

## INTRODUCTION

The grantee survey is an opportunity for the Foundation's nonprofit partners to reflect on their accomplishments, challenges and lessons learned. The Foundation will use this information to deepen its understanding about organizational effectiveness in the nonprofit organizations it supports and, when applicable, to inform the future application process for repeat grantees.

- The survey will be administered online at the end of every unrestricted operating support grant, and should be completed by the Executive Director, Chief Operating Officer, or equivalent. It should be possible to complete in a single sitting without having to reference other documents, although some of the finance-related items may require consultation with finance staff and/or financial documents.

- The online survey incorporates the existing final report narrative questions along with additional items about key functional areas (listed below) and core programs. Together, the functional areas represent what the Weingart Foundation believes are key components of overall organizational effectiveness. While some of these topics may not be directly related to an organization's original grant objectives, the Foundation is interested in learning about all of these areas for all organizations. This survey is also an opportunity for grantees to reflect on a range of topics related to organizational effectiveness, whether those areas are directly related to their Weingart grant objectives or not.

- The survey will be complemented by an in-depth conversation between the grantee and the program officer that will allow them to engage more fully in the process of organizational learning and to explore any outstanding issues raised in the survey.

The grantee survey consists of the following sections:

**I. Organization information**

**II. Organizational goals**

**III. Functional areas:**

- |  |  |
|--|--|
| 1) Board Governance and Engagement     | 5) Client/Constituent Engagement             |
| 2) Financial Operations and Management | 6) Diversity                                 |
| 3) Fund Development                    | 7) Cultural Competence                       |
| 4) Staff and Infrastructure            | 8) Organizational Strategy and Adaptability. |

**IV. Core Programs**

## Weingart Foundation Grantee Survey

### Organization Information

\* Please complete the following information

Contact Name:

Organization Name:

Contact Email Address:

Contact Phone Number:



## Weingart Foundation Grantee Survey

### ORGANIZATIONAL GOALS

Please answer the following questions about the organizational goals that you set out to accomplish at the beginning of this grant. The Foundation recognizes that some grants, despite being well conceived and executed, will not achieve the desired results. Information about approaches that have not succeeded is also important and valuable to the Foundation.

\* a. Please describe any ways that your organizational goals have changed since the beginning of this grant.

b. In the sections provided below, please list each goal you set to accomplish at the beginning of this grant as articulated in your original grant application.

**You must enter at least one goal.**

\* Enter goal #1:

\* How much progress did your organization make on this goal?

- ☐ Fully accomplished
- ☐ Mostly accomplished

- ☐ Somewhat accomplished
- ☐ Not at all accomplished

Please explain:

Enter goal #2:

How much progress did your organization make on this goal?

- ☐ Fully accomplished
- ☐ Mostly accomplished

- ☐ Somewhat accomplished
- ☐ Not at all accomplished

Please explain:

Enter goal #3:

How much progress did your organization make on this goal?

- ☐ Fully accomplished
- ☐ Mostly accomplished

- ☐ Somewhat accomplished
- ☐ Not at all accomplished

Please explain:

Enter goal #4:

How much progress did your organization make on this goal?

- ☐ Fully accomplished
- ☐ Mostly accomplished

- ☐ Somewhat accomplished
- ☐ Not at all accomplished

Please explain:

Enter goal #5:

How much progress did your organization make on this goal?

- ☐ Fully accomplished
- ☐ Mostly accomplished

- ☐ Somewhat accomplished
- ☐ Not at all accomplished

Please explain:

\* c. Please describe any challenges and/or anything unexpected that you encountered in trying to accomplish these organizational goals.

d. What did you do to address those challenges?



Weingart Foundation Grantee Survey

FUNCTIONAL AREAS

The following sets of questions are about key functional areas for nonprofit organizations. Within each functional area, please indicate:

1. the frequency with which you engage in the activities listed, or how often each statement is true for your organization
2. your assessment of your organization's overall capacity in that area
3. the extent to which your grant from the Weingart Foundation impacted your organization's capacity in that area.



## Weingart Foundation Grantee Survey

### 1) FUNCTIONAL AREA - BOARD GOVERNANCE AND ENGAGEMENT

#### \* Board Governance and Engagement

	Always	Often	Sometimes	Rarely	Never	N/A
a. Board members attend and actively participate in regular board meetings.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Our board has active and relevant committees.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Board members participate in fundraising activities and make personally meaningful contributions to our organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. We have a clear strategy for recruiting new board members with relevant skills and backgrounds.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Our board understands, reviews, and approves budgets and financial statements.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Our board formally reviews and evaluates our Executive Director at least annually.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. The roles of the board and Executive Director are clearly defined and respected.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h. New board members are oriented to the organization, including our mission, bylaws, policies, programs, key stakeholders.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i. Board members participate in ongoing training (e.g., fund development, roles and responsibilities, financial analysis).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If N/A selected please explain

\* j. Overall, how would you rate your organization's capacity in the area of BOARD GOVERNANCE AND ENGAGEMENT?

- ☐ 1 – We have a clear need for increased capacity in this area
- ☐ 2 – We are getting by in this area, and there is some room for improvement
- ☐ 3 – We are functioning well in this area
- ☐ 4 – We go above and beyond the items listed here
- ☐ N/A (not a key functional area for our organization at this time)

\* k. Overall, to what extent did your grant from the Weingart Foundation impact your organization's capacity in the area of BOARD GOVERNANCE AND ENGAGEMENT?

- ☐ Large impact
- ☐ Moderate impact
- ☐ Little to no impact
- ☐ N/A (not a focus during grant period)

l. Comments:



Weingart Foundation Grantee Survey

## 2) FUNCTIONAL AREA - FINANCIAL OPERATIONS AND MANAGEMENT

\* Financial Operations and Management

	Always	Often	Sometimes	Rarely	Never	N/A
a. We track and report financial activities to board and staff management.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Key staff and board members review regular updates on our organization's financial health.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. We have access to loans, reserves, and/or working capital to manage cash flow (e.g., to make payroll).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Financial operations are carried out in alignment with budgeting, decision-making, and organizational goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. We have written systems and controls that govern financial operations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If N/A selected please explain

\* f. Overall, how would you rate your organization's capacity in the area of FINANCIAL OPERATIONS AND MANAGEMENT

- ☐ 1 – We have a clear need for increased capacity in this area
- ☐ 2 – We are getting by in this area, and there is some room for improvement
- ☐ 3 – We are functioning well in this area
- ☐ 4 – We go above and beyond the items listed here
- ☐ N/A (not a key functional area for our organization at this time)

\* g. Overall, to what extent did your grant from the Weingart Foundation impact your organization's capacity in the area of FINANCIAL OPERATIONS AND MANAGEMENT?

- ☐ Large impact
- ☐ Moderate impact
- ☐ Little to no impact
- ☐ N/A (not a key focus during grant period)

h. Comments:



Weingart Foundation Grantee Survey

### 3) FUNCTIONAL AREA - FUND DEVELOPMENT

\* Fund Development

	Always	Often	Sometimes	Rarely	Never	N/A
a. We have an appropriate funding model or structure in place that supports core infrastructure and programs and is integrated into our organization's long-term budget projections.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Has sufficient capacity from staff and/or volunteers to implement fund development activities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. We have a staff person (other than the ED/CEO) whose primary responsibility is fund development.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. We use up-to-date results from fundraising efforts to inform planning and implementation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If N/A please explain

\* e. Overall, how would you rate your organization's capacity in the area of FUND DEVELOPMENT?

- ☐ 1 – We have a clear need for increased capacity in this area
- ☐ 2 – We are getting by in this area, and there is some room for improvement
- ☐ 3 – We are functioning well in this area
- ☐ 4 – We go above and beyond the items listed here
- ☐ N/A (not a key functional area for our organization at this time)

\* f. Overall, to what extent did your grant from the Weingart Foundation impact your organization's capacity in the area of FUND DEVELOPMENT?

- ☐ Large impact
- ☐ Moderate impact
- ☐ Little to no impact
- ☐ N/A (not a focus during grant period)

g. Comments:



Weingart Foundation Grantee Survey

#### 4) FUNCTIONAL AREA - STAFF AND INFRASTRUCTURE

\* Staff and Infrastructure

	Always	Often	Sometimes	Rarely	Never	N/A
a. Our current staffing <u>structure</u> allows us to effectively do our administrative work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Our staffing <u>structure</u> allows us to effectively do our programming work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Our staffing <u>size</u> allows us to effectively do our administrative work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Our staffing <u>size</u> allows us to effectively do our programming work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. We provide and/or support ongoing staff development opportunities, including for our Executive Director.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Staff turnover is a problem for our organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. We have the technology and information systems in place that are necessary to operate efficiently and effectively.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If N/A please explain



\* h. Overall, how would you rate your organization's capacity in the area of STAFF AND INFRASTRUCTURE?

- ☐ 1 – We have a clear need for increased capacity in this area
- ☐ 2 – We are getting by in this area, and there is some room for improvement
- ☐ 3 – We are functioning well in this area
- ☐ 4 – We go above and beyond the items listed here
- ☐ N/A (not a key functional area for our organization at this time)

\* i. Overall, to what extent did your grant from the Weingart Foundation impact your organization's capacity in the area of STAFF AND INFRASTRUCTURE?

- ☐ Large impact
- ☐ Moderate impact
- ☐ Little to no impact
- ☐ N/A (not a focus during grant period)

j. Comments:



Weingart Foundation Grantee Survey

## 5) FUNCTIONAL AREA - CLIENT/CONSTITUENT ENGAGEMENT

\* Client/Constituent Engagement

	Always	Often	Sometimes	Rarely	Never	N/A
a. We solicit feedback from clients /constituents.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. We have mechanisms in place to seek and incorporate client/constituent input on key decisions (e.g., advisory groups, needs assessments).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. We have staff position(s) that include client/constituent engagement activities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If N/A please explain

\* d. Overall, how would you rate your organization's capacity in the area of CLIENT/CONSTITUENT ENGAGEMENT?

- ☐ 1 – We have a clear need for increased capacity in this area
- ☐ 2 – We are getting by in this area, and there is some room for improvement
- ☐ 3 – We are functioning well in this area
- ☐ 4 – We go above and beyond the items listed here
- ☐ N/A (not a key functional area for our organization at this time)

\* e. Overall, to what extent did your grant from the Weingart Foundation impact your organization's capacity in the area of CLIENT/CONSTITUENT ENGAGEMENT?

- ☐ Large impact
- ☐ Moderate impact
- ☐ Little to no impact
- ☐ N/A (not a focus during grant period)

f. Comments:



Weingart Foundation Grantee Survey

## 6) FUNCTIONAL AREA - DIVERSITY

\* Diversity

	Always	Often	Sometimes	Rarely	Never	N/A
a. We have staff who reflect the diversity of people and key interests the organization serves.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. We have recruiting processes that encourage diverse candidates to apply for staff positions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. We have board members who reflect the diversity of people and key interests the organization serves.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If N/A please explain

\* d. Overall, how would you rate your organization's capacity in the area of DIVERSITY?

- ☐ 1 – We have a clear need for increased capacity in this area
- ☐ 2 – We are getting by in this area, and there is some room for improvement
- ☐ 3 – We are functioning well in this area
- ☐ 4 – We go above and beyond the items listed here
- ☐ N/A (not a key functional area for our organization at this time)

\* e. Overall, to what extent did your grant from the Weingart Foundation impact your organization's capacity in the area of DIVERSITY?

- ☐ Large impact
- ☐ Moderate impact
- ☐ Little to no impact
- ☐ N/A (not a focus during grant period)

f. Comments:



Weingart Foundation Grantee Survey

## 7) FUNCTIONAL AREA - CULTURAL COMPETENCE

\* Cultural Competence

Always   Often   Sometimes   Rarely   Never   N/A

a. Our services are responsive to the cultural needs of clients/consumers/constituents.

☐

☐

☐

☐

☐

☐

b. We make outreach and communication materials available in the primary language(s) spoken by stakeholders.

☐

☐

☐

☐

☐

☐

c. We provide training in cultural competence to our staff.

☐

☐

☐

☐

☐

☐

If N/A please explain

\* d. Overall, how would you rate your organization's capacity in the area of CULTURAL COMPETENCE?

- ☐ 1 - We have a clear need for increased capacity in this area
- ☐ 2 - We are getting by in this area, and there is some room for improvement
- ☐ 3 - We are functioning well in this area
- ☐ 4 - We go above and beyond the items listed here
- ☐ N/A (not a key functional area for our organization at this time)

\* e. Overall, to what extent did your grant from the Weingart Foundation impact your organization's capacity in the area of CULTURAL COMPETENCE?

- ☐ Large impact
- ☐ Moderate impact
- ☐ Little to no impact
- ☐ N/A (not a key focus during grant period)

f. Comments:



Weingart Foundation Grantee Survey

8) FUNCTIONAL AREA - ORGANIZATIONAL STRATEGY AND ADAPTABILITY

\* Organizational Strategy and Adaptability

	Always	Often	Sometimes	Rarely	Never	N/A
a. We have an organizational strategy for achieving our goals and objectives that is developed and actively used by staff and board.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. We periodically review our vision, mission, and major programs to analyze opportunities and challenges, strengths and weaknesses.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. We anticipate challenges in advance and consider different scenarios for responding to them.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Board members participate in strategic/organizational planning on a regular basis.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Our budget allocations are realistic and based on mission, strategies and goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Evaluation processes are integrated into program activities and used to inform our work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. We engage with others (e.g., partnerships, advocacy activities) when necessary in order to advance our mission.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If N/A please explain

\* h. Overall, how would you rate your organization's capacity in the area of ORGANIZATIONAL STRATEGY AND ADAPTABILITY?

- ☐ 1 – We have a clear need for increased capacity in this area
- ☐ 2 – We are getting by in this area, and there is some room for improvement
- ☐ 3 – We are functioning well in this area
- ☐ 4 – We go above and beyond the items listed here
- ☐ N/A (not a key functional area for our organization at this time)

\* i. Overall, to what extent did your grant from the Weingart Foundation impact your organization's capacity in the area of ORGANIZATIONAL STRATEGY AND ADAPTABILITY?

- ☐ Large impact
- ☐ Moderate impact
- ☐ Little to no impact
- ☐ N/A (not a key focus during grant period)

j. Comments:

## Weingart Foundation Grantee Survey

## CORE PROGRAMS

The Weingart Foundation is also interested in learning about your organization's approach to its core programming. Please select the most appropriate response to the questions below.

## \* Core Programs

	Decreased significantly	Decreased moderately	Stayed about the same	Increased moderately	Increased significantly
a. To what extent has the <u>demand</u> (or need) for your organization's services or programs changed during the grant term?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
b. To what extent has your organization's <u>level of activity or service</u> (number of clients served, enhanced program capacity, etc.) changed in the past two years?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
c. To what extent has the <u>effectiveness</u> of your organization's services or programs changed over the past two years?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

 \* d. To what extent have the types of work your organization engages in changed in the past two years?

- ☐ Stayed more or less the same  
☐ Changed moderately  
☐ Changed significantly

Please briefly explain your responses:

Please indicate to what extent you agree with the following statement:

*As a result of our most recent unrestricted operating support grant from the Weingart Foundation, we are better equipped to address the needs of low-income and underserved individuals.*

- ☐ Strongly disagree
- ☐ Disagree
- ☐ Neutral
- ☐ Agree
- ☐ Strongly Agree

Please briefly explain your response:

Optional: Is there anything else you want the Foundation to know about your organization?



Weingart Foundation Grantee Survey

Financial Statements

We will need to access financial statements from your most recently completed fiscal year. Please upload this document to your organization's [GuideStar nonprofit profile](#).