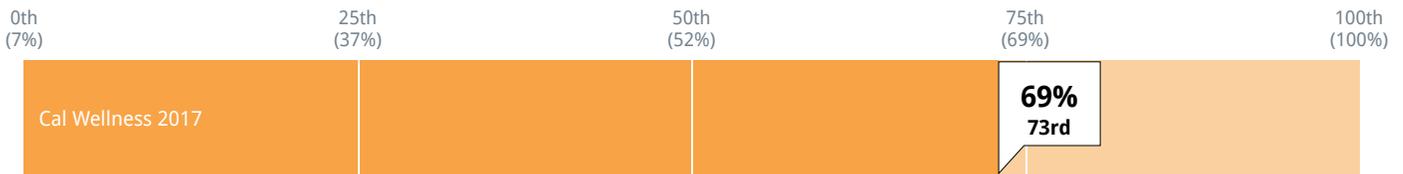
Past results: On Off

Subgroup: Grantee Portfolio

Grantee Ratings

“Did the Foundation conduct a site visit during the course of this grant?”

Proportion of grantees responding 'Yes'



Custom Cohort



Cohort: Custom Cohort

Past results: On Off

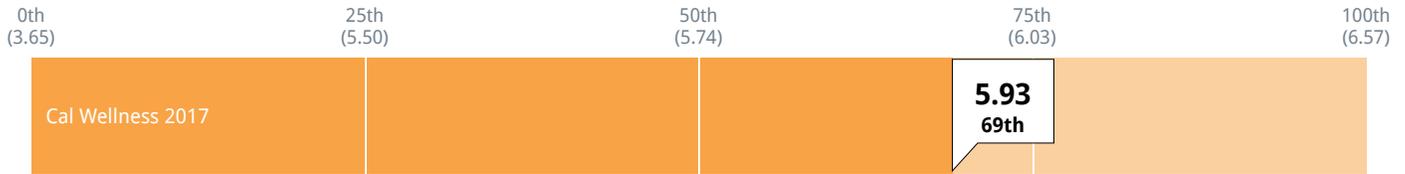
Subgroup: Grantee Portfolio

Communication

Grantee Ratings

"How clearly has the Foundation communicated its goals and strategy with you?"

1 = Not at all clearly 7 = Extremely clearly



Category	Score	Percentile
Bridging the Gaps in Access and Quality Care	6.07	-
Expanding Education and Employment Pathways	5.83	-
Opportunity Fund	5.73	-
Promoting Healthy and Safe Neighborhoods	6.05	-
Other	5.33	-

Cohort: Custom Cohort

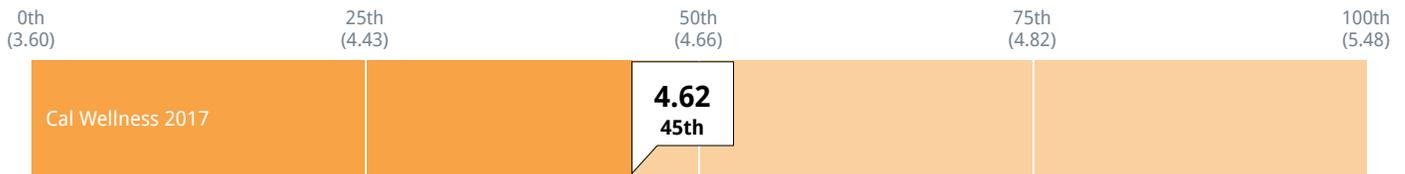
Past results: On Off

Subgroup: Grantee Portfolio

Applicant Ratings

"How clearly has the Foundation communicated its goals and strategy to you?"

1 = Not at all clearly 7 = Extremely clearly



Category	Score	Percentile
Bridging the Gaps in Access and Quality Care	4.51	-
Expanding Education and Employment Pathways	4.96	-
Opportunity Fund	5.16	-
Promoting Healthy and Safe Neighborhoods	4.26	-
Other	3.86	-

Cohort: None

Past results: On Off

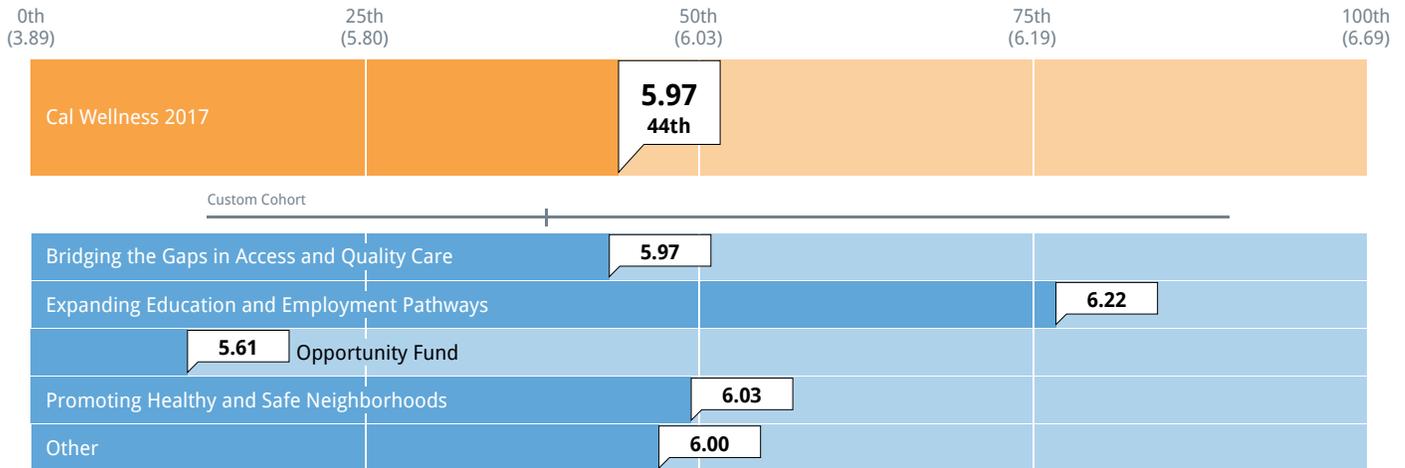
Subgroup: Applicant Portfolio

Consistency of Communication

Grantee Ratings

“How consistent was the information provided by different communications resources, both personal and written, that you used to learn about the Foundation?”

1 = Not at all consistent 7 = Completely consistent



Cohort: Custom Cohort

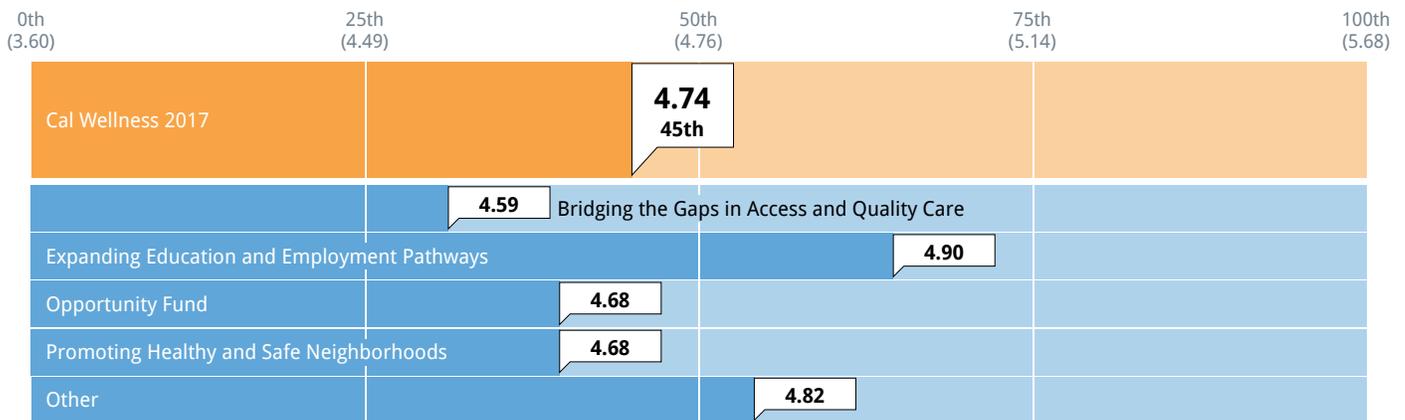
Past results: On Off

Subgroup: Grantee Portfolio

Applicant Ratings

“How consistent was the information provided by different communications resources, both personal and written, that you used to learn about the Foundation?”

1 = Not at all consistent 7 = Completely consistent



Cohort: None

Past results: On Off

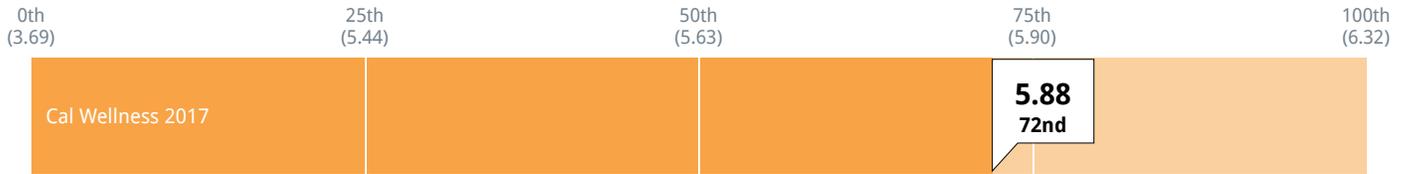
Subgroup: Applicant Portfolio

Funder Transparency

Grantee Ratings

"Overall how transparent is the Foundation with your organization?"

1 = Not at all transparent 7 = Extremely transparent



Custom Cohort



Cohort: Custom Cohort

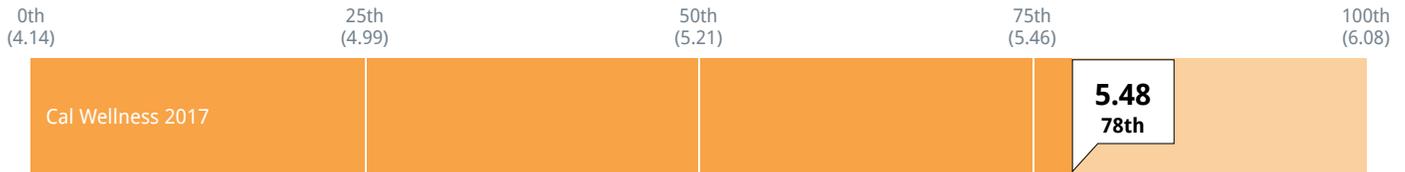
Past results: On Off

Subgroup: Grantee Portfolio

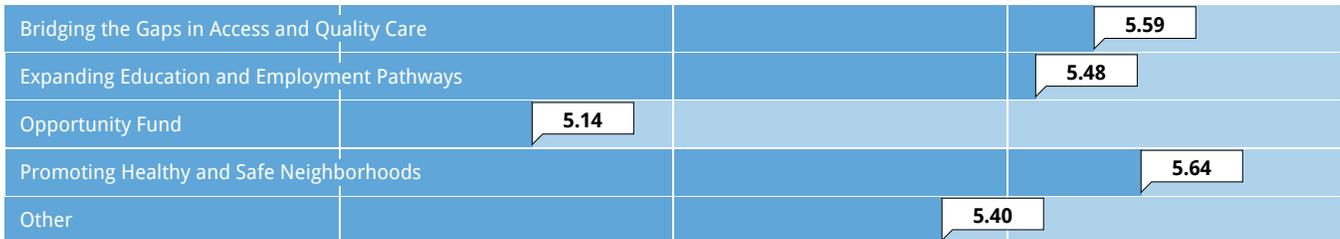
Grantee Ratings

"To what extent is the Foundation open to ideas from grantees about its strategy?"

1 = Not at all 7 = To a great extent



Custom Cohort



Cohort: Custom Cohort

Past results: On Off

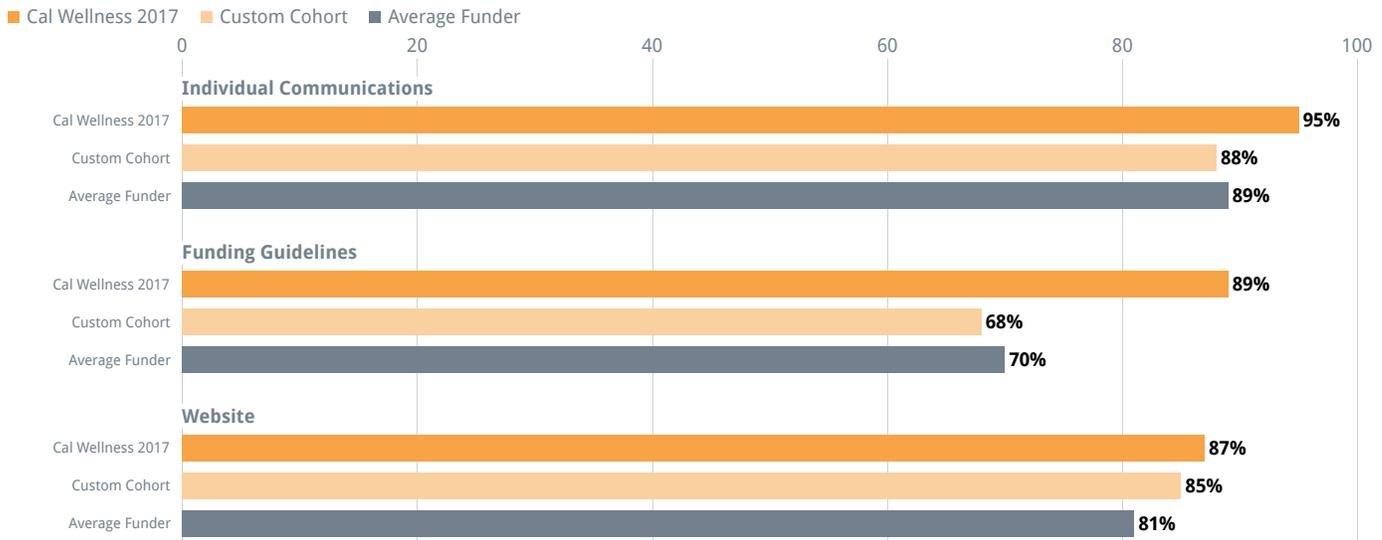
Subgroup: Grantee Portfolio

Communication Resources

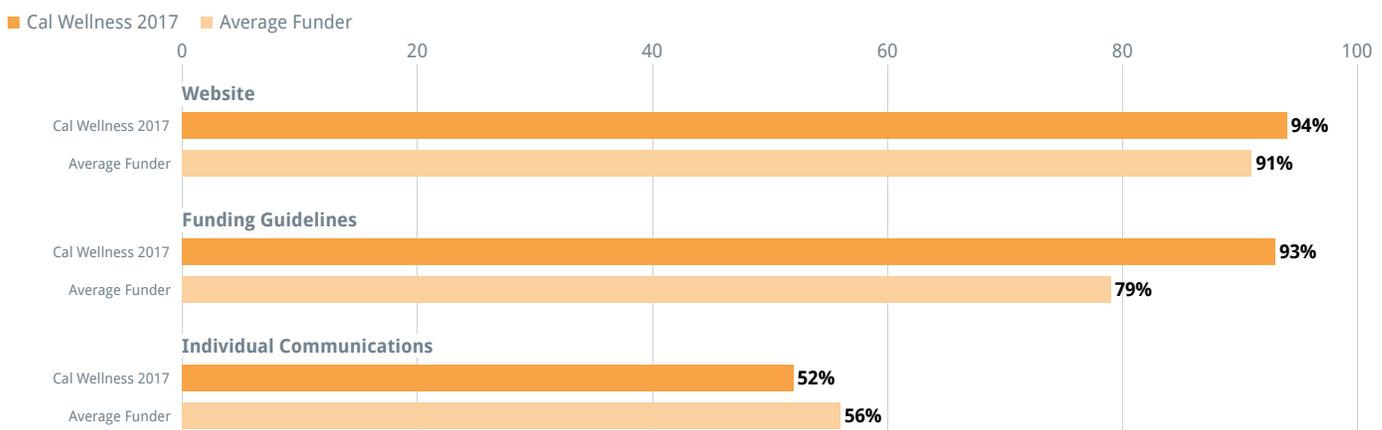
Grantees and applicants were asked whether they used each of the following communications resources from the Foundation and how helpful they found each resource. The following charts show the proportions of respondents who have used each resource.

"Please indicate whether you used any of the following resources, and if so how helpful you found each."

Usage of Communication Resources (Grantee Responses)

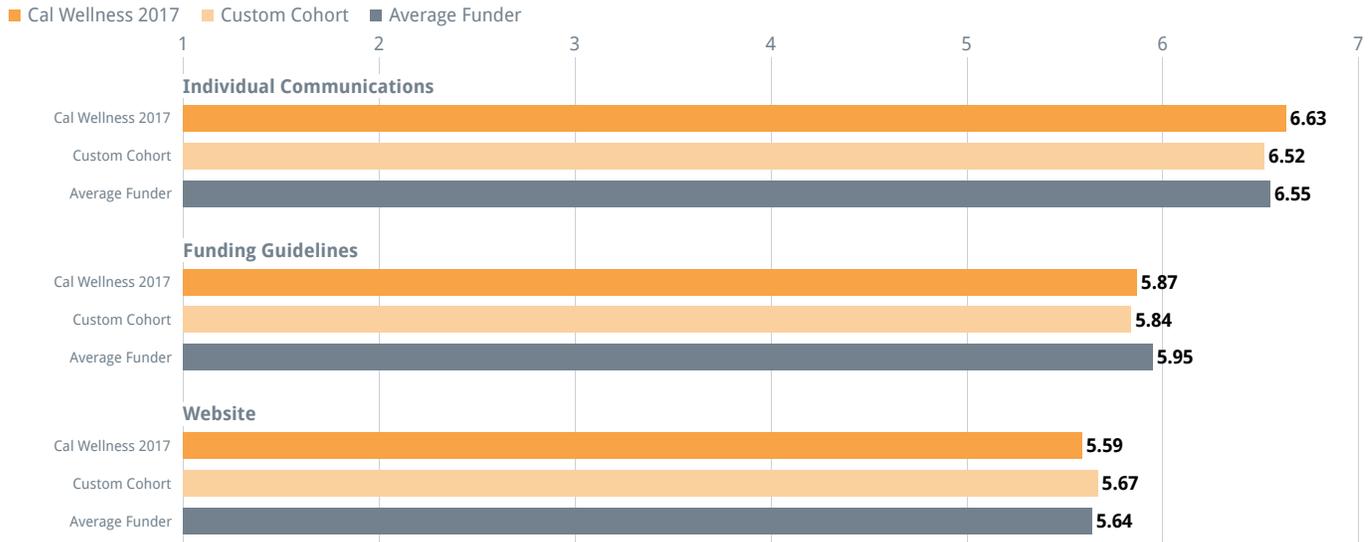


Usage of Communication Resources (Applicant Responses)



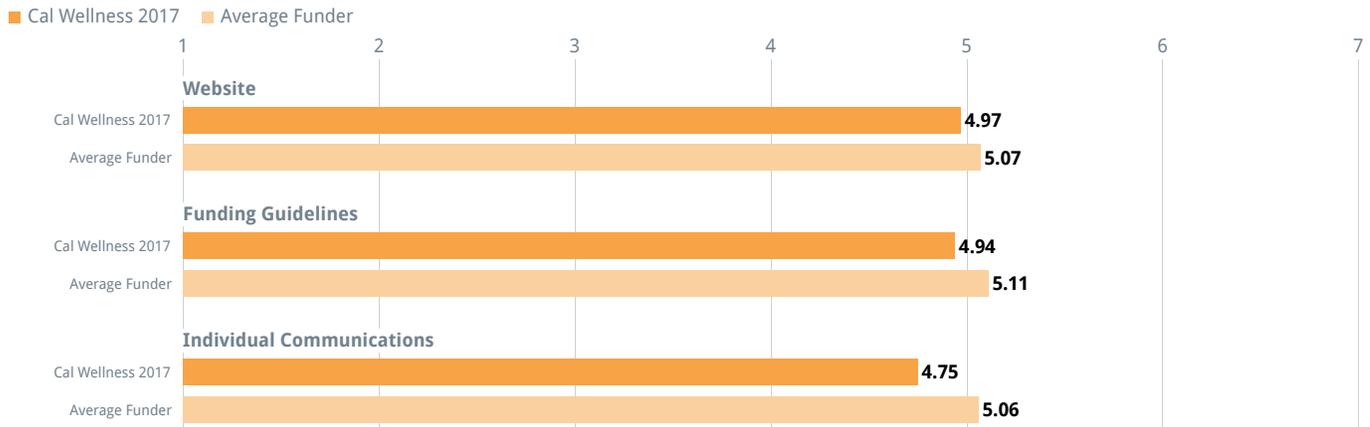
Helpfulness of Communication Resources (Grantee Ratings)

1 = Not at all helpful 7 = Extremely helpful



Helpfulness of Communication Resources (Applicant Ratings)

1 = Not at all helpful 7 = Extremely helpful

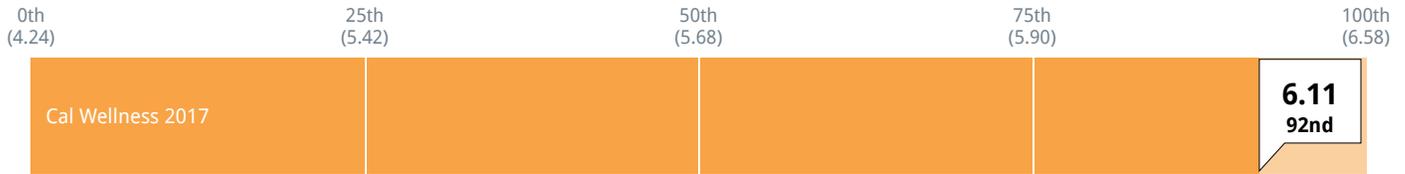


Beneficiary and Contextual Understanding

Grantee Ratings

“How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?”

1 = Limited understanding 7 = Thorough understanding



Custom Cohort

Bridging the Gaps in Access and Quality Care	6.04
Expanding Education and Employment Pathways	6.28
Opportunity Fund	5.94
Promoting Healthy and Safe Neighborhoods	6.30
Other	5.40

Cohort:

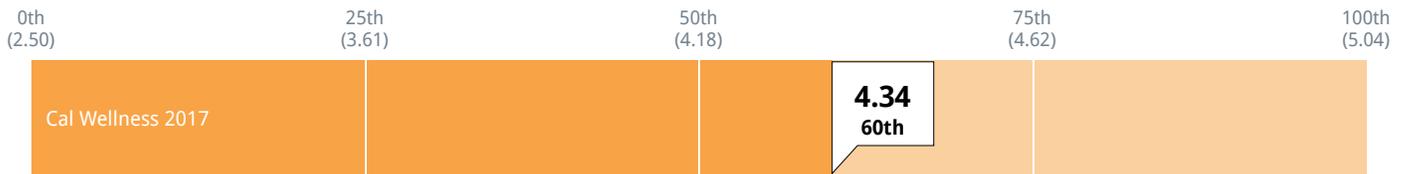
Past results: On Off

Subgroup:

Applicant Ratings

“How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?”

1 = Limited understanding 7 = Thorough understanding



Bridging the Gaps in Access and Quality Care	4.25
Expanding Education and Employment Pathways	4.57
Opportunity Fund	4.36
Promoting Healthy and Safe Neighborhoods	4.21
Other	4.25

Cohort:

Past results: On Off

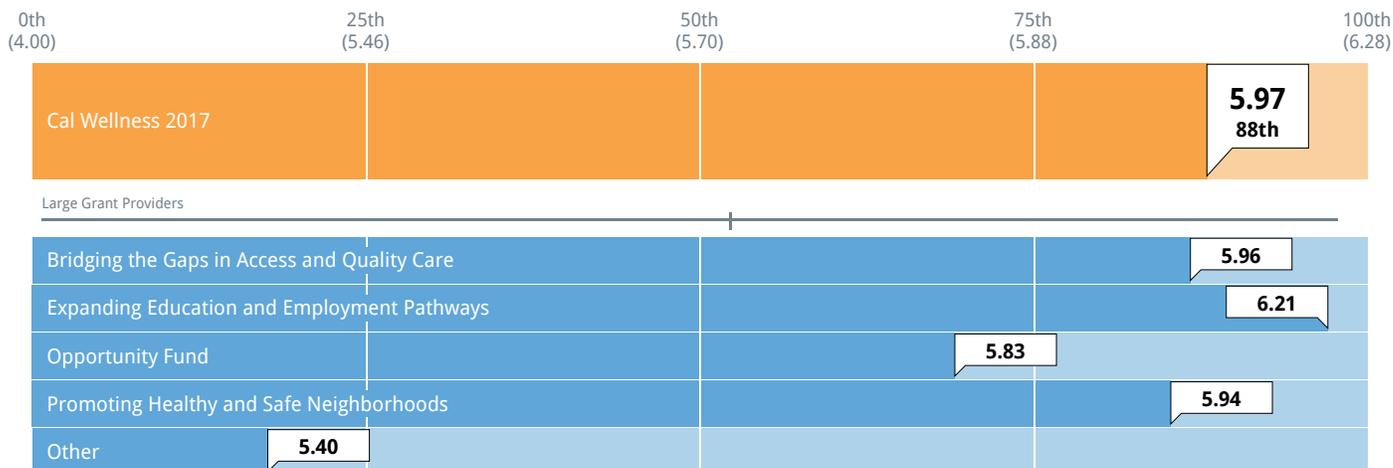
Subgroup:

In the following questions, we use the term "beneficiaries" to refer to those your organization seeks to serve through the services and/or programs it provides. Beneficiaries are often called end users, clients, or participants.

Grantee Ratings

"How well does the Foundation understand your intended beneficiaries' needs?"

1 = Limited understanding 7 = Thorough understanding



Cohort: Large Grant Providers

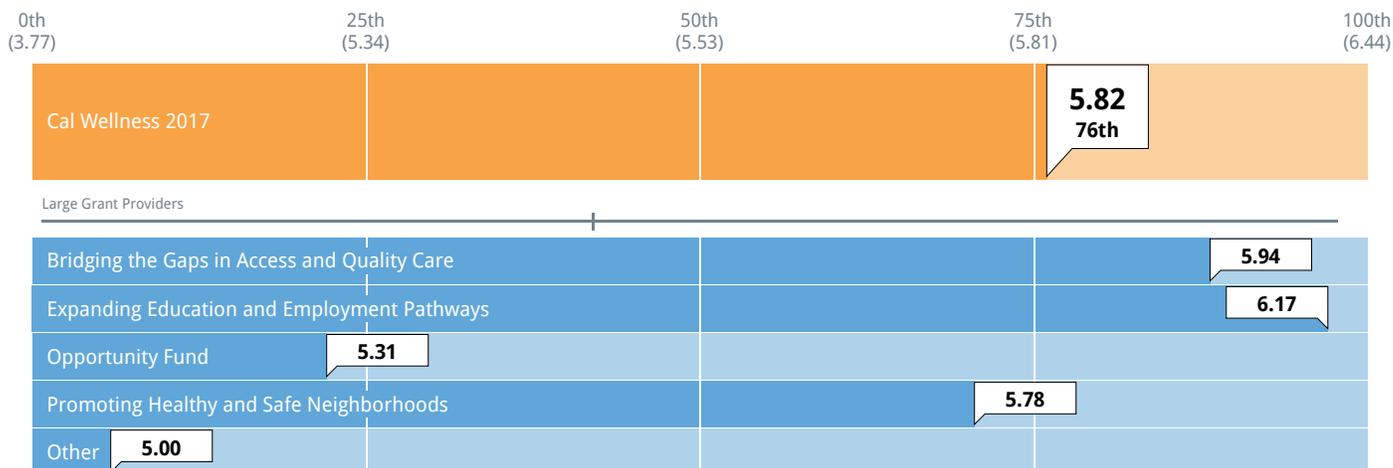
Past results: On Off

Subgroup: Grantee Portfolio

Grantee Ratings

"To what extent do the Foundation's funding priorities reflect a deep understanding of your intended beneficiaries' needs?"

1 = Not at all 7 = To a great extent



Cohort: Large Grant Providers

Past results: On Off

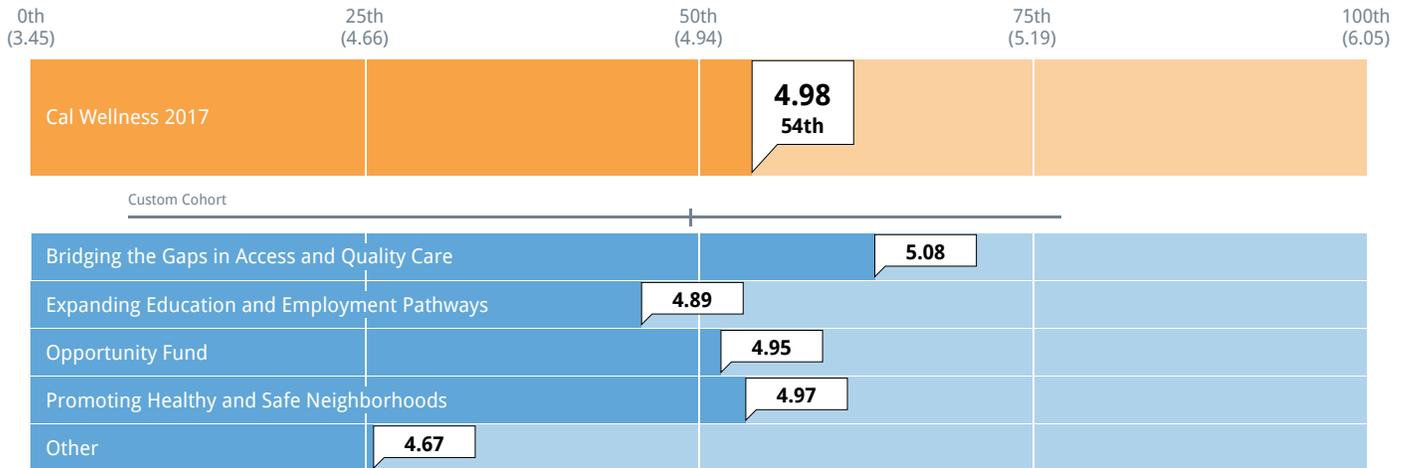
Subgroup: Grantee Portfolio

Selection Process

Grantee Ratings

"How helpful was participating in the Foundation's selection process in strengthening the organization/ program funded by the grant?"

1 = Not at all helpful 7 = Extremely helpful



Cohort: Custom Cohort ▼

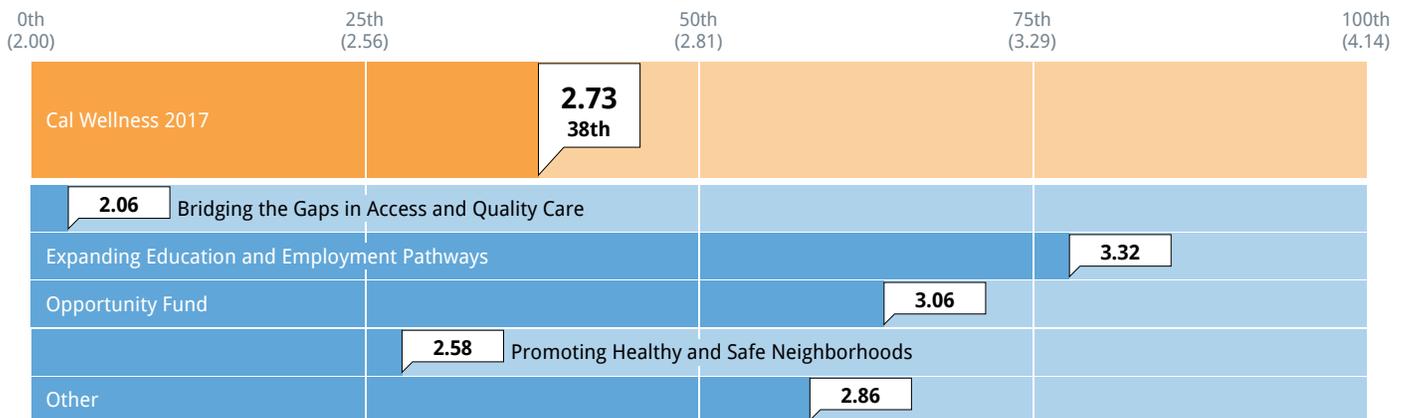
Past results: On Off

Subgroup: Grantee Portfolio ▼

Applicant Ratings

"How helpful was participating in the Foundation's selection process in strengthening the organization/program to which the grant funding would have been directed?"

1 = Not at all helpful 7 = Extremely helpful



Cohort: None ▼

Past results: On Off

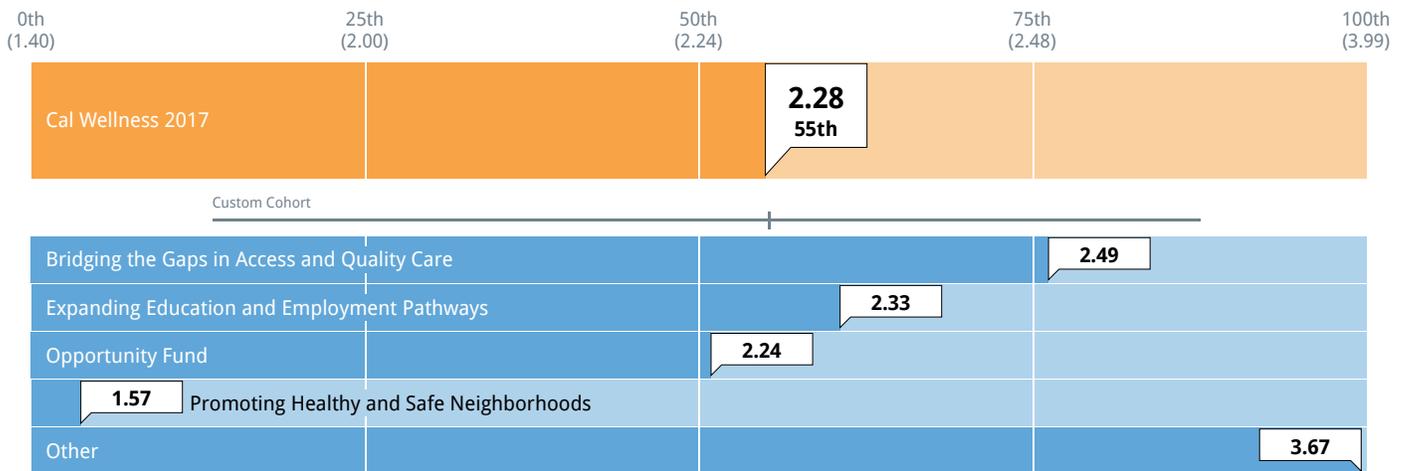
Subgroup: Applicant Portfolio ▼

Pressure to Modify Priorities

Grantee Ratings

“As you developed your grant proposal, how much pressure did you feel to modify your organization’s priorities in order to create a grant proposal that was likely to receive funding?”

1 = No pressure 7 = Significant pressure



Cohort: Custom Cohort

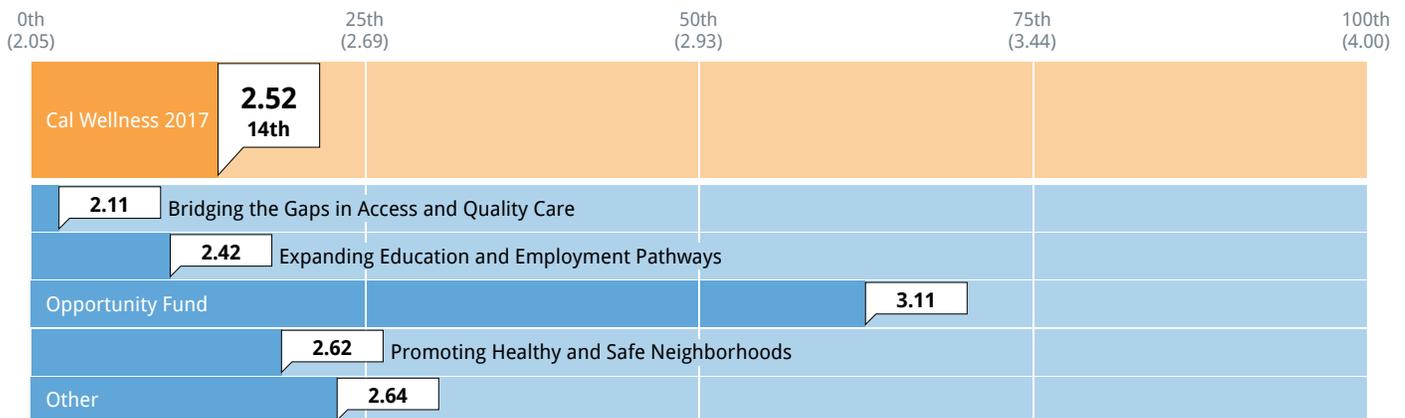
Past results: On Off

Subgroup: Grantee Portfolio

Applicant Ratings

“As you developed your grant proposal, how much pressure did you feel to modify your organization’s priorities in order to create a grant proposal that was likely to receive funding?”

1 = No pressure 7 = Significant pressure



Cohort: None

Past results: On Off

Subgroup: Applicant Portfolio

Time Between Submission and Funding Decision

Grantee Responses

“How much time elapsed from the submission of the grant proposal to clear commitment of funding?”

Time Elapsed from Submission of Proposal to Clear Commitment of Funding	Cal Wellness 2017	Average Funder	Custom Cohort
Less than 1 month	3%	6%	7%
1 - 3 months	55%	55%	53%
4 - 6 months	32%	30%	32%
7 - 9 months	7%	5%	5%
10 - 12 months	2%	2%	1%
More than 12 months	1%	2%	2%

Time Elapsed from Submission of Proposal to Clear Commitment of Funding (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Less than 1 month	4%	0%	3%	6%	0%
1 - 3 months	60%	57%	53%	51%	17%
4 - 6 months	28%	40%	38%	23%	33%
7 - 9 months	6%	2%	6%	11%	33%
10 - 12 months	1%	0%	0%	6%	0%
More than 12 months	0%	0%	0%	3%	17%

Applicant Responses

“How much time elapsed from initial submission of your grant proposal to the final decision not to fund your request?”

Time Between Submission and Funding Decision	Cal Wellness 2017	Average Funder
Less than 1 month	5%	14%
1 to 3 months	59%	54%
4 to 6 months	31%	25%
7 to 9 months	4%	4%
10 to 12 months	0%	2%
More than 12 months	1%	2%

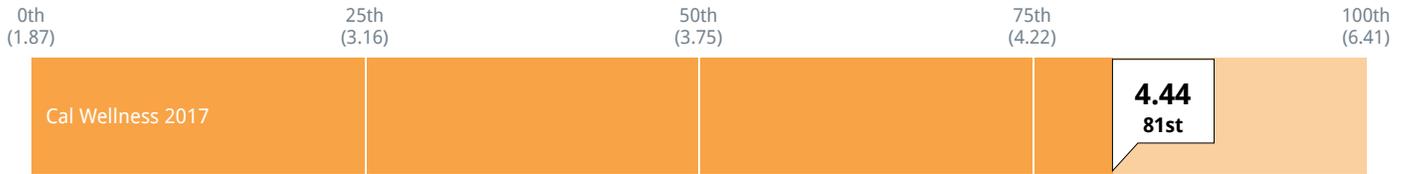
Time Between Submission and Funding Decision (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Less than 1 month	4%	3%	6%	7%	15%
1 to 3 months	71%	67%	47%	50%	38%
4 to 6 months	21%	24%	41%	38%	38%
7 to 9 months	4%	3%	6%	4%	8%
10 to 12 months	0%	0%	0%	0%	0%
More than 12 months	0%	3%	0%	1%	0%

Involvement in Proposal Development

Grantee Ratings

“How involved was the Foundation staff in the development of your proposal?”

1 = No involvement 7 = Substantial involvement



Custom Cohort

Bridging the Gaps in Access and Quality Care	4.42
Expanding Education and Employment Pathways	4.72
Opportunity Fund	4.24
Promoting Healthy and Safe Neighborhoods	4.31
Other	4.50

Cohort:

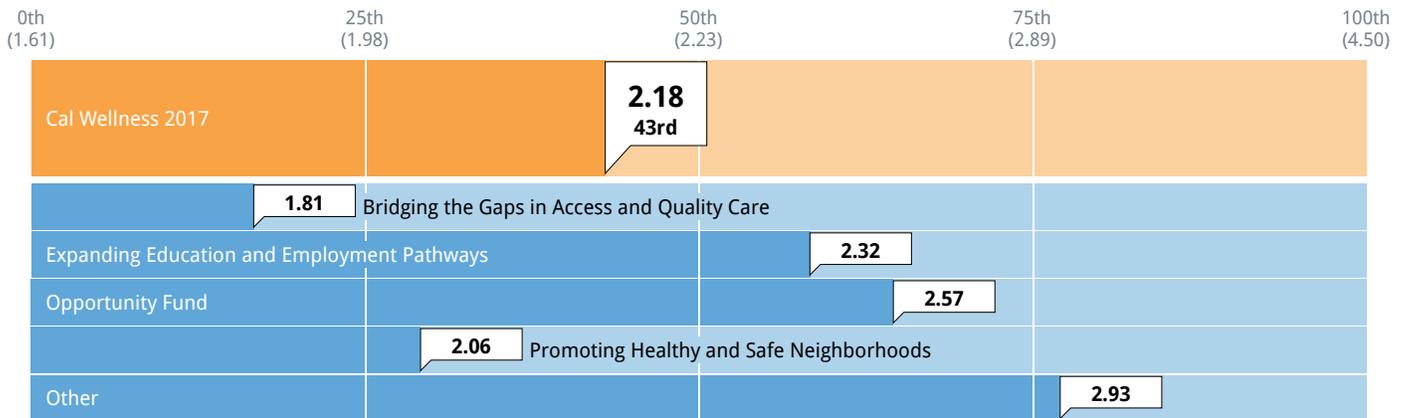
Past results: On Off

Subgroup:

Applicant Ratings

“How involved was the Foundation staff in the development of your proposal?”

1 = No involvement 7 = Substantial involvement



Cal Wellness 2017

2.18
43rd

1.81

Bridging the Gaps in Access and Quality Care

2.32

Expanding Education and Employment Pathways

2.57

Opportunity Fund

2.06

Promoting Healthy and Safe Neighborhoods

2.93

Other

Cohort:

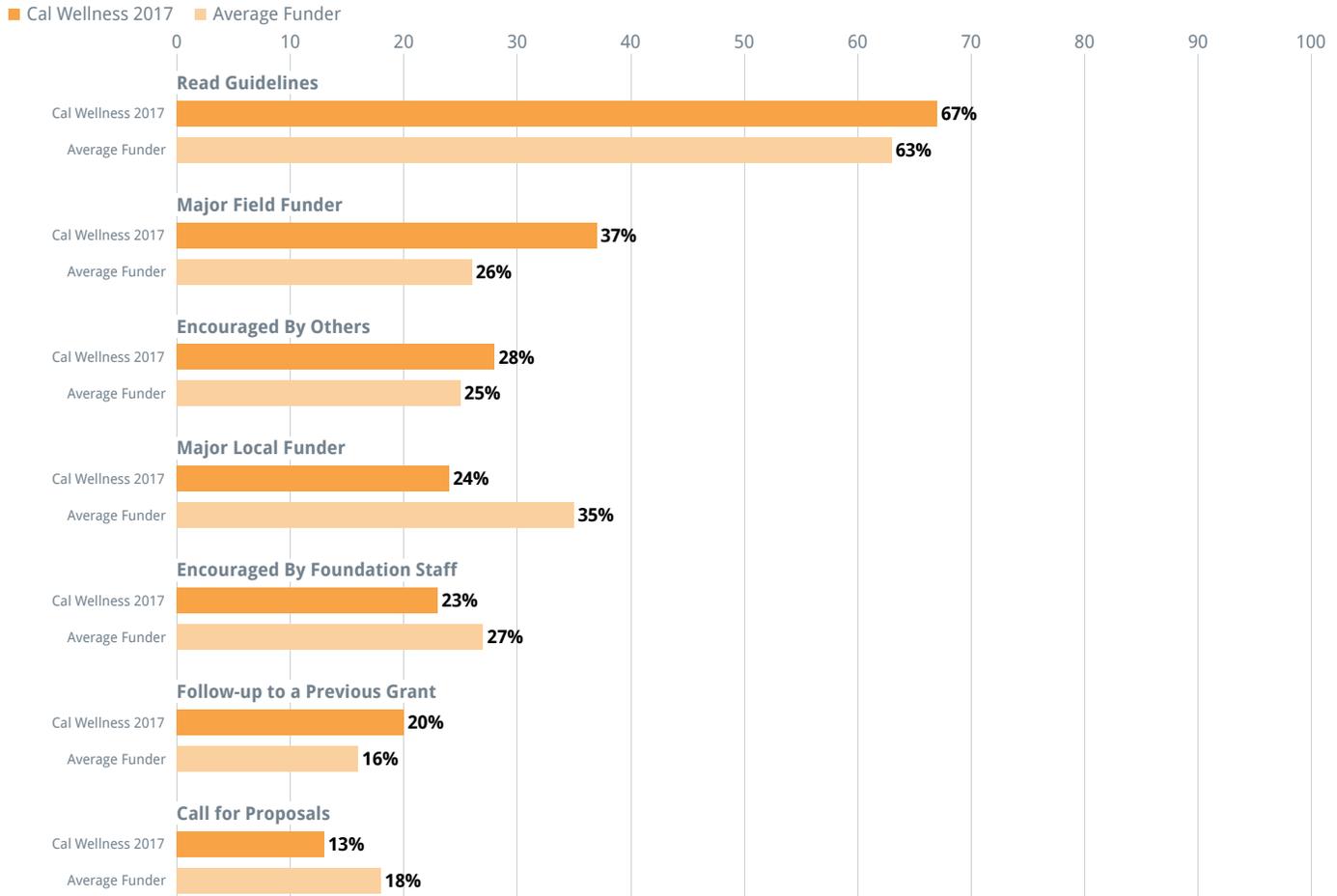
Past results: On Off

Subgroup:

Declined Applications

“Why did you apply to the Foundation for funding?”

Reasons for Applying for Funding (Applicant Responses)



Reasons Provided for Declining Proposal

Applicant Responses

"Please choose the option that most resembles the reason the Foundation gave when it declined to fund your proposal."

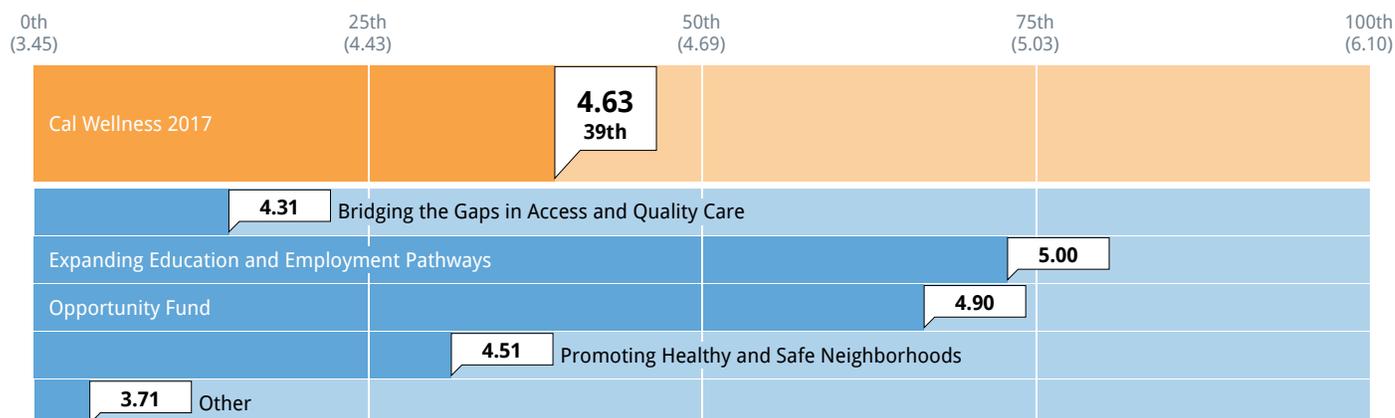
Reasons Provided for Declining Proposal	Cal Wellness 2017	Average Funder
No reason provided	11%	14%
Not enough funds/too many good proposals	50%	29%
Doesn't fit Foundation priorities/guidelines, with no explanation as to why	11%	15%
Doesn't fit Foundation priorities/guidelines, with explanation as to why	13%	15%
Other	16%	27%

Reasons Provided for Declining Proposal (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
No reason provided	5%	10%	16%	10%	36%
Not enough funds/too many good proposals	54%	51%	46%	53%	21%
Doesn't fit Foundation priorities/guidelines, with no explanation as to why	12%	3%	14%	16%	7%
Doesn't fit Foundation priorities/guidelines, with explanation as to why	9%	14%	14%	13%	7%
Other	20%	23%	11%	8%	29%

Applicant Ratings

"How would you rate the honesty of the reason(s) the Foundation gave for declining to fund your proposal?"

1 = Not at all honest 7 = Extremely honest



Cohort:

Past results: On Off

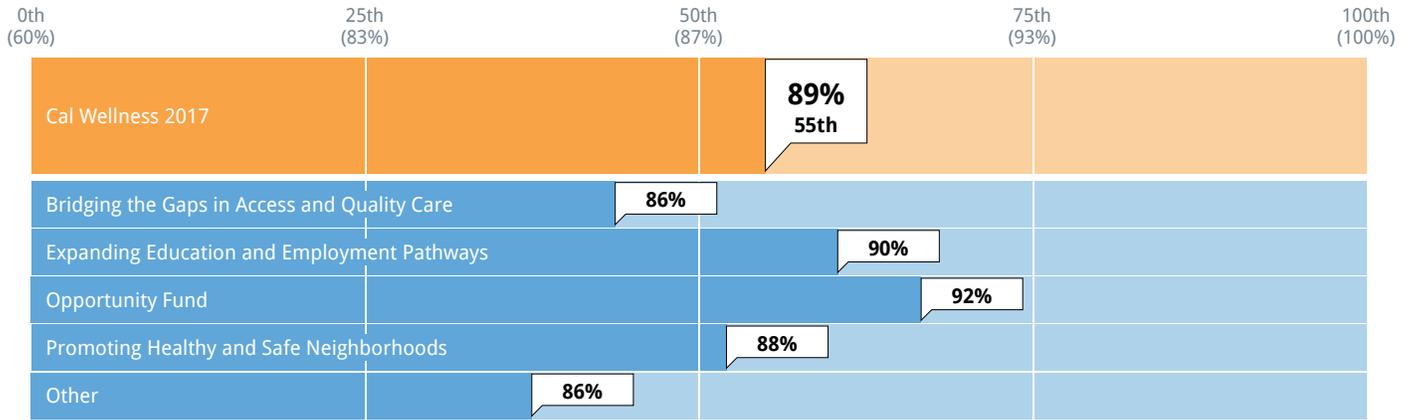
Subgroup:

Implications for Future Applications

Applicant Ratings

“Would you consider applying for funding from the Foundation in the future?”

Proportion that responded “Yes”



Cohort: Past results: On Off Subgroup:

History with the Foundation of Respondents That Would Consider Reapplying

	Cal Wellness 2017	Average Funder
First-time applicant	40%	44%
Previously received funding	42%	41%
Previously declined	18%	15%

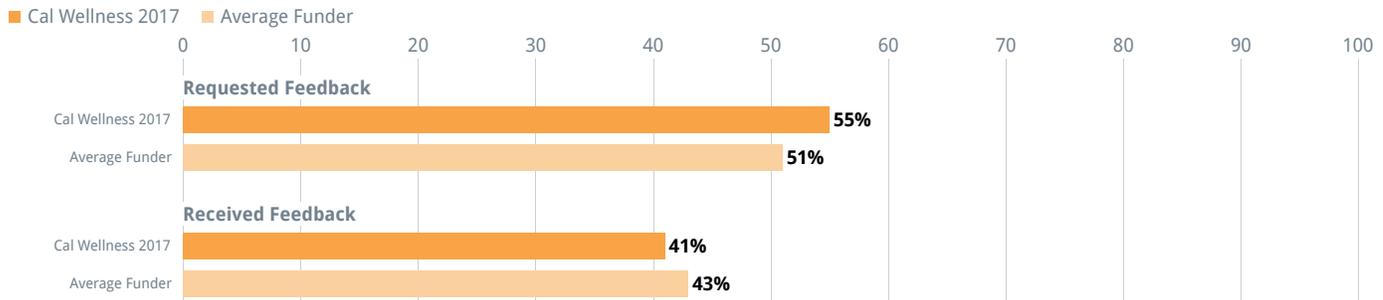
History with the Foundation of Respondents That Would Consider Reapplying (By Subgroup)

	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
First-time applicant	39%	29%	53%	42%	50%
Previously received funding	45%	41%	38%	41%	42%
Previously declined	16%	30%	9%	16%	8%

Feedback on Declined Applications

“After your request was declined did you request/receive any feedback or advice from the Foundation?”

Proportion of Applicants that Requested/Received Feedback (Applicant Responses)



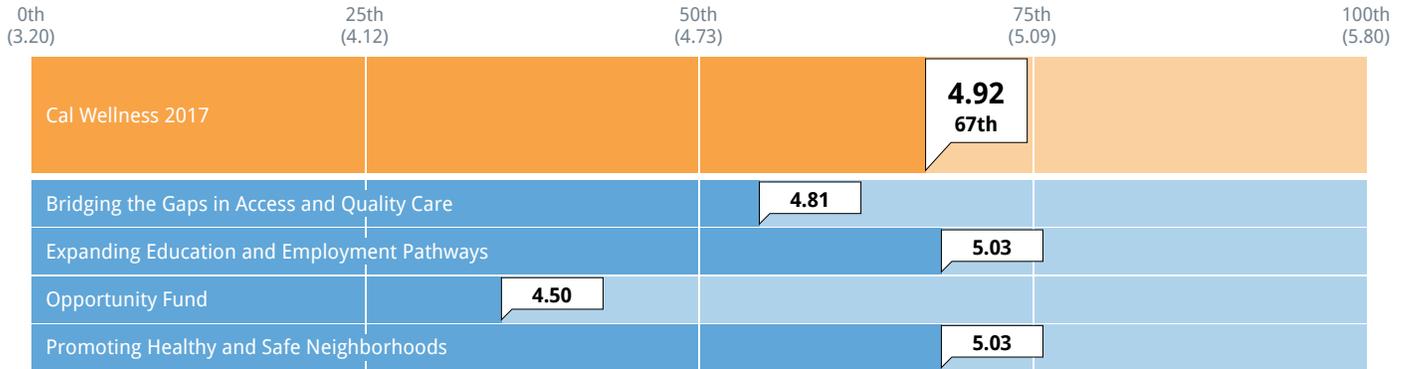
Proportion of Applicants that Requested Feedback, But Did Not Receive It (Applicant Responses)



Applicant Ratings

"Please rate the feedback and advice you received in terms of its helpfulness in strengthening future proposals to this funder."

1 = Not at all helpful 7 = Extremely helpful



Cohort: None ▼

Past results: On Off

Subgroup: Applicant Portfolio ▼

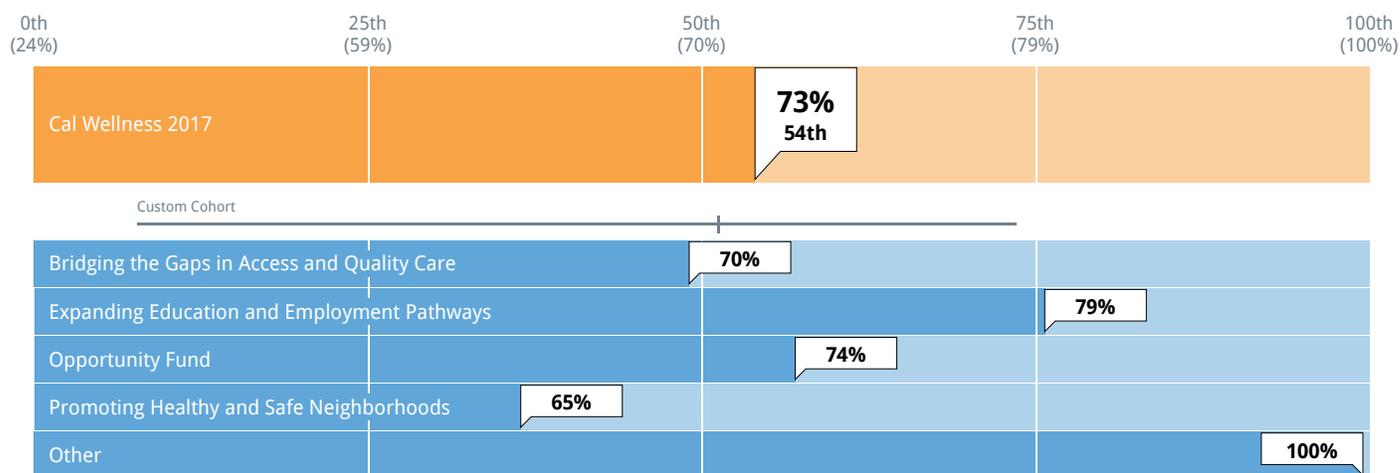
*Subgroups with less than 5 respondents are not displayed to protect respondent confidentiality.

Reporting and Evaluation Process

Grantee Ratings

“At any point during the application or the grant period, did the Foundation and your organization exchange ideas regarding how your organization would assess the results of the work funded by this grant?”

Proportion responding "Yes"



Cohort:

Past results: On Off

Subgroup:

***The following questions were recently added to the grantee survey and depict comparative data from 18 funders in the dataset.**

Participation in Reporting and/or Evaluation Processes	Cal Wellness 2017	Average Funder
Participated in a reporting process only	66%	57%
Participated in an evaluation process only	0%	1%
Participated in both a reporting and an evaluation process	14%	29%
Participated in neither a reporting nor an evaluation process	20%	13%

Participation in Reporting and/or Evaluation Processes (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Participated in a reporting process only	65%	72%	61%	67%	60%
Participated in an evaluation process only	0%	0%	0%	0%	0%
Participated in both a reporting and an evaluation process	18%	17%	14%	6%	0%
Participated in neither a reporting nor an evaluation process	18%	11%	25%	28%	40%

Reporting Process

*The following questions were recently added to the grantee survey and depict comparative data from 18 funders in the dataset.

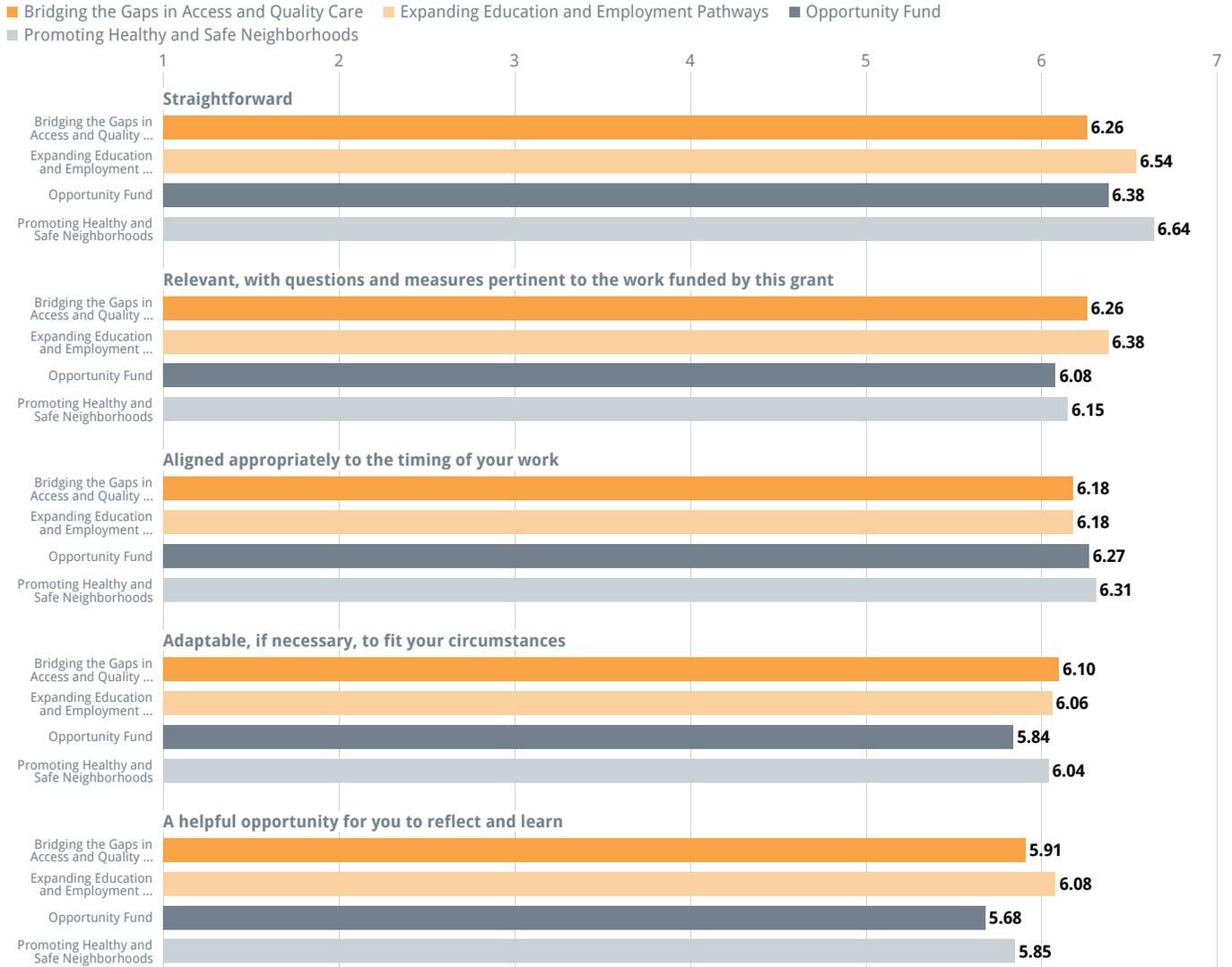
"To what extent was the Foundation's reporting process..." - Overall

1 = Not at all 7 = To a great extent



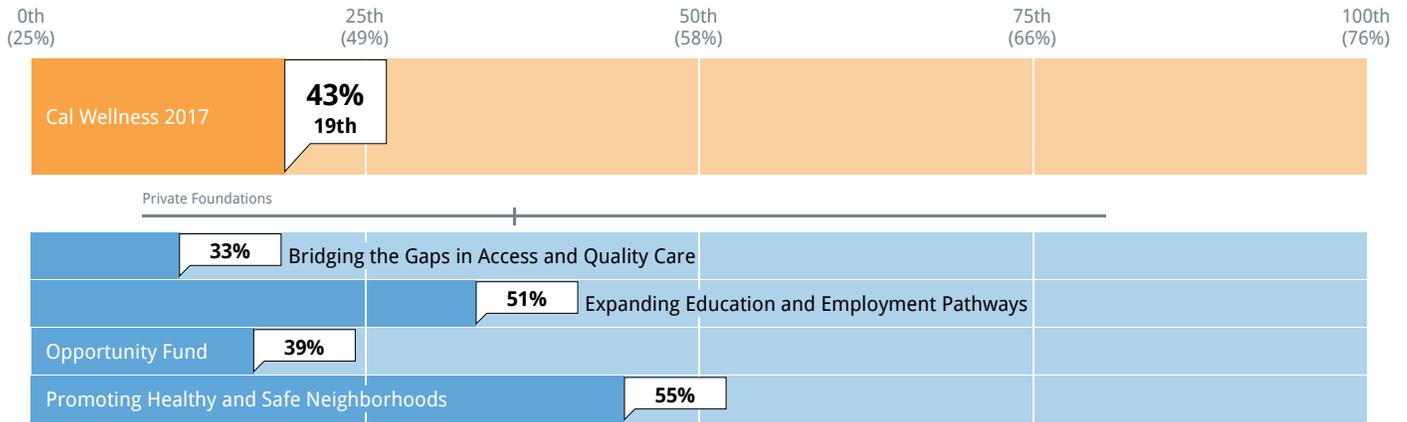
"To what extent was the Foundation's reporting process..." - By Subgroup

1 = Not at all 7 = To a great extent



"At any point have you had a substantive discussion with the Foundation about the report(s) you or your colleagues submitted as part of the reporting process?"

Proportion of grantees responding 'Yes'



Private Foundations

Cohort: Private Foundations ▼

Past results: On Off

Subgroup: Grantee Portfolio ▼

*Subgroups with less than 5 respondents are not displayed to protect respondent confidentiality.

Grantees who have substantive discussions with the Foundation regarding submitted reports rate significantly higher on several measures throughout the report, including funder-grantee relationships, the Foundation's understanding of beneficiaries' needs, and transparency.

Evaluation Process

*The following questions were recently added to the grantee survey and depict comparative data from 18 funders in the dataset.

"Who was primarily responsible for carrying out the evaluation?"	Cal Wellness 2017	Average Funder
Evaluation staff at the Foundation	12%	19%
Evaluation staff at your organization	73%	58%
External evaluator, chosen by the Foundation	4%	13%
External evaluator, chosen by your organization	12%	10%

"Who was primarily responsible for carrying out the evaluation?" (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Evaluation staff at the Foundation	0%	38%	0%	N/A	N/A
Evaluation staff at your organization	100%	50%	60%	N/A	N/A
External evaluator, chosen by the Foundation	0%	0%	20%	N/A	N/A
External evaluator, chosen by your organization	0%	13%	20%	N/A	N/A

"Did the Foundation provide financial support for the evaluation?"	Cal Wellness 2017	Average Funder
Yes, the evaluation's costs were fully funded by the Foundation	18%	27%
Yes, the evaluation's costs were partially funded by the Foundation	27%	17%
No, the evaluation's costs were not funded by the Foundation	55%	55%

"Did the Foundation provide financial support for the evaluation?" (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Yes, the evaluation's costs were fully funded by the Foundation	0%	0%	80%	N/A	N/A
Yes, the evaluation's costs were partially funded by the Foundation	22%	17%	20%	N/A	N/A
No, the evaluation's costs were not funded by the Foundation	78%	83%	0%	N/A	N/A

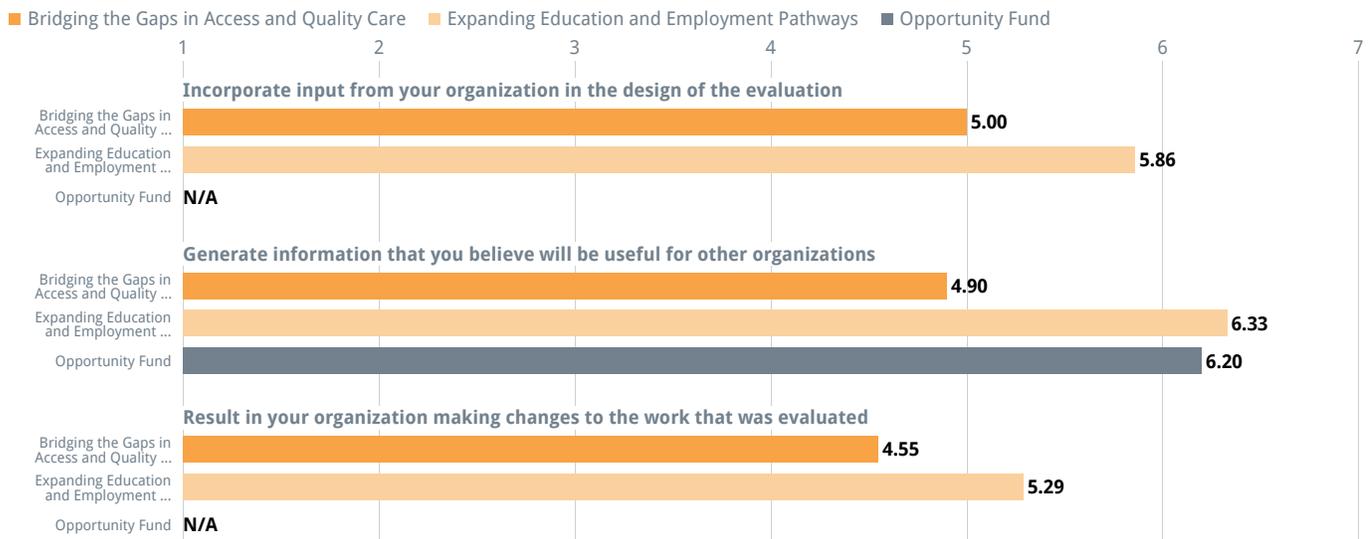
"To what extent did the evaluation..." - Overall

1 = Not at all 7 = To a great extent



"To what extent did the evaluation..." - By Subgroup

1 = Not at all 7 = To a great extent



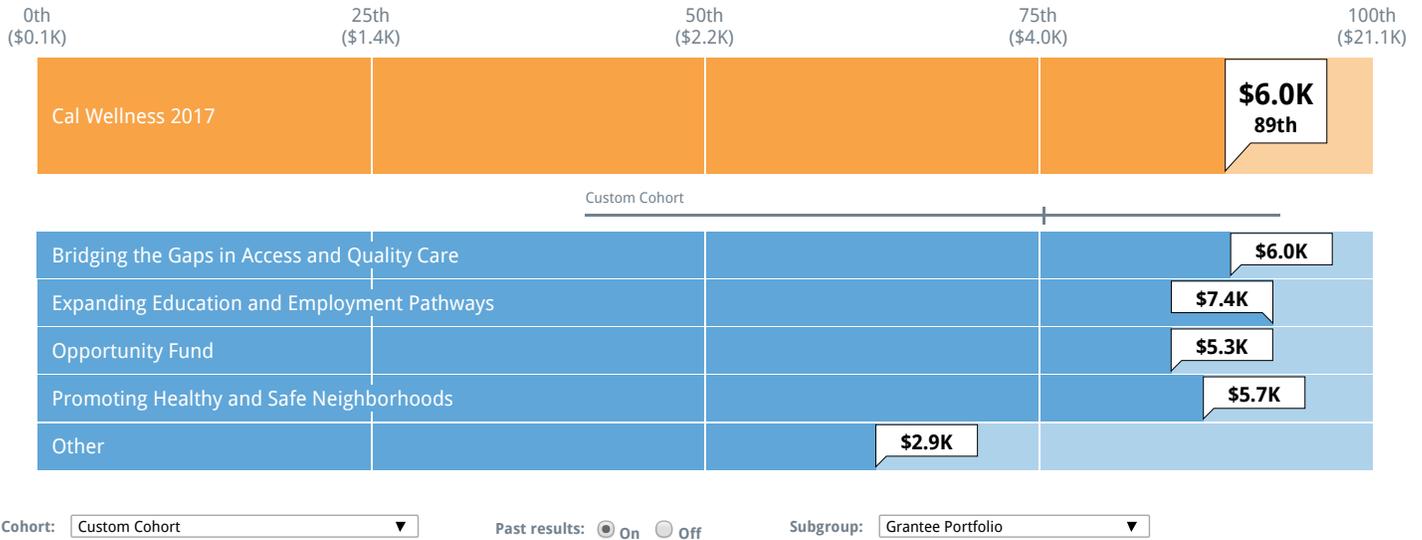
*Subgroups with less than 5 respondents are not displayed to protect respondent confidentiality.

Dollar Return and Time Spent on Processes

Grantee Responses

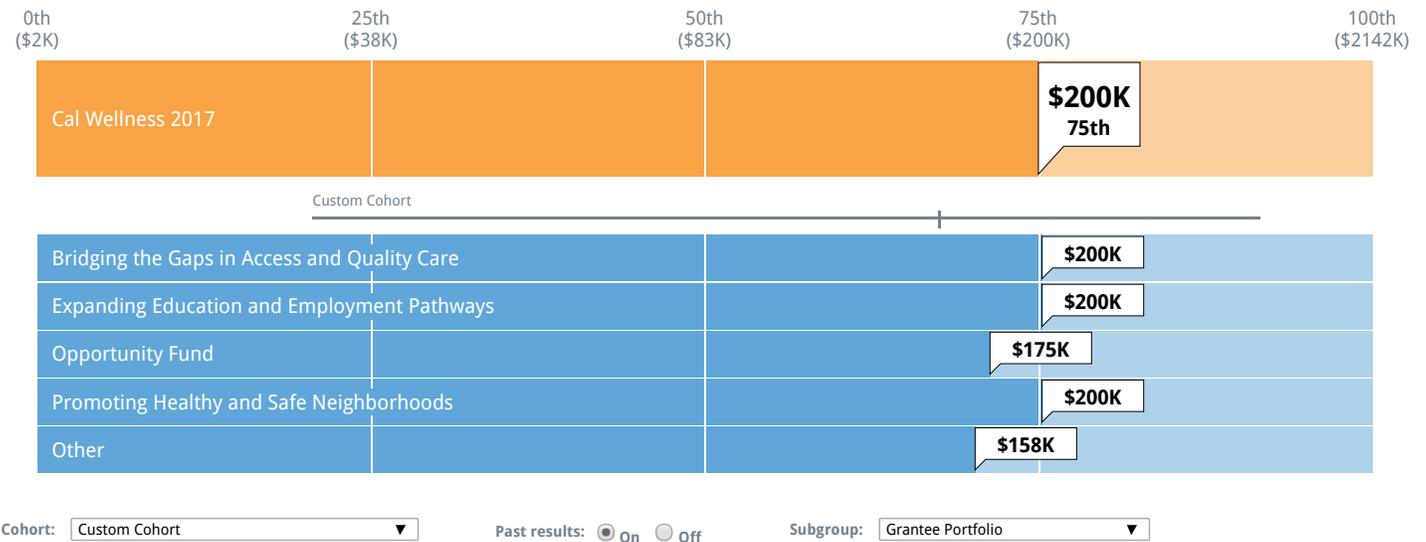
Dollar Return: Median grant dollars awarded per process hour required

Includes total grant dollars awarded and total time necessary to fulfill the requirements over the lifetime of the grant



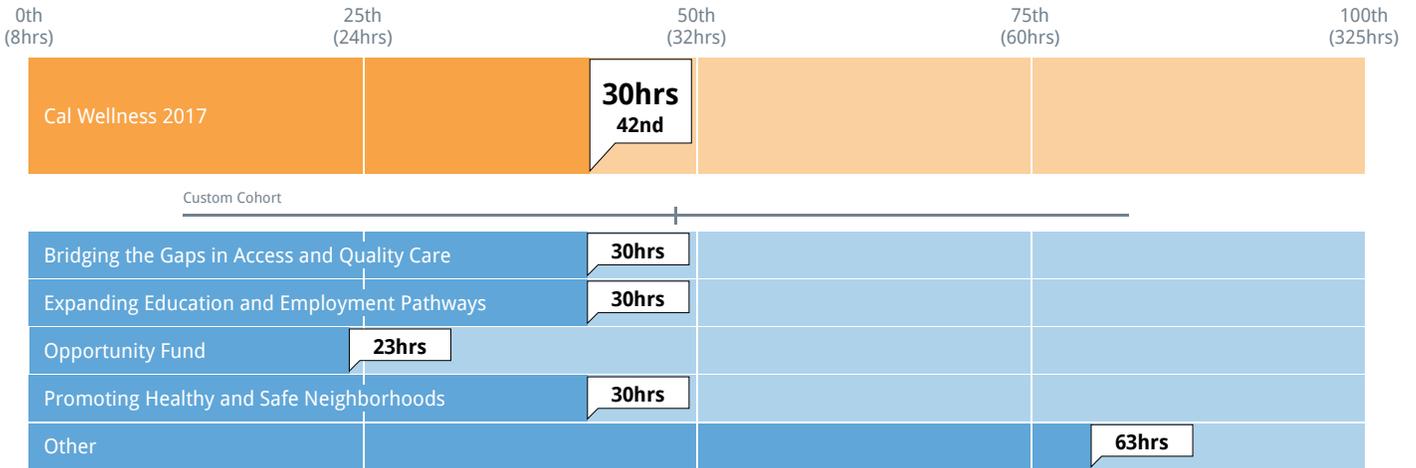
Grantee Responses

Median Grant Size



Grantee Responses

Median hours spent by grantees on funder requirements over grant lifetime



Cohort:

Past results: On Off

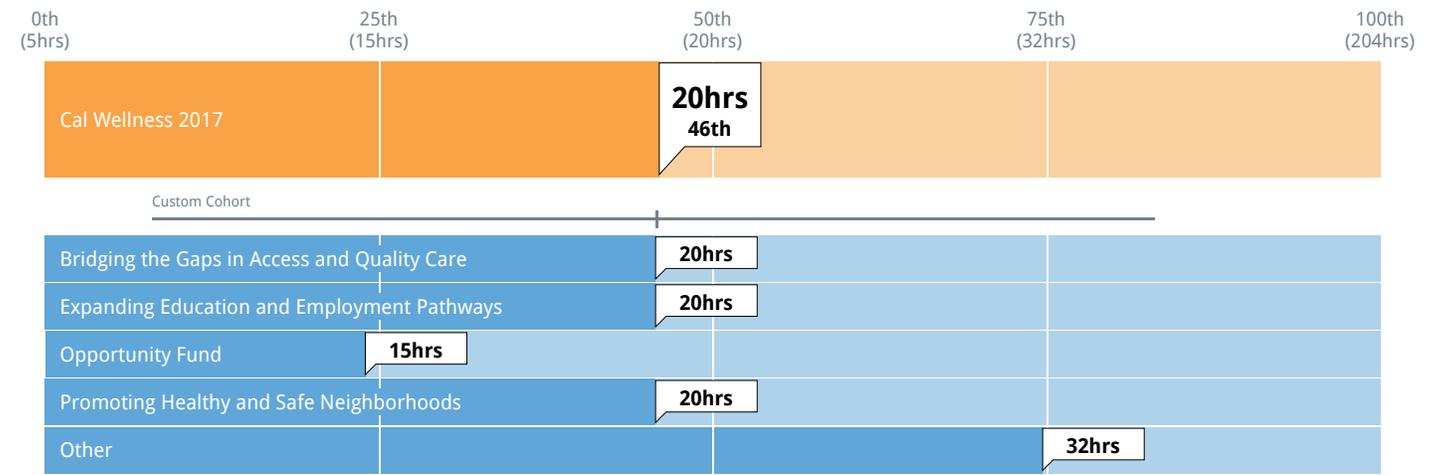
Subgroup:

Time Spent on Selection Process

Grantee Feedback

Grantee Responses

Median Hours Spent on Proposal and Selection Process



Cohort: Custom Cohort

Past results: On Off

Subgroup: Grantee Portfolio

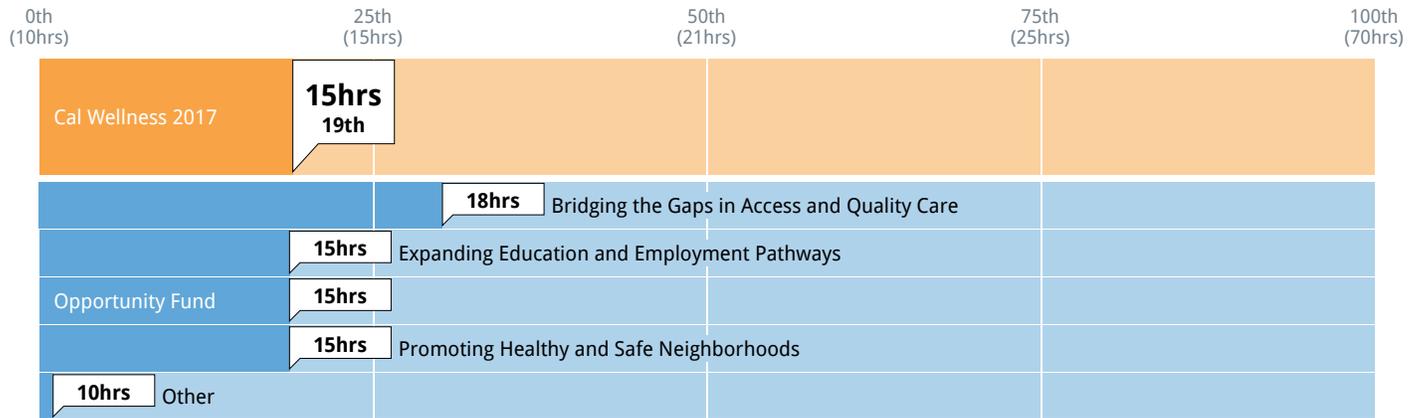
Time Spent On Proposal And Selection Process	Cal Wellness 2017	Average Funder	Custom Cohort
1 to 9 hours	18%	20%	19%
10 to 19 hours	23%	21%	22%
20 to 29 hours	25%	18%	19%
30 to 39 hours	12%	8%	9%
40 to 49 hours	10%	12%	12%
50 to 99 hours	9%	12%	12%
100 to 199 hours	4%	6%	6%
200+ hours	0%	4%	1%

Time Spent On Proposal And Selection Process (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
1 to 9 hours	11%	11%	46%	14%	0%
10 to 19 hours	24%	29%	14%	27%	17%
20 to 29 hours	26%	24%	14%	32%	33%
30 to 39 hours	11%	18%	11%	8%	0%
40 to 49 hours	7%	11%	8%	14%	17%
50 to 99 hours	13%	7%	5%	5%	17%
100 to 199 hours	8%	0%	3%	0%	17%
200+ hours	0%	0%	0%	0%	0%

Applicant Feedback

Applicant Responses

Median Hours Spent on Proposal Process



Cohort: None ▼ Past results: On Off Subgroup: Applicant Portfolio ▼

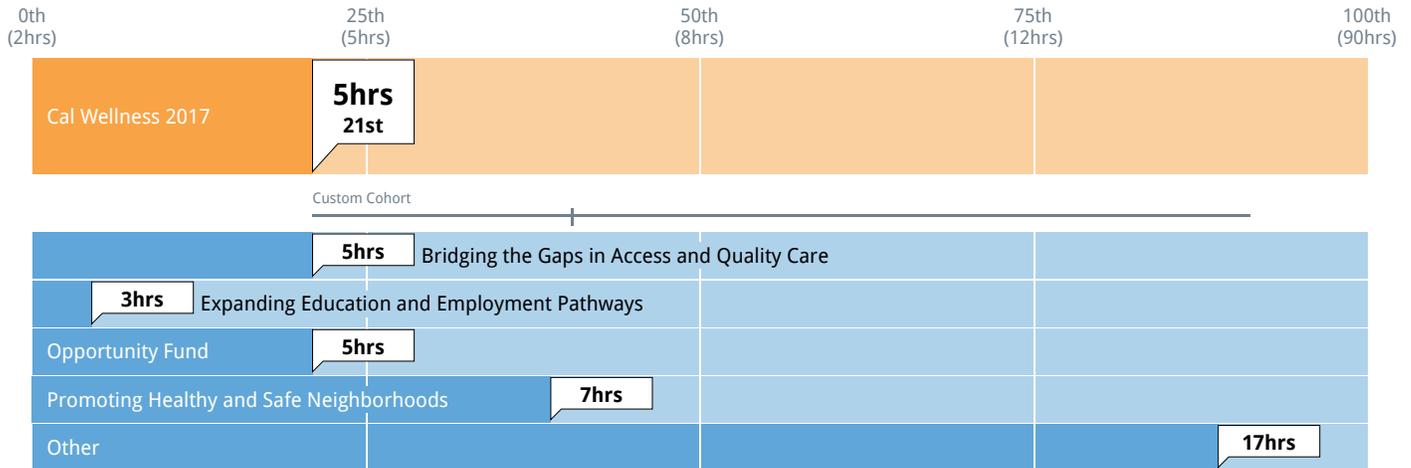
Times Spent on Selection Process	Cal Wellness 2017	Average Funder
Fewer than 10 hours	29%	17%
10 to 19 hours	26%	22%
20 to 29 hours	24%	19%
30 to 39 hours	5%	10%
40 to 49 hours	8%	10%
50 to 99 hours	6%	13%
100 to 199 hours	2%	6%
200 hours or more	1%	2%

Times Spent on Selection Process (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Fewer than 10 hours	31%	30%	24%	28%	29%
10 to 19 hours	19%	21%	34%	28%	50%
20 to 29 hours	25%	26%	24%	24%	7%
30 to 39 hours	8%	4%	5%	4%	0%
40 to 49 hours	8%	10%	5%	7%	7%
50 to 99 hours	6%	7%	8%	5%	0%
100 to 199 hours	2%	3%	0%	2%	7%
200 hours or more	2%	0%	0%	2%	0%

Time Spent on Reporting and Evaluation Process

Grantee Responses

Median Hours Spent on Monitoring, Reporting, and Evaluation Process Per Year



Cohort:

Past results: On Off

Subgroup:

Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized)	Cal Wellness 2017	Average Funder	Custom Cohort
1 to 9 hours	69%	52%	53%
10 to 19 hours	17%	20%	20%
20 to 29 hours	10%	11%	11%
30 to 39 hours	0%	4%	4%
40 to 49 hours	1%	4%	4%
50 to 99 hours	3%	5%	6%
100+ hours	0%	5%	3%

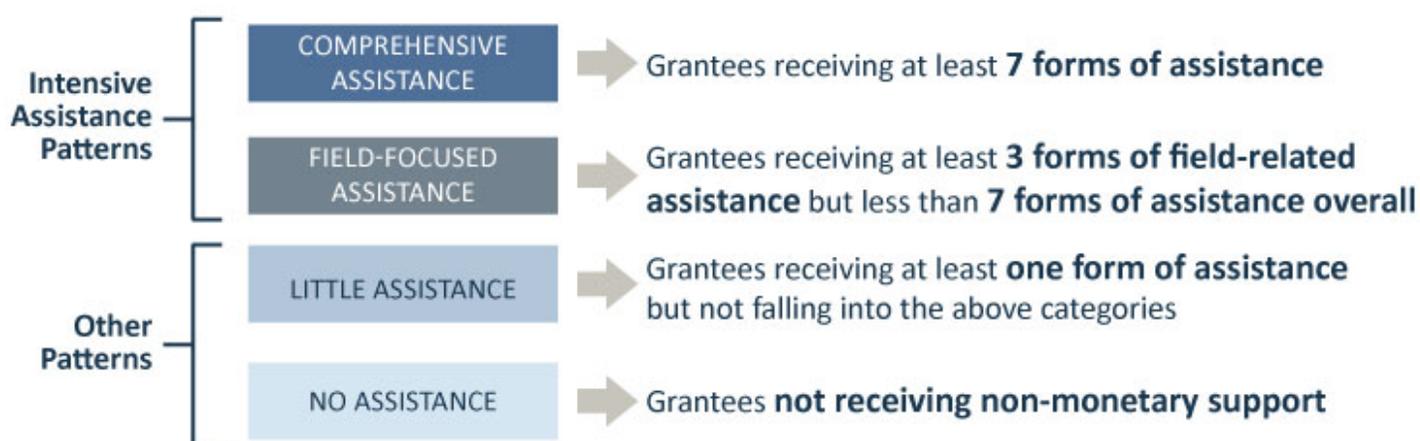
Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
1 to 9 hours	67%	81%	71%	63%	20%
10 to 19 hours	15%	5%	25%	27%	40%
20 to 29 hours	11%	11%	4%	10%	20%
30 to 39 hours	0%	0%	0%	0%	0%
40 to 49 hours	2%	0%	0%	0%	20%
50 to 99 hours	5%	3%	0%	0%	0%
100+ hours	0%	0%	0%	0%	0%

Non-Monetary Assistance

Grantees were asked to indicate whether they had received any of the following fourteen types of assistance provided directly or paid for by the Foundation.

Management Assistance	Field-Related Assistance	Other Assistance
General management advice	Encouraged/facilitated collaboration	Board development/governance assistance
Strategic planning advice	Insight and advice on your field	Information technology assistance
Financial planning/accounting	Introductions to leaders in field	Communications/marketing/publicity assistance
Development of performance measures	Provided research or best practices	Use of Foundation facilities
	Provided seminars/forums/convenings	Staff/management training

Based on their responses, CEP categorized grantees by the pattern of assistance they received. CEP's analysis shows that providing three or fewer assistance activities is often ineffective; it is only when grantees receive one of the two intensive patterns of assistance described below that they have a substantially more positive experience compared to grantees receiving no assistance.

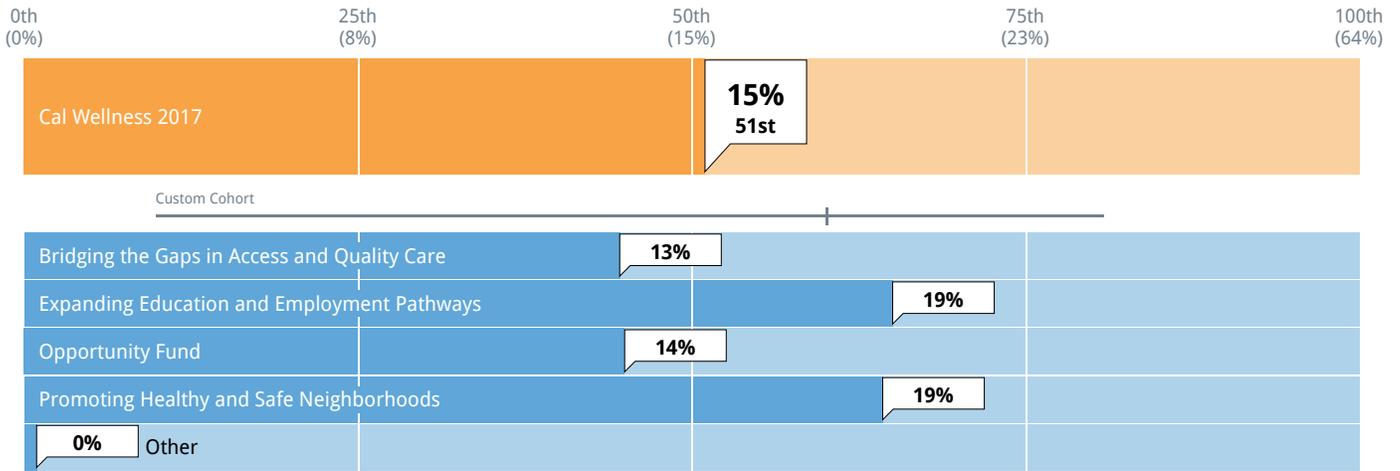


Non-Monetary Assistance Patterns	Cal Wellness 2017	Average Funder	Custom Cohort
Comprehensive	3%	7%	5%
Field-focused	12%	11%	12%
Little	42%	39%	37%
None	43%	43%	46%

Non-Monetary Assistance Patterns (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Comprehensive	3%	2%	3%	5%	0%
Field-focused	11%	17%	11%	14%	0%
Little	37%	40%	41%	54%	50%
None	49%	40%	46%	27%	50%

Grantee Responses

Proportion of grantees that received field-focused or comprehensive assistance



Cohort:

Past results: On Off

Subgroup:

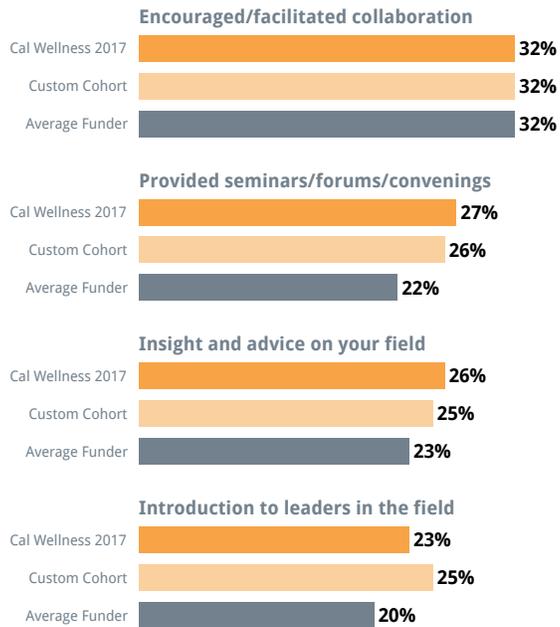
Grantees who receive field or comprehensive assistance rate significantly higher on most measures throughout the report, including impact on grantees' organizations, understanding of grantees' organizations, and the impact on the grantees' ability to continue funded work.

Field-Related Assistance Activities

"Please indicate all types of non-monetary assistance, if any, you received (from staff or a third party paid for by the Foundation) associated with this funding."

Proportion of Grantees that Received Field-Related Assistance

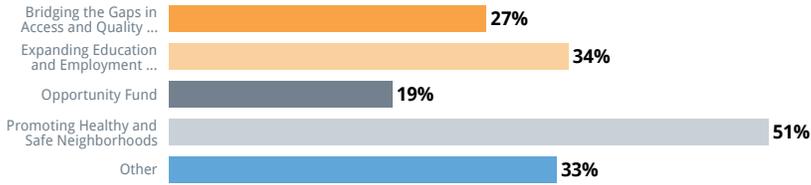
■ Cal Wellness 2017 ■ Custom Cohort ■ Average Funder



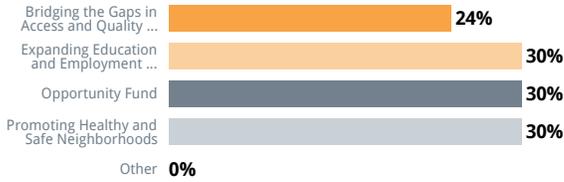
Proportion of Grantees that Received Field-Related Assistance - By Subgroup

■ Bridging the Gaps in Access and Quality Care
 ■ Expanding Education and Employment Pathways
 ■ Opportunity Fund
 ■ Promoting Healthy and Safe Neighborhoods
 ■ Other

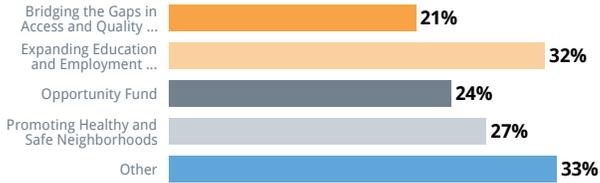
Encouraged/facilitated collaboration



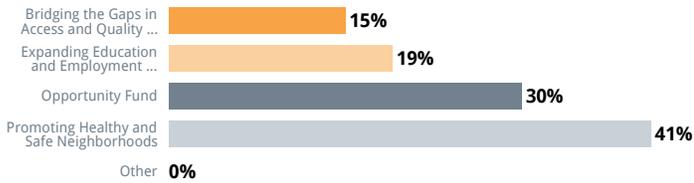
Provided seminars/forums/convenings



Insight and advice on your field



Introduction to leaders in the field

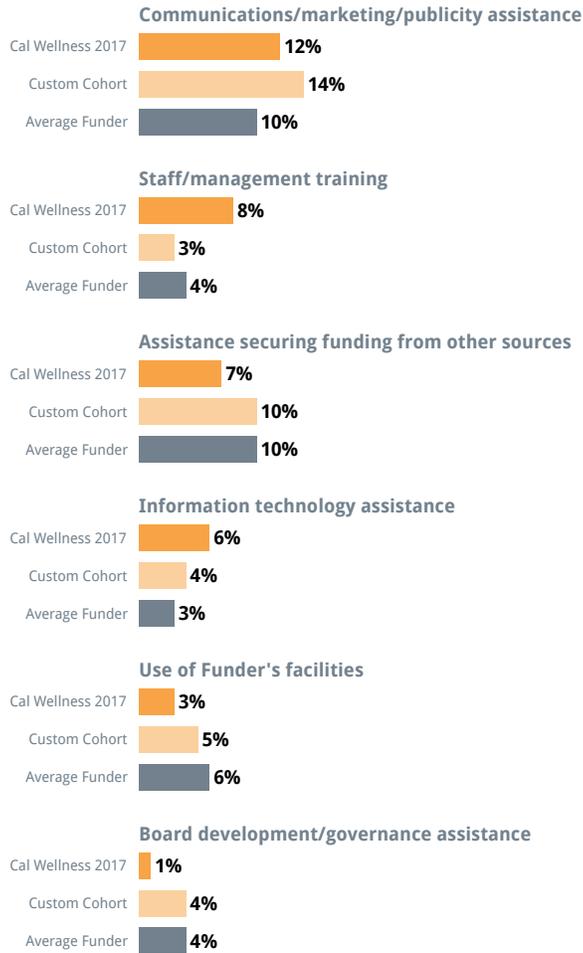


Other Assistance Activities

"Please indicate all types of non-monetary assistance, if any, you received (from staff or a third party paid for by the Foundation) associated with this funding."

Proportion of Grantees that Received Other Assistance

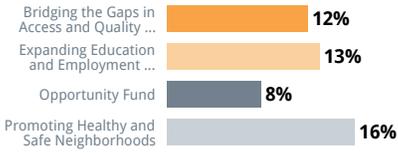
■ Cal Wellness 2017 ■ Custom Cohort ■ Average Funder



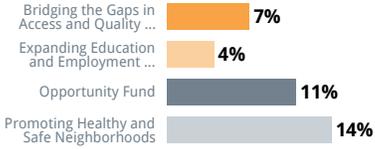
Proportion of Grantees that Received Other Assistance - By Subgroup

■ Bridging the Gaps in Access and Quality Care
 ■ Expanding Education and Employment Pathways
 ■ Opportunity Fund
 ■ Promoting Healthy and Safe Neighborhoods

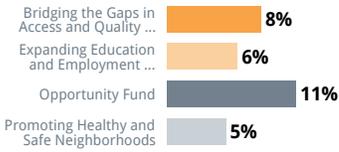
Communications/marketing/publicity assistance



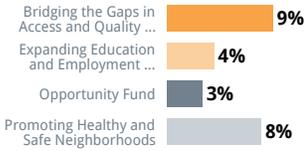
Staff/management training



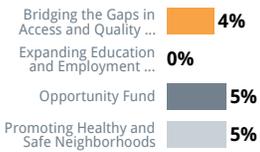
Assistance securing funding from other sources



Information technology assistance



Use of Funder's facilities



Board development/governance assistance



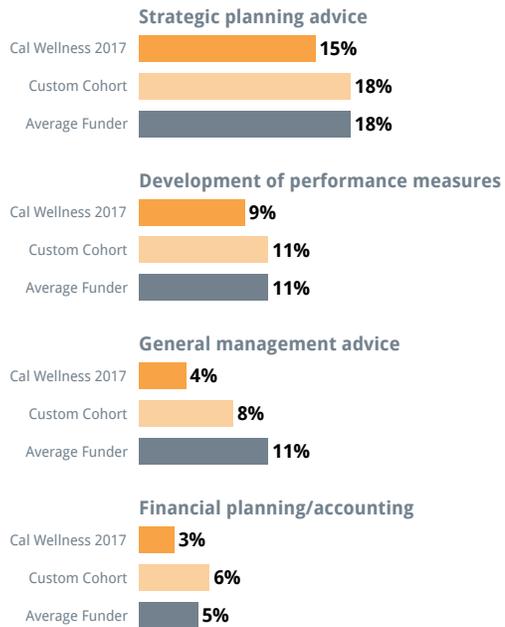
*Subgroups with less than 5 respondents are not displayed to protect respondent confidentiality.

Management Assistance Activities

"Please indicate all types of non-monetary assistance, if any, you received (from staff or a third party paid for by the Foundation) associated with this funding."

Proportion of Grantees that Received Management Assistance

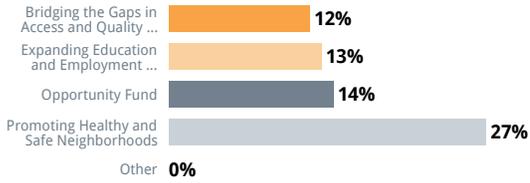
■ Cal Wellness 2017 ■ Custom Cohort ■ Average Funder



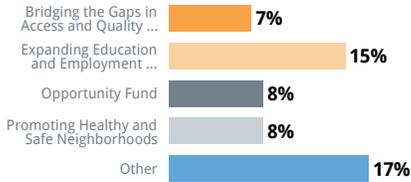
Percentage of Grantees that Received Management Assistance - By Subgroup

■ Bridging the Gaps in Access and Quality Care ■ Expanding Education and Employment Pathways ■ Opportunity Fund
■ Promoting Healthy and Safe Neighborhoods ■ Other

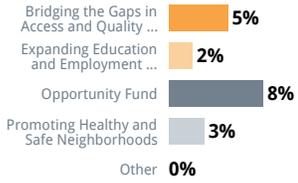
Strategic planning advice



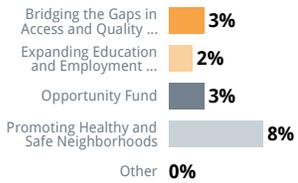
Development of performance measures



General management advice



Financial planning/accounting



Suggestions for the Foundation

Grantees and applicants were asked to provide any suggestions for how the Foundation could improve. These suggestions were then categorized by CEP and grouped into the topics below.

To download the full set of grantee and applicant comments and suggestions, please refer to the "Downloads" dropdown menu at the top right of your report. Please note that comments have been edited or deleted to protect the confidentiality of respondents.

Proportion of Grantee Suggestions by Topic

Topic of Grantee Suggestion	%
Frequency of Interactions and Responsiveness	22
Non-Monetary Support	22
Grantmaking Characteristics	16
Foundation-Wide Communication	11
Selection and Proposal Process	9
Impact on and Understanding of Grantees' Organizations	8
Impact on and Understanding of Grantees' Fields	3
Impact on and Understanding of Grantees' Communities	2
Reporting and Evaluation Process	1
Other	6

Proportion of Applicant Suggestions by Topic

Topic of Applicant Suggestion	%
Selection and Proposal Process	29
Quality of Interactions	24
Impact on and Understanding of Applicants' Organizations	9
Foundation-Wide Communication	8
Impact on and Understanding of Applicants' Communities	7
Impact on and Understanding of Applicants' Fields	5
Grantmaking Characteristics	4
Non-Monetary Support	4
Funding Strategy	3
Other	7

Selected Grantee Comments

Grantees were asked to provide any suggestions for how the Foundation could improve. These suggestions were then categorized by CEP and grouped into the topics below.

Frequency of Interactions and Responsiveness (22%)

- **Increase Frequency of Interactions (N=9)**
 - "Regular meeting in-person or via phone call with staff may help build stronger trust for better understanding about the program, projects, and activities of an organization...."
 - "I would like to be in touch with the program officer a bit more and to learn more about how the Foundation is impacting the field."
 - "Explain how best to contact them and how regularly to be in touch."
- **Increase Site Visits (N=5)**
 - "Continue site visits...."
 - "Allow staff more time in site visits."
 - "...Would really like to have 1 site visit per year."
- **Increase Responsiveness (N=4)**
 - "Currently it seems all the program officers are somewhat overwhelmed which causes delay in responses...."
 - "Again, I just can't find help when I have a question or need assistance with something."
 - "It takes a long time to get in the queue to speak with someone at Cal Wellness...."
- **Improve Individual Relationships (N=1)**
 - "They should treat prospective partners with greater respect. The whole process and experience was demoralizing for our faculty lead and the staff involved...."

Non-Monetary Support (22%)

- **Collaborate (N=6)**
 - "...More opportunities for connections with other grantees and health funders would be a plus."
 - "Would love more introductions to other grantees...."
 - "Additional collaborations with other local, state, and national funders to share best practices."
- **Assist Grantees in Securing Funding from Additional Sources (N=6)**
 - "...Introductions to other funders that support our work is always helpful."
 - "...connecting us with other, similar funders."
 - "It would be great if they introduced us to national funders."
- **Support Capacity Building (N=4)**
 - "...it will be beneficial that the Foundation expand its services in providing capacity building training to help non-profit[s] achieve long term sustainability."
 - "...If capacity building trainings are part of an on-going strategy to support grantees, we'd encourage TCWF to look at contracting with consulting."
 - "...Provide capacity building in different areas."
- **Convene Grantees (N=3)**
 - "We would greatly appreciate the opportunity for more convening with other nonprofits and funders to have the opportunity to build effective partnerships."
 - "More conferences/discussion forums in southern California...."
 - "Continue funding conferences for idea sharing... funding retreats to learn from non-profits and so we can learn from each other..."

Grantmaking Characteristics (16%)

- **Change Grant Type (N=9)**
 - "It would be most useful if we could approach Cal Wellness for core support rather than program specific funding."
 - "Again, we prefer core support. It is OK if there is a focus that we can mutually agree upon."
 - "Keep up the commitment to operating support!"
- **Increase Grant Length or Size (N=5)**
 - "...it would be helpful to receive larger granting. We love that we can get multi-year funding!"
 - "...Going back to 3-year funding would be nice. Commit, at least in theory, to continue funding an organization once that organization has performed well...."
 - "...in our experience, the foundation has begun to shorten grant periods, which has an impact on our long-term planning and the stability of our operations."

Foundation-Wide Communications (11%)

- **Increase Foundation-Wide Communications (N=5)**
 - "More PR/press releases/social media/advertising shedding light on what the grantees do (think bus/KQED/billboards/FB/twitter/major publications) -- more public campaigns...."
 - "Perhaps, webinars to community on new funding priorities...."
 - "More regular engagement and communications regarding changes at the foundation (especially with staff) and around the foundation's priorities."
- **Transparent (N=4)**
 - "Transparency and honesty with regard to funding process... foundations are very inconsistent in their funding guidelines and expectations, and the web page alone is rarely sufficient to understand the funding process."
 - "A grantee meeting annually to review reporting requirements and priorities."

- "The ONLY thing I can think of is maybe a little more clarity about the ability to be funded in different funding streams from Cal Wellness...."

- **Website (N=1)**

- "Website could be improved...."

Selection and Proposal Process (9%)

- **Streamline Processes (N=4)**

- "Improving and simplifying the grant application process would be very helpful."
- "Their portal for grants and reporting isn't very user-friendly."
- "A faster process to renew grants."

- **Funding Guidelines (N=2)**

- "Clearer funding guidelines. Clearer reporting guidelines. Provide a link for current grantees to check on status of reports to them...."
- "Clear[er] funding guidelines given the new political environment."

- **Provide Timelines (N=1)**

- "TCWF staff should provide better timelines and expectations for potential grantees."

- **Time Between Submission and Commitment to Funding (N=1)**

- "A shorter decision-making process would be helpful...."

Impact on and Understanding of Grantees' Organizations (8%)

- **Fund Certain Types of Organizations (N=6)**

- "Continue to support organizations that share the Foundation's values..."
- "Perhaps [Cal] Wellness could take on more risk by grantmaking to unusual suspects...."
- "Please, consider a start-up NPO or not well established organization, which has potential to help communities, and good causes, for your grant."

- **Improve Understanding of Grantees' Organizations (N=1)**

- "It would be great if Cal Wellness can spend more time getting to know CA tribal health organizations so that the foundation can have a deeper engagement and understanding of the multifaceted and multi-pronged strategies being employed by tribal organizations...."

Impact on and Understanding of Grantees' Fields (3%)

- **Public Policy (N=1)**

- "Focus as much as possible on ameliorating the root causes of environmental health problems by improving public policy and public investments, and enforcing of key public-interest laws such as the Clean Water Act, Clean Air Act, and Public Trust Doctrine...."

- **Advance Knowledge in the Field (N=1)**

- "I do hope that they can continue to educate other foundations on the importance of these areas of interest as well as demonstrating the effectiveness of their management style..."

- **Fund Certain Fields (N=1)**

- "Consider funding a broader range of health reform strategies."

Impact on and Understanding of Grantees' Communities (2%)

- **Improve Understanding of Grantees' Communities (N=2)**

- "...The level of need for the organization in the community should also be an overriding factor...."
- "Continue to listen to the needs of the community per county."

Reporting and Evaluation Process (1%)

- **Discuss Assessments with Grantees (N=1)**

- "More hands-on support when it comes to program evaluation and measurement would be helpful"

Other (6%)

Selected Applicant Comments

Applicants were asked to provide any suggestions for how the Foundation could improve. These suggestions were then categorized by CEP and grouped into the topics below.

Selection and Proposal Process (29%)

- **Increase Discussions Regarding Proposals (N=23)**
 - "A denial letter via email should come with additional information on how to better prepare for a new submittal proposal or at least send information on any organizations that help nonprofits or groups..."
 - "More personal outreach/follow up and more information on the decision to decline the LOI."
 - "I feel a clear explanation should be given as to why the LOI was declined and perhaps some guidance for a successful outcome to help the organization, should they decide to apply in future."
- **Funding Guidelines (N=14)**
 - "Guidelines need to be a bit more fluid in terms of populations served and projects -- otherwise there will be a very narrow pool of applicants who qualify."
 - "Would be helpful on the grant instructions to have a discussion on ranges of funding that may be appropriate, particularly for organizations without a long track record."
 - "...They could have a statement "we do not fund x,y,z" that would include things they could potentially fit into their guidelines, but that they don't fund."
- **Provide Timelines (N=4)**
 - "I think having a specific deadline for proposals and having funding priorities specifically related and clearly outlined as responding to the needs of community health centers would be beneficial."
 - "Think having a better sense of timeline and decision making process would be helpful."
 - "For future RFP's, provide more advance time to submit the proposal."
- **Streamline Processes (N=1)**
 - "Shorten the LOI process..."
- **Time Between Submission and Commitment to Funding (N=1)**
 - "It took 4 - 6 months to be told we had been rejected."
- **Other (N=1)**

Quality of Interactions (24%)

- **Increase Frequency of Interactions (N=15)**
 - "Have a more active human presence in the community at events and visiting organizations."
 - "I would like to be able to meet with Cal Wellness staff and provide information about our work."
 - "There should be at least an opportunity to talk to staff about what you are proposing before applying."
- **Increase Site Visit (N=11)**
 - "I would encourage TCWF's staff to visit South Los Angeles to gain specific first-hand experience with the needs of the community served."
 - "I suggest having a staff from Cal Wellness visit the site that are requesting funding to see if they are providing services that works with the community and builds healthy community."
 - "Visits to local agencies to measure effectiveness."
- **Improve Responsiveness (N=7)**
 - "I think they can be more responsive to requests for a call or meeting and be more honest about the fit and likelihood of getting funding. It would save everyone's time."
 - "More timely responses to requests for information."
 - "Require program officers to return all calls and emails. Look, we are all busy but everyone deserves a response."
- **Improve Quality of Interactions (N=3)**
 - "Being open to actually having a conversation would be a significant improvement."
 - "...Greater humility and less arrogance."
 - "...Improve communication. Sending just an email for a rejection is unprofessional. A formal rejection letter from the foundation, should always be in order..."

Impact on and Understanding of Applicants' Organizations (9%)

- **Understanding of Applicants' Organizations (N=7)**
 - "...there are several areas that we need to strengthen in order to better serve our communities. We need help in doing that. We'd like the Foundation to understand that size is only one determinant of effectiveness."
 - "[We'd like] for the foundation to have a clear understanding of the organization's mission, goals and strategy as well as the needs in our community."
 - "To learn more about the organization's work and needs before making decisions."
- **Fund Certain Organizations (N=7)**
 - "...I would like to see cornerstone organizations receive more funding to re-grant to smaller coalitions and small startup community organizations."
 - "...We recommend Cal Wellness to continue investing in grassroots organizations."
 - "Help smaller non-profits more."

Foundation-Wide Communication (8%)

- **Prioritize Transparency (N=9)**
 - "If TCWF is going to shift away from multi-year grants they should inform us in year two"
 - "Openly communicating the total amount annually to be expended within in each funding category would allow us to better tailor our request amounts in the future."
 - "More transparency up front about our chances of getting funded...."
- **Increase Communications(N=2)**
 - "Some communication, any communication would be helpful."
 - "Increase communications."
- **Website (N=1)**
 - "Website could be better positioned. I think Robert Wood Johnson Foundation and California Endowment do a great job at positioning the broad scope of their priorities and good examples of how it can get executed."

Impact on and Understanding of Applicants' Communities (7%)

- **Increase Understanding of Applicants' Communities (N=8)**
 - "Understanding that communities' needs are varied and not be limited to one funding focus area..."
 - "Perhaps having more direct contact with communities you hope to impact? For example, engagement in community forums or panels..."
 - "Truly understand the limited access to funding for economically depressed communities where population is a factor is acquiring government grants."
- **Fund Certain Communities (N=3)**
 - "Please consider funding more proposals for rural areas in California. There are critical health care needs to be met and limited local grant-giving organizations."
 - "More specific focus areas to geographical locations. For example, the needs in Central Orange County are much different from Downtown Los Angeles."
 - "...I would ask that a consideration for being a better funder would be to grant general operating funds to rural and remote proposals without unrealistic requirements for innovation or evaluation."

Impact on and Understanding of Applicants' Fields (5%)

- **Fund Certain Fields (N=7)**
 - "I think Cal Wellness is very good in how it funds and does have a good reputation in the nonprofit community. If anything it would be excellent if more funds could be focused on the physical and mental health of female Veterans and the caretakers of Veterans."
 - "Consider the advantages arts serves in bettering the overall wellness of individuals and communities."
 - "...Enlarging the concept of at risk youth to include children of prisoners and addicts who were never removed from their dysfunctional homes rather than just juvenile offenders and foster children."

Grantmaking Characteristics (4%)

- **Grant Type (N=4)**
 - "Continue to support core operating support for direct services and community based organizations."
 - "Offer general operating funds. This is what we all need the most...."
 - "...I would ask that a consideration for being a better funder would be to grant general operating funds to rural and remote proposals without unrealistic requirements for innovation or evaluation."
- **Grant Size (N=2)**
 - "Without additional funding we cannot hire more employees or commit dollars to do so."
 - "I believe Cal Wellness should give smaller funding for new organization with assistance to help improve...."

Non-Monetary Support (4%)

- **Provide Capacity Building Support (N=3)**
 - "...understanding of the important commitment to building capacity...."
 - "Technical support and grant awareness opportunities."
 - "...Work with these direct service organizations to help build the capacity for systems change rather than immediately dismissing them."
- **Assist Applicants in Securing Funds Outside the Foundation (N=2)**
 - "...send information on any organizations that help nonprofits or groups that help children and people who are under low poverty incomes or no income at all."
 - "...offer other suggestions for how the proposal might get funded by another funder or source...."
- **Convene Applicants (N=1)**
 - "...Please consider organizing funder briefings for your impact areas to bring together CBOs and other potential funders."

Funding Strategy (3%)

- **Reconsider Overall Priorities/Approach (N=5)**
 - "Take on some "riskier" approaches to solving public health issues."
 - "I believe that it is difficult for Cal Wellness to be seen as a leader in the field of public health advocacy if it is unwilling to seriously consider innovative proposals that don't fit neatly within the four corners of their program areas."
 - "We would like Cal Wellness to consider additional programs to be funded. It is important that the Foundation research to make sure that the groups who are requesting funding are in fact the groups actually doing the work."

Other (7%)

Contextual Data

Grantee Responses

Grantmaking Characteristics

Length of Grant Awarded	Cal Wellness 2017	Median Funder	Custom Cohort
Average grant length	2.6 years	2.1 years	2.3 years

Length of Grant Awarded	Cal Wellness 2017	Average Funder	Custom Cohort
1 year	8%	46%	34%
2 years	28%	24%	34%
3 years	63%	18%	24%
4 years	1%	4%	2%
5 or more years	2%	8%	6%

Type of Grant Awarded	Cal Wellness 2017	Average Funder	Custom Cohort
Program / Project Support	48%	65%	59%
General Operating / Core Support	47%	21%	32%
Capital Support: Building / Renovation / Endowment Support / Other	0%	6%	2%
Technical Assistance / Capacity Building	1%	4%	5%
Scholarship / Fellowship	2%	2%	1%
Event / Sponsorship Funding	0%	2%	2%

Grantmaking Characteristics - By Subgroup

Length of Grant Awarded (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Average grant length	2.9 years	2.9 years	2.1 years	2.6 years	1.9 years

Length of Grant Awarded (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
1 year	3%	0%	25%	8%	17%
2 years	22%	22%	42%	27%	67%
3 years	72%	76%	33%	65%	17%
4 years	1%	0%	0%	0%	0%
5 or more years	3%	2%	0%	0%	0%

Type of Grant Awarded (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Program / Project Support	37%	62%	53%	43%	83%
General Operating / Core Support	57%	38%	36%	54%	17%
Capital Support: Building / Renovation / Endowment Support / Other	0%	0%	3%	0%	0%
Technical Assistance / Capacity Building	1%	0%	3%	3%	0%
Scholarship / Fellowship	4%	0%	6%	0%	0%
Event / Sponsorship Funding	0%	0%	0%	0%	0%

Grant Size

Grant Amount Awarded	Cal Wellness 2017	Median Funder	Custom Cohort
Median grant size	\$200.0K	\$82.5K	\$177.6K

Grant Amount Awarded	Cal Wellness 2017	Average Funder	Custom Cohort
Less than \$10K	1%	10%	3%
\$10K - \$24K	0%	13%	12%
\$25K - \$49K	5%	13%	9%
\$50K - \$99K	2%	16%	11%
\$100K - \$149K	9%	9%	9%
\$150K - \$299K	67%	16%	27%
\$300K - \$499K	13%	8%	14%
\$500K - \$999K	5%	7%	9%
\$1MM and above	1%	8%	5%

Median Percent of Budget Funded by Grant (Annualized)	Cal Wellness 2017	Median Funder	Custom Cohort
Size of grant relative to size of grantee budget	3%	4%	5%

Grant Size - By Subgroup

Grant Amount Awarded (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Median grant size	\$200.0K	\$200.0K	\$175.0K	\$200.0K	\$157.5K

Grant Amount Awarded (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Less than \$10K	0%	0%	3%	3%	0%
\$10K - \$24K	0%	0%	0%	0%	0%
\$25K - \$49K	0%	0%	25%	0%	0%
\$50K - \$99K	1%	0%	3%	0%	17%
\$100K - \$149K	8%	7%	11%	5%	33%
\$150K - \$299K	68%	80%	44%	76%	33%
\$300K - \$499K	17%	9%	6%	14%	17%
\$500K - \$999K	5%	2%	8%	3%	0%
\$1MM and above	0%	2%	0%	0%	0%

Median Percent of Budget Funded by Grant (Annualized) (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Size of grant relative to size of grantee budget	4%	3%	2%	5%	3%

Application Characteristics

Applicant Responses

Type of Grant Requested	Cal Wellness 2017	Average Funder
Program/project support	59%	71%
General operating	34%	11%
Scholarship or research fellowship	1%	1%
Technical assistance/capacity building	1%	5%
Event/sponsorship funding	2%	1%
Capital support: building/renovation/endowment support/other	2%	11%

Grant Amount Requested	Cal Wellness 2017	Median Funder
Median Grant Amount	\$100.0K	\$50.0K

Grant Amount Requested	Cal Wellness 2017	Average Funder
Less than \$10K	3%	9%
\$10K - \$24K	9%	20%
\$25K - \$49K	10%	18%
\$50K - \$99K	20%	20%
\$100K - \$149K	17%	10%
\$150K - \$299K	29%	12%
\$300K - \$499K	11%	5%
\$500K - \$999K	0%	3%
\$1MM and above	1%	2%

Application Characteristics - By Subgroup

Type of Grant Requested (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Program/project support	57%	62%	41%	67%	54%
General operating	38%	38%	38%	31%	0%
Scholarship or research fellowship	0%	0%	8%	0%	8%
Technical assistance/capacity building	0%	0%	8%	0%	0%
Event/sponsorship funding	0%	0%	3%	0%	38%
Capital support: building/renovation/endowment support/other	5%	0%	3%	1%	0%

Grant Amount Requested (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Median Grant Amount	\$100.0K	\$150.0K	\$62.5K	\$100.0K	\$37.5K

Grant Amount Requested (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Less than \$10K	2%	3%	4%	0%	38%
\$10K - \$24K	13%	7%	7%	9%	0%
\$25K - \$49K	6%	8%	18%	10%	13%
\$50K - \$99K	19%	12%	29%	22%	25%
\$100K - \$149K	17%	12%	14%	23%	0%
\$150K - \$299K	27%	42%	25%	23%	25%
\$300K - \$499K	12%	14%	4%	13%	0%
\$500K - \$999K	2%	0%	0%	0%	0%
\$1MM and above	2%	2%	0%	0%	0%

Grantee/Applicant Characteristics

Operating Budget of Grantee Organizations

Operating Budget of Grantee Organization	Cal Wellness 2017	Median Funder	Custom Cohort
Median Budget	\$2.2M	\$1.5M	\$2.4M

Operating Budget of Grantee Organization	Cal Wellness 2017	Average Funder	Custom Cohort
<\$100K	1%	9%	4%
\$100K - \$499K	11%	20%	16%
\$500K - \$999K	13%	13%	14%
\$1MM - \$4.9MM	43%	30%	34%
\$5MM - \$24MM	25%	18%	20%
>=\$25MM	7%	11%	12%

Operating Budget of Grantee Organization (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Median Budget	\$2.2M	\$3.0M	\$4.0M	\$1.6M	\$3.3M

Operating Budget of Grantee Organization (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
<\$100K	1%	0%	0%	0%	0%
\$100K - \$499K	13%	9%	17%	6%	0%
\$500K - \$999K	13%	5%	14%	24%	0%
\$1MM - \$4.9MM	38%	45%	33%	58%	67%
\$5MM - \$24MM	25%	32%	31%	9%	33%
>=\$25MM	10%	9%	6%	3%	0%

Operating Budget of Applicant Organizations

Operating Budget of Applicant Organization	Cal Wellness 2017	Median Funder
Median Budget	\$1.2M	\$0.6M

Operating Budget of Applicant Organization	Cal Wellness 2017	Average Funder
Less than \$100K	6%	16%
\$100K-\$499K	21%	29%
\$500K-\$999K	17%	12%
\$1MM-\$4.9MM	28%	24%
\$5MM-\$25MM	18%	11%
\$25MM and above	10%	8%

Operating Budget of Applicant Organization (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Median Budget	\$2.5M	\$2.0M	\$1.0M	\$0.8M	\$1.7M

Operating Budget of Applicant Organization (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Less than \$100K	3%	6%	5%	9%	0%
\$100K-\$499K	8%	16%	30%	30%	17%
\$500K-\$999K	21%	17%	5%	21%	17%
\$1MM-\$4.9MM	27%	29%	43%	21%	33%
\$5MM-\$25MM	24%	23%	11%	15%	17%
\$25MM and above	17%	10%	5%	5%	17%

Additional Grantee Characteristics

Pattern of Grantees' Funding Relationship with the Foundation	Cal Wellness 2017	Average Funder	Custom Cohort
First grant received from the Foundation	32%	29%	28%
Consistent funding in the past	42%	52%	52%
Inconsistent funding in the past	26%	19%	21%

Funding Status and Grantees Previously Declined Funding	Cal Wellness 2017	Median Funder	Custom Cohort
Percent of grantees currently receiving funding from the Foundation	94%	80%	72%
Percent of grantees previously declined funding by the Foundation	42%	31%	36%

Pattern of Grantees' Funding Relationship with the Foundation (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
First grant received from the Foundation	22%	26%	41%	49%	50%
Consistent funding in the past	42%	49%	35%	38%	50%
Inconsistent funding in the past	36%	26%	24%	14%	0%

Funding Status and Grantees Previously Declined Funding (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Percent of grantees currently receiving funding from the Foundation	96%	96%	92%	100%	33%
Percent of grantees previously declined funding by the Foundation	39%	46%	52%	38%	20%

Grantee Demographics

Job Title of Respondents	Cal Wellness 2017	Average Funder	Custom Cohort
Executive Director	51%	47%	48%
Other Senior Management	12%	15%	17%
Project Director	10%	12%	12%
Development Director	13%	9%	8%
Other Development Staff	8%	7%	6%
Volunteer	0%	1%	1%
Other	5%	9%	8%

Gender of Respondents	Cal Wellness 2017	Average Funder	Custom Cohort
Female	70%	64%	67%
Male	30%	36%	33%

Race/Ethnicity of Respondents	Cal Wellness 2017	Average Funder	Custom Cohort
Multi-racial	6%	3%	4%
African-American/Black	12%	7%	9%
Asian (incl. Indian subcontinent)	8%	3%	5%
Hispanic/Latino	14%	5%	10%
American Indian/Alaskan Native	1%	1%	2%
Pacific Islander	1%	0%	0%
Caucasian/White	56%	80%	70%
Other	2%	1%	1%

Applicant Demographics

Job Title of Respondents	Cal Wellness 2017	Average Funder
Executive Director/CEO	51%	46%
Other Senior Management	12%	12%
Project Director	4%	10%
Development Director	16%	11%
Other Development Staff	13%	7%
Volunteer	2%	2%
Other	4%	11%

Gender of Respondents	Cal Wellness 2017	Average Funder
Male	30%	35%
Female	65%	62%

Race/Ethnicity of Respondents	Cal Wellness 2017	Average Funder
Caucasian/White	59%	78%
African-American/Black	11%	11%
Hispanic/Latino	16%	5%
Asian (incl. Indian subcontinent)	6%	2%
Multi-racial	5%	2%
American Indian/Alaskan Native	0%	1%
Pacific Islander	0%	0%
Other	1%	2%

Funder Characteristics

Financial Information	Cal Wellness 2017	Median Funder	Custom Cohort
Total assets	\$0.9B	\$0.2B	\$1.1B
Total giving	\$39.8M	\$15.7M	\$50.3M

Funder Staffing	Cal Wellness 2017	Median Funder	Custom Cohort
Total staff (FTEs)	36	15	43
Percent of staff who are program staff	39%	40%	40%

Grantmaking Processes	Cal Wellness 2017	Median Funder	Custom Cohort
Proportion of grants that are proactive	67%	44%	53%
Proportion of grantmaking dollars that are proactive	N/A	60%	62%

Cal Wellness-Specific Questions

Grantee Responses

Did someone from your organization speak to a Cal Wellness staff member about the content of your LOI prior to submitting it?	Cal Wellness 2017
Yes, we did speak to a staff member about our LOI	85%
No, we did not speak to a staff member about our LOI, but we would have liked to	6%
No, we did not feel we needed to speak to a staff member about our LOI	9%

Did someone from your organization speak to a Cal Wellness staff member about the content of your LOI prior to submitting it? (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Yes, we did speak to a staff member about our LOI	80%	95%	78%	85%	100%
No, we did not speak to a staff member about our LOI, but we would have liked to	8%	2%	9%	6%	0%
No, we did not feel we needed to speak to a staff member about our LOI	12%	2%	13%	9%	0%

Applicant Responses

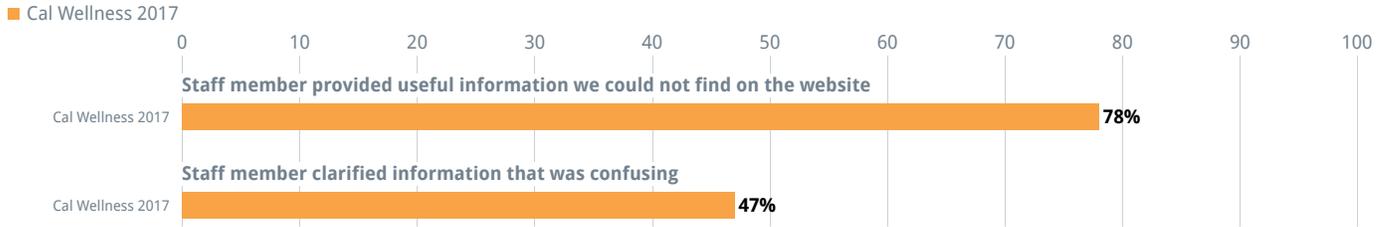
Did someone from your organization speak to a Cal Wellness staff member about the content of your LOI prior to submitting it?	Cal Wellness 2017
Yes, we did speak to a staff member about our LOI	44%
No, we did not speak to a staff member about our LOI, but we would have liked to	41%
No, we didn't feel we needed to speak to a staff member about our LOI	15%

Did someone from your organization speak to a Cal Wellness staff member about the content of your LOI prior to submitting it? (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Yes, we did speak to a staff member about our LOI	37%	43%	45%	48%	45%
No, we did not speak to a staff member about our LOI, but we would have liked to	44%	39%	42%	40%	45%
No, we didn't feel we needed to speak to a staff member about our LOI	19%	17%	12%	12%	9%

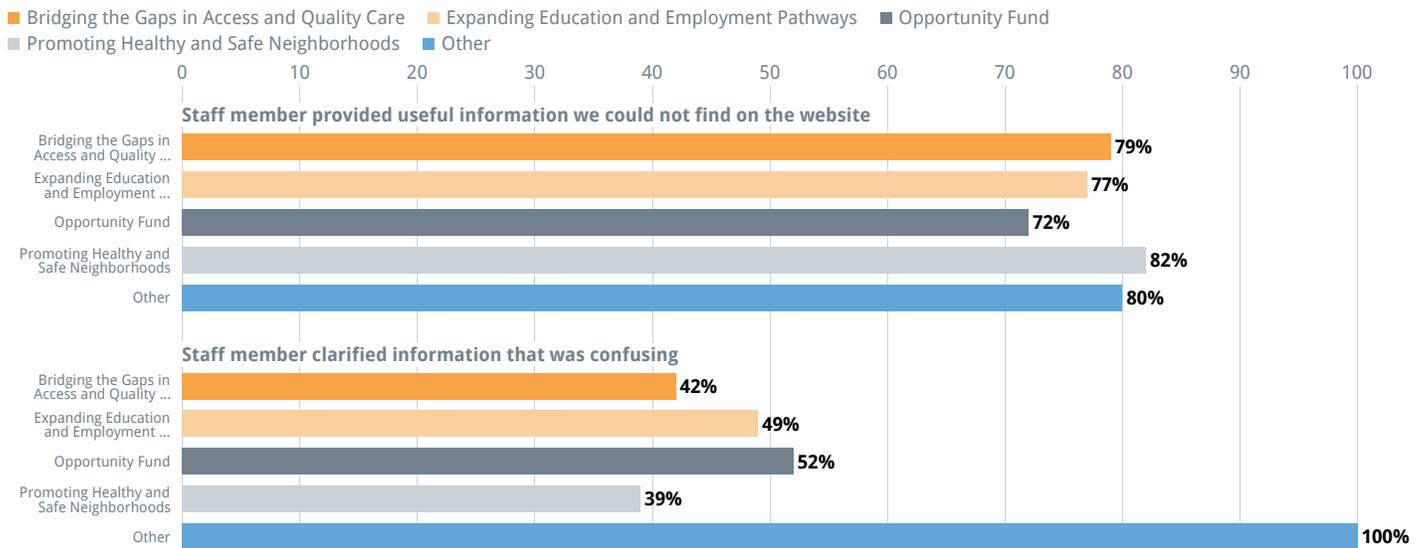
Grantee Responses

"Which of the following statements best describes your interaction with a Cal Wellness staff member prior to submitting your LOI?"

Interaction with Cal Wellness Staff - Overall



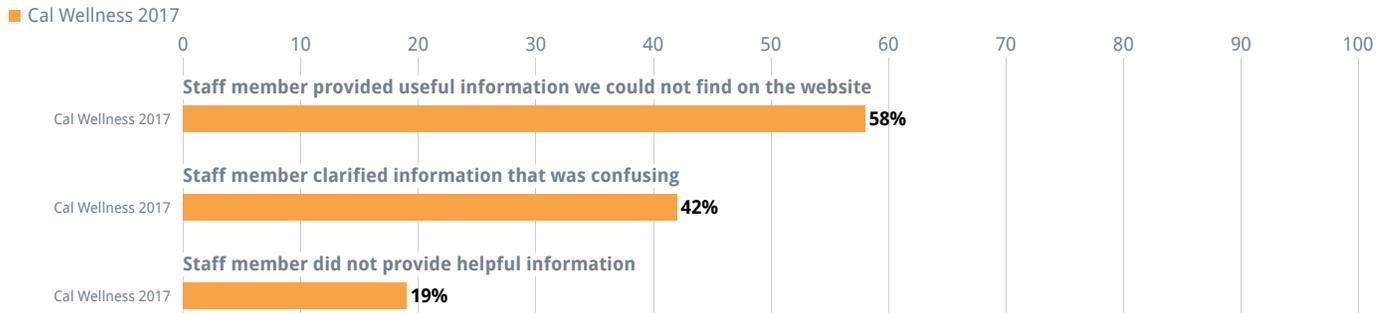
Interaction with Cal Wellness Staff - By Subgroup



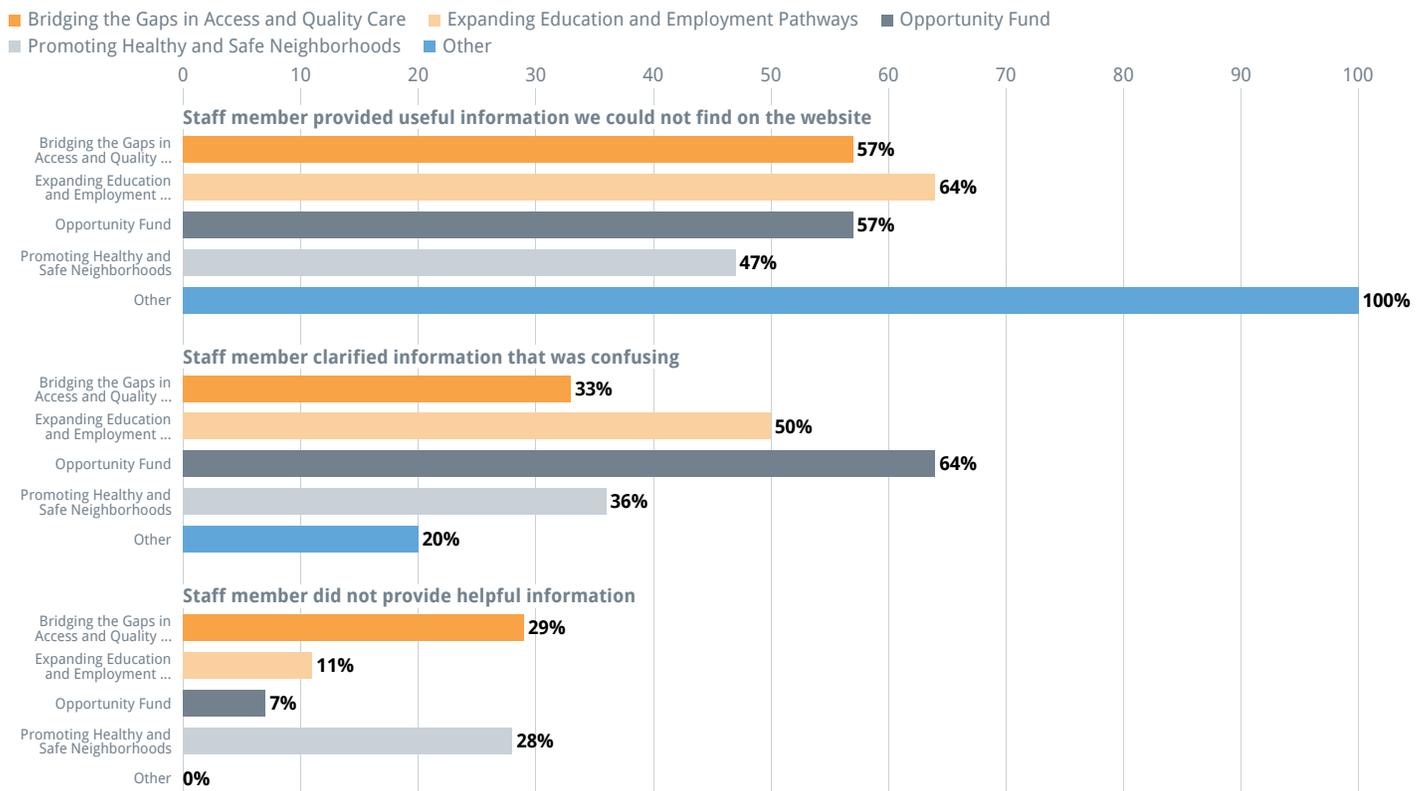
Applicant Responses

"Which of the following statements best describes your interaction with a Cal Wellness staff member prior to submitting your LOI?"

Interactions with Cal Wellness Staff - Overall



Interactions with Cal Wellness Staff - By Subgroup

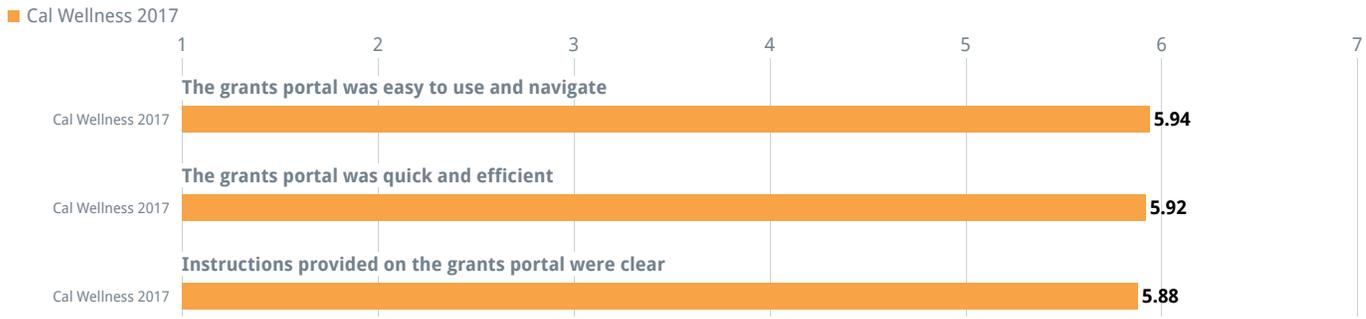


Grantee Responses

"Since September 2014, Cal Wellness has accepted LOIs, proposals and grant report forms via its online grants portal. Based on your experience using the online grants portal, how strongly do you agree or disagree with the following statements:"

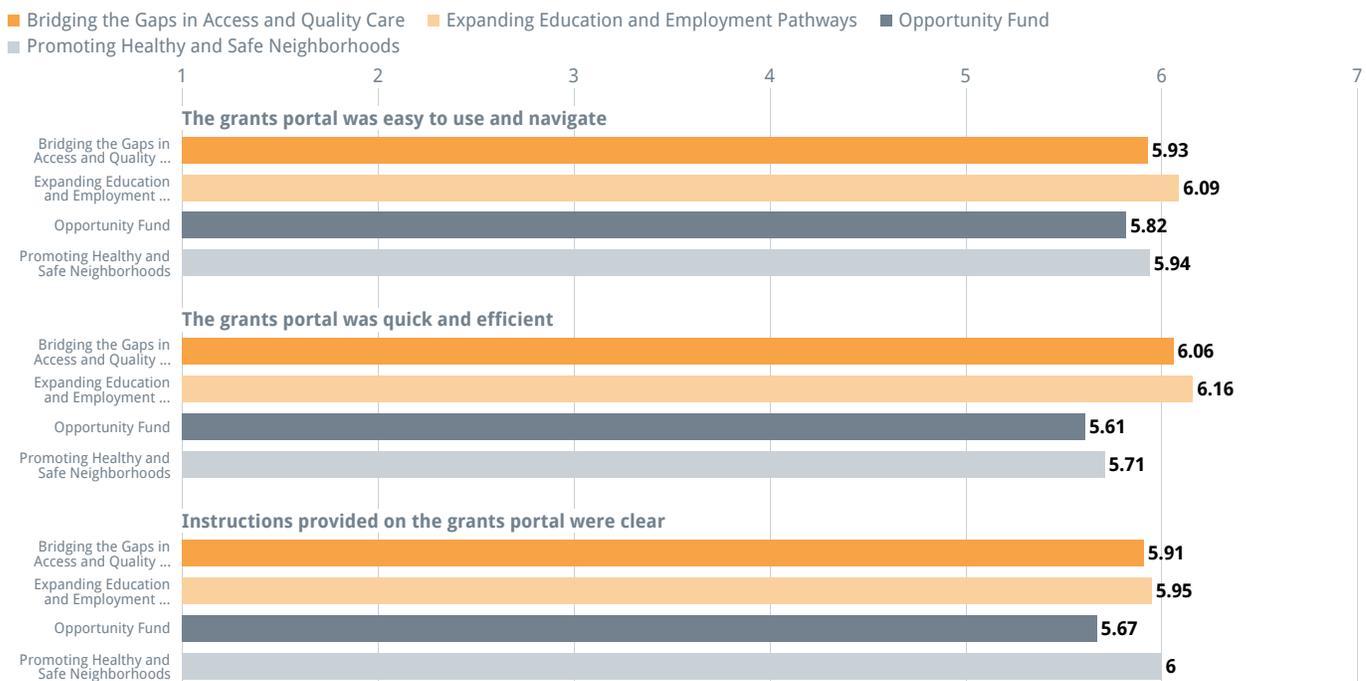
Grants Portal - Overall

1 = Strongly disagree 7 = Strongly agree



Grants Portal - By Subgroup

1 = Strongly disagree 7 = Strongly agree



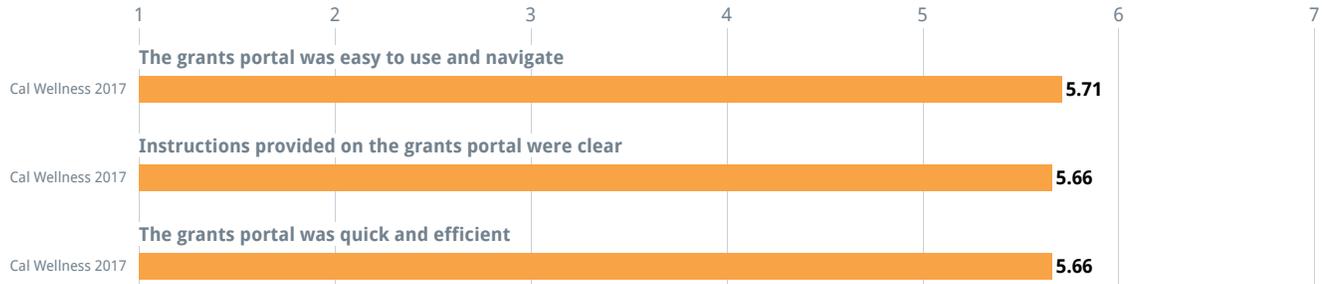
Applicant Responses

"Since September 2014, Cal Wellness has accepted LOIs, proposals and grant report forms via its online grants portal. Based on your experience using the online grants portal, how strongly do you agree or disagree with the following statements:"

Grants Portal - Overall

1 = Strongly disagree 7 = Strongly agree

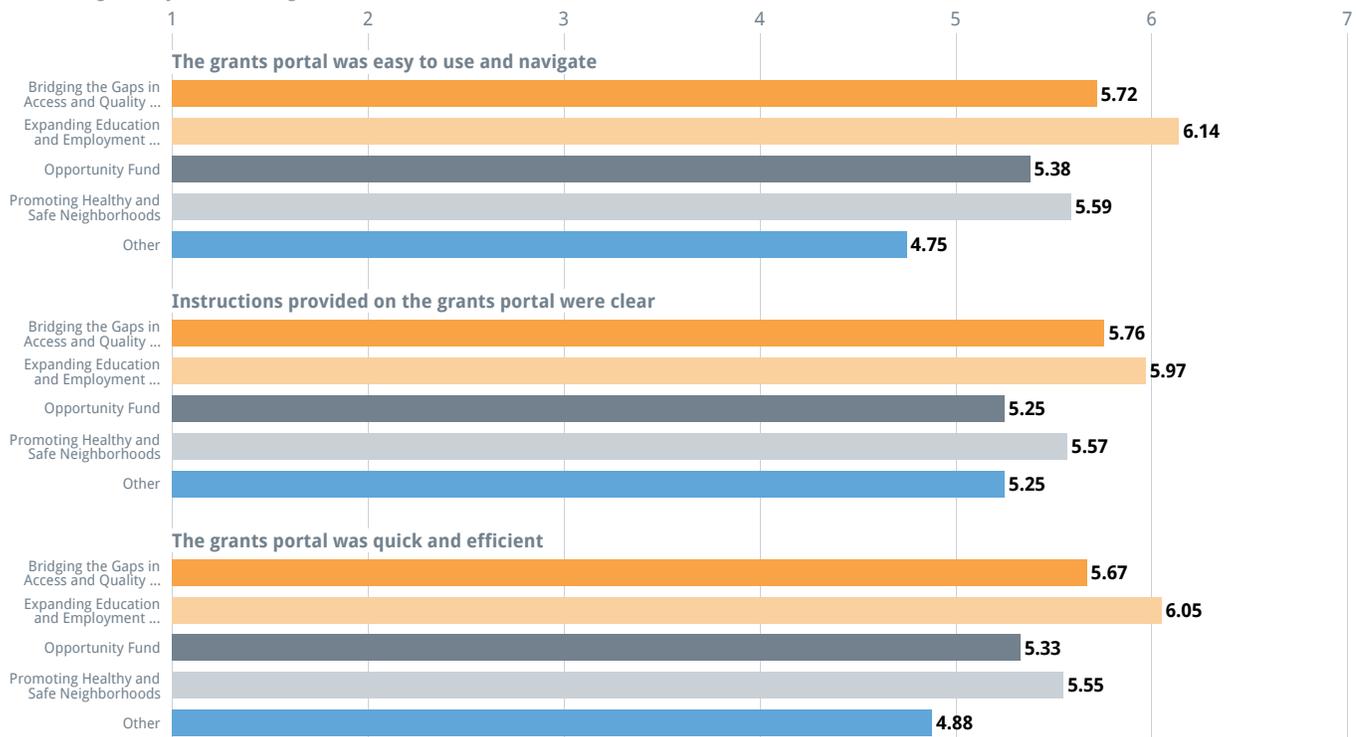
Cal Wellness 2017



Grants Portal - By Subgroup

1 = Strongly disagree 7 = Strongly agree

■ Bridging the Gaps in Access and Quality Care
 ■ Expanding Education and Employment Pathways
 ■ Opportunity Fund
 ■ Promoting Healthy and Safe Neighborhoods
 ■ Other



Resources Used by Grantees

Grantee Responses

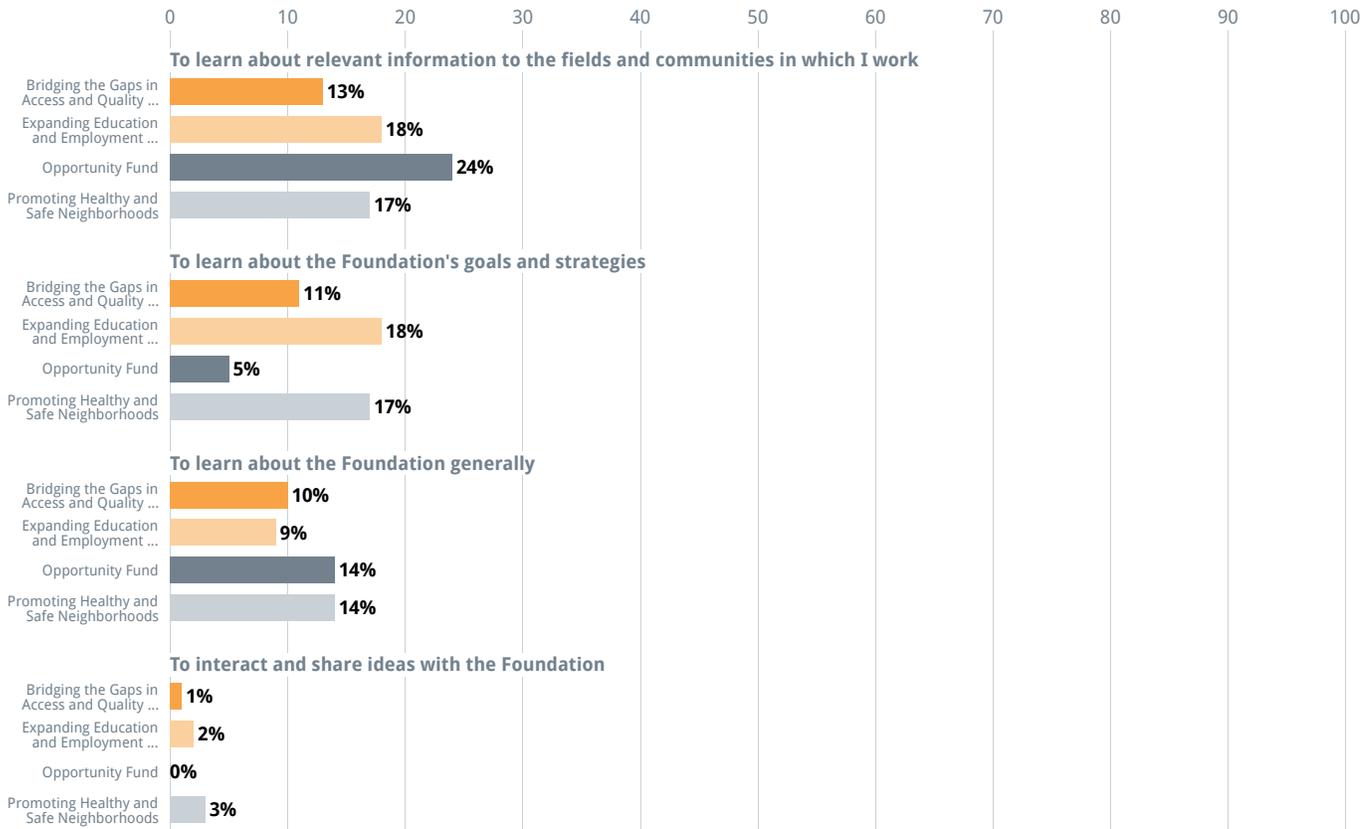
"Thinking about your use of online resources created by the Foundation or its staff, please indicate which Foundation resources you use and for what purpose you use them."

Use of Blogs - Overall

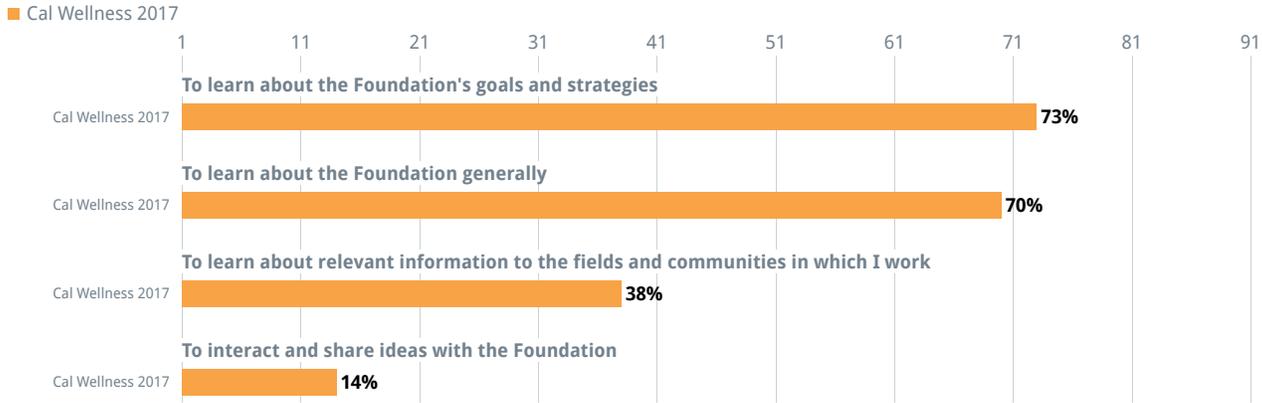


Use of Blogs - By Subgroup

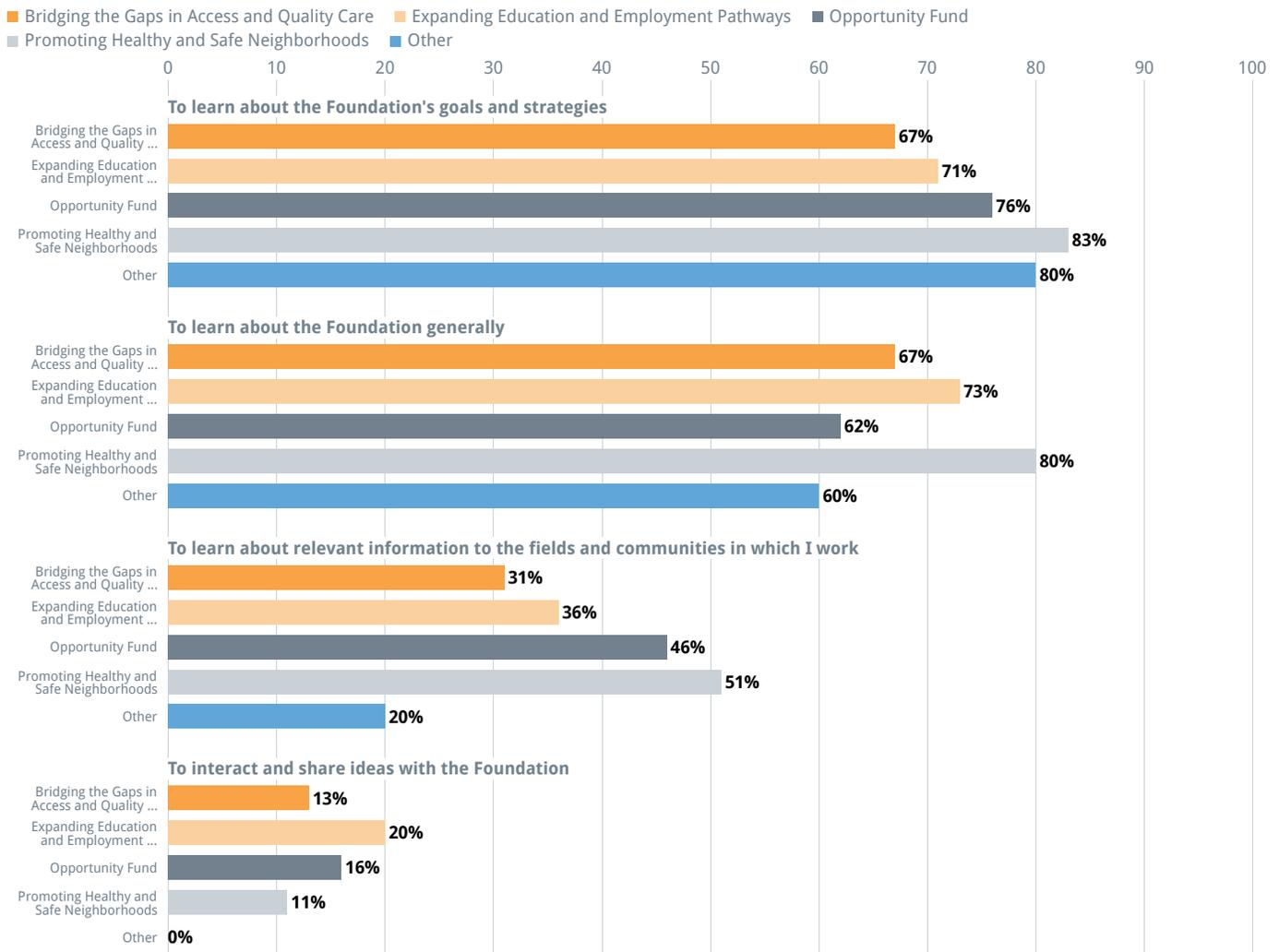
■ Bridging the Gaps in Access and Quality Care
 ■ Expanding Education and Employment Pathways
 ■ Opportunity Fund
 ■ Promoting Healthy and Safe Neighborhoods



Use of Website - Overall



Use of Website - By Subgroup



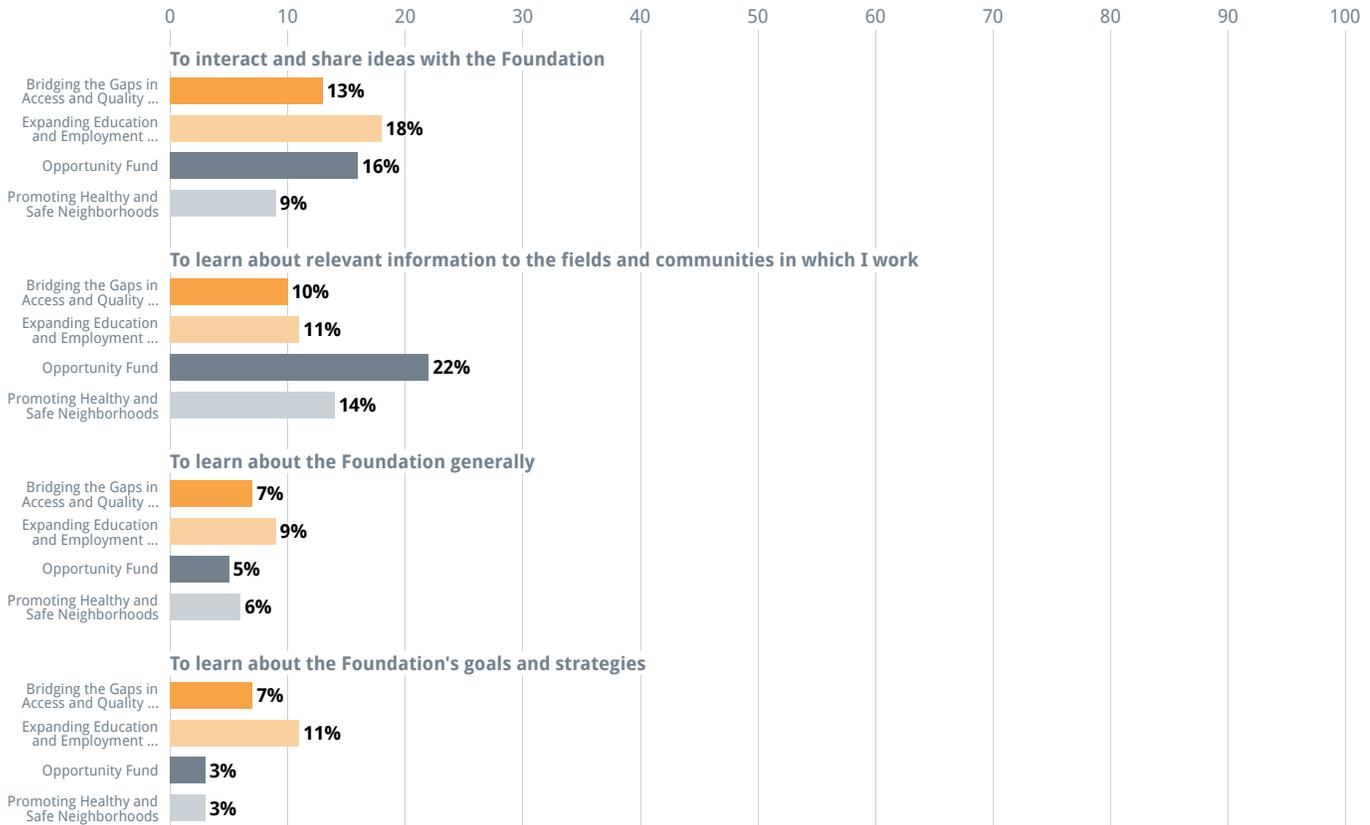
Use of Twitter - Overall

Cal Wellness 2017



Use of Twitter - By Subgroup

■ Bridging the Gaps in Access and Quality Care
 ■ Expanding Education and Employment Pathways
 ■ Opportunity Fund
 ■ Promoting Healthy and Safe Neighborhoods



Use of Youtube - Overall



Use of Youtube - By Subgroup



*Subgroups with less than 5 respondents are not displayed to protect respondent confidentiality.

Resources Used by Applicants

Applicant Responses

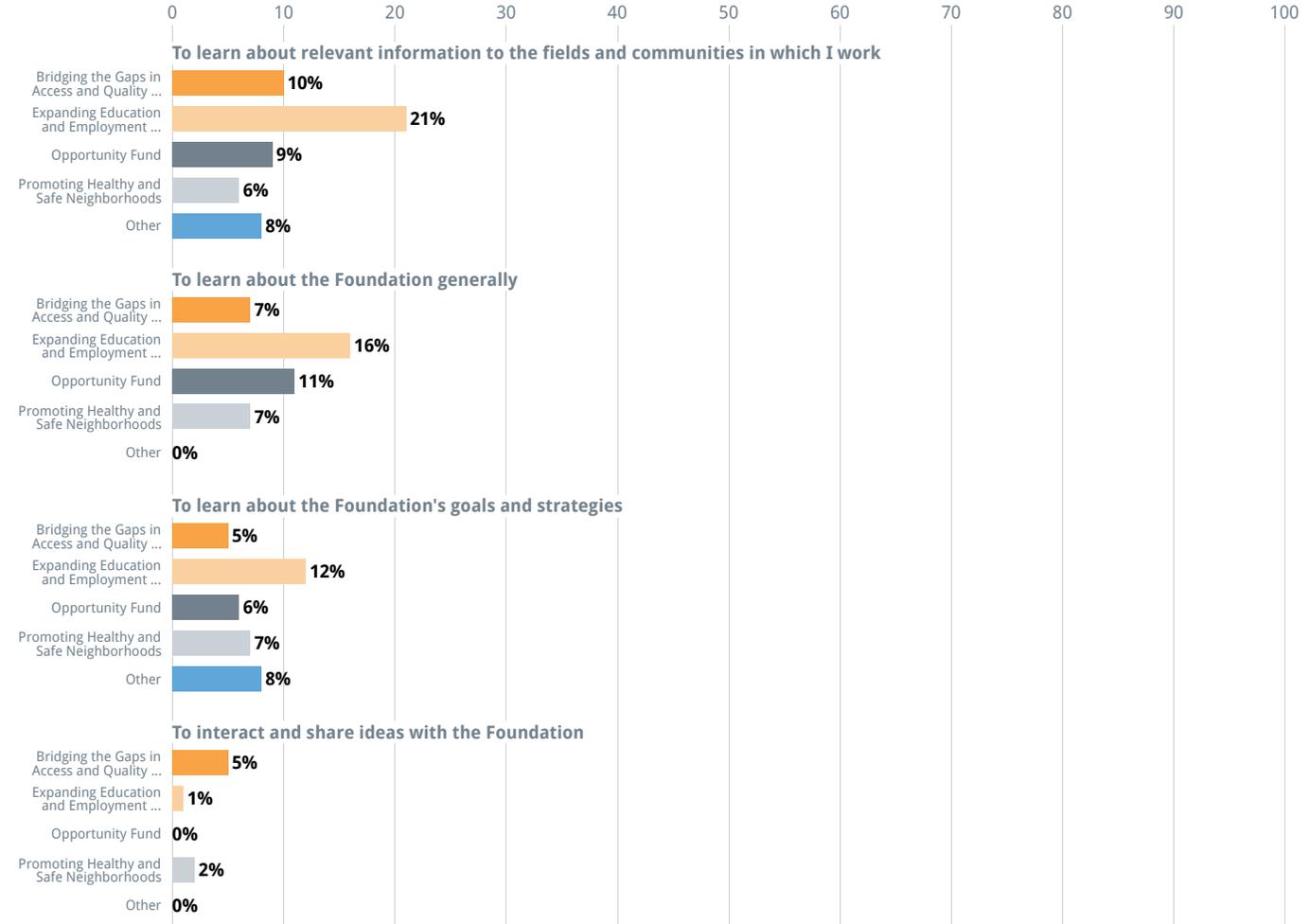
"Thinking about your use of online resources created by the Foundation or its staff, please indicate which Foundation resources you use and for what purpose you use them."

Use of Blogs - Overall

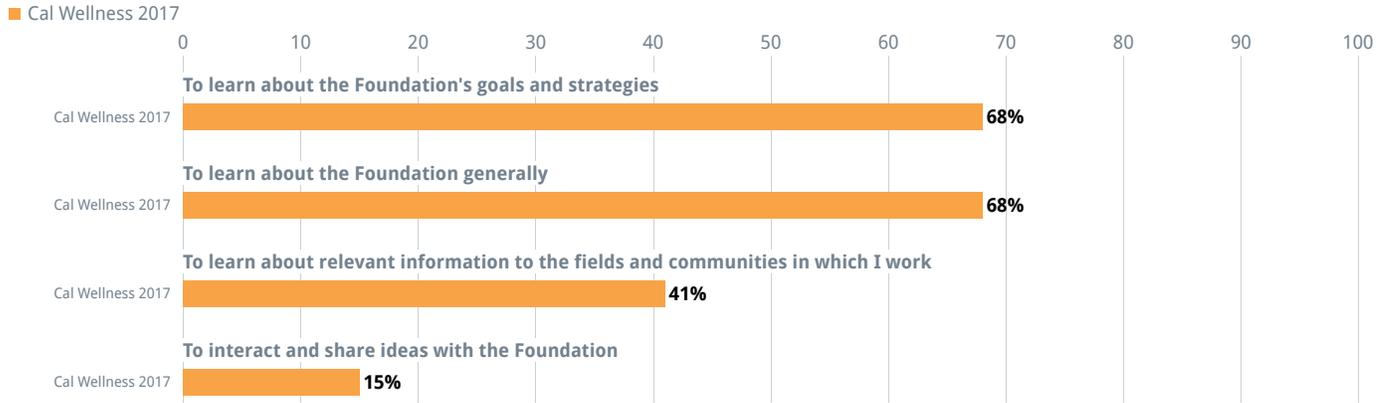


Use of Blogs - By Subgroup

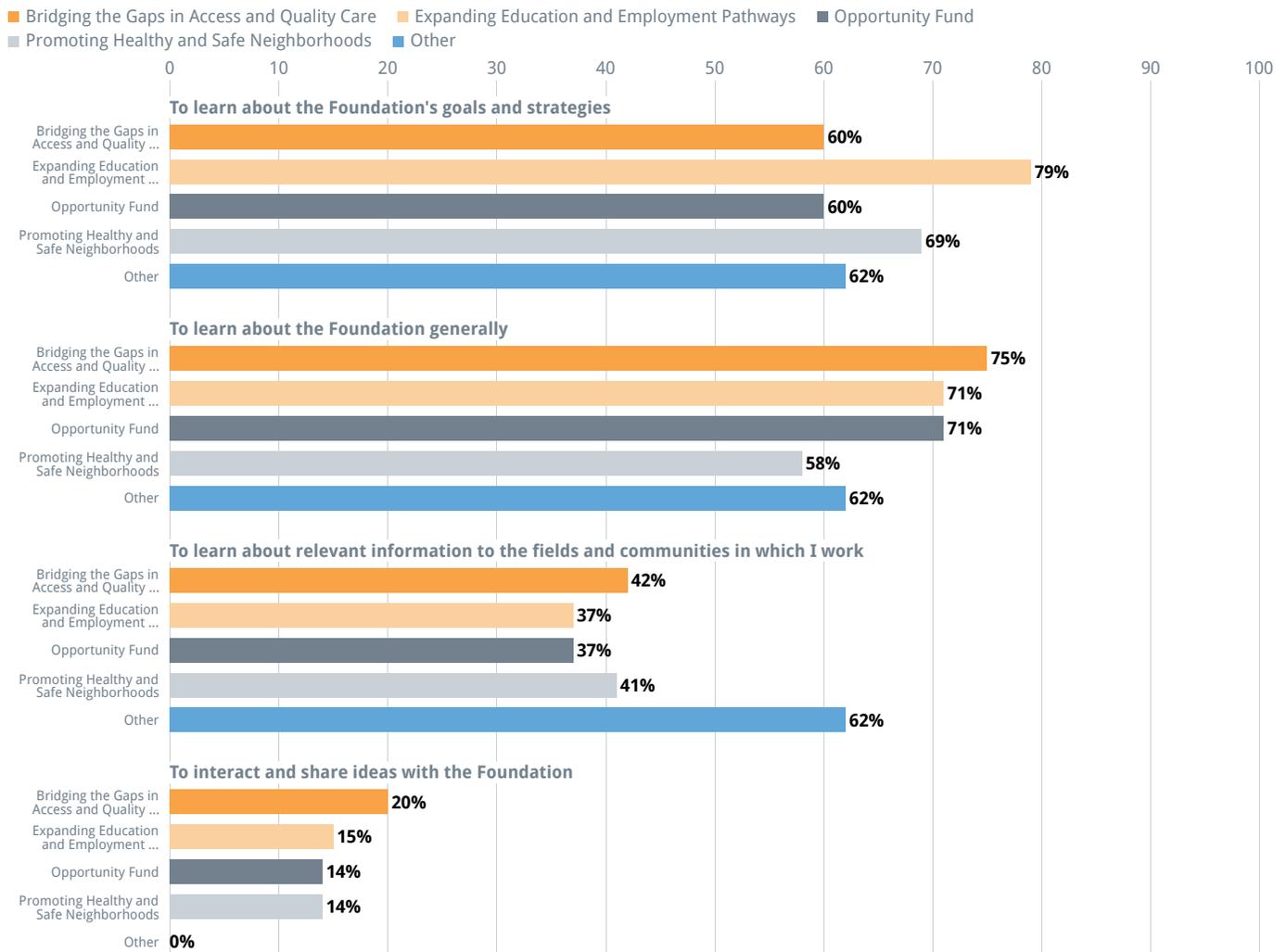
■ Bridging the Gaps in Access and Quality Care
 ■ Expanding Education and Employment Pathways
 ■ Opportunity Fund
 ■ Promoting Healthy and Safe Neighborhoods
 ■ Other



Use of Website - Overall



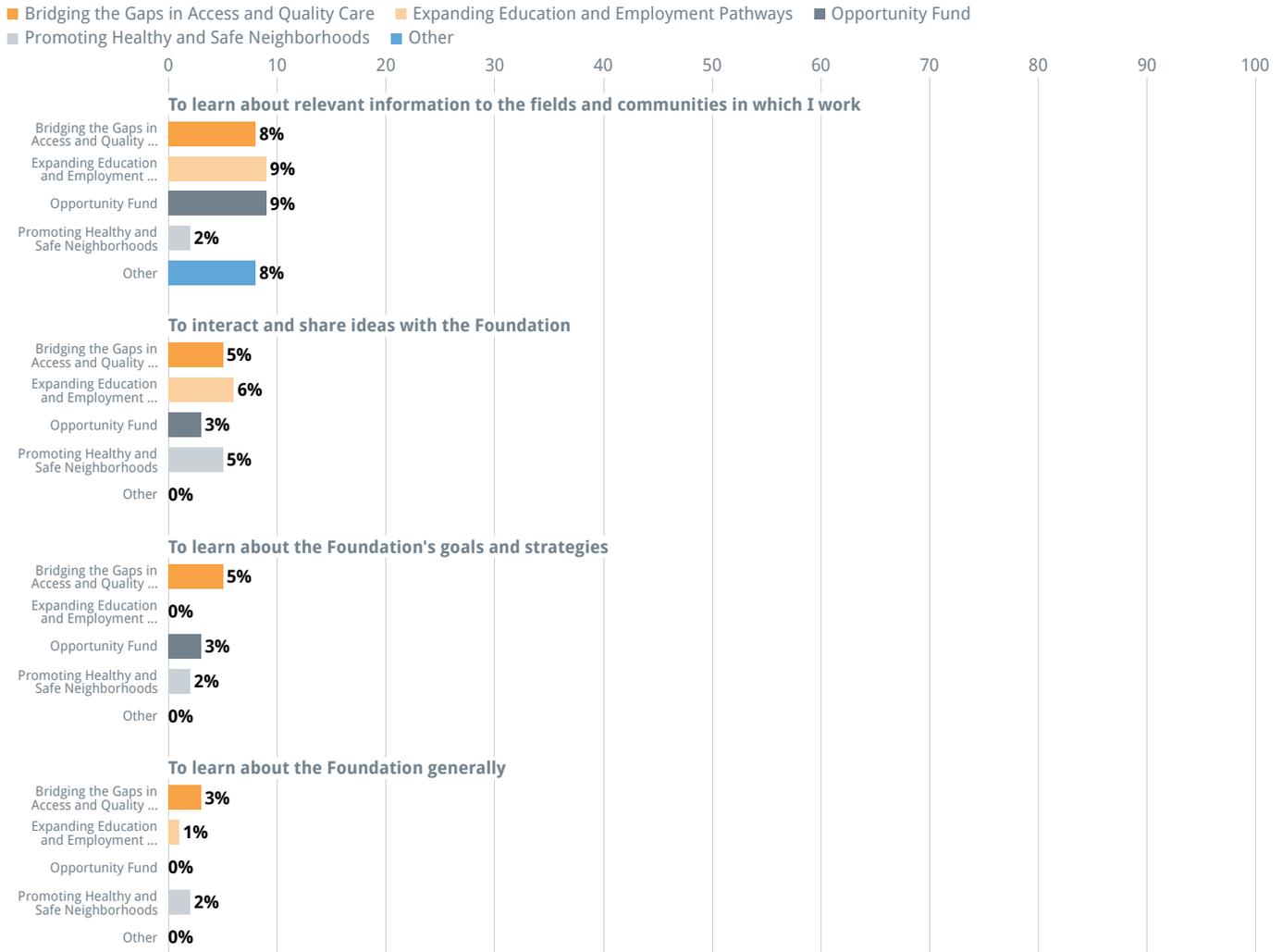
Use of Website - By Subgroup



Use of Twitter - Overall



Use of Twitter - By Subgroup



Use of Youtube - Overall



Use of Youtube - By Subgroup



*Subgroups with less than 5 respondents are not displayed to protect respondent confidentiality.

Results and Measurement

"How clearly do you understand the specific results the Foundation expects to achieve through the work funded by this grant?"

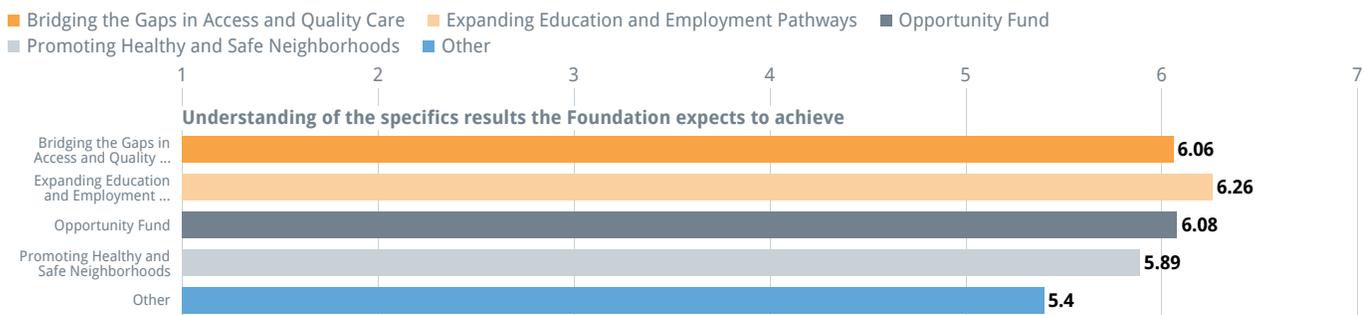
Understanding of Results - Overall

1 = Not at all clearly 7 = Extremely clearly



Understanding of Results - By Subgroup

1 = Not at all clearly 7 = Extremely clearly



Why did you begin collecting information used to measure the specific results of the work funded by this grant?	Cal Wellness 2017	Median Funder
We began collecting this information because we thought it would be useful	53%	65%
We previously collected similar information but added or modified it to fit the Foundation's requirements	40%	24%
We began collecting most of the information only because the Foundation required it to be collected	1%	4%
We began collecting most of the information only because another funder required it to be collected	2%	1%
We began collecting the information because of other requirements	4%	3%

Why did you begin collecting information used to measure the specific results of the work funded by this grant? (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
We began collecting this information because we thought it would be useful	46%	49%	61%	66%	40%
We previously collected similar information but added or modified it to fit the Foundation's requirements	48%	43%	28%	34%	40%
We began collecting most of the information only because the Foundation required it to be collected	0%	2%	3%	0%	0%
We began collecting most of the information only because another funder required it to be collected	1%	4%	3%	0%	0%
We began collecting the information because of other requirements	4%	2%	6%	0%	20%

Non-Monetary Support

"As part of our commitment to nonprofit sustainability and organizational resilience, we would like to know which of the following types of non-monetary support you have received and/or would like the Foundation to provide more of."

Encouraged/facilitated collaboration with other organizations	Cal Wellness 2017
Have received	42%
Would like to receive in the future	48%
Do not want to receive	10%

Encouraged/facilitated collaboration with other organizations (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Have received	43%	40%	34%	59%	0%
Would like to receive in the future	44%	56%	51%	38%	80%
Do not want to receive	13%	5%	14%	3%	20%

Introductions to leaders in the field	Cal Wellness 2017
Have received	33%
Would like to receive in the future	65%
Do not want to receive	3%

Introductions to leaders in the field (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Have received	32%	23%	34%	50%	0%
Would like to receive in the future	65%	73%	63%	50%	100%
Do not want to receive	3%	5%	3%	0%	0%

Learning from other grantees/knowledge sharing Cal Wellness 2017

Have received	36%
Would like to receive in the future	59%
Do not want to receive	4%

Learning from other grantees/knowledge sharing (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Have received	40%	27%	33%	50%	0%
Would like to receive in the future	57%	68%	58%	47%	100%
Do not want to receive	3%	5%	8%	3%	0%

Grantee forums or convenings Cal Wellness 2017

Have received	45%
Would like to receive in the future	47%
Do not want to receive	9%

Grantee forums or convenings (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Have received	49%	44%	34%	56%	0%
Would like to receive in the future	44%	49%	49%	38%	100%
Do not want to receive	7%	7%	17%	6%	0%

Use of Foundation's facilities Cal Wellness 2017

Have received	15%
Would like to receive in the future	46%
Do not want to receive	39%

Use of Foundation's facilities (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Have received	9%	19%	9%	25%	20%
Would like to receive in the future	41%	40%	59%	53%	40%
Do not want to receive	50%	40%	31%	22%	40%

Introductions to other funding sources Cal Wellness 2017

Have received	6%
Would like to receive in the future	67%
Do not want to receive	28%

Introductions to other funding sources (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Have received	3%	2%	12%	9%	0%
Would like to receive in the future	62%	69%	68%	69%	100%
Do not want to receive	35%	29%	21%	22%	0%

Sharing stories about your work through the Foundation's communications vehicles Cal Wellness 2017

Have received	10%
Would like to receive in the future	88%
Do not want to receive	2%

Sharing stories about your work through the Foundation's communications vehicles (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Have received	11%	9%	11%	12%	0%
Would like to receive in the future	85%	91%	89%	88%	100%
Do not want to receive	4%	0%	0%	0%	0%

General organizational management Cal Wellness 2017

Have received	9%
Would like to receive in the future	86%
Do not want to receive	5%

General organizational management (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Have received	9%	9%	3%	18%	N/A
Would like to receive in the future	84%	89%	91%	79%	N/A
Do not want to receive	7%	2%	6%	3%	N/A

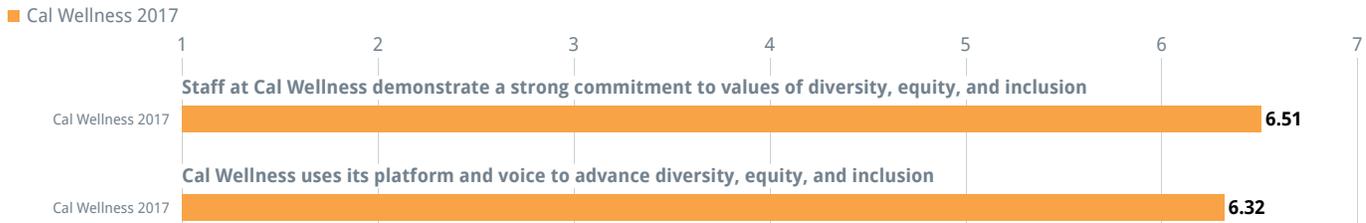
Diversity, Equity, and Inclusion

Grantee Responses

"How strongly do you agree or disagree with the following statements:"

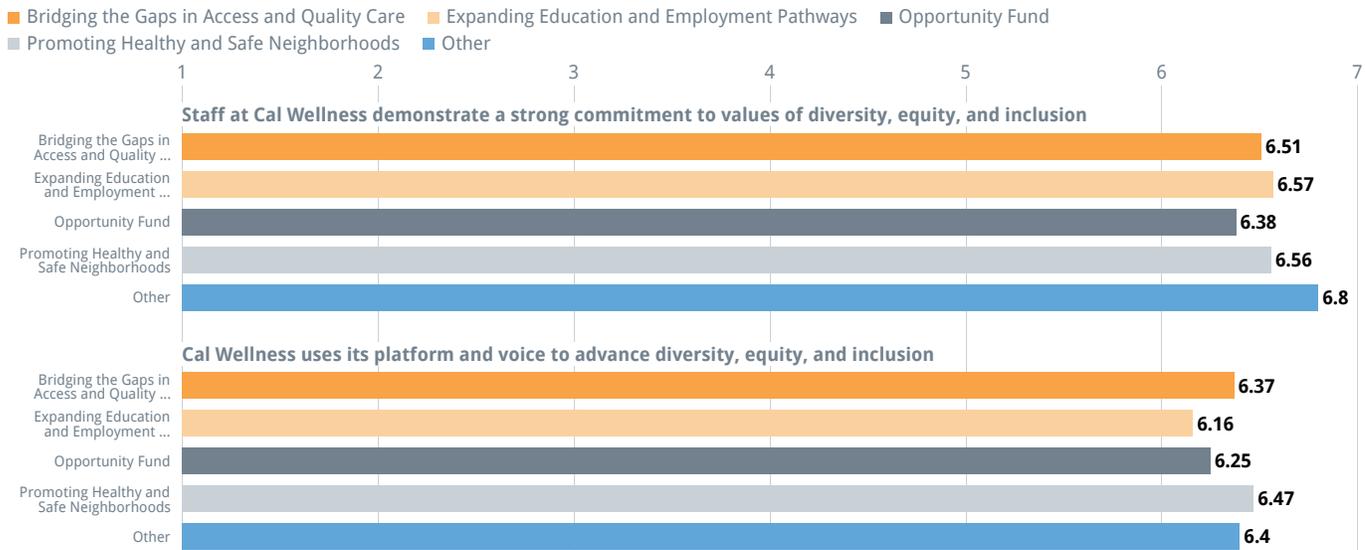
Agreement - Overall

1 = Strongly agree 7 = Strongly disagree



Agreement - By Subgroup

1 = Strongly agree 7 = Strongly disagree

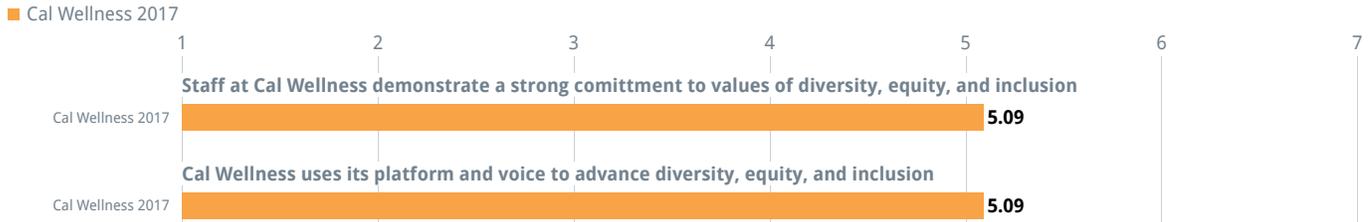


Applicant Responses

"How strongly do you agree or disagree with the following statements:"

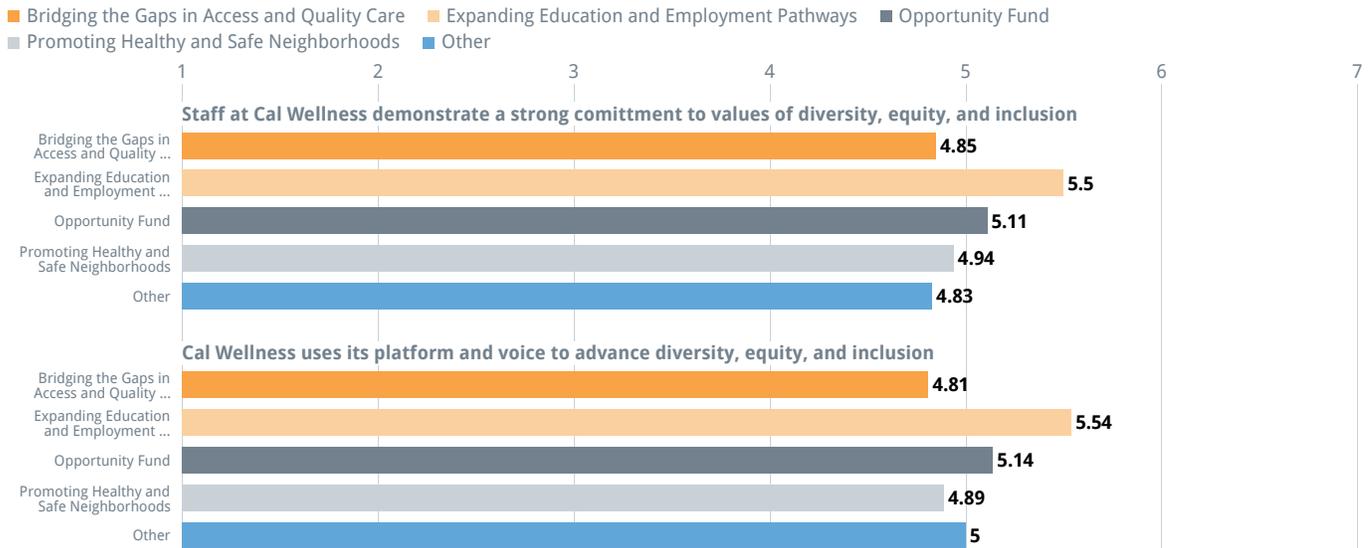
Agreement - Overall

1 = Strongly agree 7 = Strongly disagree



Agreement - By Subgroup

1 = Strongly agree 7 = Strongly disagree



Response to 2016 Elections

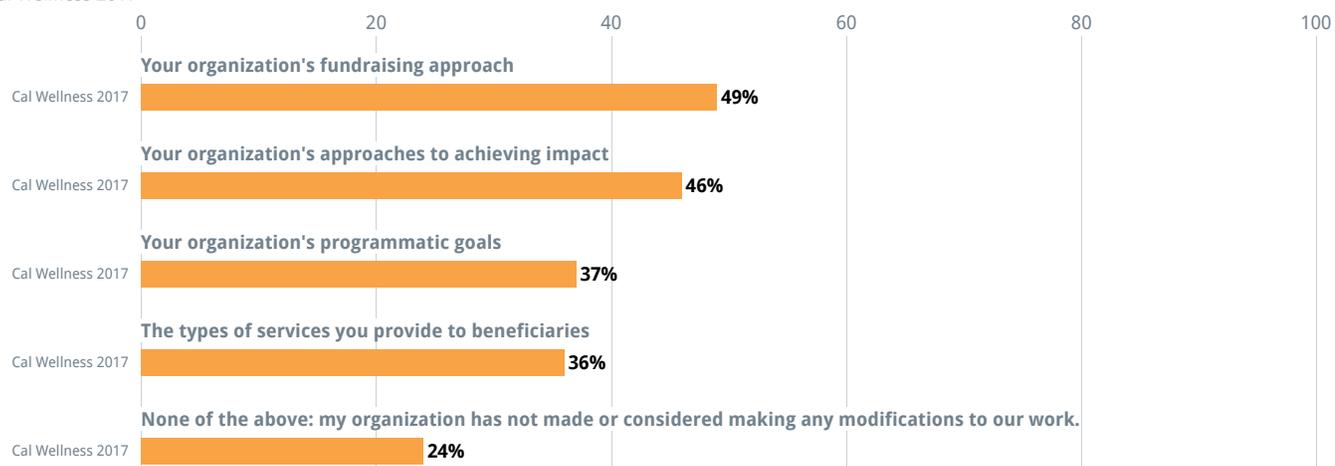
"What impact do you anticipate the changing U.S. political landscape will have on your organization's ability to carry out its mission?"

Cal
Wellness
2017

Generally positive impact	6%
No impact/Neutral	7%
Generally negative impact	87%

"Has your organization modified or made plans to modify your work in any of the following areas as a result of the changing U.S. political landscape?"

Cal Wellness 2017



(If grantees indicated making at least one modification above)

"In response to the changing U.S. political landscape, is your organization changing or planning to change the emphasis of its work in the following areas:"

Direct service work	Cal Wellness 2017
Increasing emphasis	41%
No change in emphasis	54%
Decreasing emphasis	4%

Policy/advocacy work	Cal Wellness 2017
Increasing emphasis	84%
No change in emphasis	15%
Decreasing emphasis	1%

Collaboration with other nonprofit organizations	Cal Wellness 2017
Increasing emphasis	73%
No change in emphasis	27%
Decreasing emphasis	0%

Collaboration with other sectors

Cal Wellness 2017

Increasing emphasis	72%
No change in emphasis	28%
Decreasing emphasis	0%

Local community engagement efforts

Cal Wellness 2017

Increasing emphasis	77%
No change in emphasis	23%
Decreasing emphasis	0%

Collecting input from your beneficiaries

Cal Wellness 2017

Increasing emphasis	60%
No change in emphasis	38%
Decreasing emphasis	1%

"Has the changing U.S. political landscape had any impact on your organization's ability to raise funds in support of your work?"

Ability to raise funds from foundations	Cal Wellness 2017
Generally positive impact	30%
No impact/Neutral	54%
Generally negative impact	16%

Ability to raise funds from other sources (e.g., public funders, individual donors)	Cal Wellness 2017
Generally positive impact	23%
No impact/Neutral	49%
Generally negative impact	28%

"Have you received any of the following communications from the Foundation related to the changing U.S. political landscape?"

Public communication from the Foundation (e.g., blog post, mass email, newsletter) Cal Wellness
2017

Yes	49%
No, and I would like to receive this communication	43%
No, and I don't think this communication would be helpful	8%

Communication with your program officer about your organizations's work Cal Wellness 2017

Yes	36%
No, and I would like to receive this communication	53%
No, and I don't think this communication would be helpful	11%

Communication with your program officer about the Foundation's work Cal Wellness 2017

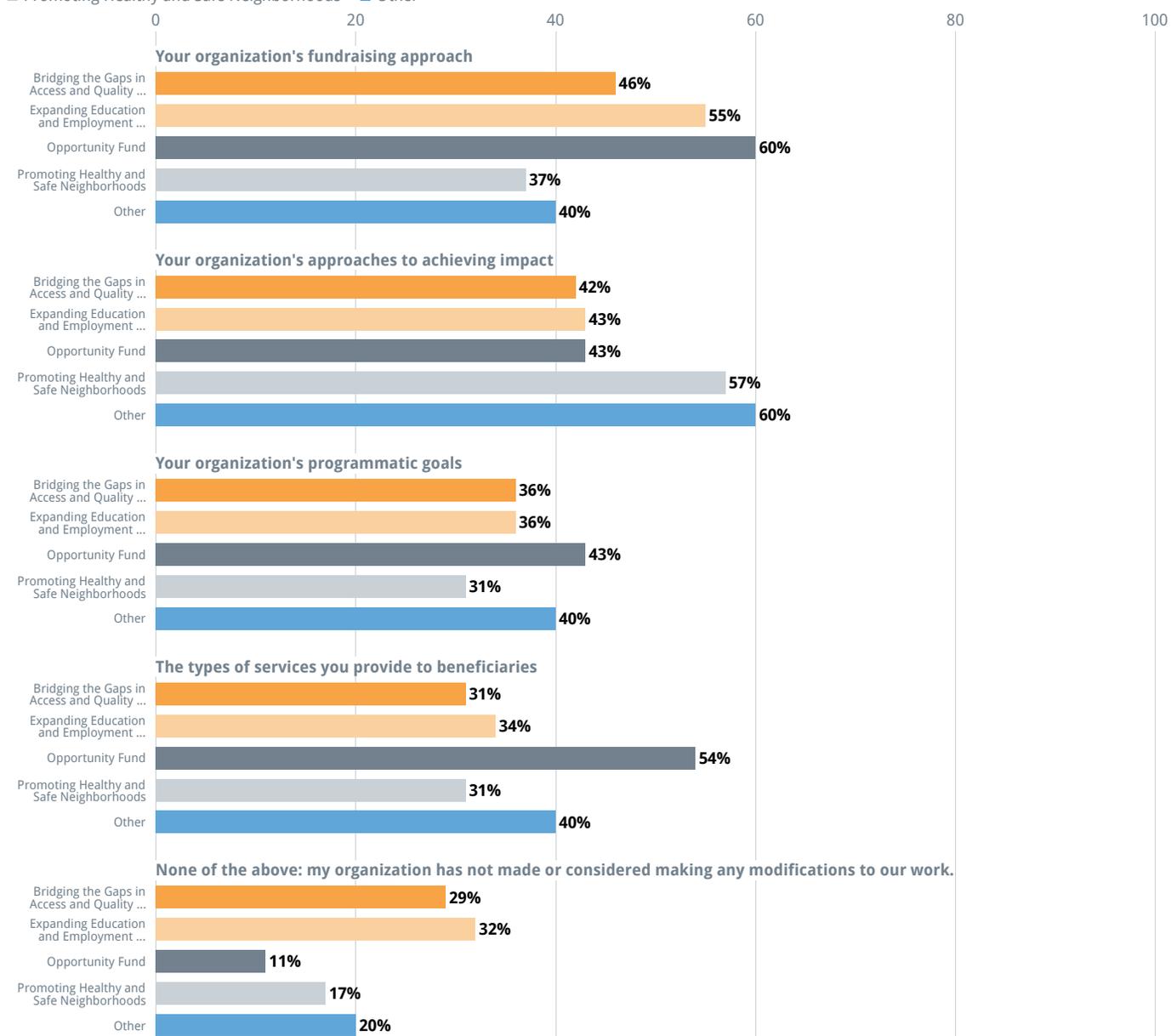
Yes	37%
No, and I would like to receive this communication	55%
No, and I don't think this communication would be helpful	8%

Response to 2016 Elections - By Subgroup

"What impact do you anticipate the changing U.S. political landscape will have on your organization's ability to carry out its mission?" (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Generally positive impact	7%	3%	3%	9%	N/A
No impact/Neutral	5%	10%	13%	3%	N/A
Generally negative impact	88%	88%	83%	88%	N/A

"Has your organization modified or made plans to modify your work in any of the following areas as a result of the changing U.S. political landscape?" - By Subgroup

■ Bridging the Gaps in Access and Quality Care
 ■ Expanding Education and Employment Pathways
 ■ Opportunity Fund
 ■ Promoting Healthy and Safe Neighborhoods
 ■ Other



(If grantees indicated making at least one modification above)

"In response to the changing U.S. political landscape, is your organization changing or planning to change the emphasis of its work in the following areas:"

Direct service work (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Increasing emphasis	36%	48%	44%	42%	N/A
No change in emphasis	58%	52%	56%	47%	N/A
Decreasing emphasis	6%	0%	0%	11%	N/A

Policy/advocacy work (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Increasing emphasis	83%	81%	93%	81%	N/A
No change in emphasis	17%	15%	7%	19%	N/A
Decreasing emphasis	0%	4%	0%	0%	N/A

Collaboration with other nonprofit organizations (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Increasing emphasis	65%	80%	77%	72%	N/A
No change in emphasis	35%	20%	23%	28%	N/A
Decreasing emphasis	0%	0%	0%	0%	N/A

Collaboration with other sectors (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Increasing emphasis	67%	83%	66%	79%	N/A
No change in emphasis	33%	17%	34%	21%	N/A
Decreasing emphasis	0%	0%	0%	0%	N/A

Local community engagement efforts (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Increasing emphasis	76%	76%	75%	79%	N/A
No change in emphasis	24%	24%	25%	21%	N/A
Decreasing emphasis	0%	0%	0%	0%	N/A

Collecting input from your beneficiaries (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Increasing emphasis	68%	53%	59%	57%	N/A
No change in emphasis	32%	47%	41%	36%	N/A
Decreasing emphasis	0%	0%	0%	7%	N/A

"Has the changing U.S. political landscape had any impact on your organization's ability to raise funds in support of your work?"

Ability to raise funds from foundations (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Generally positive impact	26%	19%	45%	32%	N/A
No impact/Neutral	55%	67%	45%	50%	N/A
Generally negative impact	19%	14%	9%	18%	N/A

Ability to raise funds from other sources (e.g., public funders, individual donors) (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Generally positive impact	16%	22%	36%	23%	N/A
No impact/Neutral	60%	33%	45%	50%	N/A
Generally negative impact	24%	44%	18%	27%	N/A

"Have you received any of the following communications from the Foundation related to the changing U.S. political landscape?"

Public communication from the Foundation (e.g., blog post, mass email, newsletter) (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Yes	54%	50%	38%	50%	40%
No, and I would like to receive this communication	34%	50%	50%	46%	40%
No, and I don't think this communication would be helpful	13%	0%	12%	4%	20%

Communication with your program officer about your organizations's work (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Yes	37%	24%	34%	54%	20%
No, and I would like to receive this communication	48%	65%	55%	43%	60%
No, and I don't think this communication would be helpful	15%	11%	10%	4%	20%

Communication with your program officer about the Foundation's work (By Subgroup)	Bridging the Gaps in Access and Quality Care	Expanding Education and Employment Pathways	Opportunity Fund	Promoting Healthy and Safe Neighborhoods	Other
Yes	39%	33%	41%	38%	20%
No, and I would like to receive this communication	46%	64%	52%	62%	80%
No, and I don't think this communication would be helpful	16%	3%	7%	0%	0%

Additional Survey Information

On many questions in the grantee and applicant surveys, respondents are allowed to select “don’t know” or “not applicable” if they are not able to provide an alternative answer. In addition, some questions in the survey are only displayed to a select group of grantees or applicants for which that question is relevant based on a previous response.

As a result, there are some measures where only a subset of responses is included in the reported results. The table below shows the number of responses included on each of these measures. The total number of respondents to Cal Wellness’s grantee and applicant surveys were 202 and 275, respectively.

Grantee Responses

Question Text	Count of Responses
Overall, how would you rate the Foundation's impact on your field?	190
How well does the Foundation understand the field in which you work?	196
To what extent has the Foundation advanced the state of knowledge in your field?	159
To what extent has the Foundation affected public policy in your field?	149
Overall, how would you rate the Foundation's impact on your local community?	169
How well does the Foundation understand the local community in which you work?	177
How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?	192
How much, if at all, did the Foundation improve your ability to sustain the work funded by this grant in the future?	190
How well does the Foundation understand your organization's strategy and goals?	192
How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Foundation?	196
Who most frequently initiated the contact you had with your program officer during this grant?	202
Did the Foundation conduct a site visit during the selection process or during the course of this grant?	194
Has your main contact at the Foundation changed in the past six months?	201
Did you submit [a proposal] to the Foundation for this grant?	202
As you developed your grant proposal, how much pressure did you feel to modify your organization's priorities in order to create a grant proposal that was likely to receive funding?	196
How involved was Foundation staff in the development of your grant proposal?	197
How much time elapsed from the submission of the grant proposal to clear commitment of funding?	185
Have you ever been declined funding from the Foundation?	163
Are you currently receiving funding from the Foundation?	200
Which of the following best describes the pattern of your organization's funding relationship with the Foundation?	201
How well does the Foundation understand your intended beneficiaries' needs?	189
To what extent do the Foundation's funding priorities reflect a deep understanding of your intended beneficiaries' needs?	188
Have you participated in a reporting or evaluation process?	197
To what extent was the Foundation's reporting process...Adaptable, if necessary, to fit your circumstances	129
To what extent was the Foundation's reporting process...A helpful opportunity for you to reflect and learn	147
To what extent was the Foundation's reporting process...Relevant, with questions and measures pertinent to the work funded by this grant	148
To what extent was the Foundation's reporting process...Straightforward	147
To what extent was the Foundation's reporting process...Aligned appropriately to the timing of your work	150
Did the Foundation provide financial support for the evaluation	22
To what extent did the evaluation...Result in you making changes to the work that was evaluated	24
To what extent did the evaluation...Incorporate your input in the design of the evaluation	24
To what extent did the evaluation...Generate information that you believe will be useful for other organizations	23
Did someone from your organization speak to a Cal Wellness staff member about the content of your LOI prior to submitting it?	177
How strongly do you agree or disagree that...the grants portal was easy to use and navigate	182
How strongly do you agree or disagree that...the grants portal was quick and efficient	181
How strongly do you agree or disagree that...instructions provided on the grants portal were clear	182

Applicant Responses

Question Text	Count of Responses
Overall, how would you rate the Foundation's impact on your field?	232
How well does the Foundation understand the field in which you work?	205
Overall, how would you rate the Foundation's impact on your local community?	188
How well does the Foundation understand the local community in which you work?	197
How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?	243
How well does the Foundation understand your organization's strategy and goals?	196
What was the dollar amount of your grant request to the Foundation?	218
How consistent was the information provided by different communications resources, both personal and written, that you used to learn about the Foundation?	246
How much time elapsed from initial submission of your grant proposal to the final decision not to fund your request?	244
After your request was declined did you request any feedback or advice from the Foundation?	251
After your request was declined did you receive any feedback or advice from the Foundation?	259
Did someone from your organization speak to a Cal Wellness staff member about the content of your LOI prior to submitting it?	247
How strongly do you agree or disagree that...the grants portal was easy to use and navigate	240
How strongly do you agree or disagree that...the grants portal was quick and efficient	241
How strongly do you agree or disagree that...instructions provided on the grants portal were clear	239

About CEP and Contact Information

Mission:

To provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness – and, as a result, their intended impact.

Vision:

We seek a world in which pressing social needs are more effectively addressed.

We believe improved performance of philanthropic funders can have a profoundly positive impact on nonprofit organizations and the people and communities they serve.

Although our work is about measuring results, providing useful data, and improving performance, our ultimate goal is improving lives. We believe this can only be achieved through a powerful combination of dispassionate analysis and passionate commitment to creating a better society.

About the GPR and APR

Since 2003, the Grantee Perception Report® (GPR) has provided funders with comparative, candid feedback based on grantee perceptions. The GPR is the only grantee survey process that provides comparative data, and is based on extensive research and analysis. Hundreds of funders of all types and sizes have commissioned the GPR, and tens of thousands of grantees have provided their perspectives to help funders improve their work. CEP has surveyed grantees in more than 150 countries and in 8 different languages. The GPR's quantitative and qualitative data helps foundation leaders evaluate and understand their grantees' perceptions of their effectiveness, and how that compares to their philanthropic peers.

CEP developed the Applicant Perception Report (APR) as a complement to the Grantee Perception Report. Based on a separate, shorter survey, the APR allows philanthropic funders to understand the candid perspectives of declined applicants on a number of important dimensions. The APR shows an individual funder the perceptions of its applicants relative to a set of perceptions of 40 funders whose declined applicants were surveyed by CEP.

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