

* 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"/>					
b. Key staff and board members review regular updates on our organization's financial health.	<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"/>					
d. Financial operations are carried out in alignment with budgeting, decision-making, and organizational goals.	<input type="radio"/>					
e. We have written systems and controls that govern financial operations.	<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"/>					
b. Has sufficient capacity from staff and/or volunteers to implement fund development activities.	<input type="radio"/>					
c. We have a staff person (other than the ED/CEO) whose primary responsibility is fund development.	<input type="radio"/>					
d. We use up-to-date results from fundraising efforts to inform planning and implementation.	<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"/>					
b. Our staffing <u>structure</u> allows us to effectively do our programming work.	<input type="radio"/>					
c. Our staffing <u>size</u> allows us to effectively do our administrative work.	<input type="radio"/>					
d. Our staffing <u>size</u> allows us to effectively do our programming work.	<input type="radio"/>					
e. We provide and/or support ongoing staff development opportunities, including for our Executive Director.	<input type="radio"/>					
f. Staff turnover is a problem for our organization.	<input type="radio"/>					
g. We have the technology and information systems in place that are necessary to operate efficiently and effectively.	<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"/>					
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"/>					
c. We have staff position(s) that include client/constituent engagement activities.	<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"/>					
b. We have recruiting processes that encourage diverse candidates to apply for staff positions.	<input type="radio"/>					
c. We have board members who reflect the diversity of people and key interests the organization serves.	<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

SAMPLE

* 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"/>					
b. We periodically review our vision, mission, and major programs to analyze opportunities and challenges, strengths and weaknesses.	<input type="radio"/>					
c. We anticipate challenges in advance and consider different scenarios for responding to them.	<input type="radio"/>					
d. Board members participate in strategic/organizational planning on a regular basis.	<input type="radio"/>					
e. Our budget allocations are realistic and based on mission, strategies and goals.	<input type="radio"/>					
f. Evaluation processes are integrated into program activities and used to inform our work.	<input type="radio"/>					
g. We engage with others (e.g., partnerships, advocacy activities) when necessary in order to advance our mission.	<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:

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](#).