

2024 ANNUAL REVIEW

Updates on Our Work, Giving,
and Organization

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STATE OF OUR STATE

California Voices

- Two out of three **Californians expect bad economic times ahead for the state** — over 70% believe their children will be worse off financially.
- About half of lower-income (<\$40K) individuals are **dissatisfied with their financial situation**.
- Eight in 10 Californians find that there is a **lack of availability of well-paying jobs**.
- Six in 10 lower-income individuals report they **do not have job security**.
- Seven in 10 adults completely or somewhat agree that **it is important for workers to organize** so that employers do not take advantage of them.

Source: Public Policy Institute of California
(November 2023, February 2024)

POSITIVE MOMENTUM AMONG THE CHALLENGES

The beginning of 2024 brought some bright spots, economically, for California: Employment has recovered after the impact of the pandemic, unemployment has reached near historic lows, and inflation is easing.

However, the state has not fully addressed the ongoing and long-term issues that prevent California from having sustainable, thriving economic growth. The state faces a shrinking labor force, slowed job growth, income inequality, steep housing costs, and education costs that are out of reach for its residents. All of this creates economic pessimism among Californians (see *sidebar*).¹

Workers paid the lowest wages face particularly economic uncertainty, as many major pandemic-related social safety net programs ended in 2023 and an evolving world influences their job prospects.² This includes new technologies that replace or affect jobs, and climate events that disparately affect low-income communities. And Black, Latino, and multiracial Californians disproportionately face tougher prospects based on economic security indicators.

In Sacramento, policymakers are grappling with a record deficit of \$68 billion for the next budget year, based on less-than-projected tax revenue. Yet California is in a strong position to weather the storm, as it did during the Great Recession.³

Signs of hope include:

- Regional unemployment gaps continue to remain narrow.
- Unemployment rates among Latino Californians are now lower than before the pandemic.⁴
- 2023 showed continued momentum in the organized labor movement, with **half-a-million workers involved in more than 400 strikes**, including one of the largest strikes of healthcare workers in U.S. history.⁵ Union workers were able to make 10-20% more than their peers, and their wins are having ripple effects in wages across their industries.
- California saw more job openings than seekers for the first time in decades, creating increased wages and flexibility — back to pre-pandemic levels.⁶
- More work location flexibility, as people move outside of urban areas, is reshaping regional economies and inviting opportunities for greater infrastructure development across the state.
- There are several initiatives using state and federal funds to bring more economic equity to under-resourced communities (see more on the next page).

Sources:

- (1) PPIC. [2023 Statewide Survey: Californians and Their Economic Well-Being](#).
- (2) CalMatters. [Year in review: Danger signs for California's economy](#)
- (3) NPR. [California faces record \\$68 billion budget deficit](#)
- (4) PPIC. [Californians and Their Economic Well-Being](#) (2023)
- (5) Cornell University. [Labor Action Strike Tracker](#)
- (6) PPIC. [Making Sense of California's Economy](#) (2024)

State of Our State

Impact of Freedom to Succeed Executive Order Since August 2023

- ✓ Nearly 7,000 workers and apprentices receiving training and 200 new jobs created to advance career opportunities
- ✓ Support for displaced oil and gas workers to connect to jobs in other sectors matching their skills with comparable wages
- ✓ Pre-apprenticeship and apprenticeship programs expanded to serve more youth who are or are at risk of being disconnected from the education system, employment, housing, or are foster youth
- ✓ Expanded access to well-paying jobs in public service by removing employment barriers for 169 job classifications that historically required traditional education stipulations
- ✓ Training for farmworkers to have access to higher wages and technical education (in partnership with the Employment Training Panel)

STATE AND FEDERAL INVESTMENTS FOR JOB CREATION AND GREATER EQUITY

Some highlights of substantial impact across state investments include:

- The state provided more than \$272 million from 2022-2023 for the **California Competes Tax Credit, Small Business Finance Center Loan Guarantee Program, and Employment Training Panel** to demonstrate the ability for job creation and retention.¹ In December 2023, the Employment Training Panel launched the Agriculture Initiative, making \$10 million in funding available for businesses and workers in the agriculture sector.²
- The **Freedom To Succeed** executive order signed in August 2023 launched a \$111 million career education effort to improve access to high-paying jobs for Californians who have historically been underserved and lacked access to essential resources for success.³ *See more in the sidebar.*
- After the launch of the first-in-the-nation state task force to study historic and systemic racism and develop recommendations to address it, the **California Reparations Task Force** voted and approved 200 recommendations in July 2023 for how to address centuries of unfair treatment of Black Californians.⁴

At the federal level, the **Justice40 initiative** has targeted efforts to flow federal investments to disadvantaged communities, including policies such as the Inflation Reduction Act, Bipartisan Infrastructure Law, and American Rescue Plan.⁵

Sources:

- (1) PPIC. [Policies for Creating and Keeping Jobs in California](#) (2023)
- (2) [State of California](#). January 2024
- (3) [Office of Governor Gavin Newsom](#). February 2024
- (4) Department of Justice. [California Reparations Report](#)
- (5) The White House. [Justice40](#)

State of Our State

IRVINE'S NORTH STAR

A California where all low-income workers have the power to advance economically.

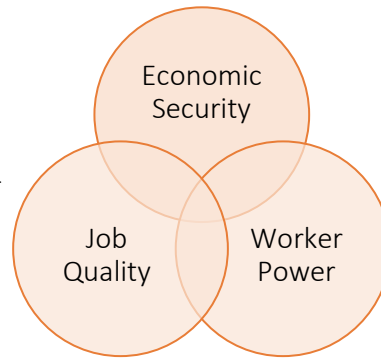
NORTH STAR INDICATORS

This section provides important context as we reflect on our previous year's work and look forward. We utilize a set of indicators to regularly track three important, inter-related dimensions of our **North Star: economic security, job quality, and worker power**. The following three pages describe the indicators, which have been updated with the latest available data.

The Three Dimensions Of Our North Star

Workers can afford basic needs and are resilient against unanticipated financial hardships.

Workers have access to employment opportunities that offer a living wage, stable job, opportunities for growth and advancement, and benefits that support health and well-being.



Workers have influence over decisions that impact their lives and are represented in related decision-making bodies.

Shining the Light on Disparities

To better understand disparities, we analyze reported data by the following demographics as available: race/ethnicity, gender, age, income, region, and/or employment status.

We note changes in demographic breakdowns highlighted last year, in the narrative, if they are approximately 5% or more.

LOOKING AHEAD

There are significant opportunities ahead to overcome or mitigate the economic uncertainties Californians face. **We continue to be inspired by the work of dedicated leaders, inspiring organizations, and passionate and effective advocates in California's communities who have created unprecedented movements, opportunities, and solutions for a more just, inclusive economy.**



ECONOMIC SECURITY

Workers can afford basic needs and are resilient against unanticipated financial hardships.

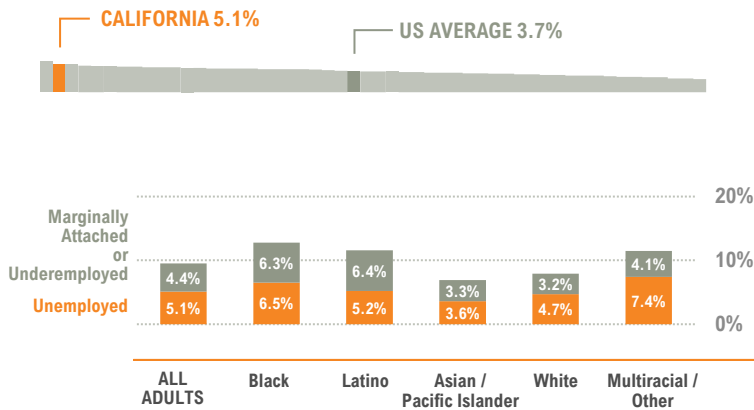
A California where all low-income workers have the power to advance economically



Employment rates have recovered from the immediate shock of the pandemic, but with a higher unemployment rate than last year many Californians are still struggling to make ends meet. Across economic security indicators, disparities continue to exist for Black, Latino, and multiracial Californians. Latino Californians are faring better than pre-pandemic and regional gaps in the employment rate have shrunk. And though inflation is easing, it continued to undercut wage gains made by low-income workers in 2023.

EMPLOYMENT

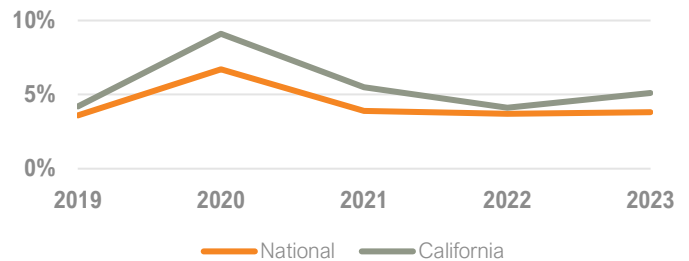
California ranks second among the 50 states with highest unemployment, which does not include individuals marginally attached to the labor force or underemployed. At 5.1%, California's official unemployment rate is 38% higher than that of the nation overall (3.7%) as of December 2023. This marks a worse ranking for California after it had made improvements in its unemployment rates in 2022.^{1,2} Accounting for underemployed and marginally attached workers, the share increases to 9.5%, or 39% higher than the national average of 6.8%.



Note: "Underemployed" includes persons who want and are available for full-time work but have had to settle for a part-time schedule. "Marginally attached" includes persons who currently are neither working nor looking for work but indicate that they want and are available for a job and have looked for work sometime in the past 12 months.

UNEMPLOYMENT OVER TIME

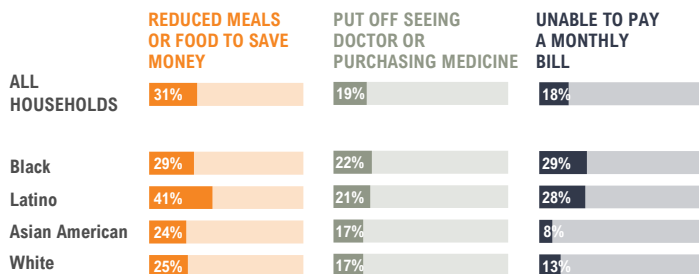
The California unemployment rate has mostly returned to pre-pandemic levels, while still exceeding the national unemployment rate. After closing that gap slightly last year, it has widened again.



Note: Unemployment rate for each year is based on data from the Employment Development Department and Bureau of Labor Statistics.

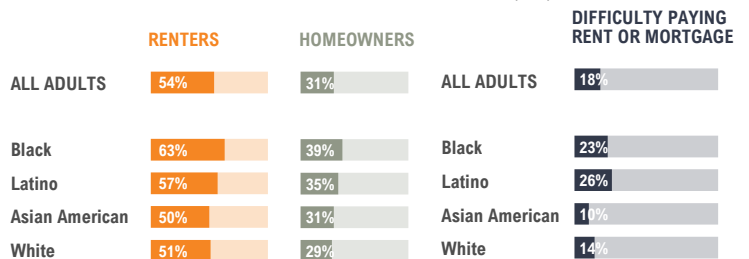
MAKING ENDS MEET

Households mostly experience similar challenges to making ends meet compared to last year.³ Asian American households experienced a 7% and 5% decrease in reducing meals and being unable to pay a monthly bill, while Latino households experienced a 9% decrease in putting off seeing a doctor.



HOUSING BURDEN

Over half of Californians are housing-burdened, spending more than 30% of their income on rent or mortgage.^{3,4} Compared to last year, difficulty paying for rent decreased the most for Asian American households (5%).



Note: Housing burden is defined as the share of owner- and renter-occupied households that are cost-burdened (spending more than 30% of income on housing costs) and "severely" cost-burdened (more than 50%). Data for 2020 represents five-year averages (e.g., 2016-2020). Native Americans renters are 55% housing-burdened compared to 30% for homeowners. Categories for racial groups may differ slightly as the two graphs are from different data sources.

¹ Bureau of Labor Statistics (December 2023)

² Public Policy Institute of California calculations from EDD as of January 2023

³ Public Policy Institute of California (November 2023)

⁴ National Equity Atlas' Analysis of Census American Communities Survey data (2020)

A California where all low-income workers have the power to advance economically



JOB QUALITY

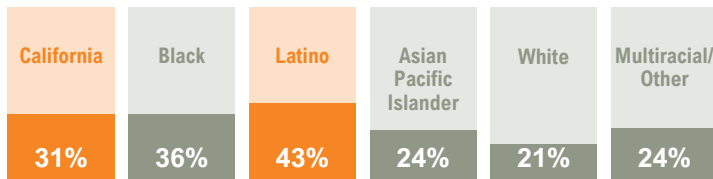
Workers have access to employment opportunities that offer a living wage, job stability, opportunities for growth and advancement, and benefits that support health and well-being.

About seven in 10 California households earn enough to avoid living in or near poverty, similar to last year — with most California workers reporting having good job quality (defined by job stability, access to benefits, and advancement opportunities). Racial disparities persist for Latino and Black workers. Those with higher incomes tend to report better quality jobs, as do full-time workers as compared to part-time workers.

HOUSEHOLD INCOME



Nearly one-third of California households are living at or near poverty. This reflects a small increase from last year. Latino Californians experienced the highest rates of poverty.¹

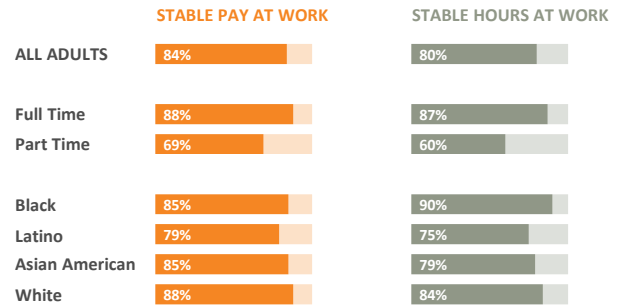


Note: "At or near poverty" is defined as 150% of the California Poverty Measure, which corresponds to approximately 250% of Federal Poverty Guidelines. This translates to a household of four with an average income of \$62,102. Adjusted by region, this ranges from \$49,171 for a household of four in North Coast and North State to \$72,554 in the Bay Area. (See more on the California Poverty Measure [here](#).)

JOB STABILITY



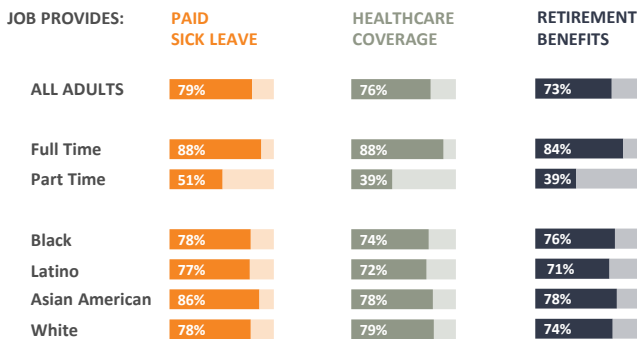
Many Californians report stable pay and hours at work. Stable pay remained the same compared to last year for all adults. However, it decreased for Latino workers by 8%. Stable hours increased for Black and White workers by 5%.²



JOB BENEFITS



Most Californians have access to benefits through their employers but they vary substantially whether workers are full or part time. Part-time workers fare the worst in terms of accessing benefits. Compared to last year, paid sick leave, healthcare coverage, and retirement benefits decreased for Black workers by 6%, 7%, and 7%, respectively. Health coverage and retirement benefits increased for Latino workers by 5% and 7%, respectively.²

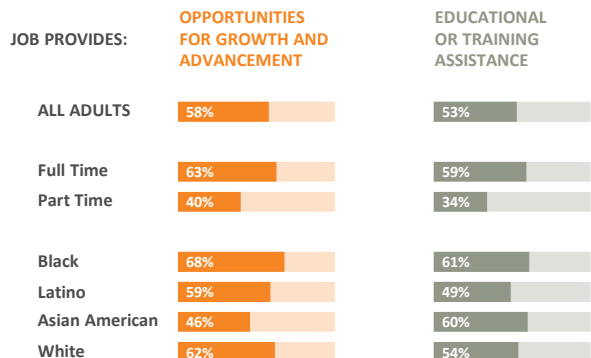


Note: While the above PPIC survey data describes employer-provided benefits, the Census American Communities Survey (2021) includes data on healthcare coverage broadly, not just employer-sponsored coverage. This data reveals a much higher rate of coverage for all races: Black (94%), Latino (88%), Asian (96%), Native Hawaiian or Other Pacific Islander (93%), American Indian or Alaska Native (87%), White (94%), suggesting many are purchasing coverage on their own.

OPPORTUNITIES FOR ADVANCEMENT



Compared to job benefits and job stability, workers in California have less access to advancement opportunities and educational/training assistance at their workplaces. For advancement opportunities, compared to last year, Asian American workers experienced a 12% decrease. For educational/training assistance, Latino workers experienced an increase of 5%.²



¹ California Poverty Measure (2022)

² Public Policy Institute of California (November 2023)



WORKER POWER

Workers have influence over decisions that impact their lives and are represented in related decision-making bodies.

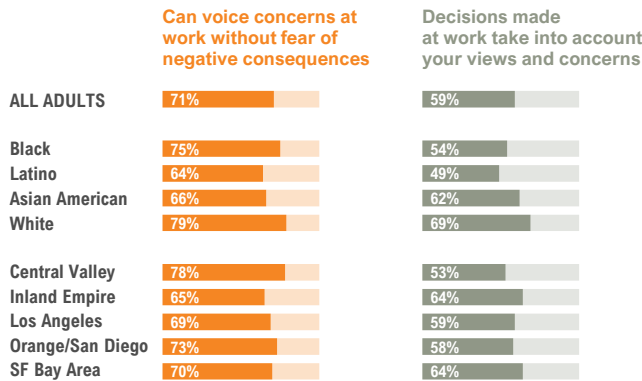
A California where all low-income workers have the power to advance economically



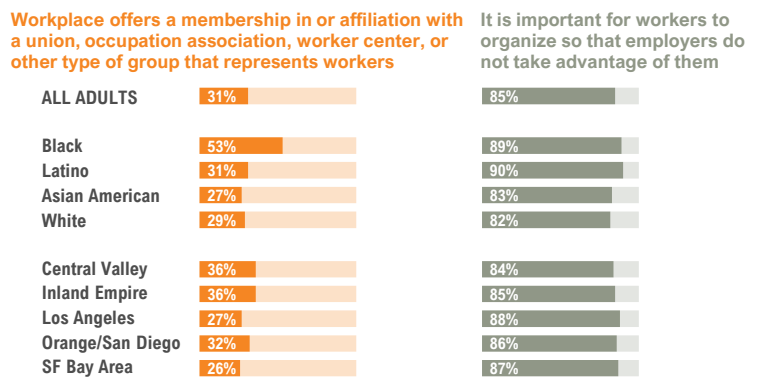
Californians continue to agree on the importance of voting and worker organizing. However, fewer than half of Californians feel they can trust the state government to handle issues related to jobs and the economy. Only six in 10 workers feel that their employers' decisions take their views and concerns into account, and only about one-third of workers have a formal way to organize around their workplace concerns and rights.

WORKER VOICE

Nearly three-quarters of California workers feel they can voice concerns at work; fewer report that decisions take their views into account. Fewer Asian American workers feel they can voice concerns (8% decrease) while those in Central Valley experienced a 5% increase. More White workers and Inland Empire residents feel like employers take their concerns into account (5-7% increase) while fewer Central Valley and Orange County/San Diego residents do (5% decrease).¹



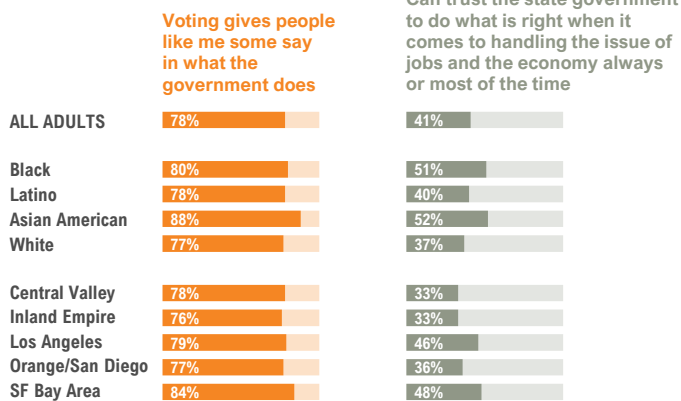
Most Californians continue to feel it is important for workers to organize so that employers do not take advantage of them. This contrasts with less than a third of workers who report having workplaces that offer formal venues for worker representation. Since last year, membership availability has increased for Asian American and Inland Empire workers by 6%. Importance of worker organizing increased for Asian American and Orange County/San Diego workers by 5%.¹



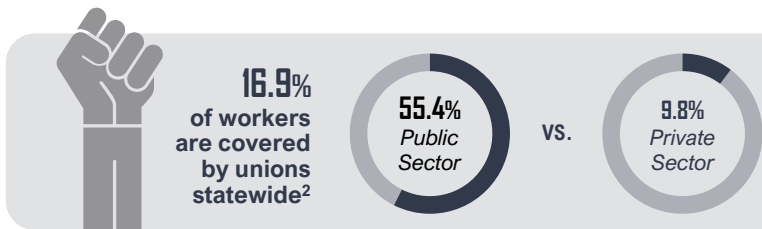
Note: The graph on the right includes survey respondents who chose "completely agree" and "somewhat agree." It excludes those who chose "somewhat disagree" or "completely disagree".

VOTING AND REPRESENTATION

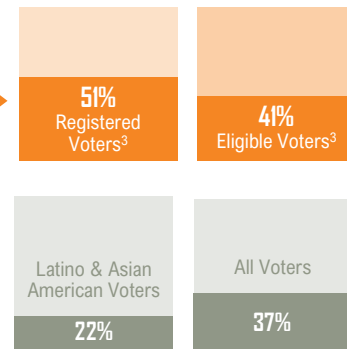
Most Californians continue to agree that voting is important in having some say in what the government does. For Latino, Inland Empire, and Los Angeles residents, their belief in the importance of voting has declined by 6-10% compared to last year. Over the same period, trust in the state government has decreased from 5-10% for Latino, Central Valley, Los Angeles, and Bay Area residents.¹



Notes: (1) For the question on voting, survey respondents could identify "completely agree," "somewhat agree," "somewhat disagree," "completely disagree," or "don't know." (2) For the question on trust, survey respondents could identify "just about always," "most of the time," "only some of the time," or "don't know."



Turnout for those registered and eligible for the 2022 state general election was low but is typically higher during presidential election years.³



Historically, Latino and Asian American Californians are less likely to vote or register to vote. Only 22% voted in the 2020 primary elections.⁵

¹ Public Policy Institute of California (November 2023)

² Barry T. Hirsch, William Even and David A. Macpherson, "Union Membership and Coverage Database from the Current Population Survey", available at UnionStats.com (2023)

³ California Secretary of State

⁴ United States Election Project, <http://www.electproject.org/2020g>

⁵ USC Center for Inclusive Democracy

IRVINE'S APPROACH

Irvine's Approach

The Irvine Foundation is now several years into our singular focus on the economic opportunities for working Californians paid the lowest wages. Our grantmaking initiatives are underway and regularly reflecting on what will best support grantees to have the greatest impact.

Our grantmaking strategy is designed to navigate the volatility of our payout (due to the changing value of our endowment). Our initiative grantmaking in 2024 will not be impacted by reductions in payout, but a decreased grantmaking budget will make us more selective in other giving and partnerships that we may pursue this year.

Top of mind in all we do are our institutional values — Accountability, Curiosity, Empathy, Equity, Nimbleness, Partnership, and Transparency — and our commitment to advancing racial equity in how we give and how we operate. Please see the 'Our People and Culture' section for more on that commitment, driven by our [racial equity statement](#).

This section includes updates and insights related to our:

- Initiatives
- Additional Grantmaking
- Cross-Portfolio Investments
- Exploratory Grantmaking
- Listening and Learning

Initiatives

BETTER CAREERS

In December 2022, the Irvine board approved a revised strategy for [Better Careers](#), committing an additional \$170 million over seven years to **support high-quality training, promote quality jobs, and address systemic racism.**

In 2023, we directly invested almost \$34 million in 60+ grantees along with \$4.5 million more through our community-advised [New Fund](#) process. Our funding supported the three priorities of our new strategy (apprenticeship, community-accountable workforce, and public sector practice change), as well as supporting research and transitioning grantees from our previous strategy. Within our three priority strategies, our goals are to:

- 1 **Strengthen the field of apprenticeship intermediaries** to provide sustainable, inclusive, debt-free paths for low-wage workers to access jobs with good benefits and wages, opportunities to advance, and worker voice
- 2 **Support community-led and -accountable organizations** that Californians who have been failed by multiple systems trust to provide comprehensive support, build worker power, and connect them to quality jobs
- 3 **Promote inclusive public workforce services and investments** to focus public dollars on equity and better meet low-wage workers' needs

Initiatives

» Notable in 2023 «

- **Validation from the field.** The field continues to validate our updated, high-level and focus area strategies, and we heard appreciation for a thoughtful, equity-centered approach.
- **Articulation of focus area strategies.** In 2023, we translated our initiative-level strategy into workstream-level workplans for apprenticeship, community-accountable workforce, and public sector practice change. It was a significant endeavor that brought clarity to the problems we are trying to solve, how we will approach them, and how we will know if we are making progress.
- **Exploration of sharing power.** The New Fund, part of our community-accountable workforce workstream, was driven by an advisory committee made up of leaders in workforce development, community organizing, and education. This exercise in sharing power allowed the team to expand our thinking based on insights from those closest to the work and helped us articulate the values to guide our grantmaking. We plan to continue this approach in our Public Sector Practice Change workstream.

BETTER CAREERS (cont'd.)

Key Learnings

From our updated strategy, we have learned distinct lessons from each area:

- **The work of building inclusive apprenticeship intermediaries takes time and careful attention.** Many of the most promising players are new to being intermediaries and/or are new to a more inclusive approach. Building the capacity and relationships — especially with employers, community colleges, and community organizations — to do this work well requires patience and specific, unwavering focus on equity.
- **There are many under-resourced organizations that are accountable to their communities and using workforce development services to repair historical harms.** There is an even larger-than-anticipated group of potential core grantees, and we are working to discern the right mix to move forward in this work. As we learn more about these organizations, who they serve, and how they work, the opportunity for effective capacity building and technical expertise to significantly magnify their impact — and their influence on the broader public system — is coming into focus.

Our Initiative Values

Developing racial equity values specifically for the Better Careers initiative has helped add the “why” to the “what” of the higher-level strategy decisions we’ve already made and brings shape to our work and grantmaking.

Fix work, not the worker.

Workforce development often focuses on individuals attaining skills and conveys that the exceptional achievement of the few in escaping systemic poverty means that labor markets are not broken. We must focus on changing systems, not people.

Love, not charity.

Workforce development services can help repair the damage caused by years of what is often racially motivated divestment. Recognizing the value and agency of a jobseeker and holistically meeting their needs should be the rule, not the exception.

Name the harm and take care not to do more of it.

Workforce development interventions sometimes support and exacerbate racial and gender segregation in work. Efforts to address this must start with recognizing it.

Share power.

Decisions are more just when those they impact can inform and make them. We must involve more community members in funding decisions and support workforce development staff to listen to and partner with those they serve.

Stories of progress, not tallies of placements.

The workforce development system often rewards quick placements into low-quality jobs. We must tell the story of what real progress looks like for people who have been failed by multiple systems.

Initiatives

Notable in 2023

- **Wage theft case brings justice to caregivers.** Pilipino Workers Center and the Labor Commissioner's Office pursued the largest wage theft case in residential care in state history, against an employer found to pay 150+ workers an average of \$2.54 per hour. Workers received their due in December 2023 and are on track to receive \$5.5 million in back wages. Other settlements are in the pipeline.
- **Enforcement partnership as a model for federal efforts.** DOL Partnerships connects the U.S. Department of Labor with worker advocates, building on California efforts spearheaded by Irvine investments. An integrated approach to enforcement, including public-private partnerships, will prove valuable for California workers given the magnitude of the challenge.
- **Significant policy wins.** The California Coalition for Worker Power (CCWP) has continued to align on core interests for organizations working across industries. In its first two years, CCWP successfully advocated for tens of millions in new state investments for worker outreach, stronger state enforcement, and the Equal Pay and Retaliation Act, which protects workers who report labor violations from being fired, bullied, or harassed.
- **Elevating stories of wage theft.** [Wage Theft Stories](#), an Irvine-funded multimedia storytelling project, illuminates the challenges of wage theft and solutions to end it (see more in our 'Listening and Learning' section)

FAIR WORK

In March 2023, Irvine's board approved \$186.5 million in additional grantmaking through 2030 for the [Fair Work](#) initiative. At the center of the initiative is the belief that workers will do better economically when they have a meaningful voice on the economic issues that affect them, are fully afforded their labor rights, and have opportunities for advancement that enhance their lives and livelihoods.

Since Fair Work launched in 2018, worker rights groups and their partners in California have made significant gains: substantially increasing their engagement and support of workers, leveraging worker voices to advance policy reforms that strengthen worker protections, and advancing solutions that increase access to quality jobs and strengthen the public sector's responsiveness to the needs of workers and communities.

Formal evaluation has shown that Fair Work's investment approach is working, but there are still significant needs in the field, constant threats to policy gains, and other opportunities for future impact.

We see that more workers need to be engaged, reforms and labor protections must be fully enforced, and groups need more diverse resources to advance and sustain wins in the workplace and in policy arenas.

The main strategies for the Fair Work initiative are:

- 1 Expanding worker organizing to help partners engage more California workers around their rights and opportunities for family-sustaining work
- 2 Advancing integrated approaches to strengthen labor enforcement and ensure workers receive their full wages due
- 3 Supporting promising innovations, policy solutions, and public-private partnerships that improve job conditions in low-wage industries and increase access to secure employment
- 4 Furthering racial equity in the worker rights movement by deepening support to groups led by and serving people of color, and helping connect them to key state and regional coalitions

Informed by grantees, the initiative envisions progress in three critical areas:

- Low-wage workers are informed and civically engaged, and benefit from workplace improvements within industries.
- Strong and sustainable nonprofits improve conditions for low-wage workers.
- Organizations make progress in shifting the underlying conditions that adversely affect low-wage workers.

Initiatives

» Notable in 2023 «

Since the Just Prosperity initiative began making grants in 2022, we have worked to define the initiative's distinctive role and influence as a significant funder in California's power-building space. We convened an advisory group of grantees, distinguished power-building leaders, and field practitioners for an ongoing, collaborative approach to inform our investments — ensuring they truly reflect the priorities of those working on the ground. Highlights:

- Finalized the initiative's **Learning and Evaluation Plan**, with input from an advisory group of grantees and field leaders
- Sharpened **impact goals** to direct future investments
- **Commissioned research**, using a racial equity lens, to gain insight into the demographics of low-income households in California and to identify opportunities for greater impact
- Convened **listening sessions** with grantees to more closely align our investments with the priorities of low-wage Californians, and convened grantees for discussions on collaborative opportunities for worker voice and power, narrative change, and long-term systems change
- Grantees — including **PICO California** and its coalition partners in the **Million Voters Project** — community, and labor groups advocated for the Homelessness Prevention Act, signed into law by Governor Newsom. The bill addresses the housing crisis and prevents evictions for people burdened by high rent costs.

JUST PROSPERITY

In 2022, the Irvine board approved the Just Prosperity initiative, which aims to ensure that low-income Californians have the power to influence lasting change in our economic and political systems. The specific goals of the four-year, \$107 million initiative are to:

- 1 Increase capacity and coordination within and across organizations and networks that seek to build the voice and power of communities historically excluded from opportunity and policymaking
- 2 Build public and political will for policies, practices, and narratives that advance the power and prosperity of low-income Californians
- 3 Create and implement new approaches and solutions that advance racial equity and improve economic outcomes for low-income households

In 2023 we invested **\$28.5 million in 33 grantees** focused on:

1. **Organizing and advocacy:** supporting organizations and efforts that elevate worker leadership, so their voices are heard and represented at decision-making tables
2. **Research and storytelling:** investing in quality research, compelling stories, and opportunities to amplify worker perspectives and promote dialogue that complements the efforts of worker advocates
3. **Partnerships and new ideas:** supporting collaborations across sectors to spark new ideas and solutions that lead to a more equitable California

Key Learnings

- **Organizations led by and serving Indigenous, Black, and people of color face limited internal capacity and infrastructure — and lack funding.** Charitable giving by individuals and institutions is, broadly, forcing nonprofit leaders to make difficult personnel and programmatic decisions.
- **Grantees report increased levels of misinformation circulating among their constituents' social media and chat networks.** Misinformation erodes trust in government and democracy. This is particularly a threat to organizations working to increase civic engagement in communities that have had, historically, less voice in and trust for government.
- **Grantees forged new partnerships to leverage increased state and federal funds.** Several organizations led by and serving Indigenous, Black, and people of color pursued public funding, often for the first time.
- **Funders and nonprofits increasingly recognize the need for strategies that change narratives about work and workers.** When integrated into organizing and advocacy efforts, such strategies can reshape public perception on the issues that grantees are working on. The initiative has made grants to strengthen grantees' abilities to change narratives.

Initiatives



» Notable in 2023 «

Community and institutional partners are collaborating to build more inclusive economies for their regions. Evaluation of the Priority Communities initiative in 2024 will highlight examples of organizations' stronger capabilities, partnerships, and local policies adopted to drive a plan for better jobs and economic mobility for low-wage workers. Until then, highlights include:

- In **Salinas**, leaders have developed apprenticeship models in new industries such as Drones, Automation, Robotics, and Technologies (DART) that create new career pathways for local residents.
- **Stockton** grantees strengthened community-driven workforce collaboratives, specifically around developing project strategies to make the city more competitive for federal and state grants.
- Our support of small business ecosystem planning in **Fresno** will drive better technical assistance opportunities and a campaign to raise capital for entrepreneurs.
- **Inland Empire leaders** are working together in new ways, including creating the Community Economic Resilience Fund Equity Committee that includes Irvine grantees.
- National philanthropies (e.g., Kresge and Gates foundations), are showing greater interest in our priority communities, especially Fresno and the Inland Empire, because these regions are demonstrating their leadership at scale.

PRIORITY COMMUNITIES

In 2020, the board approved \$135 million over seven years to support efforts in Fresno, Salinas, Riverside, San Bernardino, and Stockton to:

- 1 Create more good jobs that offer a family-sustaining wage, benefits, and opportunities to low-wage workers to advance economically
- 2 Ensure more low-wage workers obtain good jobs and training to land them
- 3 Support effective, community-based approaches to increase the spread of good jobs
- 4 Leverage our dollars to bring in more public, private, and philanthropic funds

As of December 2023, the initiative has **invested \$40.8 million in 31 grantees** to support the local infrastructure needed to create quality jobs and put workers paid low wages at the center. The initiative has helped to:

1. **Strengthen local planning tables** that have cross-sector participants
2. **Build the capacity of community organizations** to ensure residents and workers have a voice in economic planning
3. **Invest in small business development**, especially approaches that prioritize entrepreneurs who traditionally have received less investment
4. **Support economic research** and efforts to change the narrative about ensuring our economies work for all

Key Learnings

- **Communities with less access to funding need continued investments.** Robust support of local partnerships allows communities — especially Indigenous, Black and other leaders of color — to find and prioritize opportunities for public funds, economic development, and entrepreneurship.
- **Supporting communities to develop inclusive economies is difficult.** It entails supporting stakeholders not traditionally included in economic development discussions to lead and participate in defining what a future economy looks like and who should benefit.
- **Irvine's investment in strengthening partners' leadership, networks, and more, has enabled certain regions to create plans and projects ready for state and federal investment.** Communities are moving toward shovel-ready to shovel-worthy projects because there is capacity to work together and put racial equity at the center of the designs and prioritization of opportunities.
- **We are following the community's lead in identifying innovative solutions to address historic racial economic inequality in communities.** It is a learning process, as we shift from the idea that innovation is a return on investment to ensuring "good ideas" are community-driven, values-aligned, and equitable.

Additional Grantmaking

HOUSING AFFORDABILITY

California's high housing costs are a significant barrier to economic advancement for families living on low incomes. Unaffordable housing disproportionately affects workers of color based on years of systemic racial bias, discrimination, and segregation embedded in housing policies and practices. Ongoing rebuilding efforts after the pandemic are a valuable opportunity to implement sustainable and equitable solutions, and we believe the voices, ideas, and priorities of the Californians most deeply impacted by the housing crisis must inform these conversations.

In 2021, Irvine committed **\$40 million over four years** to:

- 1 Build the capacity of housing policy advocates across the state to elevate the voices, interests, and ideas of low-income residents
- 2 Engage impacted populations in the design and implementation of policy solutions
- 3 Advance a 3Ps agenda: Protect tenants, Preserve affordable housing, and Produce new affordable units

In 2022, we directed **\$19.5 million** to support various statewide housing advocacy efforts, strengthen the capacity and coordination of community advocates in Los Angeles County, and advance policy research to elevate the voices and priorities of low-income residents, including with a racial equity analysis.

We invested **\$9.1 million** in 2023 to continue to build statewide and regional advocacy capacity and strengthen coordination and collaboration in the housing field. In response to grantee feedback, we added two grantees to our portfolio to ensure that rural, tribal, and farmworker perspectives are represented in housing policy and to support community-driven housing solutions in Stockton.

In 2024 we will continue our support of statewide and regional housing advocacy, identify and support other priorities informed by the field and community, and assess progress and share lessons learned. With an eye to 2025 and beyond, we plan to develop options for how Irvine might continue to support housing-related efforts within and/or alongside our four major grantmaking initiatives.

LEADERSHIP AWARDS

Each year, [The James Irvine Foundation Leadership Awards](#) recognize leaders whose innovative solutions to critical state challenges improve people's lives, create opportunity, and contribute to a better California. The Foundation grants each organization \$350,000 and shares their approaches with policymakers, peers, and other audiences via an event in Sacramento, traditional and social media activity, and individualized creative/artistic projects. [Read about these impressive leaders here.](#)

Cross-Portfolio Investments

Each year we use some of our staff and grantmaking capacity to explore opportunities that are complementary to our initiatives and sit outside or span multiple areas of focus. These investments can offer other ways to reach our North Star goal, to advance our racial equity commitments, and to support learning and strategy development across our work.

Examples of Irvine Partnerships with the State of California

- The **High Road Training Fund**, focused on helping jobseekers and workers overcome barriers to economic mobility through job placement, retention, and case-management services
- Planning for a **California teacher apprenticeship program**
- The **California Rapid Response Border fund**, including legal services and other supports for immigrant families in federal custody in California
- **Reimagining San Quentin**, an effort to redesign the prison to better focus on rehabilitation, reentry, and connection to quality jobs — and to serve as a model for other prisons
- **Humboldt County’s ability to respond to earthquakes and other disasters**
- The state’s **Community Economic Resilience Fund**, now called [California Jobs First](#). Over the next 10 years, California could invest as much as \$180 billion in infrastructure projects that create 400,000 jobs. We and other foundations are providing grants to community organizations to access and influence the allocation of public funds to maximize community and worker benefits.

LEVERAGING PUBLIC FUNDS

Because we cannot achieve our North Star goal alone, we often collaborate with funders, the public sector, organized labor, and employers to improve outcomes for Californians paid low wages. This has been a particularly ripe opportunity in recent years because of the significant funding coming from the state and federal government to rebuild our economies, infrastructure, and to prepare for climate change.

If California uses these billions of dollars equitably and effectively, we can produce higher-quality jobs and more equitable workforce development. Some 2023 examples of our efforts, with those goals in mind, include:

- Governor Newsom issued a [report on the impact of their partnerships](#), which included several examples of Irvine collaboration and funding (*see sidebar*).
- We continued supporting the [Community Economic Mobility Initiative](#), which we launched in 2022 with the Sierra Health Foundation. Five other foundations have joined, raising the fund to \$21.25 million to **strengthen community organizations’** agency in how \$139 billion in state and federal funds are invested for infrastructure and economic recovery.
- We made another grant to support [What Works Plus](#), a hub for grantmakers to **coordinate on projects related to the federal infrastructure and climate bills of 2021**. This helps us to engage policymakers and foundations on effective and equitable delivery of billions in public investments.
- A third grant to support the [Equity in Infrastructure Project](#) aims to further its momentum and ensure implementation among California public agencies who agreed to **increase the share of procurement contracts that small, disadvantaged businesses receive**.
- The [Families and Workers Fund](#), which we support, launched the Powering Climate and Infrastructure Careers for All initiative to create at least 1 million good jobs in the clean energy and infrastructure industries. Through \$50 million in grants, strategic partnerships, and technical assistance to nonprofits, employer groups, and local governments (in California and 13 other states), the initiative will **connect people in underinvested communities to careers in energy, construction, and other specialized industries, along with supporting public agencies, employers, community colleges, and nonprofits on the frontlines**.

Exploratory Investments

Small Business in our Priority Communities

From 2020 through 2023 we **invested \$40 million related to small businesses, \$25 million of which is in our Priority Communities**, to:

- Build **regional capacity** of the institutions and ecosystem that support small businesses
- Provide **microenterprises**, including entrepreneurs of color, with capital and technical assistance
- Support efforts to **create quality jobs**
- **Research** gaps, business models, and policy interventions to unlock greater resources for small businesses

SMALL BUSINESS

Small businesses employ nearly half of all private employees in California and often offer a way back into the workforce for the unemployed. Importantly, small businesses also advance racial equity, as a path for low-income, entrepreneurs of color to build intergenerational wealth or an alternative source of income in communities with few quality jobs.

Since 2021 we have explored what role Irvine might play in supporting small business through research, internal education, and engaging experts in the field. In 2022 we made pilot grants for learning and to engage with new grantees and stakeholders, and in 2023 we reported to the board that the best direction for small business investments was not through a new initiative but rather through continued and expanded support in our Priority Communities: Fresno, Salinas, Stockton, Riverside, and San Bernardino.

Investing in small business has been a key strategy in Priority Communities because starting or working at one of these enterprises can be a critical economic avenue for low-wage workers, particularly workers of color who face limited access and other barriers to quality jobs in these cities. And because our priority communities receive less philanthropic and public dollars than bigger California cities, our support can have outsized impact.

Going forward, we will **deepen Irvine’s small business grantmaking in Priority Communities to address disparities in small business support and to aid our partners to shape local economies that advance ownership, wealth, and quality jobs for residents**. In 2024 we will provide approximately \$10 million in grants, within Priority Communities, focused on growing strong regional institutions; building community power; and to target emerging industries. And the initiative is exploring additional investments in 2025 and beyond.

LEARNING THE PRIORITIES OF LOW-INCOME RESIDENTS IN ORANGE COUNTY

The Foundation has historic ties to Orange County, where James Irvine built his wealth through agriculture and ranching. Orange County encompasses land that was stolen from Native people, and the region is home to a large, diverse population of low-income residents who face structural barriers to economic opportunity.

In 2023, Irvine launched an effort to learn more about the history and current context of Orange County and the priorities of low-income communities of color and California Native communities in the region.

In partnership with current grantees, the team plans to convene community leaders and peer funders around opportunities to build relationships with local tribes and strengthen local economic justice efforts.

Listening and Learning

Listening to the people we seek to support and partner with is fundamental to our work. Our approach is driven, in part, by our [Impact Assessment and Learning Framework 2.0](#). Updated in 2023, the framework guides how we assess progress and impact, and use what we learn in our grantmaking, strategy, and operations. We support many forms of listening across Irvine to inform our thinking, approaches, and practices — and to advance equity. We also share what we learn with others, where relevant and useful.

Below are 2023 examples of listening to and learning from Native-led and serving grantees, workers, as well as supporting grantee and field-level efforts to strengthen equitable evaluation, listening, and feedback practices.

LISTENING TO GRANTEES

- The Center for Effective Philanthropy produced Irvine’s Grantee Perception Report, which provides data about how our grantees perceive us and comparisons to peer foundations who also participate in the survey. The survey includes confidential feedback from 169 grantees about their involvement with Irvine. The board will discuss the results and corresponding next steps at its March 2024 meeting.
- Fair Work supported [Wage Theft Stories](#), a listening and storytelling project to illuminate the challenges of and solutions for wage theft. Curated by an independent journalist, it chronicles how California workers are fighting to recover lost wages and efforts by government and nonprofit leaders to aid workers and strengthen enforcement.
- Just Prosperity completed a series of listening sessions with an advisory group of grantees and field leaders to refine the initiative’s impact goals and co-create investment strategies. The team also commissioned research to better understand low-income California households via a racial equity lens and identify additional impact opportunities.
- The Fair Work and Better Careers teams each engaged their respective grantees to refine initiative impact goals and co-design the learning questions they will use to assess the progress of updated strategies. Fair Work is also gathering grantee insights to shape its investments in organizational development, while Better Careers launched communities of practice to support peer learning among grantees.

LISTENING TO CALIFORNIA WORKERS

With Irvine support, the Public Policy Institute of California conducted its annual [Economic Well-Being Survey](#) about Californians’ economic situations and perspectives on economic mobility. The survey of 2,250 adults included an oversample of respondents living on low incomes (household income under \$40,000).

Listening and Learning

Example Grants to Native-led Organizations and Tribes

Below are some Native-led and -serving grantee partners and related efforts for exploring the connection between economic opportunity and tribally-led workforce development, power building, narrative change, cultural and family preservation, land stewardship, and ways for tribal partners to more easily access and leverage public funds.



[Blue Lake Rancheria](#)



[California Indian Manpower Consortium](#)



[California Native Vote Project](#)



[California Truth & Healing Fund](#) (via Decolonizing Wealth Project)



[Humboldt Area Foundation-Klamath Fund](#)

COREHub [Humboldt Area Foundation – Redwood Core Hub](#)



[IllumiNative](#)



[Intertribal Sinkyone Wilderness Council](#)



[Northern California Indian Development Council](#)



[So'oh-Shinálí Sister Project](#)



[The California Tribal Families Coalition](#)



[Tribal Marine Stewards Network](#)



[True North Organizing Network](#)

SUPPORTING FIELD LISTENING AND FEEDBACK PRACTICES

The Fund for Shared Insight (FSI) continues to promote listening and feedback practices with funders and nonprofits in service of greater impact and equity. FSI's signature program, [Listen 4 Good](#), supports nonprofits in adopting high-quality, equity-based feedback loops for greater impact. Irvine provides ongoing input to assist FSI's research and equitable evaluation efforts, and in 2023 we supported three grantees from the entertainment, movie, and television industries to participate in a Listen 4 Good Learning Community to connect cross-organizationally to share learnings, roadblocks, and solutions.

LEARNING FROM NATIVE-LED AND -SERVING ORGANIZATIONS AND TRIBES

A cross-departmental Native Learning and Investments Workgroup took a learning-by-investing approach to deepen Irvine's understanding of the economic priorities of California's Native and tribal communities. This built on grantmaking led by Irvine's Just Prosperity initiative to support Native-led and -serving organizations building power in and with Native and tribal communities in California. Despite deep economic and funding inequities, Native and tribal communities are at the forefront of demonstrating the solutions needed to advance equity and justice.

Since 2022 Irvine has **invested more than \$5 million in 11 new Native-led and -serving organizations and tribal partners and/or tribally led projects to support Native-led:**

- Practices to increase the data available about the Native American community in California
- Workforce development strategies
- Power building for Native peoples and tribes around the policy issues critical to advancing their own economic opportunity while also protecting tribal sovereignty
- Storytelling and narrative-change campaigns to center the unique history and experiences of Native peoples throughout California
- Participation in determining the future of California's green energy development along with land stewardship

These learning grants have also informed grantmaking practices more broadly for the Foundation — practices rooted in trust and relationship-building. Many organizations were new to philanthropic funding or had limited staff, so we piloted new, more equitable processes: streamlining the application and reporting process, providing more flexible deadlines, and adapting our processes to tribal governance structures.

2024 Grantmaking Portfolio at-a-Glance

INITIATIVES

Better Careers

Goal: To connect low-income Californians to good jobs with family-sustaining wages and advancement opportunities.

Fair Work

Goal: To advance fairness, dignity, and respect for California workers.

Just Prosperity

Goal: To support low-wage workers to have the power to influence regional, state, and federal public policy priorities.

Priority Communities

Goal: To partner with leaders and organizations in California communities to create good jobs and inclusive economies that work for all residents.

PROJECTS

Housing Affordability

Goal: To support policies that aim to improve long-term housing affordability outcomes for low-income workers in California.

Leadership Awards

Goal: To recognize and support leaders advancing innovative and effective solutions to significant state issues.

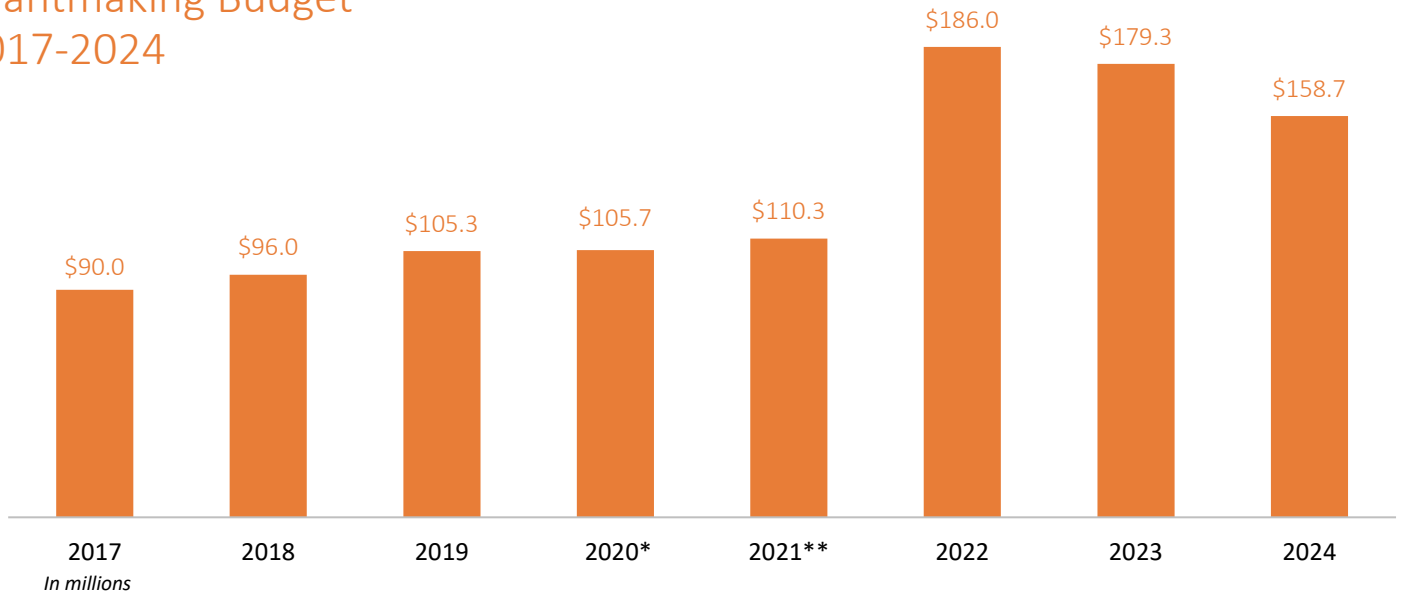
PROGRAM DEVELOPMENT

Research and Development

Goal: To support research that expands knowledge and grantmaking that tests new ideas to increase impact towards Irvine's North Star.

2023 GRANTMAKING PORTFOLIO BY THE NUMBERS

Grantmaking Budget 2017-2024



*2020 budget shown above is the originally approved budget and does not include the \$2M special allocation for racial equity grants.

**2021 budget shown above is the originally approved budget and does not include the \$18M special allocation for racial equity grants

2023 Grantmaking Budget

	2023 Actual
Initiatives	
Better Careers	\$ 33,480,255
Fair Work	\$ 36,876,795
Just Prosperity	\$ 28,499,700
Priority Communities	\$ 41,321,607
Projects	
Housing Affordability	\$ 9,100,000
Leadership Awards*	\$ 6,643,500
Program Development	
Research and Development	\$ 16,698,650
Culminating Work	
Media	\$ 750,000
Additional Grantmaking	
Impact Assessment and Learning	\$ 1,500,000
Institutional Relationship Grantmaking	\$ 1,845,000
Opportunistic Grantmaking	\$ 545,000
Flex Fund	\$ 525,000
Membership/Sponsorship	\$ 709,500
Board/Staff Discretionary Grants	\$ 1,777,068
Total	\$180,272,076

*2023 Leadership Awards budget included grants for 2024 awardees

2023 Grantmaking Portfolio Overview

2023 GRANTMAKING CATEGORIES

Initiatives

- Better Careers
- Fair Work
- Just Prosperity
- Priority Communities

Projects & Ongoing Grantmaking

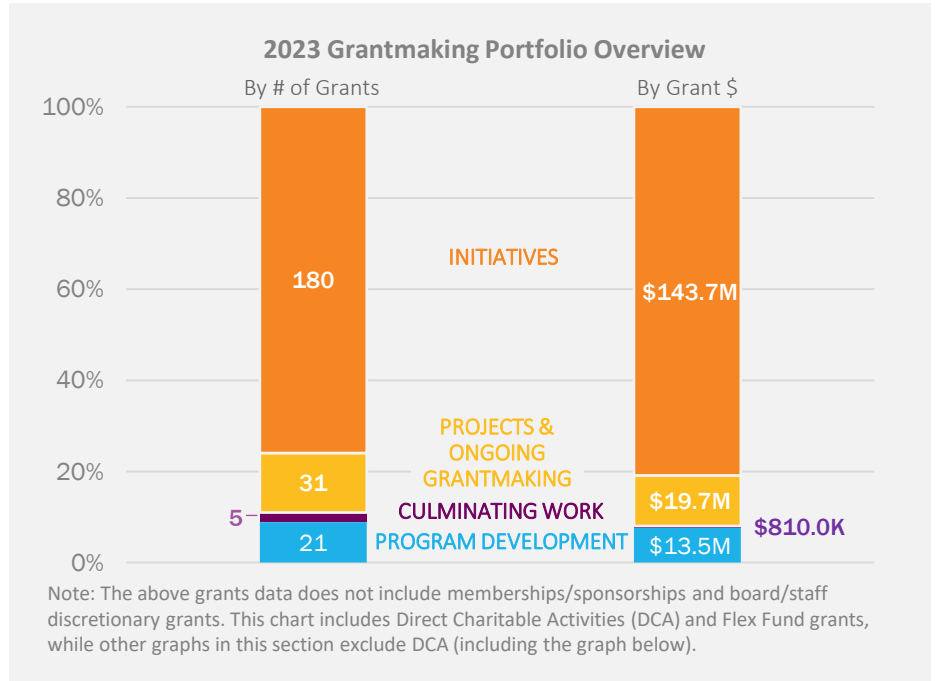
- Additional Grantmaking*
- Housing Affordability
- Impact Assessment and Learning
- Leadership Awards

Culminating Work

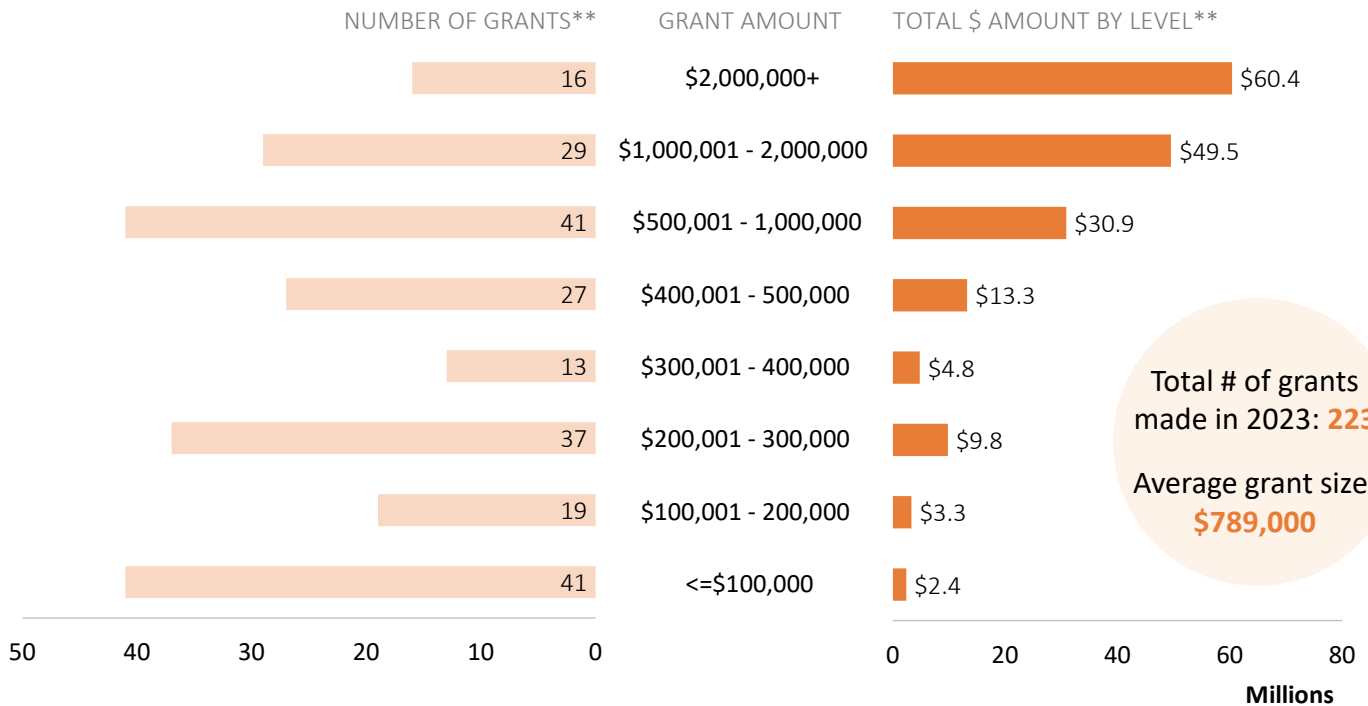
- Media

Program Development

- Research and Development



Total Grantmaking in 2023 by Grant Amount



*Additional Grantmaking in this section includes Flex Fund and Institutional Relationship and Opportunistic grantmaking.

**Number of Grants and Total \$ Amount does not include Direct Charitable Activities (DCA), memberships/sponsorships, and board/staff discretionary grants. It does include Flex Fund grants.

2023 Grantmaking by Region of California



	2023 Regional Grantmaking	% of Total 2023 Regional Grantmaking	Active Portfolio* (as of 1/2024)	% of Total Active Portfolio Regional Grantmaking	% of California Population** (2023)	% of Californians At Or Near Poverty (2023)***
CALIFORNIA REGIONS						
Bay Area	\$14,673,000	14%	\$31,084,700	12%	19%	16%
Central Coast	\$8,939,621	8%	\$26,087,655	10%	4%	4%
Los Angeles Metro	\$17,051,150	16%	\$44,641,150	18%	27%	32%
North Coast and North State	\$3,939,000	4%	\$5,502,250	2%	1%	1%
North Valley	\$34,000	0%	\$464,000	0%	2%	1%
Orange County	\$3,846,000	4%	\$7,621,000	3%	8%	8%
Riverside and San Bernardino	\$15,422,043	15%	\$39,656,800	16%	12%	12%
Sacramento Metro	\$1,364,700	1%	\$2,589,700	1%	6%	5%
San Diego and Imperial	\$10,592,954	10%	\$15,480,850	6%	9%	9%
San Joaquin Valley	\$29,988,523	28%	\$75,723,550	30%	11%	11%
Sierra	\$4,000	0%	\$4,000	0%	1%	1%
TOTAL REGIONAL GRANTMAKING	\$105,854,991	100%	\$248,855,655	100%		
	2023 Grantmaking	% of Total 2023 Grantmaking	Active Portfolio** (as of 1/2024)	% of Total Active Portfolio Grantmaking		
TOTAL REGIONAL GRANTMAKING	\$105,854,991	60%	\$248,855,655	59%		
TOTAL STATEWIDE GRANTMAKING	\$71,930,163	40%	\$174,676,025	41%		
TOTAL REGIONAL AND STATEWIDE	\$177,785,154	100%	\$423,531,680	100%		

Note: Percentages may not add up to 100% due to rounding.

*Active Portfolio is comprised of grants made in 2023 and multiyear grants made in previous years.

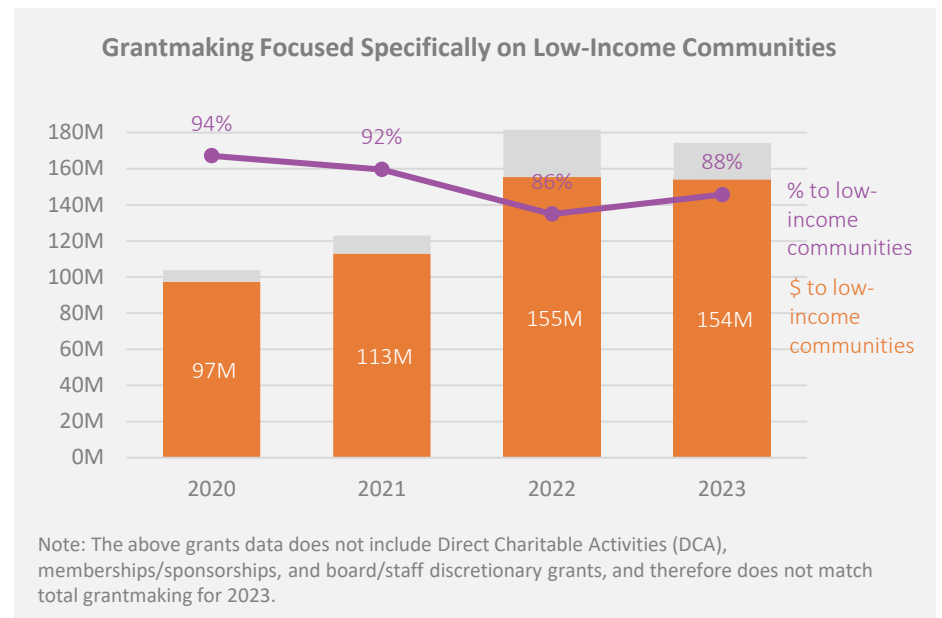
**California regions have grouped counties based on the geographic detail available in the Census Bureau American Community Survey, on which the California Poverty Measure (CPM) research is based.

***% of Californians At or Near Poverty - i.e., 33% of Californians at or near poverty live in Los Angeles. Source: PPIC calculations from the Q1 2023 California Poverty Measure research, as of October 2023. Based on the American Community Survey in 2019 with projections to Q1 2023. California Poverty Measure poverty thresholds are basic needs estimates for a family of four that rents its place of residence, averaged over all Californians in the state or region. The CPM differs from the federal poverty line in that it takes cost of living into account. "At or near poverty" is defined as 150% of the California Poverty Measure, which corresponds to approximately 250% of Federal Poverty Guidelines.

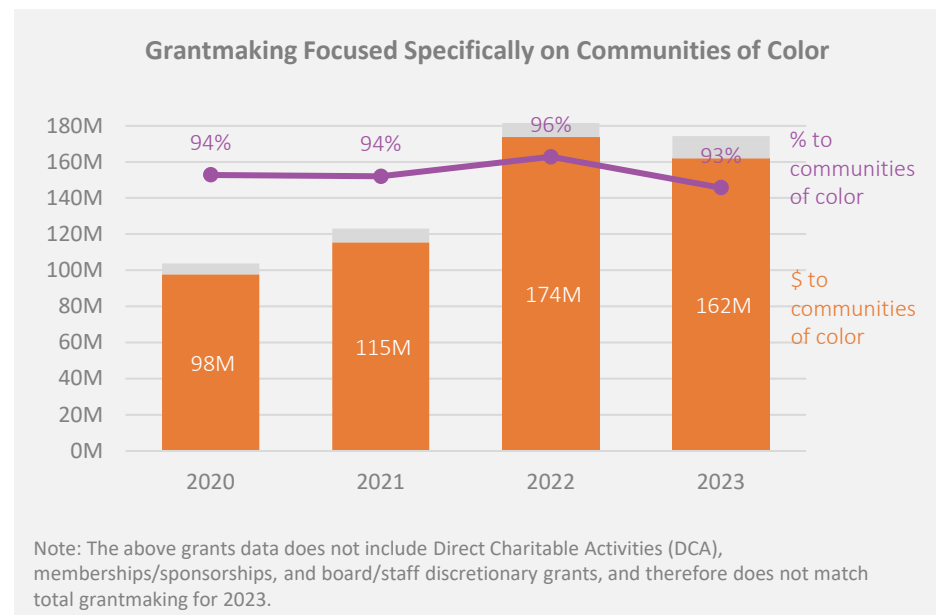
2023 Grantmaking to Support Low-Income Communities

A significant percentage of our funding continues to specifically support low-income communities and communities of color.

The slight decrease in 2022 in the overall percentage of our funding *specifically* focused on low-income communities, as compared to prior years, is primarily due to a \$14M grant to launch the Community Economic Mobilization Initiative (CEMI), which regranted Irvine dollars to community-based organizations across the state. This funding ultimately supported the ability of underserved and BIPOC communities to secure public funds and reduce economic inequities.



2023 Grantmaking to Support Communities of Color



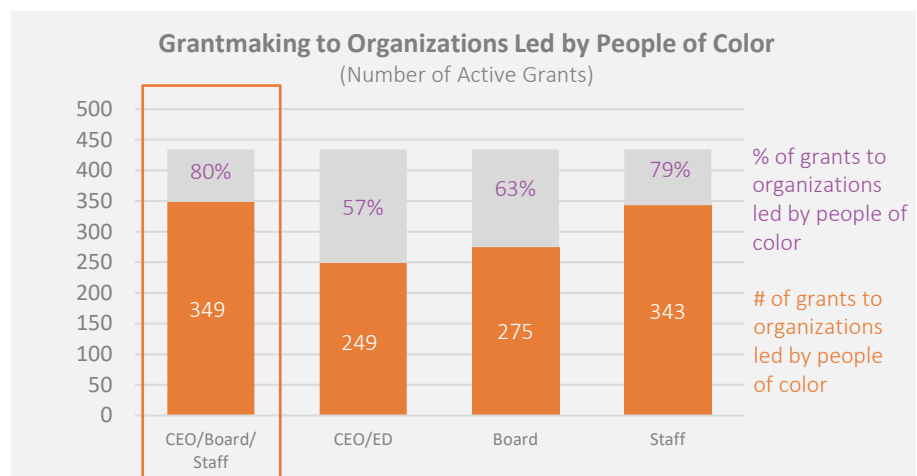
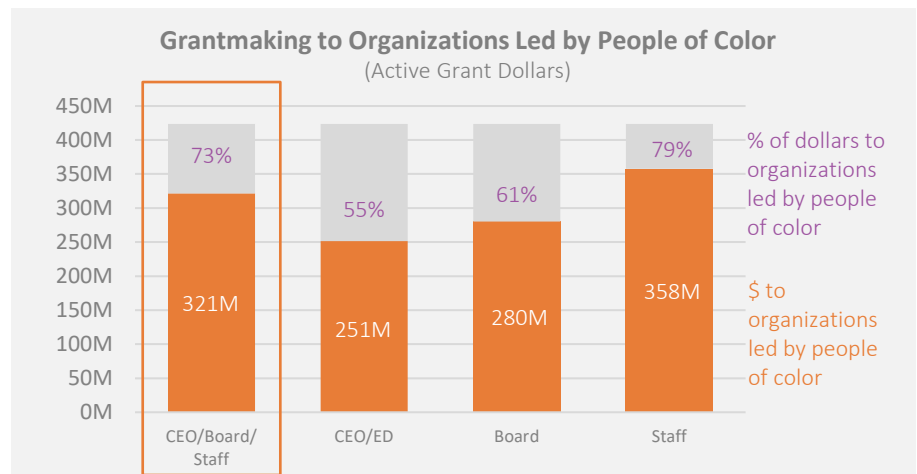
Grantmaking to Organizations Led by People of Color

Irvine currently collects data on the following criteria to determine if organizations are led by people of color:

- (1) CEO/Executive Director is a person of color
- (2) Board of Directors is comprised of 50% or more people of color
- (3) Staff is comprised of 50% or more people of color

For active grants* that meet any of these three criteria, 73% of our grantmaking dollars support organizations led by people of color, and 80% of our grantees are led by people of color.

Below we show breakdowns of this data by grantmaking dollars and by number of grants to organizations that meet only one of the above criteria.

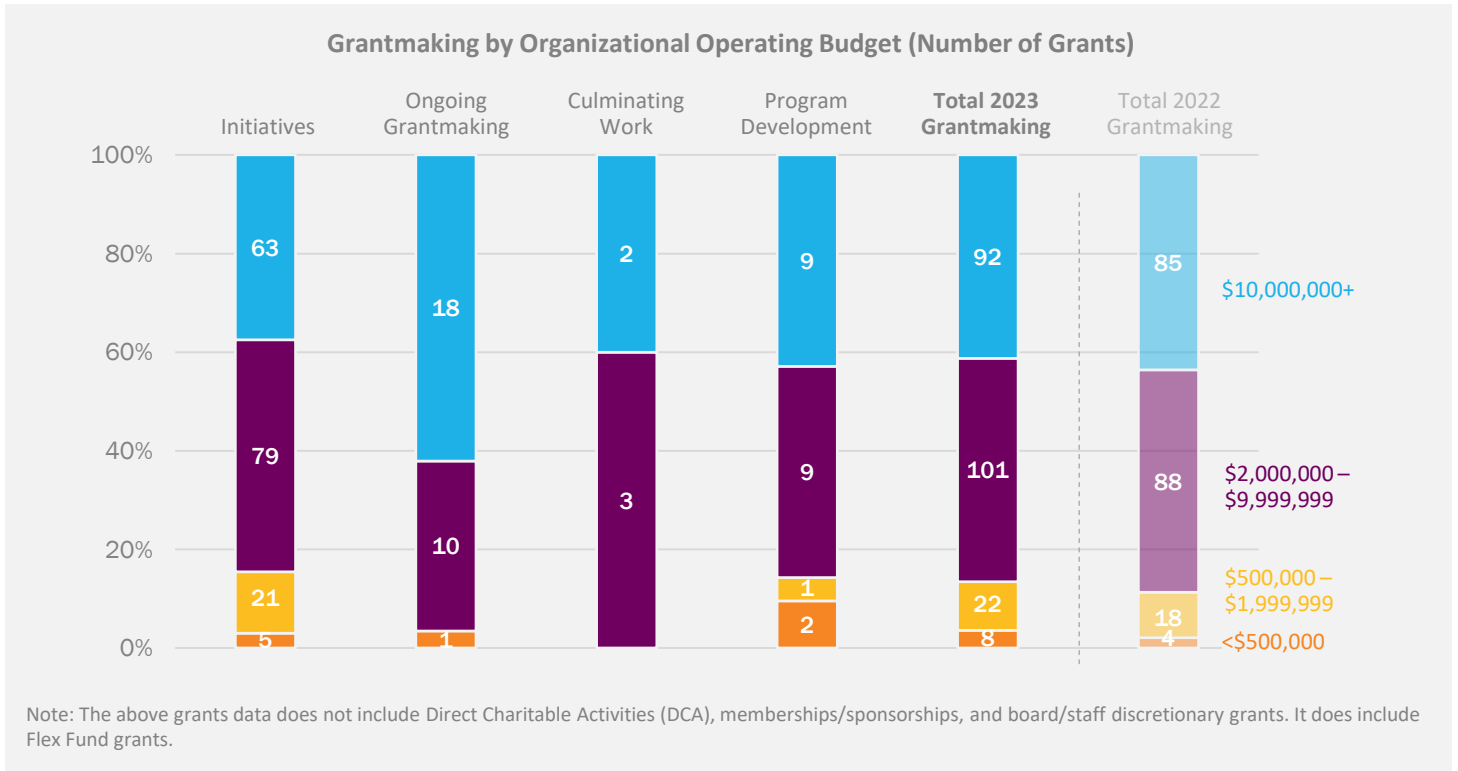


Through our racial equity work, we are exploring how Irvine can continue to increase our grantmaking to organizations led by people of color. In addition, we continue to collaborate with The California Endowment and Weingart Foundation to identify more effective and efficient ways to collect this data from grantees and to streamline these practices across the field.

*Active grants (as of January 2024) include grants made in 2023 and multiyear grants made in previous years.

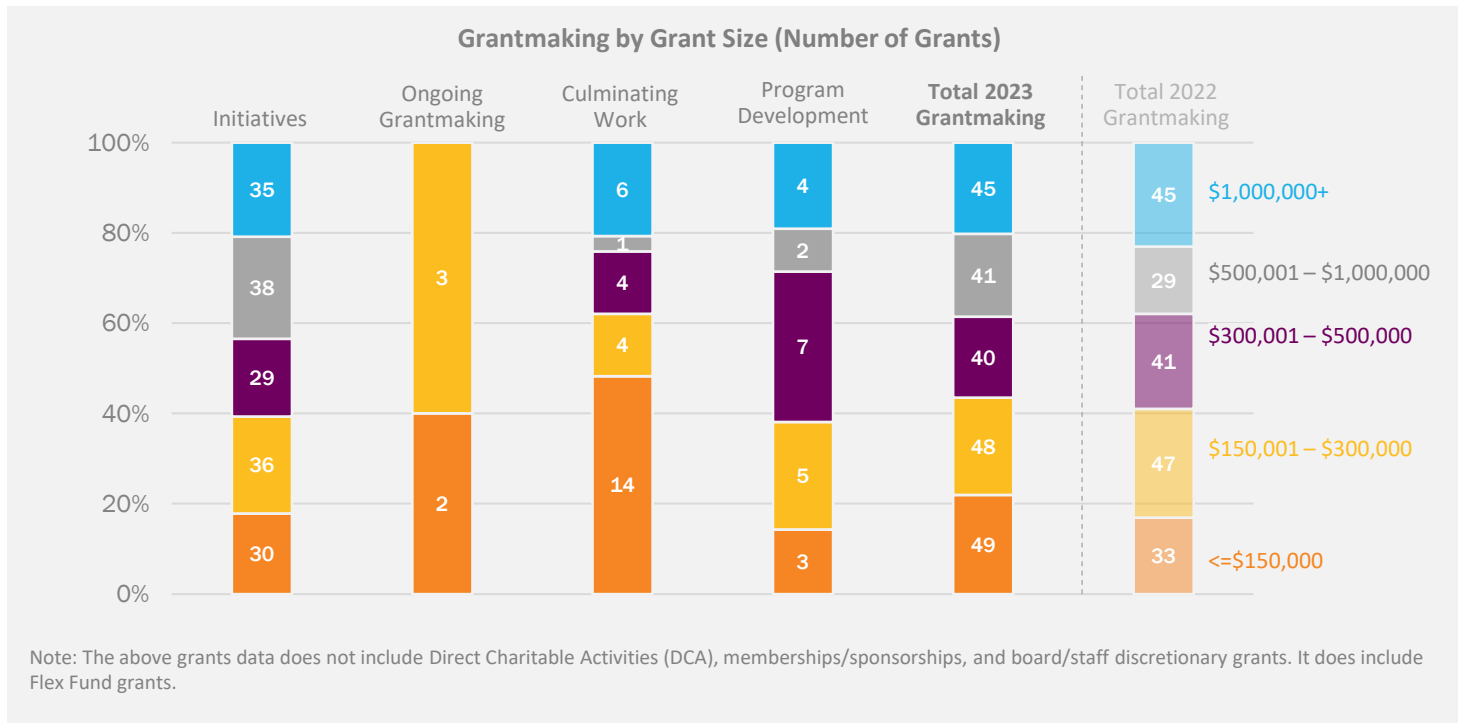
Note: The above grants data does not include Direct Charitable Activities (DCA), memberships/sponsorships, and board/staff discretionary grants. It does include Flex Fund grants.

Operating Budget Size of 2023 Grantees



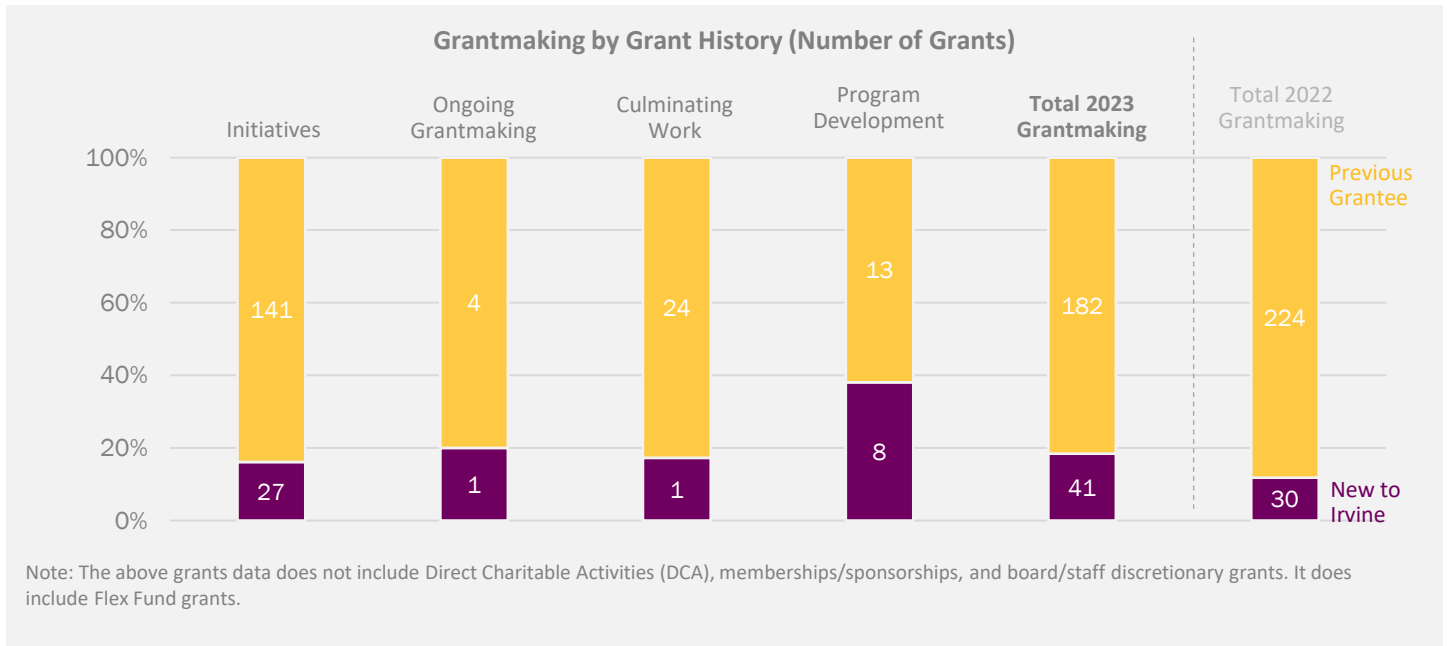
Grant Size in 2023

Our average grant size decreased in 2023 compared to 2022 (from \$931K to \$747K), but remained greater than in 2021 (\$711K) and 2020 (\$409K). This is due in part to an increased percentage of grants made below \$150K and over \$500K in 2023.



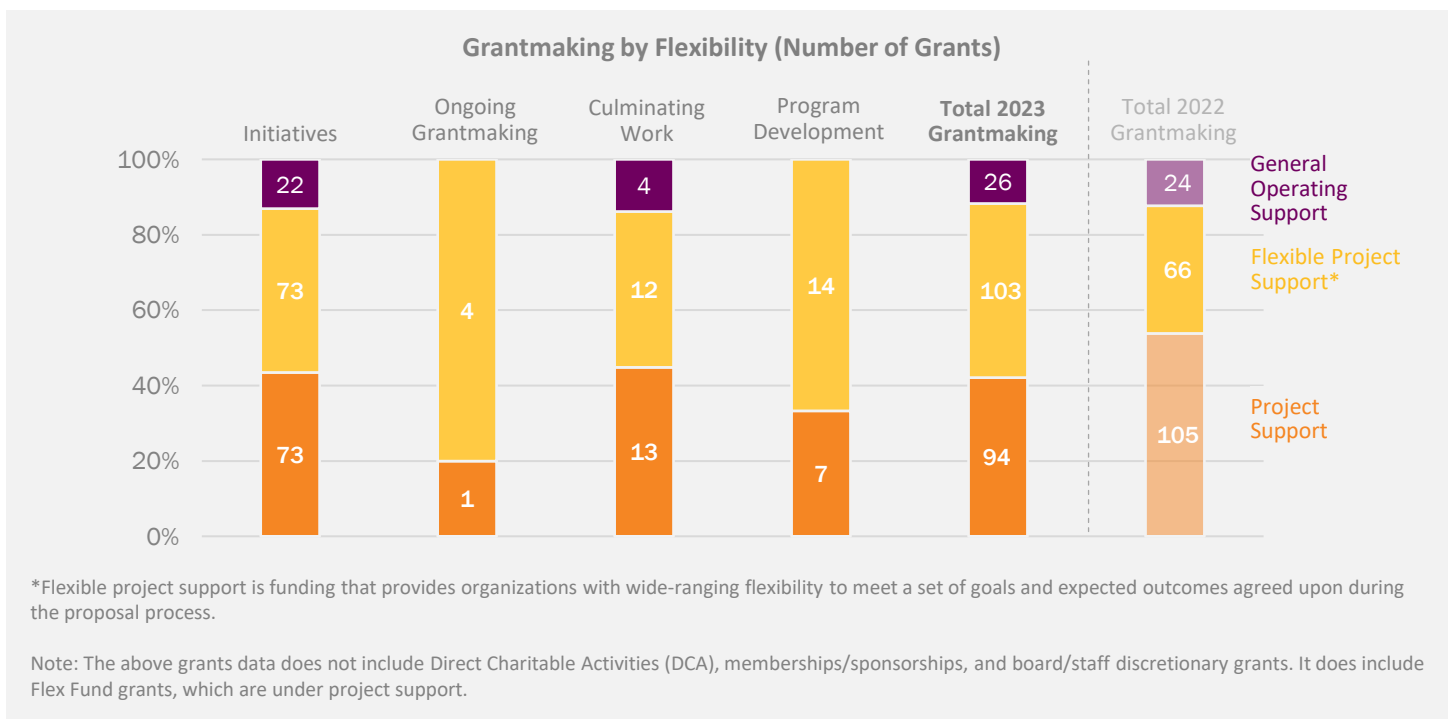
Previous vs. New Organizations to Irvine in 2023

Our initiatives support a set of core grantees over the course of the initiative, resulting in a significant percentage of our grants going to organizations that received prior support from Irvine. We also engage new partners in both our initiatives and program development work, and anticipate adding new grantees to our portfolio over time as we continue to pursue our racial equity commitments.



Types of Grant Support in 2023

We strive to provide funding that is as flexible as possible to support grantees to achieve their goals. We are not able to provide general operating support to some organizations, for reasons including when they are national or broad in scope, serve as fiscal sponsors, and/or regrant Irvine dollars. We provided more general operating and flexible project support than project support grants in 2023 (57%) than in 2022 (46%).



OUR PEOPLE AND CULTURE

Diversity, Equity, and Inclusion

We continually strive to find new opportunities to live our [organizational values](#) and foster a diverse, inclusive, and equitable culture at Irvine.

DEI STAFF ADVISORY COMMITTEE

In 2017, the Leadership Team approved a Diversity, Equity, and Inclusion (DEI) Staff Advisory Committee to advance the following goals at Irvine:

- Provide staff with a voice and vehicle for identifying DEI priorities and advancing DEI activities
- Create a focus on DEI activities that staff have identified as priorities
- Operationalize DEI throughout our policies and practices in an inclusive way that elevates strong staff voices
- Create accountability back to leadership on implementing DEI activities

The staff-led committee has become a trusted partner embedded in the fabric of Irvine to ensure the organization not only maintains but deepens its commitment to DEI.

With Irvine's recent growth, new staff have joined the committee and brought fresh perspectives, ideas, and insights to the organization. In 2023, the committee began to survey leadership and staff to consider opportunities to evolve the mission, vision, structure, and role of the committee to better serve the Foundation into the future.

ADVANCING RACIAL EQUITY

In March 2022, after a two-year process of internal learning and reflection, the board approved a statement that outlines Irvine's long-term [commitments to advance racial equity and address structural racism](#).

Since then, in collaboration with the DEI committee, our board, leadership, and staff have begun to operationalize these commitments across the following organization-wide priorities:

- Address structural racism and embed racial equity in our grantmaking. *To learn more about our current work and priorities, see the "Our Approach" section.*
- Embody racial equity in our organizational culture, talent recruitment, and professional development
- Integrate racial equity into our systems, policies, procedures, and practices

In 2023, our work focused on cross-departmental learning and reexamining our systems, policies, and practices, as outlined on the following pages.

Diversity, Equity, and Inclusion

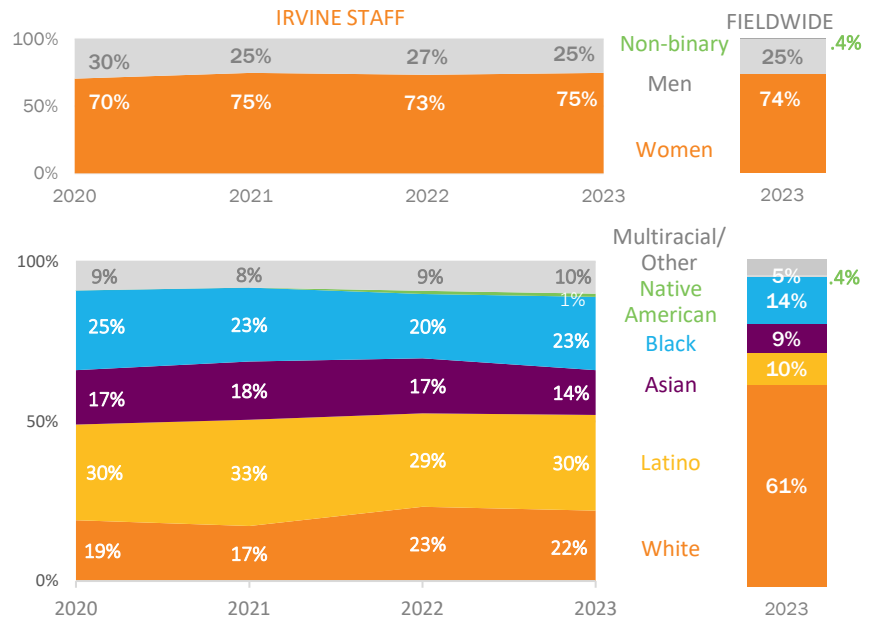
2023 Accomplishments

Focus Area	Accomplishments
CROSS-DEPARTMENTAL LEARNING	<ul style="list-style-type: none">• In March, the board approved racial equity-related amendments to committee charters and engaged in ongoing learning and implementation aligned with committee commitments.• Our all-staff retreat in July focused on Irvine’s racial equity journey and commitments and included discussions on advancing an equitable culture at Irvine and understanding structural racism in the economy.• Each department and grantmaking team sent representatives to CHANGE Philanthropy’s 2023 Unity Summit in October to deepen individual and institutional practice to advance equity with an intersectional lens, while keeping community at the center.• Throughout the year, staff organized and participated in a variety of learning sessions, workshops, and cohorts on topics such as the findings of the California Reparations Task Force, partnering with Native-led organizations and tribes, the disability rights movement, and community-led grantmaking.• All staff had access to professional development resources to further their individual learning about racial equity through conferences, cultural activities, retreats, coaching, and materials.
RE-EXAMINING OUR SYSTEMS, POLICIES, AND PRACTICES	<ul style="list-style-type: none">• Irvine restructured its Leadership Team, which sits below Irvine’s Executive Team and monitors and supports organizational culture, to include broader representation across the Foundation, more distributed leadership, and more intentionality in including staff voice in decisions.• Departments and staff workgroups developed recommendations to refresh our grantmaking processes and policies with a racial equity lens, developed a new equity competency in our Talent system, and continued ongoing efforts to review the diversity of our investment managers.• Our annual DEI staff survey in Fall 2023 measured staff perspectives on DEI-related issues over time and identified opportunities to improve DEI practices at a team and broader organizational level.

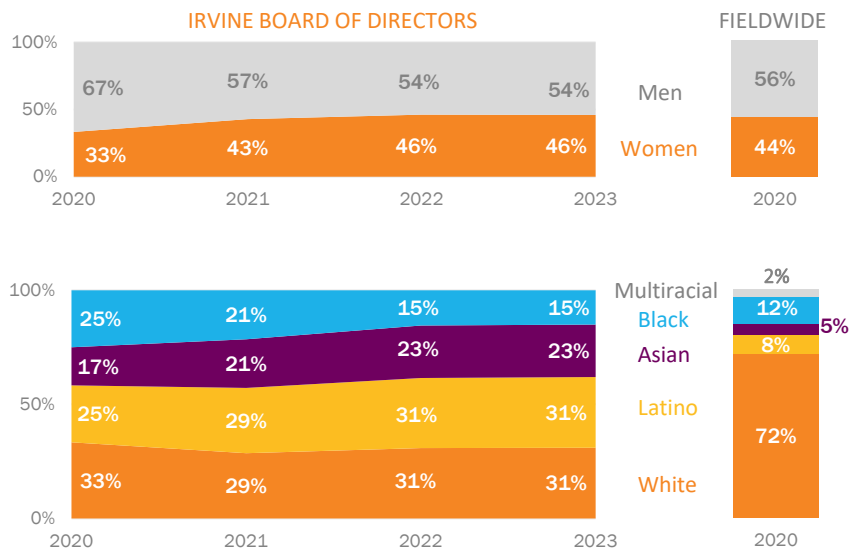
Staff and Board Demographics

In the tables below, we provide demographic data on Irvine’s board and staff. We benchmark our demographics against our peers, which show that our racial diversity continues to distinguish the Foundation from the broader field of private foundations.

Self-identification data, where staff and board members were asked to identify their own demographic representation, has been incorporated in the following charts:



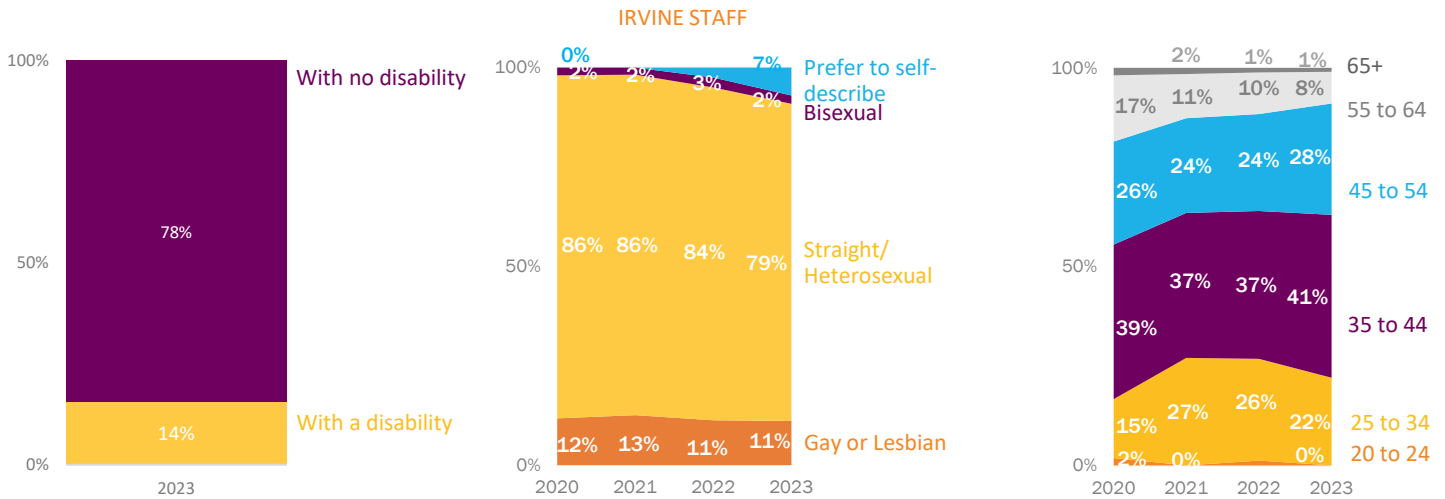
Note: Fieldwide data comes from the Council on Foundations, 2023 Grantmakers Salary and Benefits Report. Irvine data includes staff members as of December 2023. Graph excludes staff who have chosen not to disclose their data.



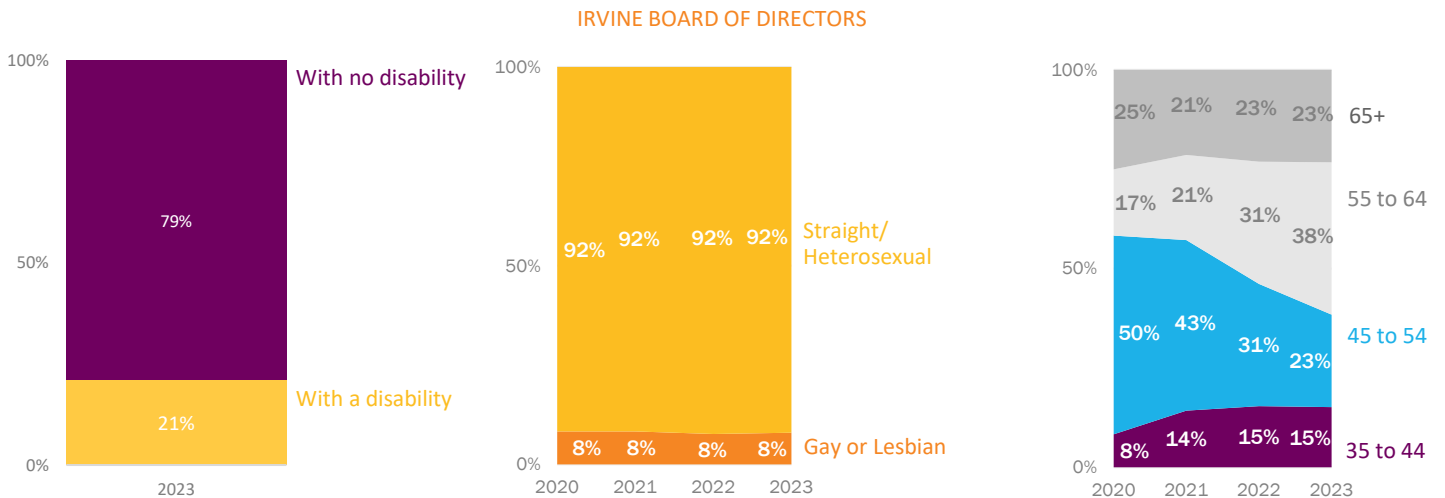
Note: Fieldwide data comes from the Croner 2020 DEI Survey sponsored by The Ford Foundation (more recent data is not currently available). Irvine board responses represented above are captured from a self-identification survey from 2021, as well as board members who joined in 2022. Irvine data includes board members as of December 2023, and includes Irvine’s President and CEO, who is an ex-officio board member.

Staff and Board Demographics

We use a self-identification method of data collection for demographic categories related to sexual orientation, age, and ability for our board and staff.



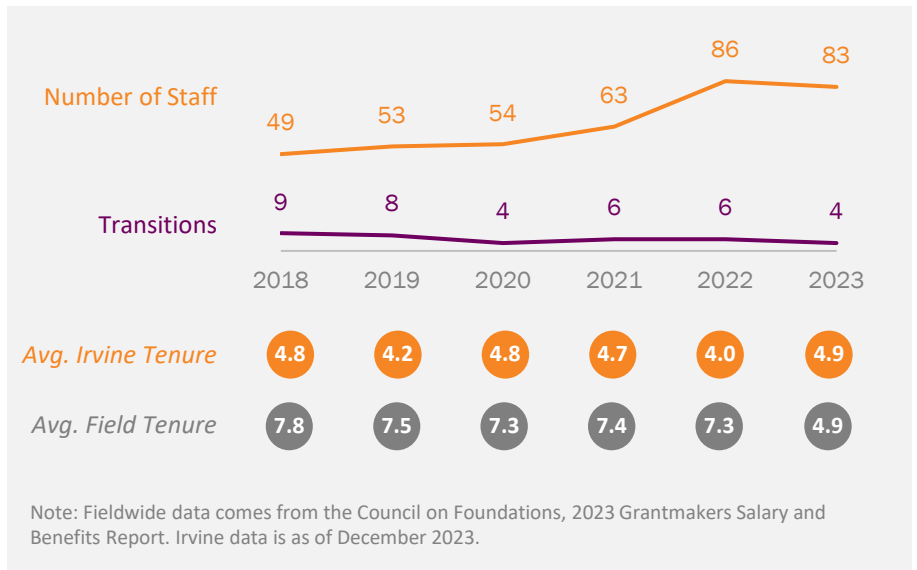
Note: Only responses captured from the staff self-identification survey are represented above (ability data collected since 2023). Irvine data includes staff members as of December 2023. Graph excludes staff who have chosen not to disclose their data or who were on leave at the time of survey. Fieldwide data is not available for these demographic categories.



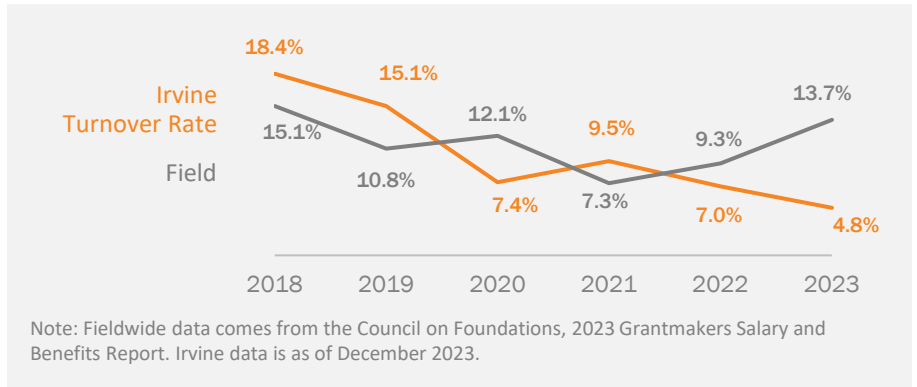
Note: Responses for sexual orientation, ability, and age are captured from the board self-identification survey from 2021 and 2024. (ability data collected since 2023). Includes board members as of December 2023, and includes Irvine's President and CEO, who is an ex-officio board member. Fieldwide data is not available for these demographic categories.

Staff Headcount and Turnover

The table below shows that our staffing levels have steadily increased since 2018, with significant growth in 2022.



The chart below shows that our 4.8% staff turnover rate in 2023 is significantly below our historical range and current field turnover rate.



We recruited 7 new staff members in 2023. As of December 31, 2023, 32 staff were located in our Los Angeles office, with the remaining 51 in San Francisco.

