



Investee Survey 2021

This past year presented a myriad of unprecedented challenges that required all of us to shift the way we work with one another as well as with the Bridgeport children, students, and families your organization serves. As we look ahead to hopefully brighter days and another year of collaboration with our investee partners, the Tauck Family Foundation (TFF) seeks to gather the following information:

- Insight about your organization’s partnership with TFF which will help inform our grantmaking approach and refine our communications and processes; and
- Candid feedback from a variety of stakeholders across all TFF partners about the key areas of interest and support you and your organization’s staff, teachers, and/or Board members might want or need to strengthen your organization and continue the important work you do within the Bridgeport community. Our goal is to identify common needs or areas of interest among our partners and, to the extent possible, respond accordingly to the needs and interests articulated.

The survey that follows is a mix of multiple choice and open-ended questions that must be completed in one session. **Please note: all survey responses are anonymous, your candor (positive or negative) is appreciated, and specific examples when possible are encouraged.**

Thank you for your partnership and for making the time to complete this survey. **We kindly request that you respond by Friday, March 26th.**

*Note: * denotes a required question.*

The Partnership Overall

1. *Tauck Family Foundation’s (TFF) partnership with my organization adds value to our organization or initiative.
(Strongly Agree, Agree, Somewhat Disagree, Disagree, I Don’t Know)
2. *What word(s) would you use to describe the partnership between your organization or initiative and TFF?
3. Open response: What aspect of the Foundation’s partnership with your organization/initiative has been most valuable? Please provide examples if possible.
4. Open response: What aspect of the Foundation’s partnership with your organization/initiative has been less helpful? Please provide examples if possible.

5. *TFF staff understand my organization/initiative, including its mission, goals, needs, and challenges.
(Strongly Agree, Agree, Somewhat Disagree, Disagree, I Don't Know)

Communication

6. *TFF communicates effectively with my organization as it relates to grant-related requirements.
(Strongly Agree, Agree, Somewhat Disagree, Disagree, I Don't Know, N/A)
7. *How would you describe communication with TFF staff?
(Meetings: Too many, Just the right amount, Too few; Emails: Too many, Just the right amount, Too few)
8. *I feel comfortable informing TFF staff of any concerns (with regard to the partnership or otherwise) that have arisen.
(Strongly Agree, Agree, Somewhat Disagree, Disagree, I Don't Know, N/A)
9. *I find the Resource Roundup email sent by TFF staff to be useful.
(Strongly Agree, Agree, Somewhat Disagree, Disagree, I Don't Know, N/A)
10. Open response: What additional topics or areas would be helpful to include in the Resource Roundup emails?
11. Open response: How could the Foundation improve its communication (including language/jargon, as well as methods, length, and frequency of communication)?

Grant Requirements

Questions 12 and 13 list the TFF grant requirements during a typical year. While some of these activities did not occur in 2020 due to the pandemic, we hope to resume most of these requirements in 2021, to the extent possible. Please answer these questions based on your past experience with these requirements.

12. * Please rate each of the following grant requirements on a scale from one to five on how burdensome they are for you/your staff/your organization to participate/complete.
(1=not at all, 2=a little, 3=neutral, 4=somewhat, 5=very, I don't know, N/A)
- Quarterly check-in meetings
 - Annual focus group discussions
 - Impact Capacity Assessment Tool (iCAT) (please select N/A if your organization is part of BECSELI or the BPS SEL Initiative)
 - Annual grant report
 - Capacity building plan (for organizations) or work plan (for initiatives) development
 - Investee Cohort Gathering
13. *Please rate each of the following grant requirements on a scale from one to five on how helpful they are to you/your staff/your organization.
(1=not at all, 2=a little, 3=neutral, 4=somewhat, 5=very, I don't know, N/A)
- Quarterly check-in meetings

- Annual focus group discussions
- Impact Capacity Assessment Tool (iCAT) (please select N/A if your organization is part of BECSELI or the BPS SEL Initiative)
- Annual grant report
- Capacity building plan (for organizations) or work plan (for initiatives) development
- Investee Cohort Gathering

14. Open Response: Please share your feedback about any of these requirements: strengths, weaknesses, and/or how they could be improved for the future. When possible, provide specific examples.

15. *For the Foundation's annual Cohort Gathering event held in November, where investee representatives (including Board members and staff), Bridgeport parents and community members, and Tauck family members are traditionally invited, what format would you prefer for 2021? (Select one)

- In-person event (that would follow all required Covid-19 safety protocols)
- Virtual event
- An in-person event with an option to participate virtually
- I do not have a preference at this time

16. *What time of day would be best to hold this 3-4 hour event? (Select one)

- Breakfast
- Lunch
- Early Evening (3pm start time)
- Evening (5pm start time)
- Other
- I Don't Know

17. *What part(s) of the Investee Cohort Gathering events do you find most useful/beneficial? (Select up to 3 choices)

- Networking with Bridgeport colleagues
- Learning more about the work of other TFF investees
- Meeting/connecting with Tauck family members
- Meeting/connecting with other TFF investee representatives
- Meeting/connecting with TFF Advisory Committee members
- Learning more about a specific topic relevant to my field or the organization I serve
- I don't find the Investee Cohort Gatherings useful/beneficial
- Other
- I haven't participated in a Cohort Gathering
- I don't know

18. *What part(s) of the Investee Cohort Gathering events do you find less helpful? (Select up to 3 choices)

- Networking with Bridgeport colleagues
- Learning more about the work of other TFF Investees
- Meeting/connecting with Tauck family members
- Meeting/connecting with other TFF Investee representatives

- Meeting/connecting with TFF Advisory Committee members
- Learning more about a specific topic relevant to my field or the organization I serve
- Other
- I haven't participated in a Cohort Gathering
- I don't know

Knowledge Building and Sharing

TFF seeks to gather feedback about the key areas of interest and support you and your organization's staff, teachers, and/or Board members might want or need to strengthen your organization and continue the important work you do within the Bridgeport community. Our goal is to identify common needs or areas of interest among our partners and, to the extent possible, respond accordingly to the needs and interests articulated.

For questions 19 and 21, please select the topic area(s) of interest and whether this area is of interest to the organization's Board, staff, and/or teachers. For questions 20 and 22, please provide additional information about what exploring a certain topic might look like for your organization.

19. Are there particular education and/or SEL-related topics you, your organization's Board, staff and/or teachers would be interested in learning more about via professional development opportunities? *Note: If you are a staff member at an organization within one of the initiatives that TFF supports, please answer on behalf of the organization you represent, not on behalf of the initiative. (Check all that apply)*

- Restorative Practices
- Mindfulness/Meditation
- Trauma-Responsive Classrooms and Schools
- Family Engagement
- Anti-Racism/Abolitionist Teaching
- Cultural Competency and Culturally Responsive/Affirming Practices
- Other (please share more in the next question)

20. Please provide further explanation or ideas from topics you selected in the previous question and/or share other education/SEL-related topics of interest that are not listed in the previous question. Information shared here may include specific professional development trainings, sessions, conferences, and/or webinars your organization's Board, staff and/or teachers are interested in participated in around these topics.

21. Are there particular non-SEL-related topics you, your organization's Board, staff, and/or teachers would be interested in learning more about via professional development opportunities? *Note: If you are a staff member at an organization within one of the initiatives that TFF supports, please answer on behalf of the organization you represent, not on behalf of the initiative. (Check all that apply)*

- Strategic Planning
- Board Development and Governance
- Leadership and Management
- Risk Management
- Diversity, Equity, Inclusion work (which may include anti-racism, implicit bias and/or racial equity assessment work)
- Human Resources

- Budgeting and Financial Management
- Marketing
- Communications/Social Media
- Fundraising
- Grant Writing
- Data Collection
- How to Use Data Effectively
- Website development/IT
- Other (please share more in the next question)

22. Please provide further explanation or ideas from topics you selected in the previous question and/or share other non-SEL-related topics of interest that are not listed in the previous question. Information shared here may include specific professional development trainings, sessions, conferences, and/or webinars your organization's Board, staff and/or teachers are interested in participated in around these topics.

23. *Investee partners have reflected that racial equity and justice are important areas for their organizations to explore and address, particularly in light of events that have occurred over the past year. Which of the following would be most useful in supporting your organization's work on racial equity and justice? (Select one)

- Learning: Introduction and entry exploration of topics related to racial equity and justice.
- Application: Support and tools to make changes or sustain new practices adopted to advance racial equity and justice within my organization.
- Networking: Connecting with peers and further understanding the landscape of racial equity and justice work.
- Cohort: A sustained, multi-month program with a cohort of peers engaged in more advanced learning and application around racial equity and justice.

24. *To strengthen communication among, and build connection between TFF investee partners, would you be interested in participating in regularly held informal sessions with other TFF investee representatives to discuss relevant topics to your work and/or the Bridgeport community?

- Yes
- No
- Maybe
- I Don't Know

25. Open response: If TFF were to implement this idea, what suggestions do you have that might encourage you/your staff to participate in these sessions? (around structure, timing, which staff within your organization should participate, topics to include in discussions, etc.)

Impact

26. *My organization or initiative's SEL efforts to date are making a difference in the Bridgeport community.

(Strongly Agree, Agree, Somewhat Disagree, Disagree, I Don't Know)

27. Can you provide an example of how your organization or initiative's SEL efforts are making an impact within Bridgeport?

28. Open response: How can TFF be most helpful to your organization or the initiative that your organization is a part of in achieving success?

Final Thoughts

29. Open response: Is there anything else you would like us to know or you would like to share that we didn't ask?

Thank you for your time, reflections, and insights.