The James Irvine Foundation 2020 Grantee Perception Report

Generated on February 23, 2021

CEP

THE CENTER FOR
EFFECTIVE PHILANTHROPY

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

Key Ratings Summary

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

Key Measures	Trend Data	Average Rating	Percentile Rank
Field Impact Impact on Grantees' Fields		5.65	38th Custom Cohort
Community Impact Impact on Grantees' Communities		5.48	36th Custom Cohort
Organizational Impact Impact on Grantees' Organizations		6.25	61st Custom Cohort
Relationships Strength of Relationships with Grantees		6.01	23rd Custom Cohort
Selection Process Helpfulness of the Selection Process		5.08	53rd Custom Cohort

Interpreting Your Charts

Many of the charts in this report are shown in this format. See below for an explanation of the chart elements.
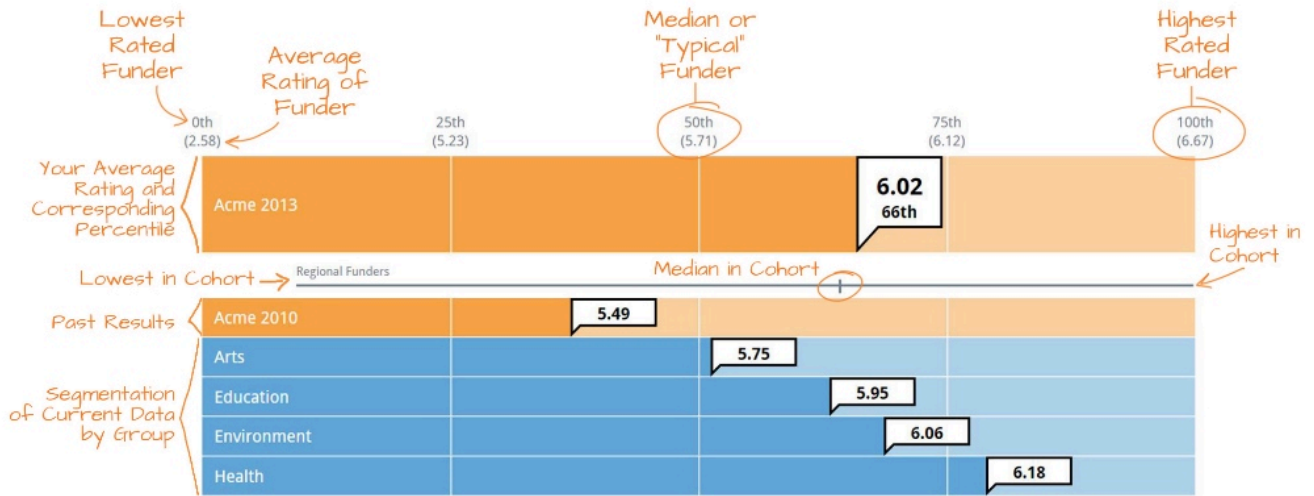
Missing data: Selected grantee ratings are not displayed in this report due to changes in the survey instrument, or when a question received fewer than 5 responses.

STATISTICAL SIGNIFICANCE OF CHANGES OVER TIME

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

5.81*
60th

Survey Population

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
Irvine 2020	August and September 2020	317	201	63%
Irvine 2014	September and October 2014	340	235	69%
Irvine 2010	May and June 2010	411	305	74%
Irvine 2006	September and October 2006	237	171	72%

Survey Year	Year of Active Grants
Irvine 2020	June 2019 through May 2020
Irvine 2014	2013
Irvine 2010	2009
Irvine 2006	2005

Throughout this report, The James Irvine Foundation's survey results are compared to CEP's broader dataset of more than 40,000 grantees built up over more than a decade of grantee surveys of more than 300 funders. The full list of participating funders can be found at https://cep.org/gpr-participants/.

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

Subgroups

In addition to showing Irvine's overall ratings, this report shows ratings segmented by Portfolio. The online version of this report also shows ratings segmented by Geographic Area Served, Support Type, Gender Identity, and Gender Identity/Race strata.

Portfolio	Number of Responses
Current Work and Strategy	123
Leadership Awards	14
Culminating Grants	64

Geographic Area Served	Number of Responses
Bay Area	23
CA Statewide	96
Central Coast	7
LA Metro	22
Orange County	6
Riverside and San Bernardino	12
San Diego and Imperial	10
San Joaquin Valley	24

Support Type	Number of Responses
Flexible Project Support	84

Support Type	Number of Responses
General Operating Support	27
Project Support	90

Grantee-reported Gender Identity	Number of Responses
Exclusively selected 'Man'	76
Exclusively selected 'Woman'	110

Gender Identity/Race Strata	Number of Responses
Non-POC-Man	42
Non-POC-Woman	61
POC-Man	34
POC-Woman	47

Subgroup Methodology and Summary of Differences

The following page summarizes the methodology behind each subgroup displayed in the report, as well as any differences in grantee perceptions. Differences should be interpreted in light of Irvine's goals and strategy.

Subgroup Methodology

Portfolio: In the Foundation's grantee list, each individual was tagged by Initiative. CEP then created three overarching categories to group specific initiatives together, with input from Irvine. Specifically:

- **Current Work and Strategy** includes Better Careers, Fair Work, Priority Communities, Program Development (Strategic Partnerships, New Initiatives in Development, and Research and Development), and Other Ongoing work (Impact Assessment & Learning, Media, and Additional Grantmaking).
- **Leadership Awards** consists only of grantees tagged to Leadership Awards.
- **Culminating Grants** consists of grantees tagged to Protecting Immigrant Rights, Immigrant Integration, Voter and Civic Engagement, Postsecondary Success, Linked Learning, Arts Engagement, Election Policies and Practices, and Special Initiatives.

Geographic Area Served: Grantees were tagged to the geographic area they serve in the Foundation's list.

Support Type: Grantees were tagged to the type of support they received in the Foundation's list. For grantees who received two different types of support across multiple grants, Irvine selected the most appropriate tag.

Gender Identity: In the survey, grantees were asked to select all options that applied to the question, "Please select the option that represents how you describe yourself:".

Gender Identity/Race Strata: With input from the Foundation, CEP created four categories to represent the intersection of gender identity and person of color status. The data for gender identity was self-reported by grantees to the question, "Please select the option that represents how you describe yourself:". The data for person of color status was self-reported by grantees to the question, "Do you identify as a person of color?".

Summary of Subgroup Differences

Per CEP's standard methodology, groups with fewer than 10 respondents are excluded from statistical analysis. Where possible, CEP does run trend analysis among groups to understand if ratings differ from the overall rating by more than 0.3 across survey measures.

Portfolio: Grantees in Irvine's current work and strategy portfolio rate significantly higher than grantees in the Foundation's culminating portfolio on nearly all measures related to relationships and understanding, such as:

- Irvine's understanding of the contexts in which they work and awareness of their organizational challenges
- How fairly they feel treated, how comfortable they feel approaching Irvine when a problem arises, and staff responsiveness
- The clarity and consistency of the Foundation's communications about its goals and strategy.

Geographic Area Served: Central Coast and Orange County grantees each had fewer than 10 grantees, so were excluded from statistical analysis. However, in observing trends for these groups (defined as differing from the overall rating by 0.3), Central Coast grantee ratings trend higher on nearly every survey measure, and Orange County grantee ratings trend higher on the majority of survey measures.

For the six other geographic areas, there are no significant differences in grantee ratings.

Support Type: There are no significant differences in grantee ratings when segmented by support type.

Gender Identity: Irvine grantees who identify exclusively as a woman (57% of respondents) rate the Foundation significantly lower than those who identify exclusively as a man (40% of respondents) across multiple survey measures including Irvine's:

- Understanding of grantees' goals, strategies, and contexts,
- Strength of relationships, including how fairly grantees feel treated, their comfort approaching the Foundation if a problem arises, and staff responsiveness,
- Overall transparency and the extent to which the Foundation exhibits candor about its perspectives on grantees work,
- Commitment to and communications about DEI and clarity of communications about Irvine's goals and strategies.

Analyses show ratings from women grantees did not differ from ratings of men grantees with regards to grantmaking characteristics, organizational characteristics, and most interactions patterns. There were no significant differences when it came grant length, grant size, grant type (unrestricted vs. restricted), annual organizational budget, or initiation of contact. Women grantees were significantly more likely to interact with Foundation staff less than once a year.

Analyses also show that these differences may be related to the status of the respondent's grant. Grantees who identify exclusively as a woman comprise a much larger portion of Irvine's culminating portfolio compared to those who identify exclusively as a man – 67 percent compared to 33 percent – while Irvine's current work and strategy includes a slightly larger proportion of grantees who exclusively identify as a man – 55 percent compared to 45 percent who exclusively identify as a woman. However, grant status cannot account for all of the differences seen by gender identity: grantees identifying as men rate significantly higher than those identifying as women on 5 measures where no differences by grant status emerged, including measures related specifically to DEI.

Gender Identity/Race: POC-Men rate significantly higher than the other three groups for the Foundation's impact on grantees fields and effect on public policy. Ratings from this group trend higher on about half of the survey measures.

POC-Women comprise a significantly larger portion of Irvine's culminating portfolio, and their ratings trend lower for:

- The overall quality of their relationships with the Foundation, including their comfort approaching the Foundation if a problem arises

- Their understanding of how the funded work fits into the Foundation's broader efforts
- The Foundation's overall transparency
- Irvine's understanding of the contextual factors that affect their work

Similar to gender identity, analyses show ratings from POC-women grantees did not differ from ratings of Non-POC-women grantees with regards to grantmaking characteristics, organizational characteristics, and interactions patterns.

Comparative Cohorts

Customized Cohort

Irvine selected a set of 16 funders to create a smaller comparison group that more closely resembles Irvine in scale and scope.

Custom Cohort
Bill & Melinda Gates Foundation
Chan Zuckerberg Initiative
Evelyn and Walter Haas, Jr. Fund
Ewing Marion Kauffman Foundation
Ford Foundation
Surdna Foundation, Inc.
The Annie E. Casey Foundation
The California Endowment
The California Wellness Foundation
The David and Lucile Packard Foundation
The James Irvine Foundation
The Kresge Foundation
The San Francisco Foundation
The William and Flora Hewlett Foundation
Walton Family Foundation
Weingart Foundation

Standard Cohorts

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

Strategy Cohorts

Cohort Name	Count	Description
Small Grant Providers	40	Funders with median grant size of $20K or less
Large Grant Providers	90	Funders with median grant size of $200K or more
High Touch Funders	36	Funders for which a majority of grantees report having contact with their primary contact monthly or more often
Intensive Non-Monetary Assistance Providers	42	Funders that provide at least 30% of grantees with comprehensive or field-focused assistance as defined by CEP
Proactive Grantmakers	82	Funders that make at least 90% of grants by invitation only
Responsive Grantmakers	100	Funders that make at most 10% of grants by invitation only
International Funders	55	Funders that fund outside of their own country
European Funders	25	Funders that are headquartered in Europe

Annual Giving Cohorts

Cohort Name	Count	Description
Funders Giving Less Than $5 Million	58	Funders with annual giving of less than $5 million
Funders Giving $50 Million or More	70	Funders with annual giving of $50 million or more

Foundation Type Cohorts

Cohort Name	Count	Description
Private Foundations	158	All private foundations in the GPR dataset
Family Foundations	76	All family foundations in the GPR dataset
Community Foundations	34	All community foundations in the GPR dataset
Health Conversion Foundations	29	All health conversation foundations in the GPR dataset
Corporate Foundations	20	All corporate foundations in the GPR dataset

Other Cohorts

Cohort Name	Count	Description
Funders Outside the United States	39	Funders that are primarily based outside the United States
Recently Established Foundations	78	Funders that were established in 2000 or later
Funders Surveyed During COVID-19	29	Funders who surveyed grantees during COVID-19 (GPR only)

Grantmaking Characteristics

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

Median Grant Size

	0th ($2K)	25th ($40K)	50th ($100K)	75th ($224K)	100th ($3300K)

Irvine 2020	$300K 82nd

Custom Cohort

Irvine 2014	$210K
Irvine 2010	$225K
Irvine 2006	$150K
Current Work and Strategy	$300K
Leadership Awards	$63K
Culminating Grants	$400K
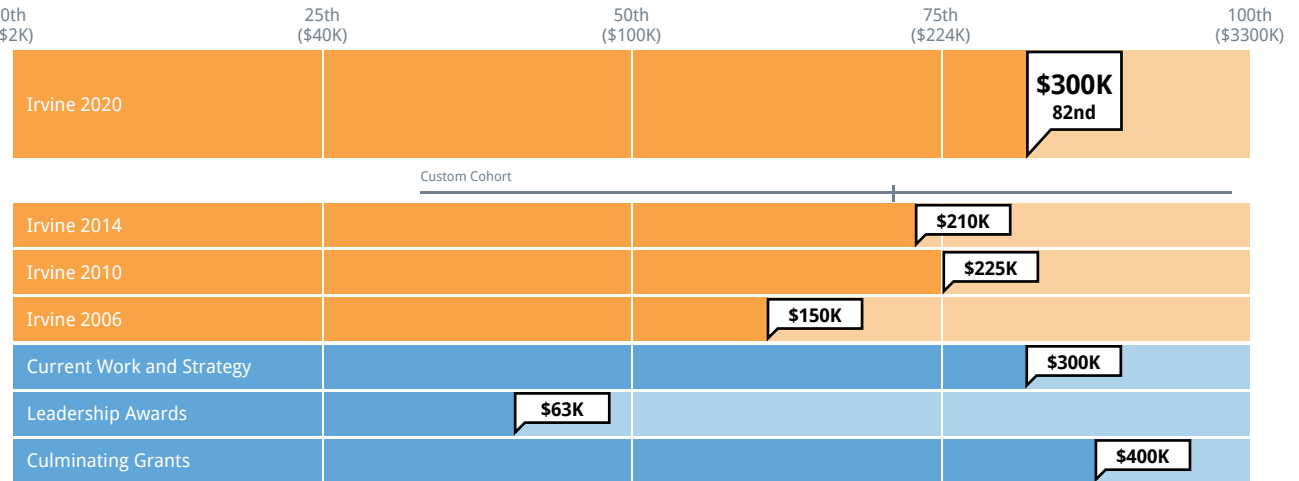
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Average Grant Length

	0th (1.0yrs)	25th (1.8yrs)	50th (2.2yrs)	75th (2.7yrs)	100th (7.9yrs)

Irvine 2020	2.1yrs 41st

Custom Cohort

Irvine 2014	2.2yrs
Irvine 2010	2.7yrs
Irvine 2006	2.2yrs
Current Work and Strategy	1.9yrs
1.3yrs Leadership Awards	
Culminating Grants	2.5yrs
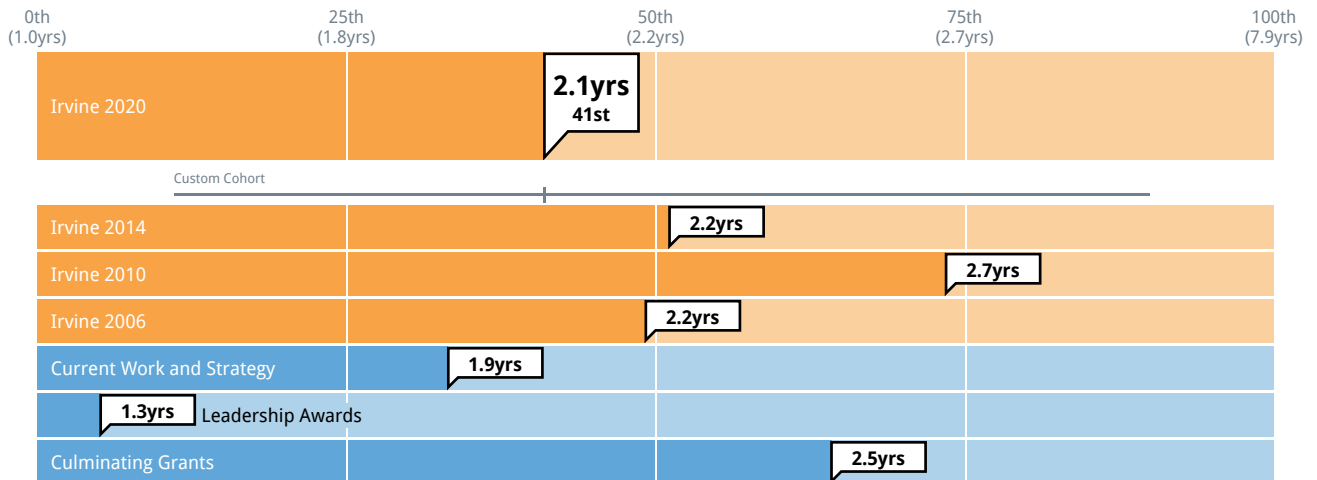
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Median Organizational Budget
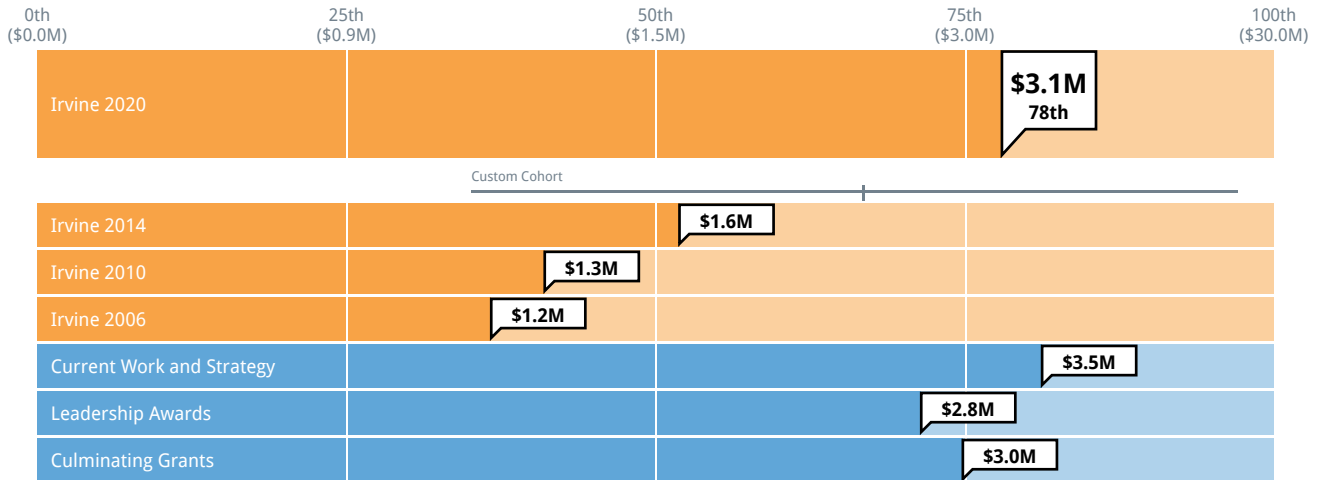
0th ($0.0M)	25th ($0.9M)	50th ($1.5M)	75th ($3.0M)	100th ($30.0M)

Irvine 2020 — **$3.1M** 78th

Custom Cohort

Irvine 2014 — **$1.6M**

Irvine 2010 — **$1.3M**

Irvine 2006 — **$1.2M**

Current Work and Strategy — **$3.5M**

Leadership Awards — **$2.8M**

Culminating Grants — **$3.0M**

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Selected Cohort: Custom Cohort

Grant History	Irvine 2020	Irvine 2014	Irvine 2010	Average Funder	Custom Cohort
Percentage of first-time grants	26%	22%	33%	28%	28%

Selected Cohort: Custom Cohort

Program Staff Load	Irvine 2020	Irvine 2014	Irvine 2010	Irvine 2006	Median Funder	Custom Cohort
Dollars awarded per program staff full-time employee	$3.9M	$4.8M	$4.2M	$4.6M	$2.7M	$3M
Applications per program full-time employee	11	30	31	52	27	13
Active grants per program full-time employee	24	34	39	41	31	26

Proportion of Unrestricted Funding

Proportion of grantees responding 'No, this funding was not restricted to a specific use (i.e. general operating, core support)'
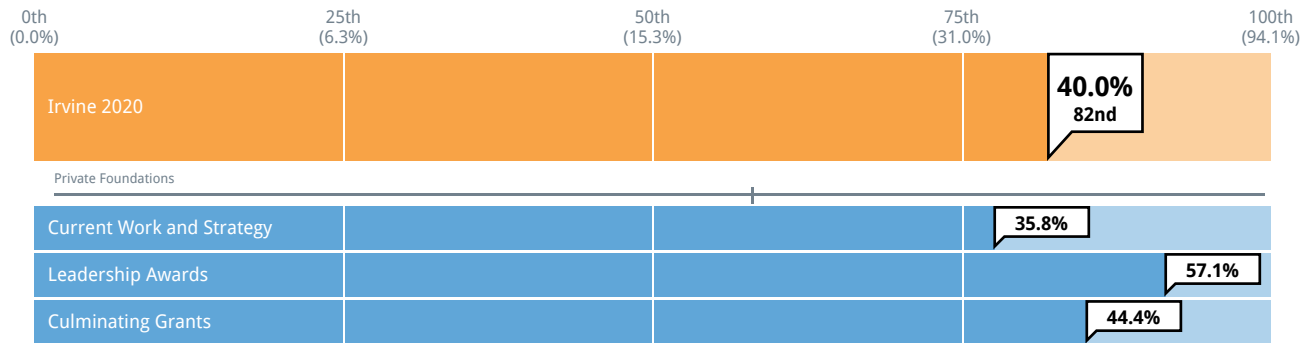
	0th (0.0%)	25th (6.3%)	50th (15.3%)	75th (31.0%)	100th (94.1%)

Irvine 2020 — 40.0% / 82nd

Private Foundations

Current Work and Strategy	35.8%
Leadership Awards	57.1%
Culminating Grants	44.4%

Cohort: Private Foundations   **Past results:** on   **Subgroup:** Portfolio

Impact on and Understanding of Grantees' Fields

Overall, how would you rate the Foundation's impact on your field?

1 = No impact   **7** = Significant positive impact
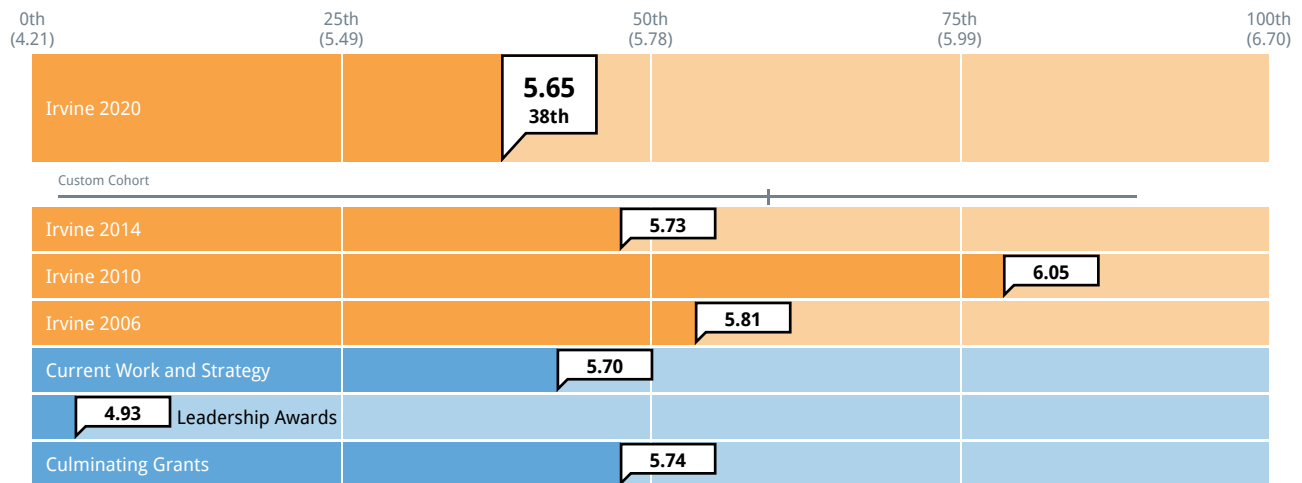
0th (4.21)	25th (5.49)	50th (5.78)	75th (5.99)	100th (6.70)

Irvine 2020 — **5.65** / **38th**

Custom Cohort

Irvine 2014 — **5.73**
Irvine 2010 — **6.05**
Irvine 2006 — **5.81**
Current Work and Strategy — **5.70**
4.93 Leadership Awards
Culminating Grants — **5.74**

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

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

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

0th (4.60)	25th (5.46)	50th (5.71)	75th (5.94)	100th (6.63)

Irvine 2020 — **5.34** / **17th**

Custom Cohort

Irvine 2014 — **5.56**
Irvine 2010 — **5.87**
Irvine 2006 — **5.61**
5.30 Current Work and Strategy
Leadership Awards — **5.38**
Culminating Grants — **5.42**

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Advancing Knowledge and Public Policy

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

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

0th (3.45)	25th (4.75)	50th (5.14)	75th (5.46)	100th (6.44)

Irvine 2020 — **5.11*** 48th

Custom Cohort

Irvine 2014 — 5.44
Irvine 2010 — 5.54
Irvine 2006 — 5.23
Current Work and Strategy — 5.11
Leadership Awards — 4.14
Culminating Grants — 5.24
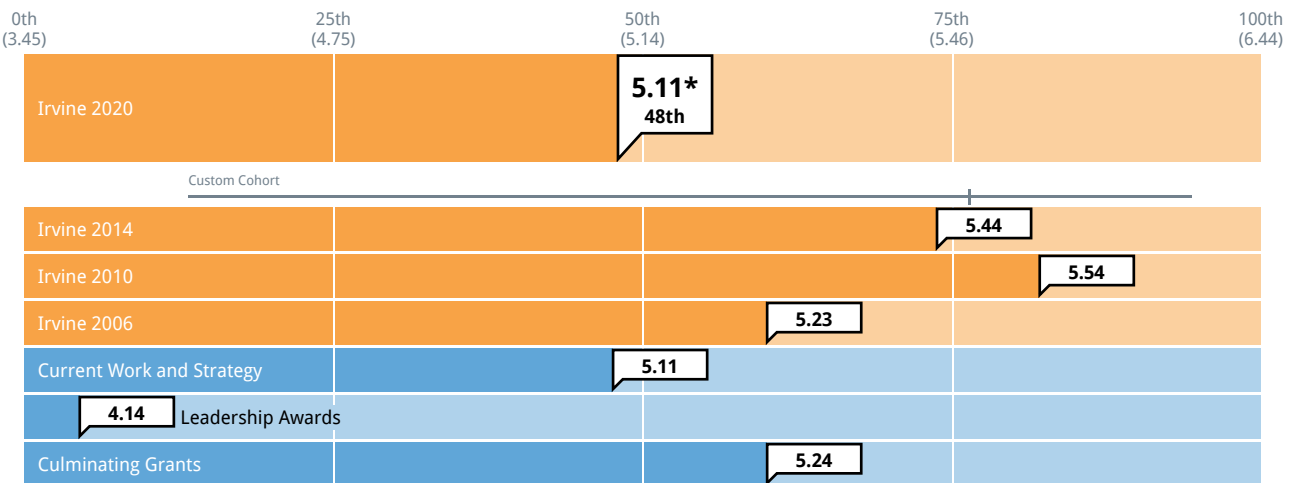
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

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

1 = Not at all   7 = Major influence on shaping public policy
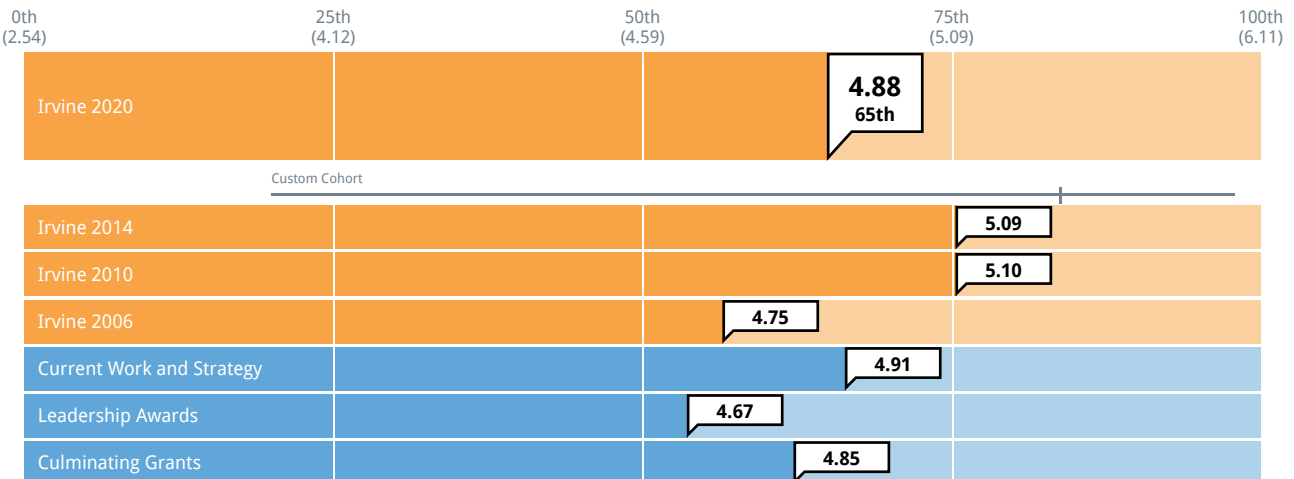
0th (2.54)	25th (4.12)	50th (4.59)	75th (5.09)	100th (6.11)

Irvine 2020 — **4.88** 65th

Custom Cohort

Irvine 2014 — 5.09
Irvine 2010 — 5.10
Irvine 2006 — 4.75
Current Work and Strategy — 4.91
Leadership Awards — 4.67
Culminating Grants — 4.85

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Impact on and Understanding of Grantees' Local Communities

Overall, how would you rate the Foundation's impact on your local community?

| **1** = No impact | **7** = Significant positive impact |
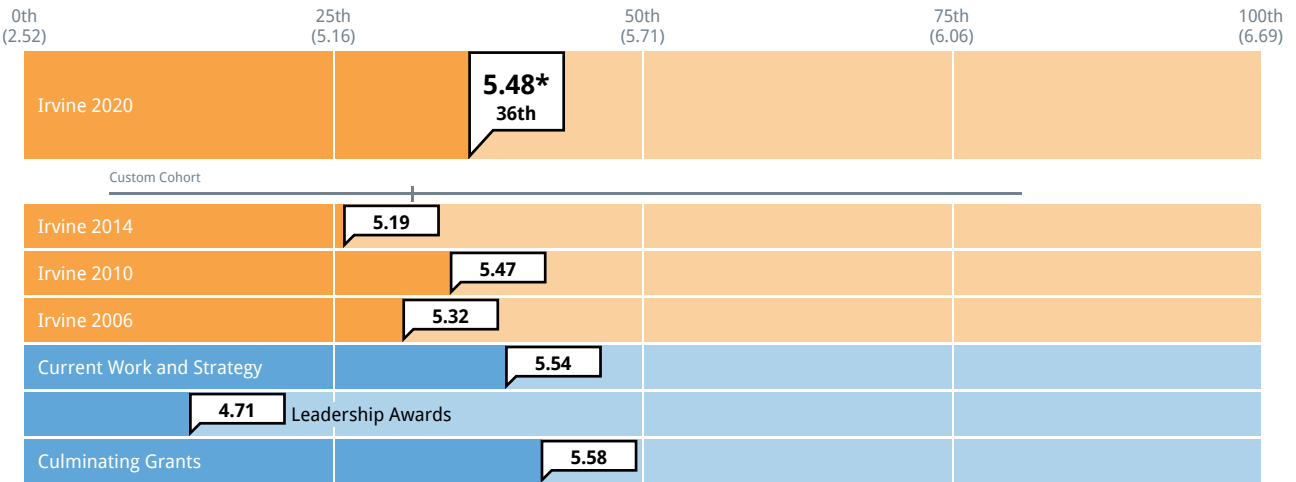
0th (2.52)	25th (5.16)	50th (5.71)	75th (6.06)	100th (6.69)

Irvine 2020 — **5.48*** 36th

Custom Cohort

Irvine 2014 — 5.19
Irvine 2010 — 5.47
Irvine 2006 — 5.32
Current Work and Strategy — 5.54
Leadership Awards — 4.71
Culminating Grants — 5.58

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

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

| **1** = Limited understanding of the community | **7** = Regarded as an expert on the community |
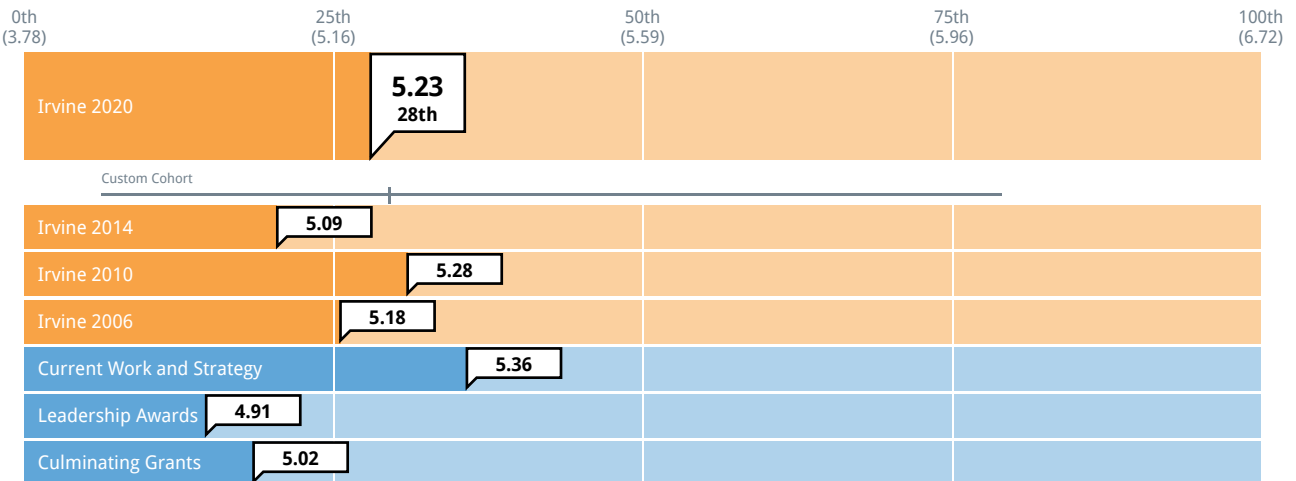
0th (3.78)	25th (5.16)	50th (5.59)	75th (5.96)	100th (6.72)

Irvine 2020 — **5.23** 28th

Custom Cohort

Irvine 2014 — 5.09
Irvine 2010 — 5.28
Irvine 2006 — 5.18
Current Work and Strategy — 5.36
Leadership Awards — 4.91
Culminating Grants — 5.02

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Impact on and Understanding of Grantees' Organizations

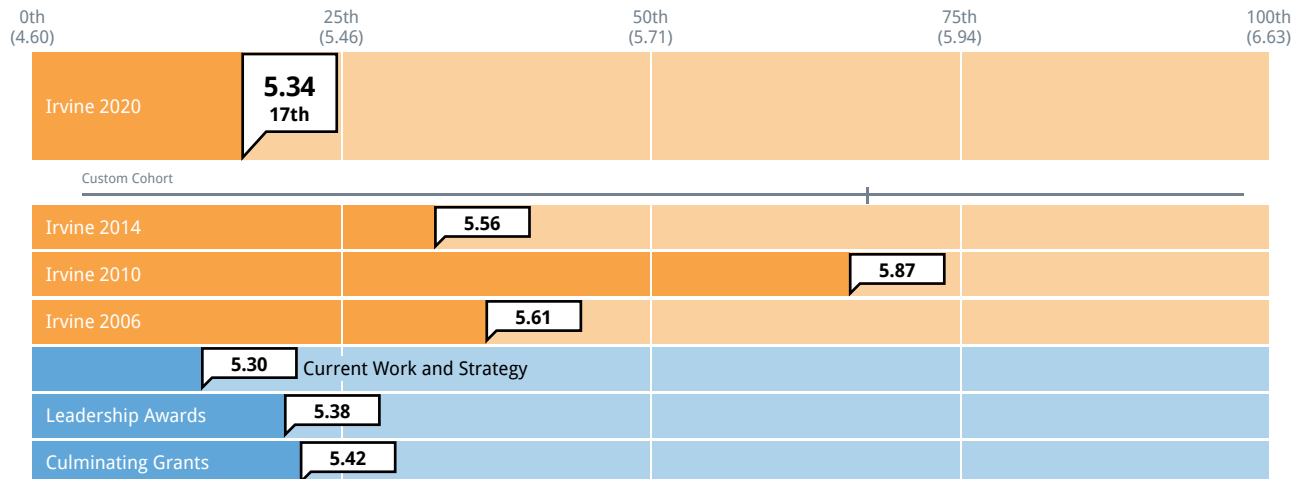## Overall, how would you rate the Foundation's impact on your organization?

1 = No impact   **7** = Significant positive impact
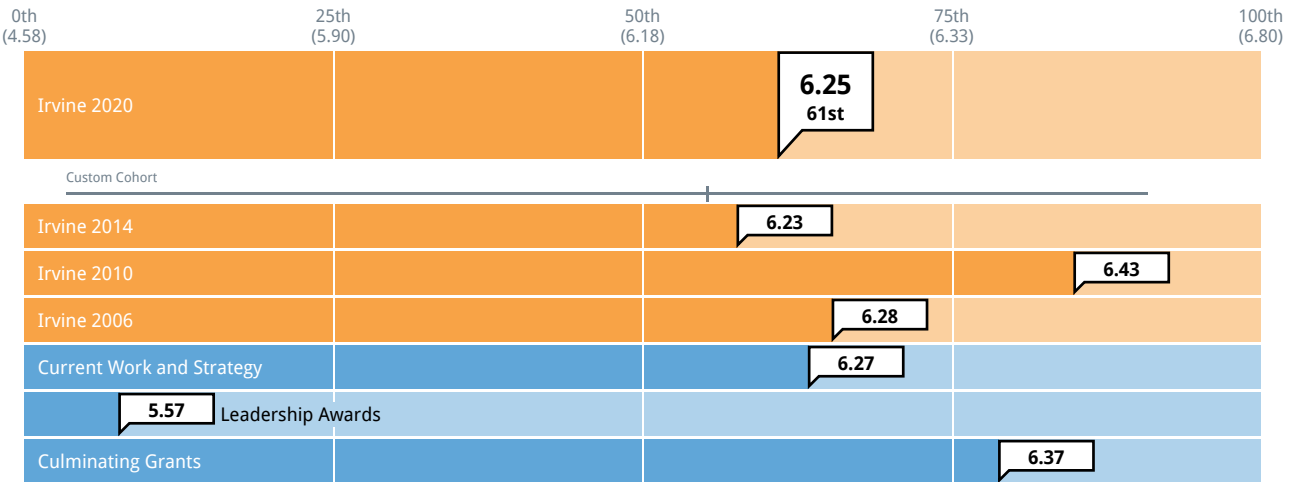
0th (4.58)	25th (5.90)	50th (6.18)	75th (6.33)	100th (6.80)

Irvine 2020 — **6.25** 61st

Custom Cohort

Irvine 2014 — 6.23
Irvine 2010 — 6.43
Irvine 2006 — 6.28
Current Work and Strategy — 6.27
Leadership Awards — 5.57
Culminating Grants — 6.37

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

How well does the Foundation understand your organization's strategy and goals?

1 = Limited understanding   **7** = Thorough understanding

0th (3.69)	25th (5.59)	50th (5.79)	75th (6.00)	100th (6.60)

Irvine 2020 — **5.57*** 24th

Custom Cohort

Irvine 2014 — 5.30
Irvine 2010 — 5.73
Irvine 2006 — 5.23
Current Work and Strategy — 5.67
Leadership Awards — 5.15
Culminating Grants — 5.46
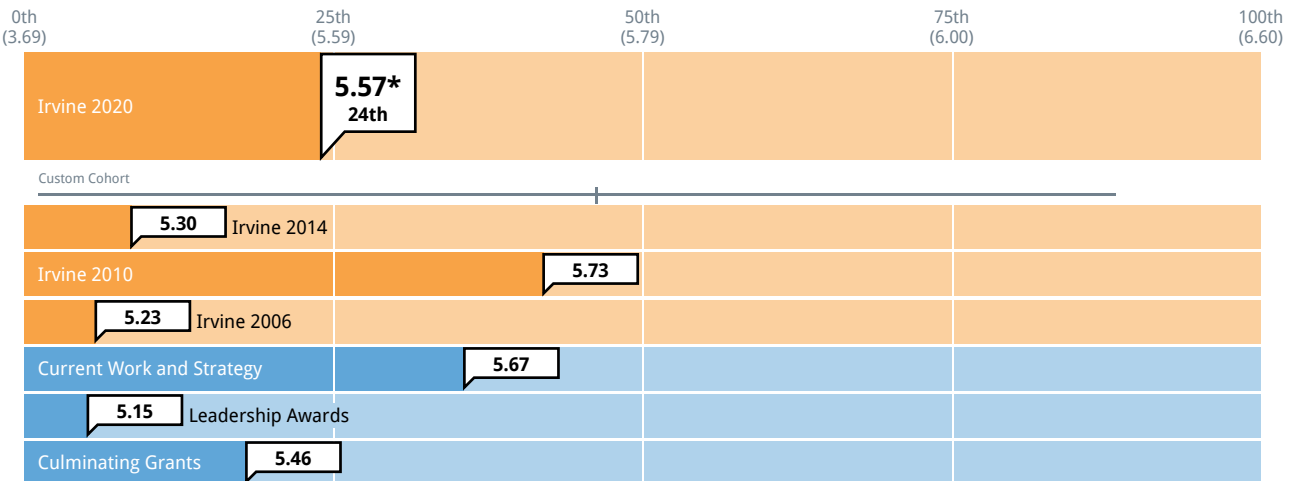
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Grantee Challenges

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

1 = Not at all aware   **7** = Extremely aware

0th (4.00)	25th (5.05)	50th (5.31)	75th (5.53)	100th (6.29)

Irvine 2020 — **4.96** **19th**

Custom Cohort

Irvine 2014 — **4.81**

Current Work and Strategy — **5.31**

Leadership Awards — **4.29**

Culminating Grants — **4.44**
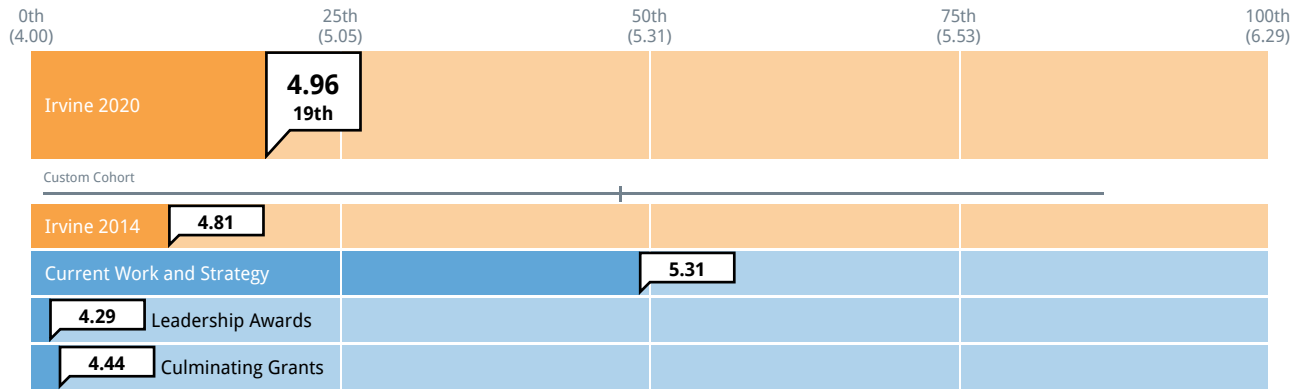
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Funder-Grantee Relationships

Funder-Grantee Relationships Summary Measure

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

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

Funder-Grantee Relationships Summary Measure

1 = Very negative   **7** = Very positive

	0th (4.80)	25th (6.02)	50th (6.20)	75th (6.37)	100th (6.72)
Irvine 2020		**6.01** **23rd**			

Custom Cohort

Irvine 2014		6.05			
Irvine 2010			6.16		
Irvine 2006	5.92				
Current Work and Strategy			6.19		
	5.88 Leadership Awards				
	5.68 Culminating Grants				
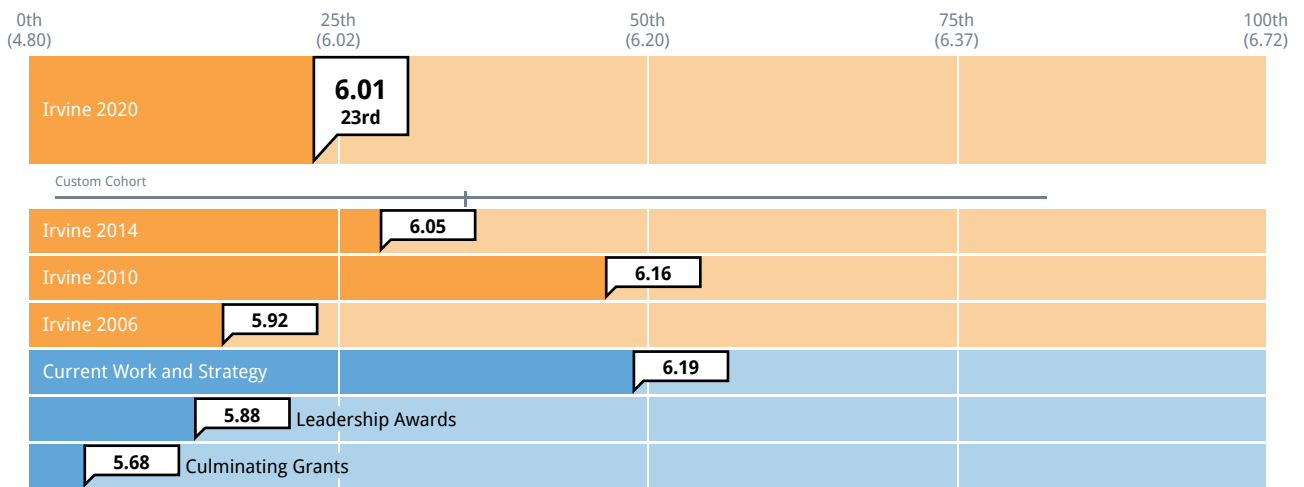
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Quality of Interactions

Overall, how fairly did the Foundation treat you?

1 = Not at all fairly   7 = Extremely fairly

	0th (5.12)	25th (6.39)	50th (6.55)	75th (6.68)	100th (6.95)
Irvine 2020			**6.49** 40th		

Custom Cohort

Irvine 2014		6.47			
Irvine 2010			6.53		
Irvine 2006	6.32				
Current Work and Strategy				6.66	
Leadership Awards	6.21				
Culminating Grants	6.23				
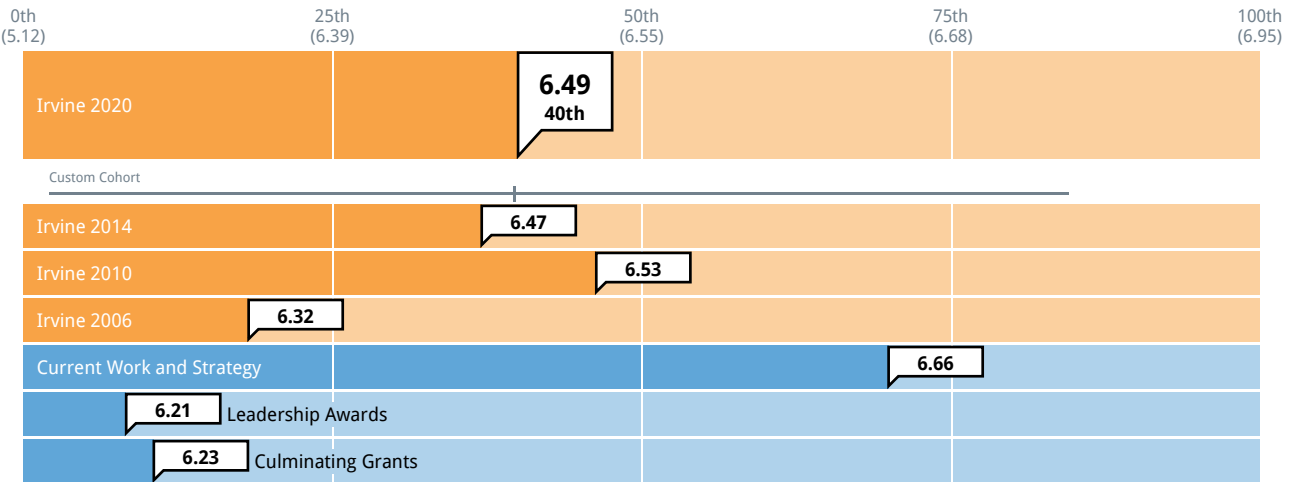
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

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

1 = Not at all comfortable   7 = Extremely comfortable

	0th (4.80)	25th (6.06)	50th (6.24)	75th (6.40)	100th (6.84)
Irvine 2020		**6.03** 23rd			

Custom Cohort

Irvine 2014		6.02			
Irvine 2010		6.01			
Irvine 2006	5.67				
Current Work and Strategy			6.20		
Leadership Awards	5.57				
Culminating Grants	5.78				
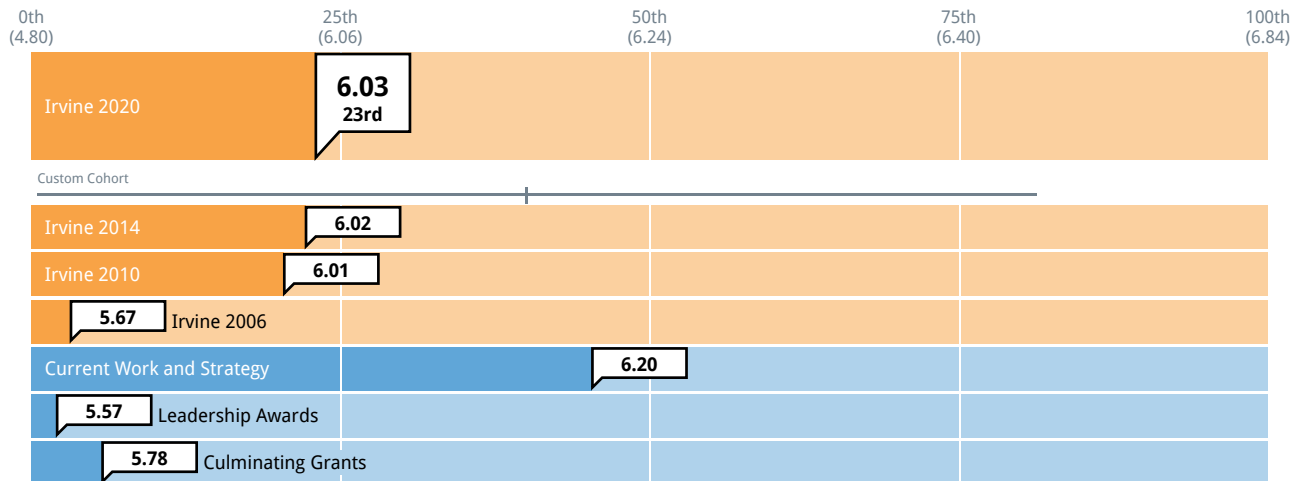
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Overall, how responsive was Foundation staff?

1 = Not at all responsive   **7** = Extremely responsive
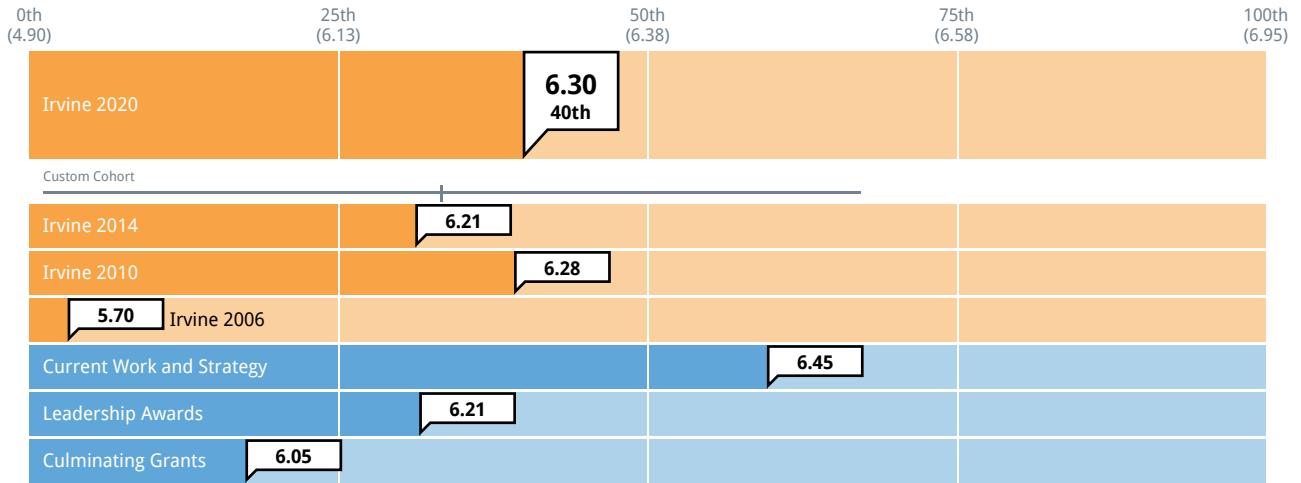
	0th (4.90)	25th (6.13)	50th (6.38)	75th (6.58)	100th (6.95)

Irvine 2020 — **6.30** 40th

Custom Cohort

Irvine 2014 — 6.21
Irvine 2010 — 6.28
Irvine 2006 — 5.70
Current Work and Strategy — 6.45
Leadership Awards — 6.21
Culminating Grants — 6.05

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

To what extent did the Foundation exhibit trust in your organization's staff during this grant?
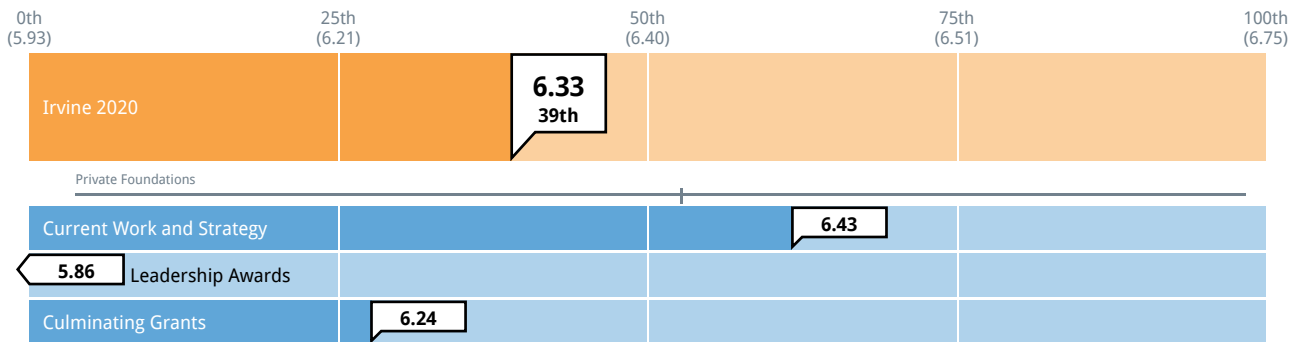
1 = Not at all   **4** = Somewhat   **7** = To a great extent

	0th (5.93)	25th (6.21)	50th (6.40)	75th (6.51)	100th (6.75)

Irvine 2020 — **6.33** 39th

Private Foundations

Current Work and Strategy — 6.43
Leadership Awards — 5.86
Culminating Grants — 6.24

Cohort: Private Foundations   **Past results:** on   **Subgroup:** Portfolio

To what extent did the Foundation exhibit candor about the Foundation's perspectives on your work during this grant?
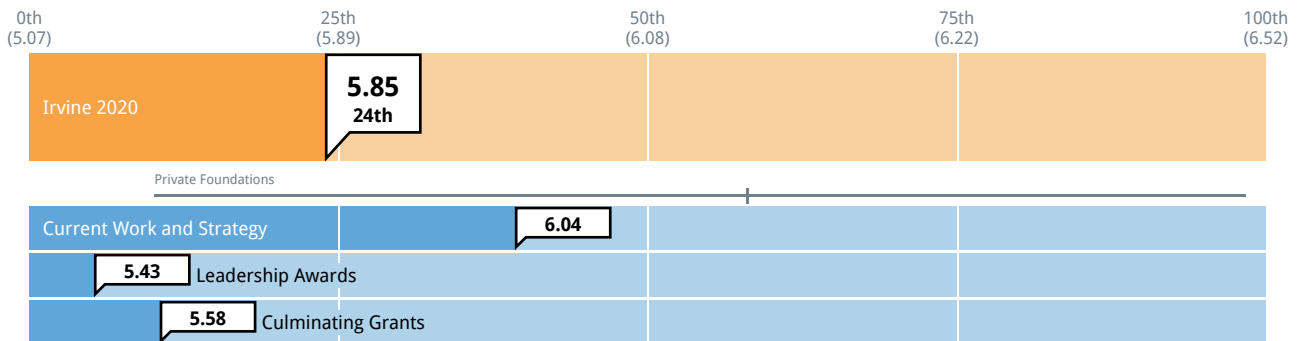
1 = Not at all   **4** = Somewhat   **7** = To a great extent

	0th (5.07)	25th (5.89)	50th (6.08)	75th (6.22)	100th (6.52)

Irvine 2020 — **5.85** 24th

Private Foundations

Current Work and Strategy — 6.04
Leadership Awards — 5.43
Culminating Grants — 5.58

Cohort: Private Foundations   **Past results:** on   **Subgroup:** Portfolio

To what extent did the Foundation exhibit respectful interaction during this grant?
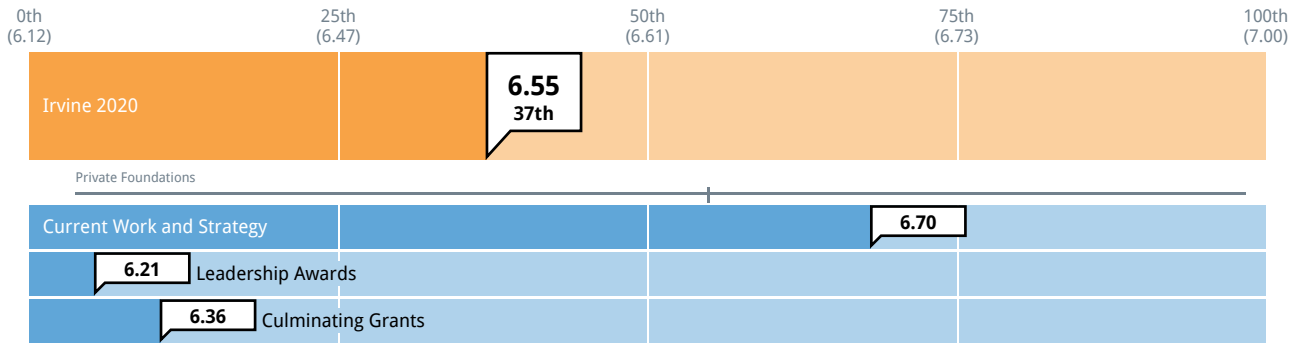
1 = Not at all	**4** = Somewhat	**7** = To a great extent

0th (6.12)	25th (6.47)	50th (6.61)	75th (6.73)	100th (7.00)

Irvine 2020 — **6.55** **37th**

Private Foundations

Current Work and Strategy — 6.70

6.21 Leadership Awards

6.36 Culminating Grants

Cohort: Private Foundations   **Past results:** on   **Subgroup:** Portfolio

To what extent did the Foundation exhibit compassion for those affected by your work during this grant?

1 = Not at all	**4** = Somewhat	**7** = To a great extent

0th (5.41)	25th (6.24)	50th (6.42)	75th (6.58)	100th (6.94)

Irvine 2020 — **6.46** **56th**

Private Foundations

Current Work and Strategy — 6.66

Leadership Awards — 6.21

6.14 Culminating Grants
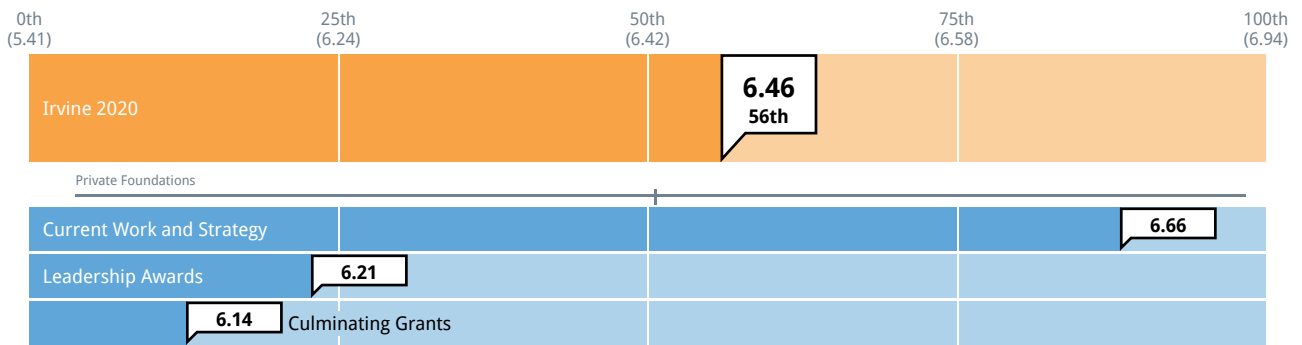
Cohort: Private Foundations   **Past results:** on   **Subgroup:** Portfolio

Interaction Patterns

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

■ Yearly or less often ■ Once every few months ■ Monthly or more often

Irvine 2020	22%	64%	14%
Irvine 2014	20%	54%	26%
Irvine 2010	21%	59%	20%
Irvine 2006	35%	46%	20%
Custom Cohort	18%	58%	25%
Average Funder	18%	55%	27%
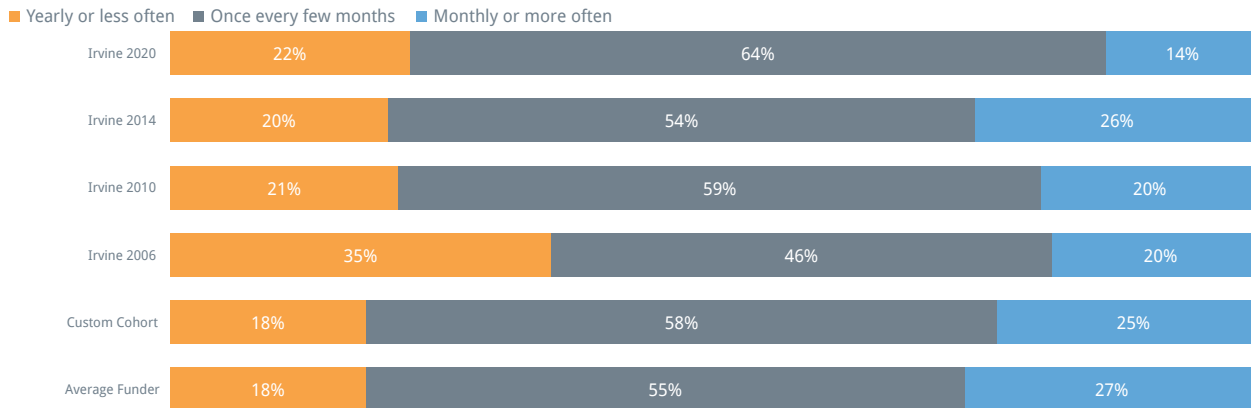
Cohort: Custom Cohort   **Past results:** on

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

■ Yearly or less often ■ Once every few months ■ Monthly or more often

Current Work and Strategy	11%	70%	20%
Leadership Awards	57%	43%	
Culminating Grants	38%	58%	5%
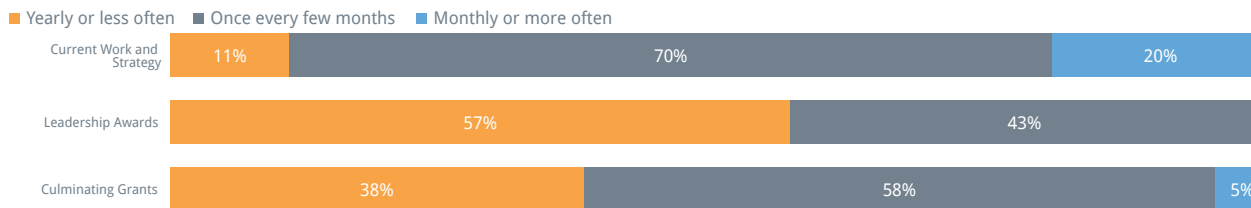
Subgroup: Portfolio

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

■ Program Officer ■ Both of equal frequency ■ Grantee

Irvine 2020	16%	50%	30%
Irvine 2014	9%	49%	40%
Irvine 2010	11%	40%	42%
Irvine 2006	13%	35%	39%
Custom Cohort	13%	48%	33%
Average Funder	15%	48%	31%
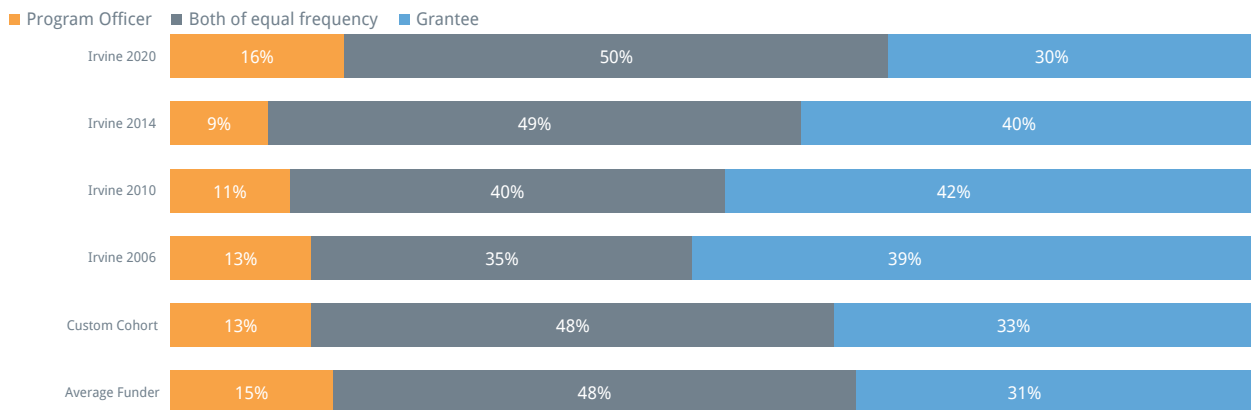
Cohort: Custom Cohort   **Past results:** on

"Who most frequently initiated the contact you had with your program officer?" (By Subgroup)

■ Program Officer ■ Both of equal frequency ■ Grantee

Subgroup	Program Officer	Both of equal frequency	Grantee
Current Work and Strategy	12%	59%	25%
Leadership Awards	36%	14%	43%
Culminating Grants	20%	39%	36%
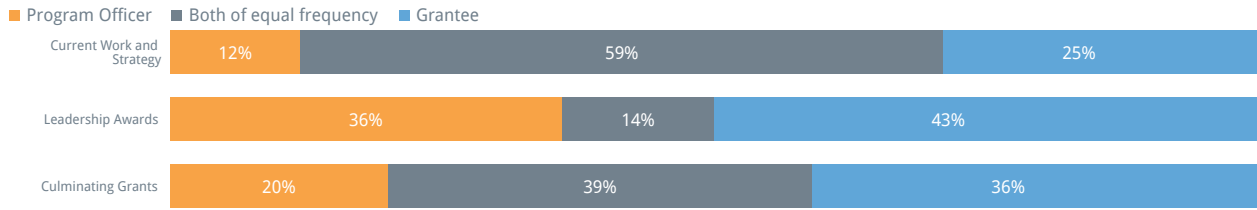
Subgroup: Portfolio

Contact Change and Site Visits

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

Proportion of grantees responding 'Yes'
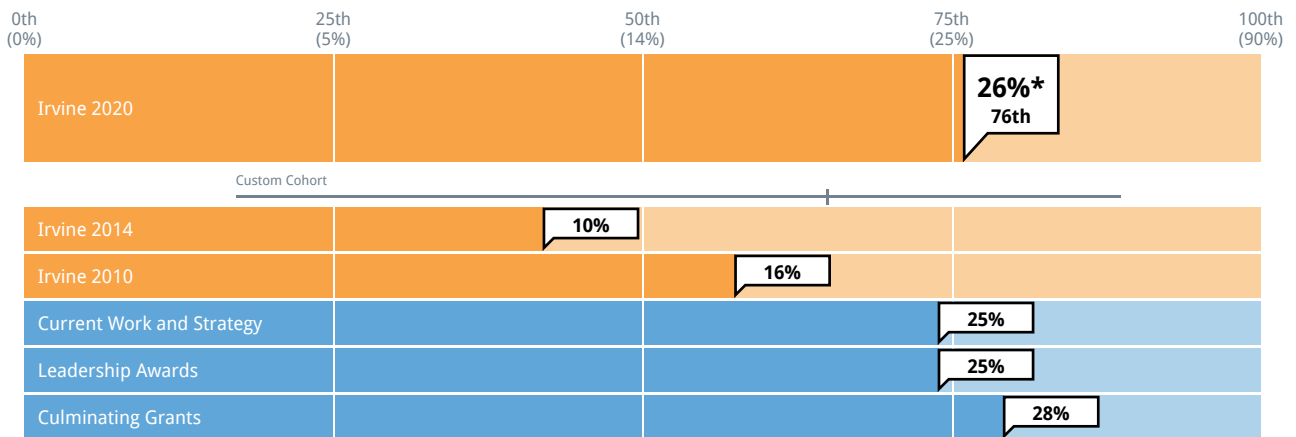
0th (0%)	25th (5%)	50th (14%)	75th (25%)	100th (90%)

Irvine 2020 — **26%*** 76th

Custom Cohort

- Irvine 2014 — **10%**
- Irvine 2010 — **16%**
- Current Work and Strategy — **25%**
- Leadership Awards — **25%**
- Culminating Grants — **28%**

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

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

Proportion of grantees responding 'Yes'

0th (5%)	25th (36%)	50th (49%)	75th (69%)	100th (100%)

Irvine 2020 — **33%*** 20th

Custom Cohort

- Irvine 2014 — **47%**
- Irvine 2010 — **56%**
- Irvine 2006 — **47%**
- **31%** Current Work and Strategy
- Leadership Awards — **64%**
- Culminating Grants — **29%**
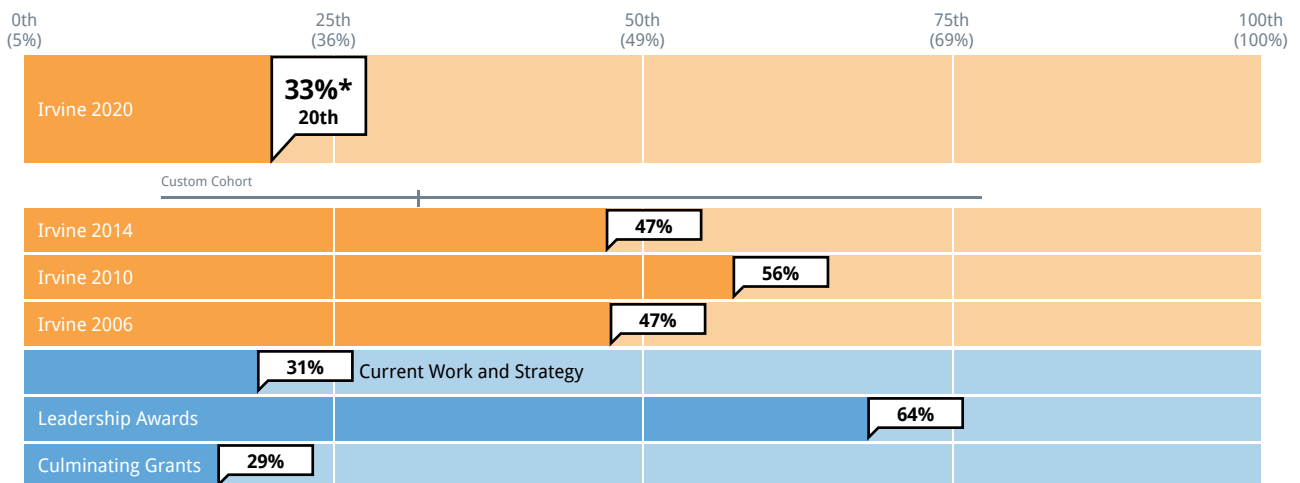
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Communication

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

1 = Not at all clearly   7 = Extremely clearly

	0th (3.65)	25th (5.50)	50th (5.76)	75th (5.98)	100th (6.48)
Irvine 2020	5.29* 13th				
	Custom Cohort				
Irvine 2014		5.68			
Irvine 2010			5.90		
Irvine 2006		5.71			
Current Work and Strategy	5.59				
Leadership Awards	4.64				
Culminating Grants	4.87				

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Foundation?
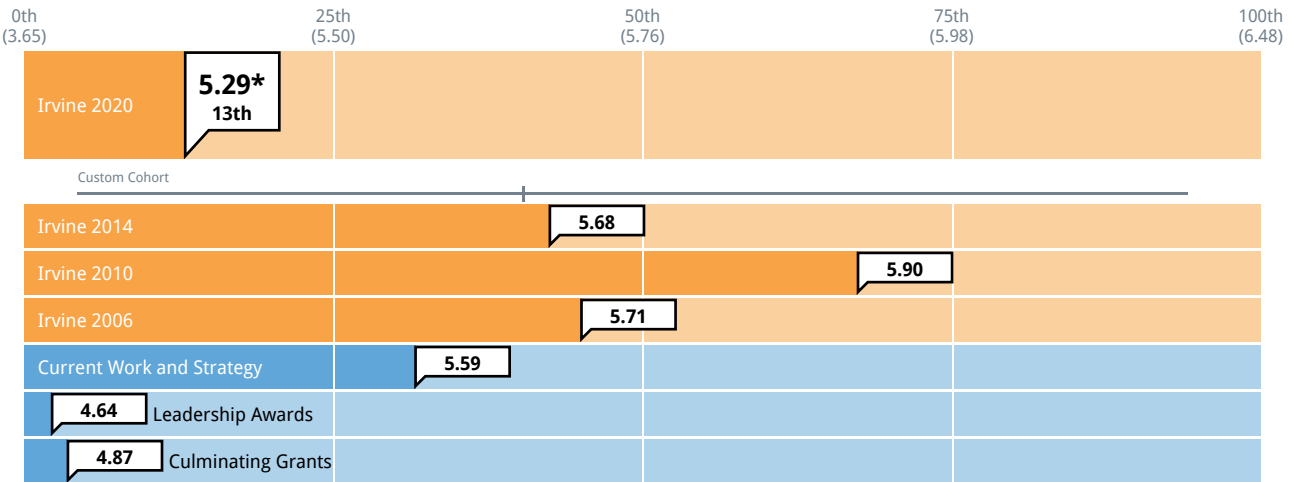
1 = Not at all consistent   7 = Completely consistent
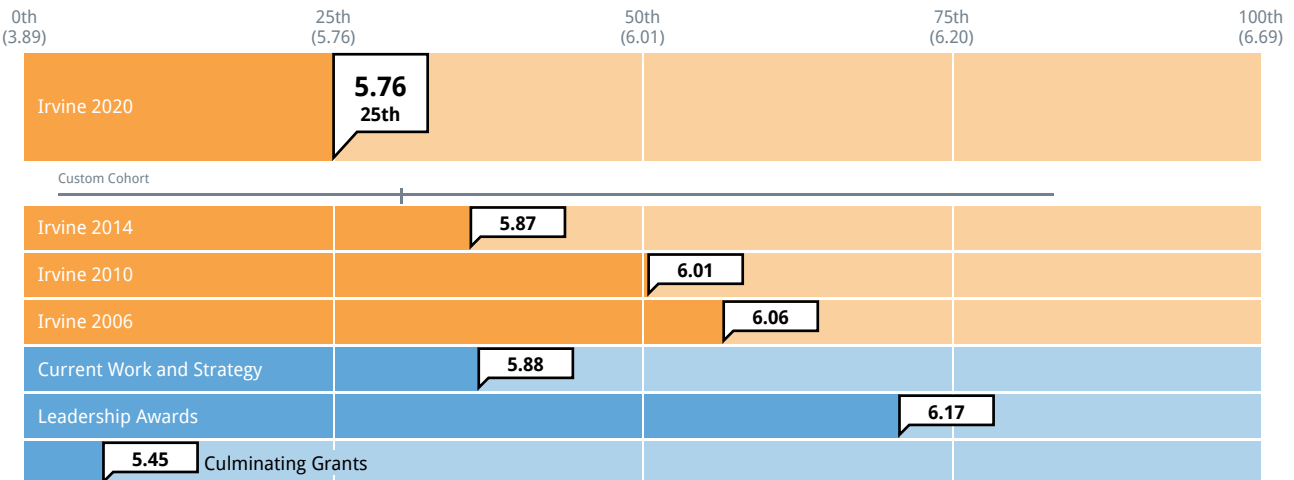
	0th (3.89)	25th (5.76)	50th (6.01)	75th (6.20)	100th (6.69)
Irvine 2020	5.76 25th				
	Custom Cohort				
Irvine 2014		5.87			
Irvine 2010		6.01			
Irvine 2006		6.06			
Current Work and Strategy	5.88				
Leadership Awards				6.17	
Culminating Grants	5.45				

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

The following question was recently added to the grantee survey and depicts comparative data from 30 funders in the grantee dataset.

How well do you understand the way in which the work funded by this grant fits into the Foundation's broader efforts?
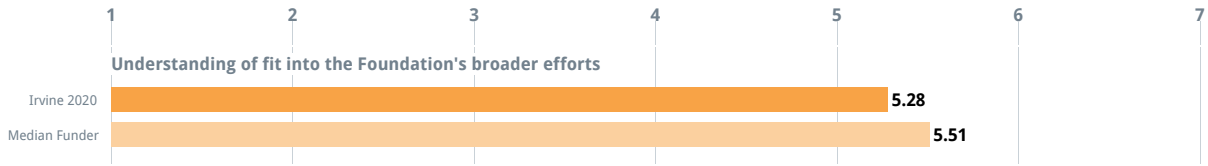
1 = Limited understanding   **7** = Thorough understanding

■ Irvine 2020   ■ Median Funder

Understanding of fit into the Foundation's broader efforts

Irvine 2020	5.28
Median Funder	5.51

Cohort: None   **Past results:** on

How well do you understand the way in which the work funded by this grant fits into the Foundation's broader efforts? - By Subgroup

1 = Limited understanding   **7** = Thorough understanding

■ Current Work and Strategy   ■ Leadership Awards   ■ Culminating Grants

Understanding of fit into the Foundation's broader efforts

Current Work and Strategy	5.55
Leadership Awards	4.85
Culminating Grants	4.83
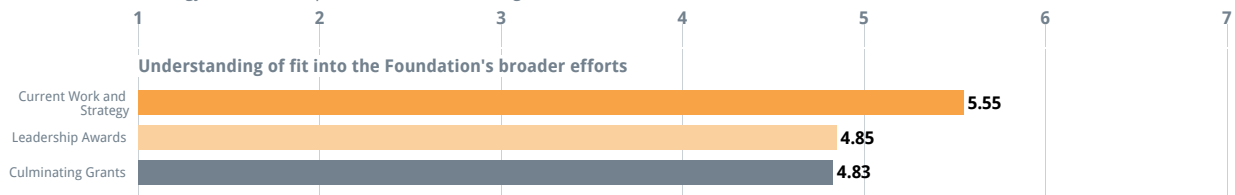
Subgroup: Portfolio

Openness

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

1 = Not at all   **7** = To a great extent

0th (4.14)	25th (5.08)	50th (5.34)	75th (5.57)	100th (6.34)

Irvine 2020 — **5.23** **40th**

Custom Cohort

Current Work and Strategy — **5.65**

4.36 Leadership Awards

4.66 Culminating Grants
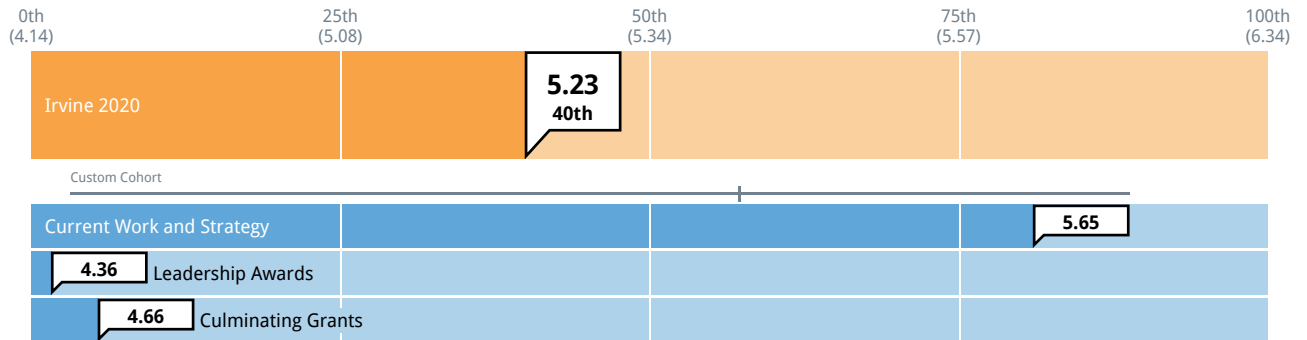
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Top Predictors of Relationships

CEP's research has shown that the strongest predictors of the strength of funder-grantee relationships are transparency and understanding.

Seven related measures of understanding, together create the larger construct that CEP refers to as "understanding". The understanding summary measure below is an average of ratings on the following measures:

- Irvine's understanding of partner organizations' **strategy and goals**
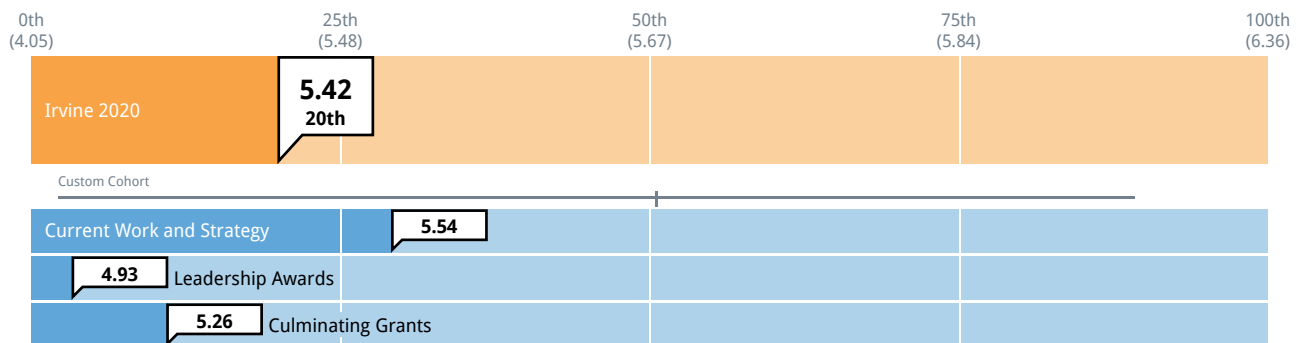- Irvine's awareness of partner **organizations' challenges**
- Irvine's understanding of the **fields** in which partners work
- Irvine's understanding of partners' **local communities**
- Irvine's understanding of the **social, cultural, or socioeconomic factors** that affect partners' work
- Irvine's understanding of intended **beneficiaries' needs**
- Extent to which Irvine's **funding priorities** reflect a deep understanding of partners' intended beneficiaries' needs

Understanding Summary Measure

| **1** = Very negative | **7** = Very positive |

| 0th (4.05) | 25th (5.48) | 50th (5.67) | 75th (5.84) | 100th (6.36) |

Irvine 2020 — **5.42** 20th

Custom Cohort

Current Work and Strategy — **5.54**
4.93 Leadership Awards
5.26 Culminating Grants

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Overall, how transparent is the Foundation with your organization?

| **1** = Not at all transparent | **7** = Extremely transparent |

| 0th (3.69) | 25th (5.51) | 50th (5.77) | 75th (5.98) | 100th (6.55) |

Irvine 2020 — **5.64*** 35th

Custom Cohort

Irvine 2014 — **5.39**
Current Work and Strategy — **5.85**
Leadership Awards — **5.54**
5.25 Culminating Grants
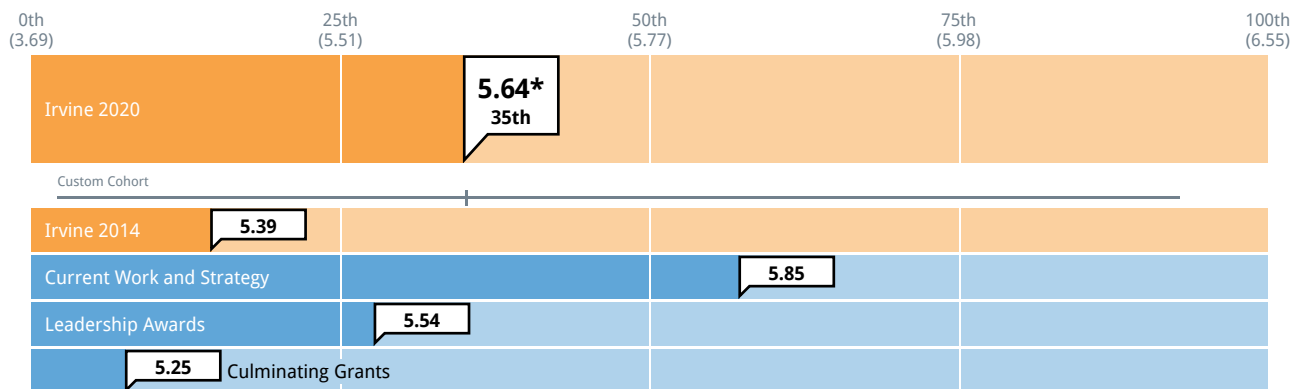
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Beneficiaries and DEI

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

1 = Limited understanding   **7** = Thorough understanding

0th (4.24)	25th (5.45)	50th (5.68)	75th (5.90)	100th (6.54)

Irvine 2020 — **5.64*** 45th

Custom Cohort

Irvine 2014 — **5.36**

Current Work and Strategy — **5.83**

5.21 Leadership Awards

Culminating Grants — **5.36**

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

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

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

1 = Limited understanding   **7** = Thorough understanding

0th (4.00)	25th (5.48)	50th (5.67)	75th (5.87)	100th (6.46)

Irvine 2020 — **5.37** 18th

Custom Cohort

Current Work and Strategy — **5.57**

4.54 Leadership Awards

5.16 Culminating Grants
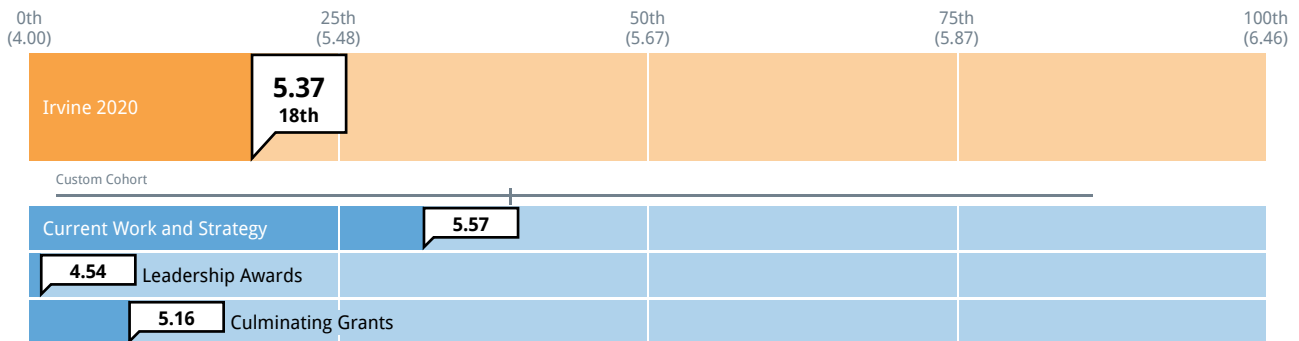
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

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

1 = Not at all   **7** = To a great extent
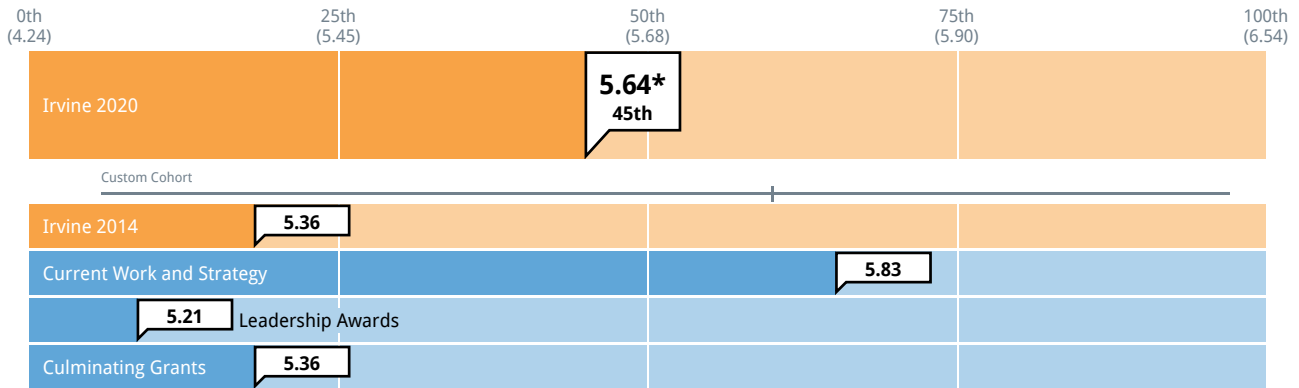
0th (3.77)	25th (5.35)	50th (5.57)	75th (5.82)	100th (6.45)

Irvine 2020 — **5.20** / **15th**

Custom Cohort

Current Work and Strategy — **5.49**

Leadership Awards — **4.58**

Culminating Grants — **4.74**
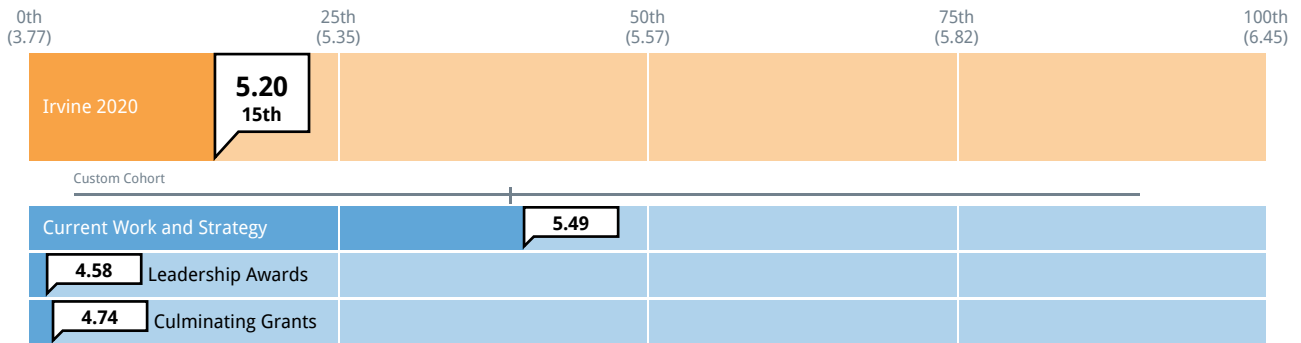
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

The remaining questions in this section were recently added to the grantee survey and do not yet have comparative data.

Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?

■ Yes   ■ No   ■ Don't know

Irvine 2020 — 90% | 8%

Cohort: None   **Past results:** on

Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups? - By Subgroup

■ Yes   ■ No   ■ Don't know

Current Work and Strategy — 90% | 8%

Leadership Awards — 86% | 14%

Culminating Grants — 92% | 5%
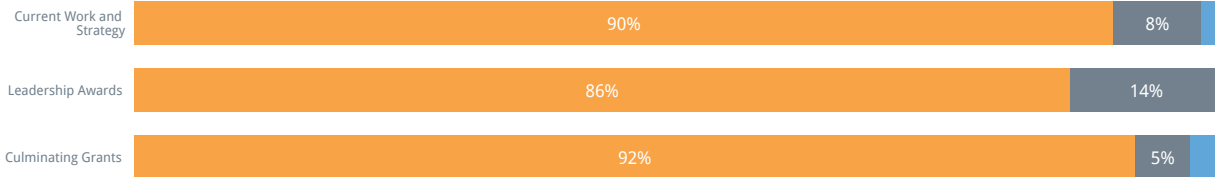
Subgroup: Portfolio

Only asked of grantees who answered "Yes" to the question above.

Specifically, are Black, Indigenous and/or people of color (BIPOC) communities or individuals the primary intended beneficiaries of the efforts funded by this grant?

■ Yes   ■ No   ■ Don't know

Irvine 2020 — 87% | 10%

Cohort: None   **Past results:** on

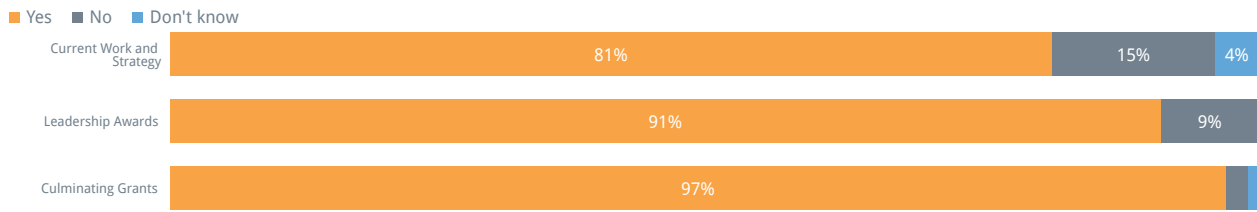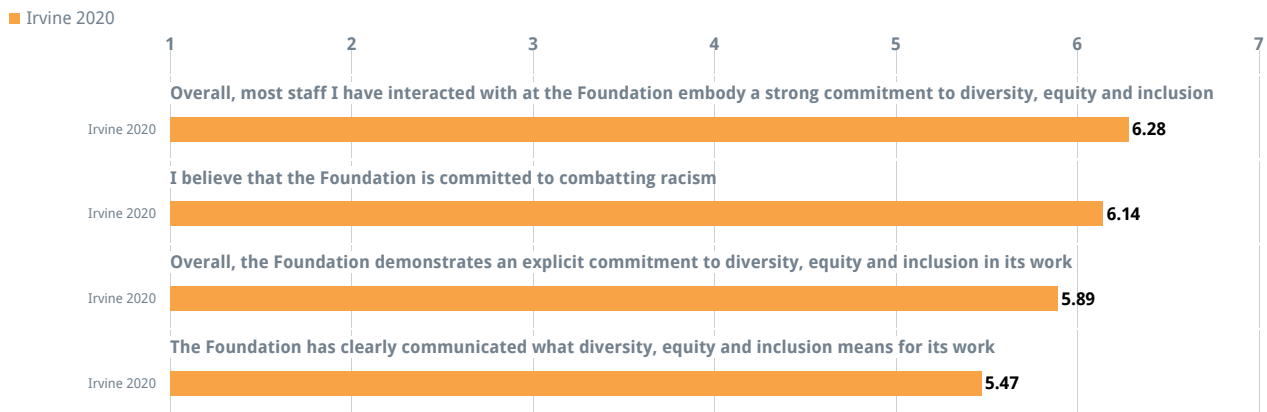**Specifically, are Black, Indigenous and/or people of color (BIPOC) communities or individuals the primary intended beneficiaries of the efforts funded by this grant? - By Subgroup**

■ Yes ■ No ■ Don't know

Current Work and Strategy	81%	15%	4%
Leadership Awards	91%	9%	
Culminating Grants	97%		

Subgroup: Portfolio

Please rate the extent to which you agree or disagree with the following statements about diversity, equity and inclusion:

1 = Strongly disagree   **4** = Neither agree nor disagree   **7** = Strongly agree

■ Irvine 2020

Overall, most staff I have interacted with at the Foundation embody a strong commitment to diversity, equity and inclusion
Irvine 2020 — **6.28**

I believe that the Foundation is committed to combatting racism
Irvine 2020 — **6.14**

Overall, the Foundation demonstrates an explicit commitment to diversity, equity and inclusion in its work
Irvine 2020 — **5.89**

The Foundation has clearly communicated what diversity, equity and inclusion means for its work
Irvine 2020 — **5.47**

Cohort: None   **Past results:** on

Please rate the extent to which you agree or disagree with the following statements about diversity, equity and inclusion: - By Subgroup

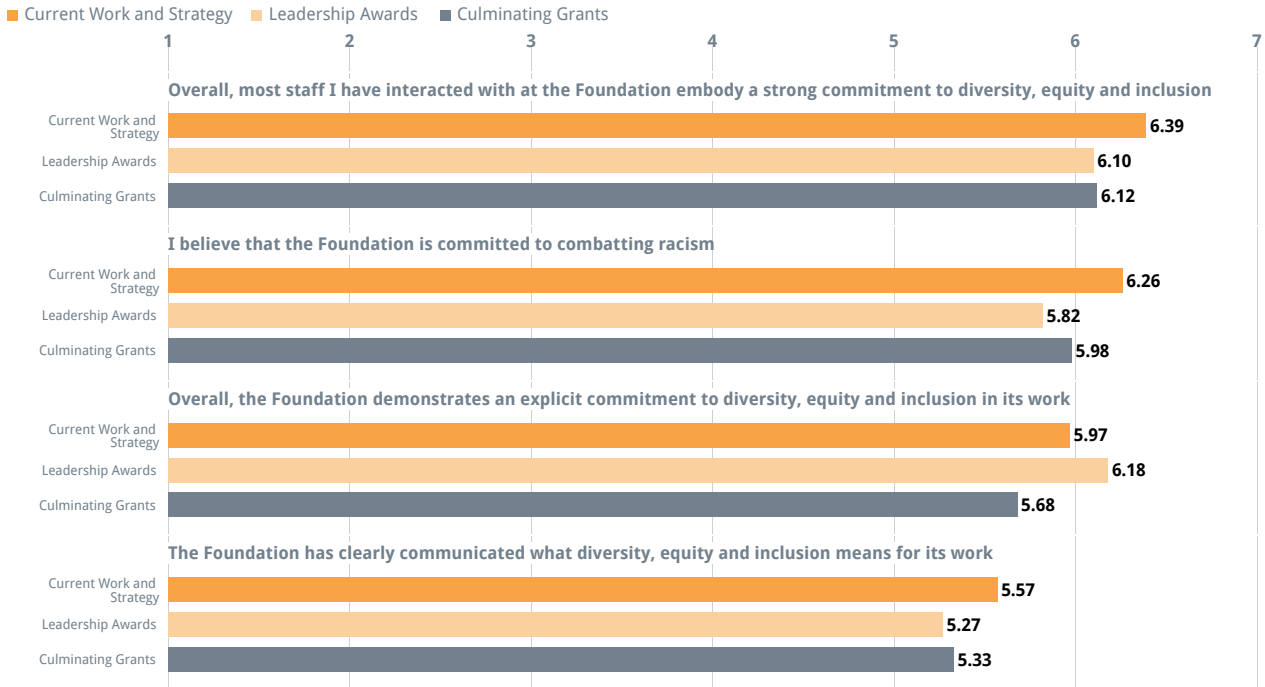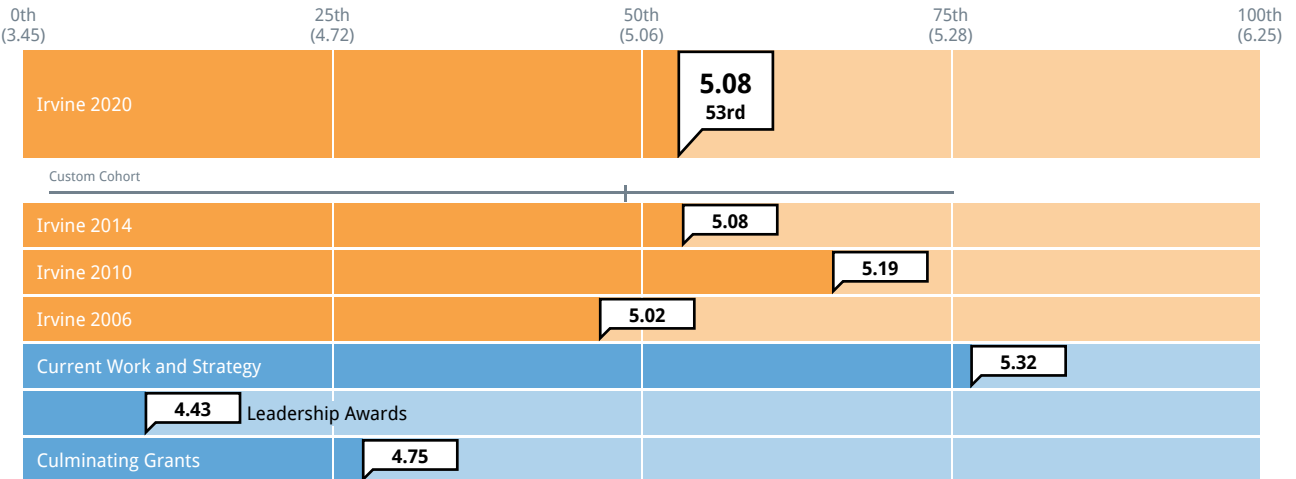1 = Strongly disagree   4 = Neither agree nor disagree   7 = Strongly agree

■ Current Work and Strategy ■ Leadership Awards ■ Culminating Grants

Overall, most staff I have interacted with at the Foundation embody a strong commitment to diversity, equity and inclusion
- Current Work and Strategy: 6.39
- Leadership Awards: 6.10
- Culminating Grants: 6.12

I believe that the Foundation is committed to combatting racism
- Current Work and Strategy: 6.26
- Leadership Awards: 5.82
- Culminating Grants: 5.98

Overall, the Foundation demonstrates an explicit commitment to diversity, equity and inclusion in its work
- Current Work and Strategy: 5.97
- Leadership Awards: 6.18
- Culminating Grants: 5.68

The Foundation has clearly communicated what diversity, equity and inclusion means for its work
- Current Work and Strategy: 5.57
- Leadership Awards: 5.27
- Culminating Grants: 5.33

Subgroup: Portfolio

Grant Processes

How helpful was participating in the Foundation's selection process in strengthening the organization/program funded by the grant?
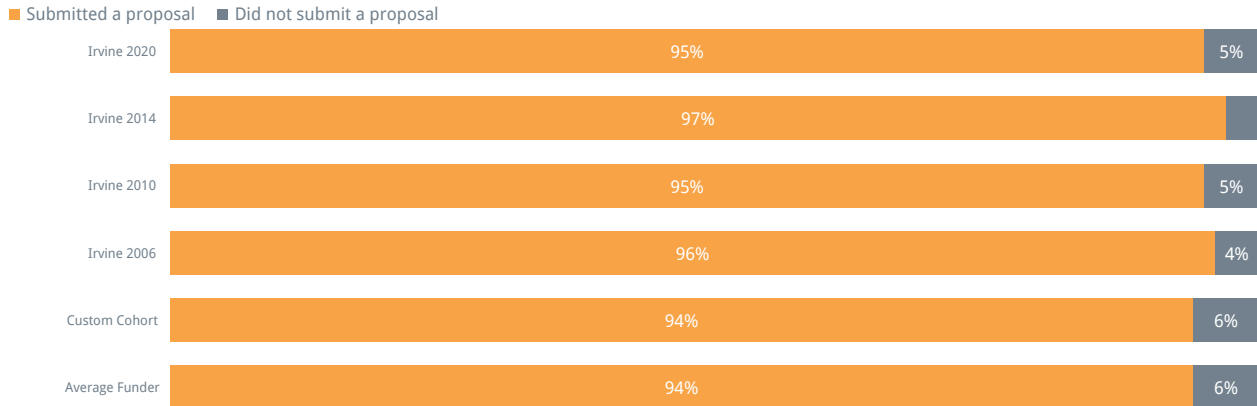
1 = Not at all helpful   **7** = Extremely helpful

	0th (3.45)	25th (4.72)	50th (5.06)	75th (5.28)	100th (6.25)

Irvine 2020 — 5.08, 53rd

Custom Cohort

Irvine 2014 — 5.08
Irvine 2010 — 5.19
Irvine 2006 — 5.02
Current Work and Strategy — 5.32
Leadership Awards — 4.43
Culminating Grants — 4.75

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Selection Process

Did you submit a proposal for this grant?

■ Submitted a proposal   ■ Did not submit a proposal

Irvine 2020	95%	5%
Irvine 2014	97%	
Irvine 2010	95%	5%
Irvine 2006	96%	4%
Custom Cohort	94%	6%
Average Funder	94%	6%

Cohort: Custom Cohort   **Past results:** on

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

1 = No pressure   **7** = Significant pressure

	0th (1.32)	25th (2.01)	50th (2.25)	75th (2.49)	100th (4.24)
Irvine 2020				2.56* 79th	
		Custom Cohort			
Irvine 2014					2.86
Irvine 2010					2.84
Irvine 2006			2.44		
Current Work and Strategy				2.54	
Leadership Awards	2.00				
Culminating Grants				2.69	
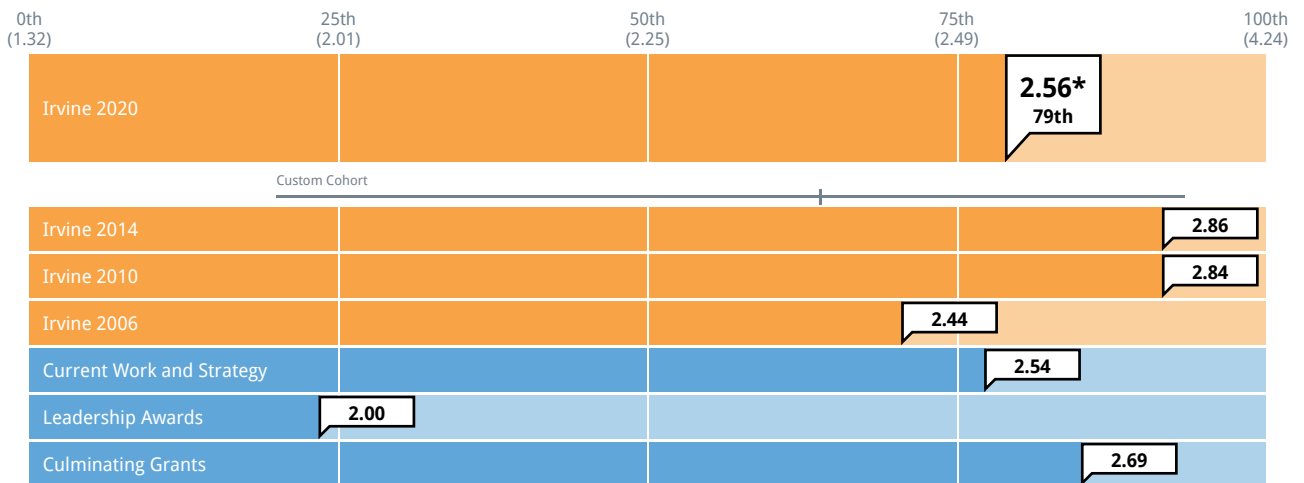
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Time Between Submission and Clear Commitment

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

Selected Cohort: Custom Cohort

Time Elapsed from Submission of Proposal to Clear Commitment of Funding	Irvine 2020	Irvine 2014	Irvine 2010	Irvine 2006	Average Funder	Custom Cohort
Less than 3 months	80%	54%	50%	64%	62%	68%
4 - 6 months	18%	38%	42%	31%	29%	24%
7 - 12 months	2%	8%	8%	4%	7%	6%
More than 12 months	0%	0%	0%	1%	2%	2%

Selected Subgroup: Portfolio

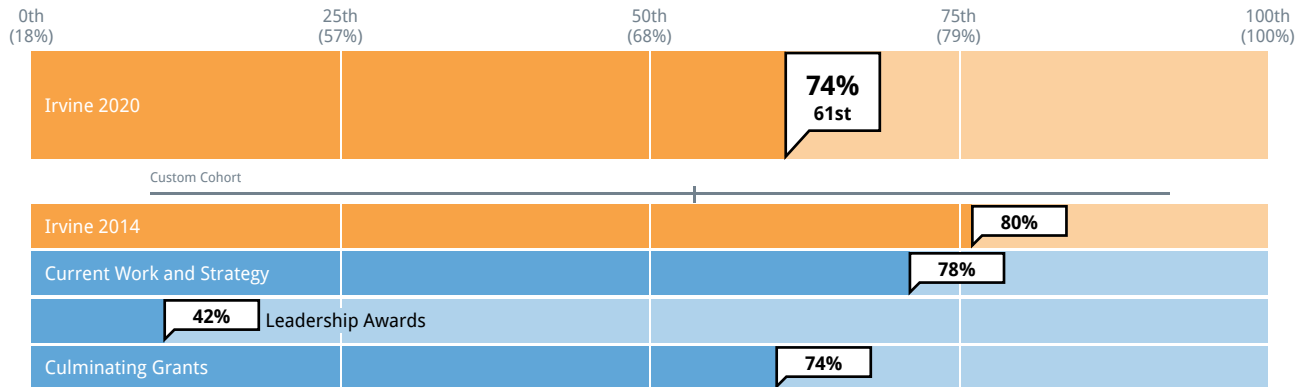| Time Elapsed from Submission of Proposal to Clear Commitment of Funding (By Subgroup)	Current Work and Strategy	Leadership Awards	Culminating Grants
Less than 3 months	87%	56%	71%
4 - 6 months	12%	22%	29%
7 - 12 months	2%	22%	0%
More than 12 months	0%	0%	0%

Reporting and Evaluation Process

Definition of Reporting and Evaluation

- "Reporting" - Irvine's standard oversight, monitoring, and grant reporting.
- "Evaluation" - formal activities *beyond reporting* undertaken by Irvine to assess or learn about a grant, a program, or Irvine's efforts.

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

Proportion of grantees responding 'Yes'

0th (18%)	25th (57%)	50th (68%)	75th (79%)	100th (100%)

Irvine 2020 — **74%** **61st**

Custom Cohort

Irvine 2014 — **80%**

Current Work and Strategy — **78%**

Leadership Awards — **42%**

Culminating Grants — **74%**

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

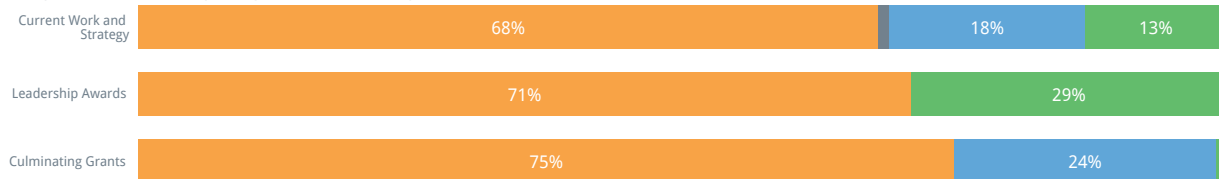## Participation in Reporting and/or Evaluation Processes

■ Participated in a reporting process only ■ Participated in an evaluation process only ■ Participated in both a reporting and an evaluation process
■ Participated in neither a reporting nor an evaluation process

	Reporting only	Both	Neither
Irvine 2020	70%	19%	11%
Custom Cohort	63%	22%	14%
Average Funder	56%	31%	12%

Cohort: Custom Cohort   **Past results:** on

Participation in Reporting and/or Evaluation Processes (By Subgroup)

■ Participated in a reporting process only ■ Participated in an evaluation process only ■ Participated in both a reporting and an evaluation process
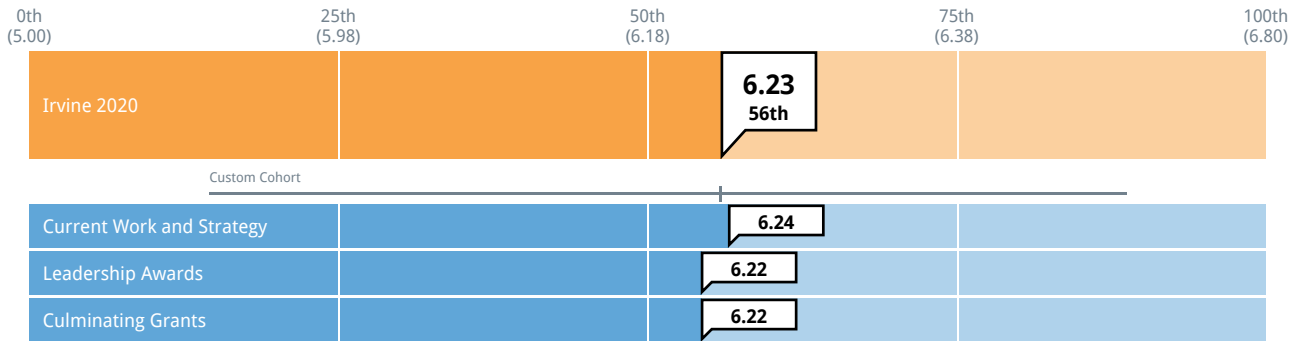■ Participated in neither a reporting nor an evaluation process

	Reporting only	Both	Neither
Current Work and Strategy	68%	18%	13%
Leadership Awards	71%		29%
Culminating Grants	75%	24%	

Subgroup: Portfolio

Reporting Process

The following questions were only asked of grantees that indicated having participated in a reporting process. See the "Reporting and Evaluation Process" page for data on the proportion of grantees participating in this process.

To what extent was the Foundation's reporting process straightforward?
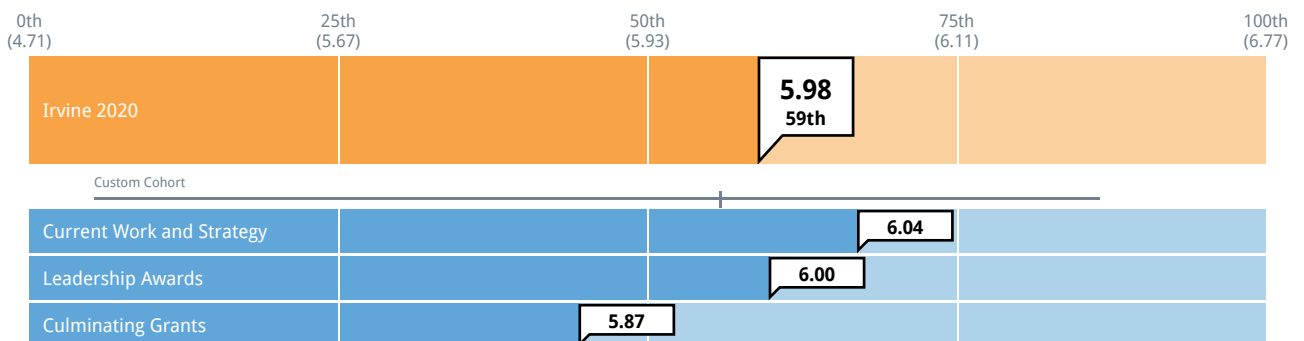
1 = Not at all   **7** = To a great extent

	0th (5.00)	25th (5.98)	50th (6.18)	75th (6.38)	100th (6.80)
Irvine 2020			**6.23** 56th		

Custom Cohort

Current Work and Strategy			6.24		
Leadership Awards			6.22		
Culminating Grants			6.22		

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

To what extent was the Foundation's reporting process adaptable, if necessary, to fit your circumstances?
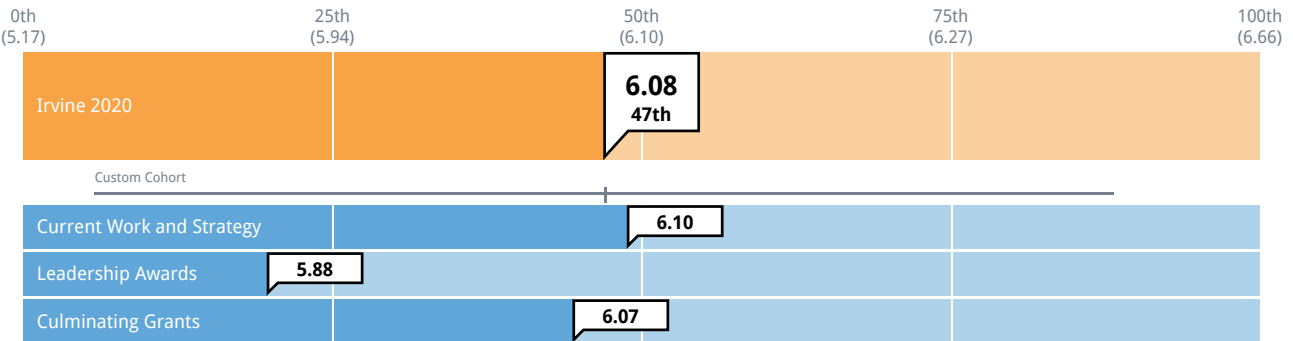
1 = Not at all   **7** = To a great extent

	0th (4.71)	25th (5.67)	50th (5.93)	75th (6.11)	100th (6.77)
Irvine 2020			**5.98** 59th		

Custom Cohort

Current Work and Strategy			6.04		
Leadership Awards			6.00		
Culminating Grants		5.87			

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

To what extent was the Foundation's reporting process relevant, with questions and measures pertinent to the work funded by this grant?
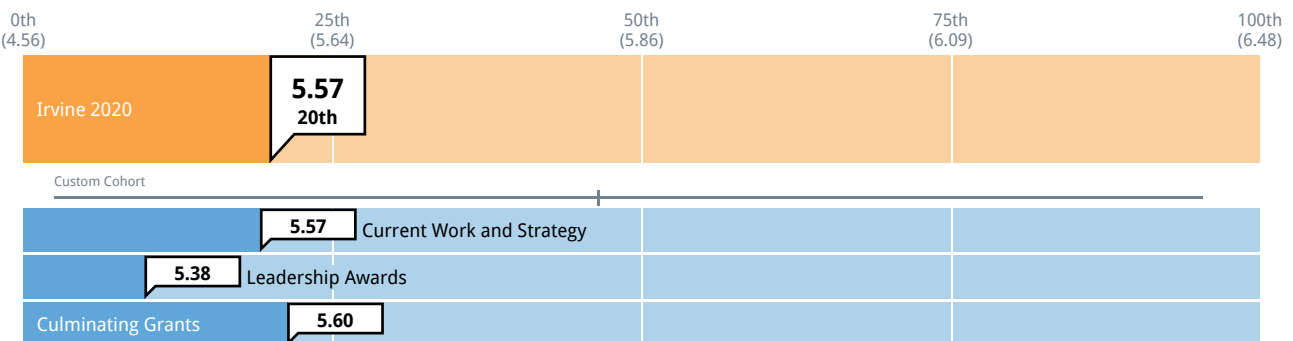
1 = Not at all   7 = To a great extent

0th (5.17)	25th (5.94)	50th (6.10)	75th (6.27)	100th (6.66)

Irvine 2020 — **6.08** 47th

Custom Cohort

Current Work and Strategy — 6.10
Leadership Awards — 5.88
Culminating Grants — 6.07

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

To what extent was the Foundation's reporting process a helpful opportunity for you to reflect and learn?
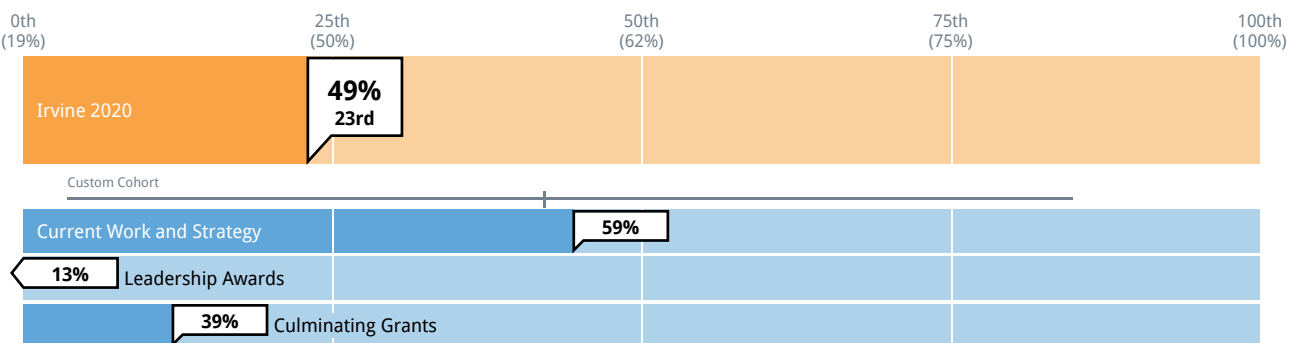
1 = Not at all   7 = To a great extent

0th (4.56)	25th (5.64)	50th (5.86)	75th (6.09)	100th (6.48)

Irvine 2020 — **5.57** 20th

Custom Cohort

5.57 Current Work and Strategy
5.38 Leadership Awards
Culminating Grants 5.60

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

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

Proportion of grantees responding 'Yes'

0th (19%)	25th (50%)	50th (62%)	75th (75%)	100th (100%)

Irvine 2020 — **49%** 23rd

Custom Cohort

Current Work and Strategy — 59%
13% Leadership Awards
39% Culminating Grants

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Evaluation Process

The following questions were only asked of grantees that indicated having participated in an evaluation process. See the "Reporting and Evaluation Process" page for data on the proportion of grantees participating in this process.

## Who was primarily responsible for carrying out the evaluation?

■ Evaluation staff at the Foundation   ■ Evaluation staff at your organization   ■ External evaluator, chosen by the Foundation
■ External evaluator, chosen by your organization

Irvine 2020	21%	26%	41%	12%
Custom Cohort	23%	43%	20%	14%
Average Funder	23%	48%	16%	14%
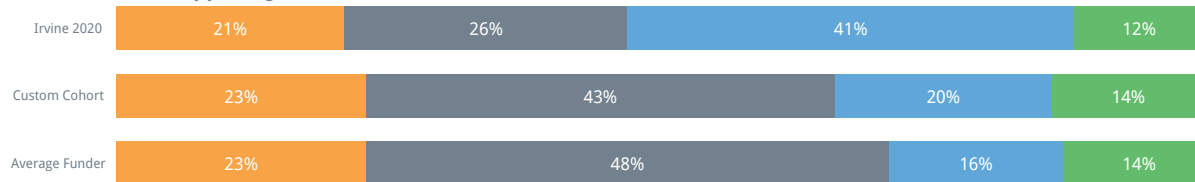
Cohort: Custom Cohort   **Past results:** on

Who was primarily responsible for carrying out the evaluation? (By Subgroup)

■ Evaluation staff at the Foundation   ■ Evaluation staff at your organization   ■ External evaluator, chosen by the Foundation
■ External evaluator, chosen by your organization

Current Work and Strategy	19%	33%	38%	10%
Culminating Grants	23%	15%	46%	15%

Subgroup: Portfolio

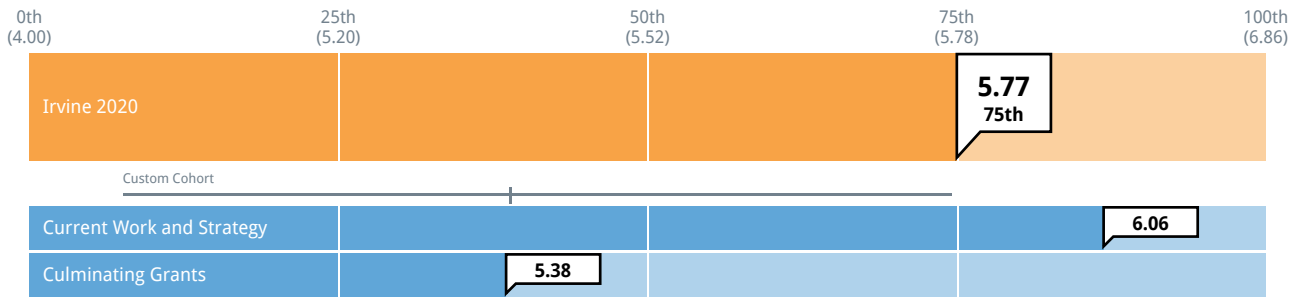## Did the Foundation provide financial support for the evaluation?

■ Yes, the evaluation's costs were fully funded by the Foundation   ■ Yes, the evaluation's costs were partially funded by the Foundation
■ No, the evaluation's costs were not funded by the Foundation

Irvine 2020	63%	10%	27%
Custom Cohort	40%	18%	43%
Average Funder	38%	16%	45%
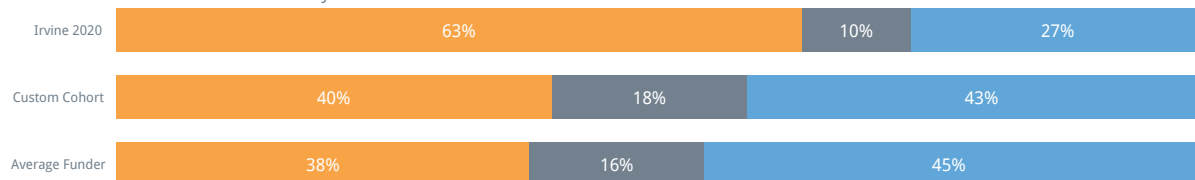
Cohort: Custom Cohort   **Past results:** on

Did the Foundation provide financial support for the evaluation? (By Subgroup)

■ Yes, the evaluation's costs were fully funded by the Foundation   ■ Yes, the evaluation's costs were partially funded by the Foundation
■ No, the evaluation's costs were not funded by the Foundation

Current Work and Strategy	61%	11%	28%
Culminating Grants	67%	8%	25%

Subgroup: Portfolio

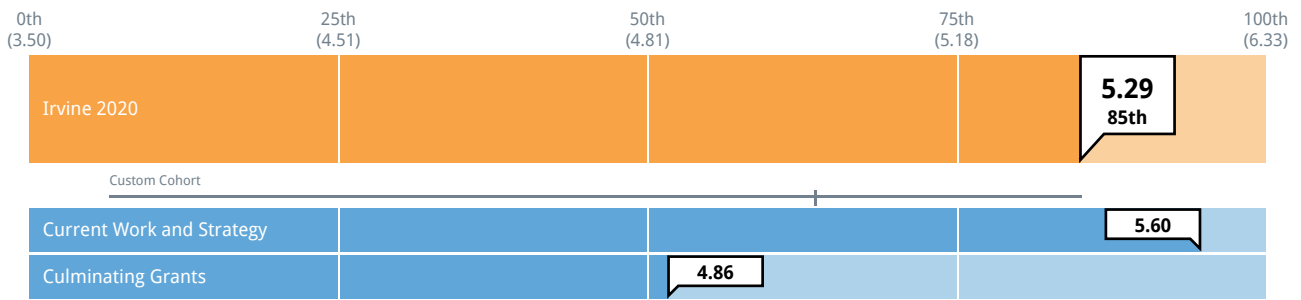**To what extent did the evaluation incorporate input from your organization in the design of the evaluation?**

1 = Not at all   **7** = To a great extent

0th (4.00)	25th (5.20)	50th (5.52)	75th (5.78)	100th (6.86)

Irvine 2020 — **5.77** 75th

Custom Cohort

Current Work and Strategy — 6.06

Culminating Grants — 5.38

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

To what extent did the evaluation result in your organization making changes to the work that was evaluated?
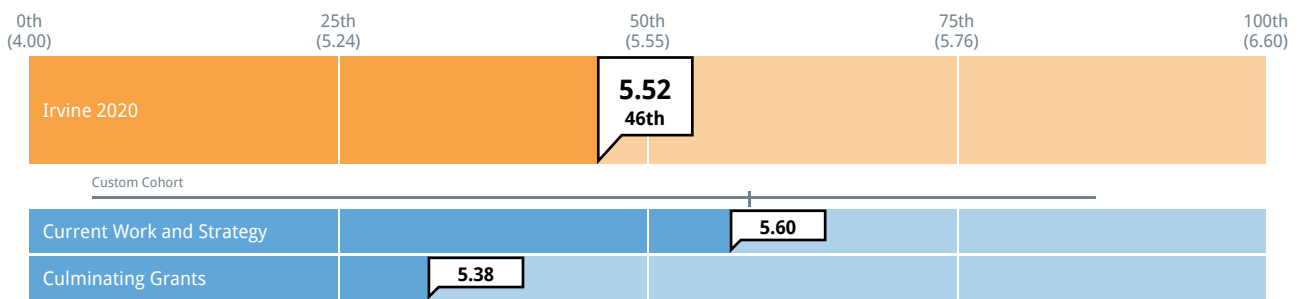
1 = Not at all   **7** = To a great extent

0th (3.50)	25th (4.51)	50th (4.81)	75th (5.18)	100th (6.33)

Irvine 2020 — **5.29** 85th

Custom Cohort

Current Work and Strategy — 5.60

Culminating Grants — 4.86

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

To what extent did the evaluation generate information that you believe will be useful for other organizations?
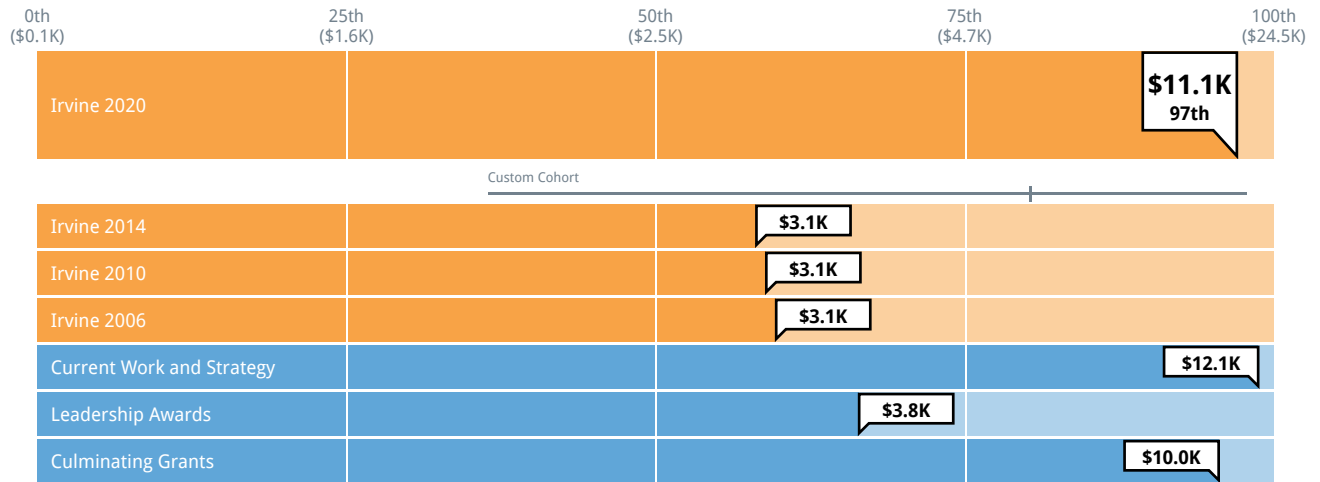
1 = Not at all   **7** = To a great extent

0th (4.00)	25th (5.24)	50th (5.55)	75th (5.76)	100th (6.60)

Irvine 2020 — **5.52** 46th

Custom Cohort

Current Work and Strategy — 5.60

Culminating Grants — 5.38

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

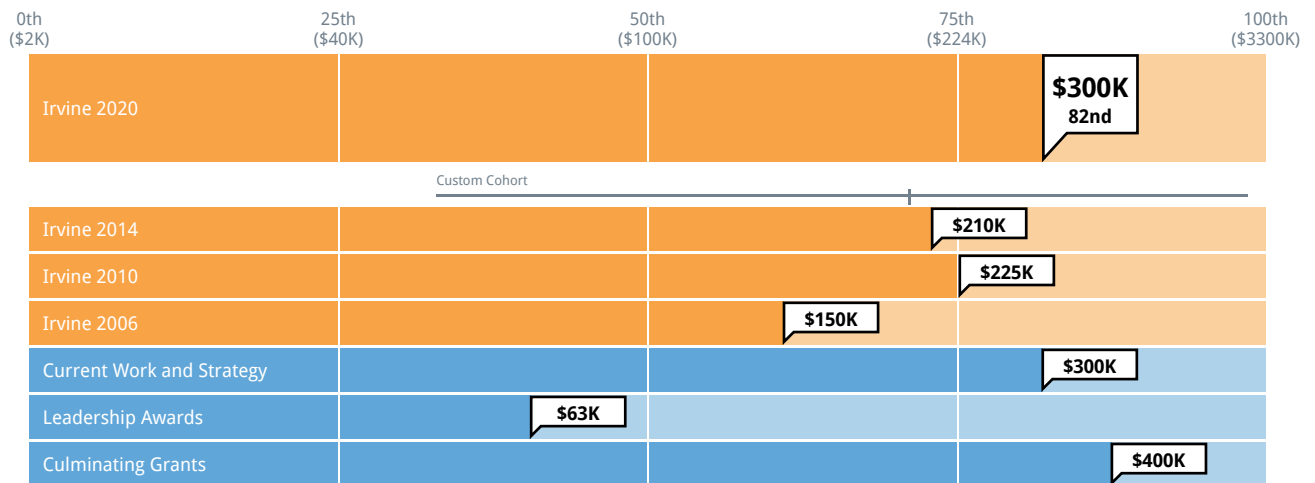# Dollar Return and Time Spent on Processes

Dollar Return: Median grant dollars awarded per process hour required

Includes total grant dollars awarded and total time necessary to fulfill the requirements over the lifetime of the grant
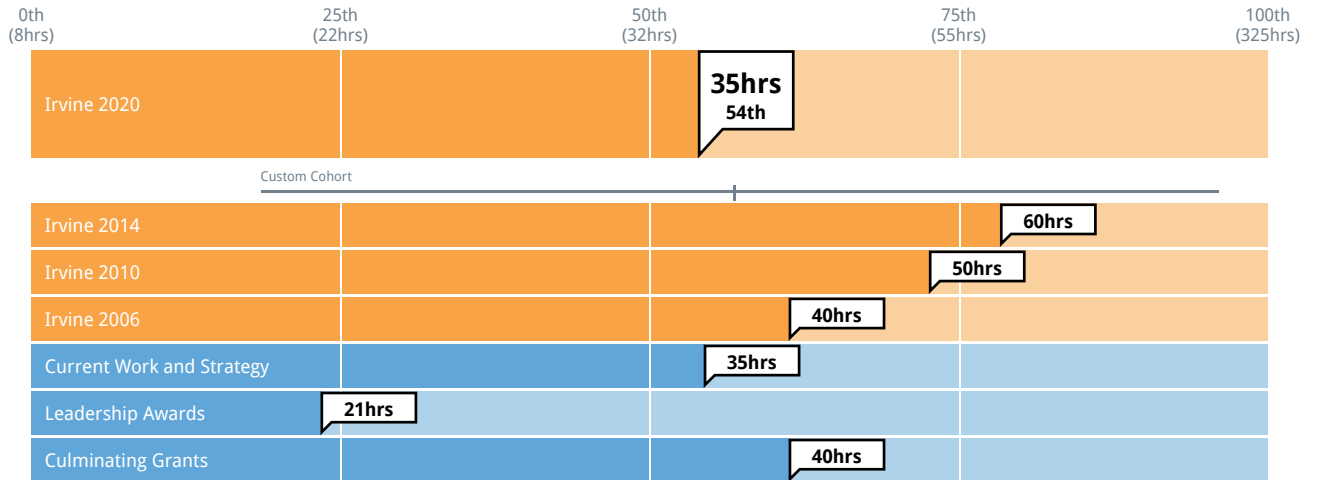
	0th ($0.1K)	25th ($1.6K)	50th ($2.5K)	75th ($4.7K)	100th ($24.5K)
Irvine 2020					$11.1K 97th
				Custom Cohort	
Irvine 2014			$3.1K		
Irvine 2010			$3.1K		
Irvine 2006			$3.1K		
Current Work and Strategy				$12.1K	
Leadership Awards			$3.8K		
Culminating Grants				$10.0K	

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Median Grant Size

	0th ($2K)	25th ($40K)	50th ($100K)	75th ($224K)	100th ($3300K)
Irvine 2020				$300K 82nd	
				Custom Cohort	
Irvine 2014				$210K	
Irvine 2010				$225K	
Irvine 2006			$150K		
Current Work and Strategy				$300K	
Leadership Awards		$63K			
Culminating Grants				$400K	

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Median hours spent by grantees on funder requirements over grant lifetime

	0th (8hrs)	25th (22hrs)	50th (32hrs)	75th (55hrs)	100th (325hrs)

Irvine 2020 — **35hrs** 54th

Custom Cohort

Irvine 2014 — 60hrs

Irvine 2010 — 50hrs

Irvine 2006 — 40hrs

Current Work and Strategy — 35hrs

Leadership Awards — 21hrs

Culminating Grants — 40hrs

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Time Spent on Selection Process

Median Hours Spent on Proposal and Selection Process
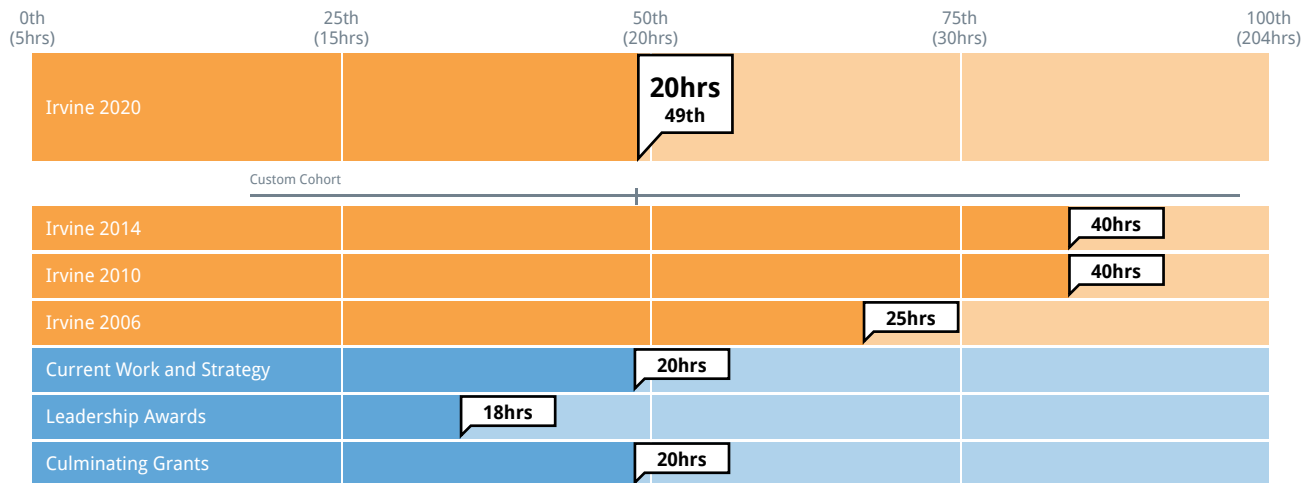
	0th (5hrs)	25th (15hrs)	50th (20hrs)	75th (30hrs)	100th (204hrs)

Irvine 2020 — **20hrs / 49th**

Custom Cohort

Irvine 2014 — **40hrs**
Irvine 2010 — **40hrs**
Irvine 2006 — **25hrs**
Current Work and Strategy — **20hrs**
Leadership Awards — **18hrs**
Culminating Grants — **20hrs**

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Selected Cohort: Custom Cohort

Time Spent On Proposal And Selection Process	Irvine 2020	Irvine 2014	Irvine 2010	Irvine 2006	Average Funder	Custom Cohort
1 to 9 hours	17%	5%	8%	10%	21%	18%
10 to 19 hours	27%	13%	17%	21%	21%	22%
20 to 29 hours	21%	22%	18%	23%	18%	20%
30 to 39 hours	8%	9%	6%	6%	8%	9%
40 to 49 hours	12%	20%	19%	25%	12%	12%
50 to 99 hours	11%	18%	16%	8%	11%	11%
100 to 199 hours	3%	8%	11%	7%	6%	6%
200+ hours	1%	4%	4%	1%	4%	3%

Selected Subgroup: Portfolio

Time Spent On Proposal And Selection Process (By Subgroup)	Current Work and Strategy	Leadership Awards	Culminating Grants
1 to 9 hours	16%	29%	16%
10 to 19 hours	29%	21%	24%
20 to 29 hours	16%	36%	28%
30 to 39 hours	8%	0%	12%
40 to 49 hours	15%	7%	9%
50 to 99 hours	13%	7%	7%
100 to 199 hours	3%	0%	3%
200+ hours	1%	0%	2%

Time Spent on Reporting and Evaluation Process

Median Hours Spent on Monitoring, Reporting and Evaluation Process Per Year
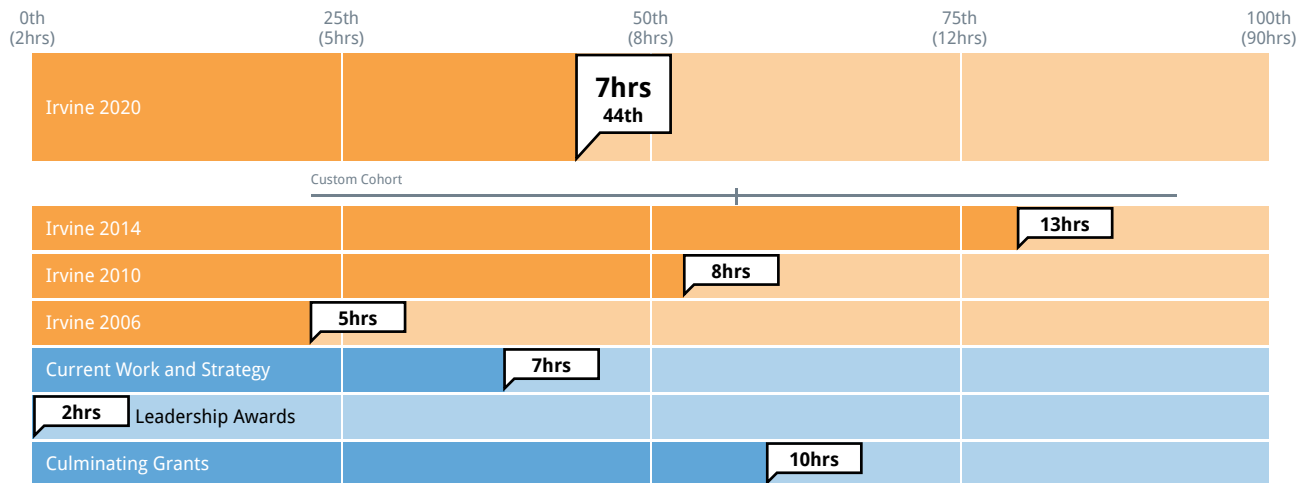
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

Selected Cohort: Custom Cohort

| Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized)	Irvine 2020	Irvine 2014	Irvine 2010	Irvine 2006	Average Funder	Custom Cohort
1 to 9 hours	59%	37%	55%	64%	53%	53%
10 to 19 hours	22%	29%	25%	22%	20%	21%
20 to 29 hours	13%	14%	8%	7%	10%	12%
30 to 39 hours	2%	4%	4%	0%	4%	3%
40 to 49 hours	2%	3%	2%	4%	4%	4%
50 to 99 hours	2%	8%	4%	2%	5%	4%
100+ hours	1%	6%	2%	1%	5%	3%

Selected Subgroup: Portfolio

Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (By Subgroup)	Current Work and Strategy	Leadership Awards	Culminating Grants
1 to 9 hours	60%	91%	50%
10 to 19 hours	23%	0%	24%
20 to 29 hours	13%	0%	17%
30 to 39 hours	0%	0%	6%
40 to 49 hours	1%	0%	4%
50 to 99 hours	3%	0%	0%
100+ hours	0%	9%	0%

Non-Monetary Assistance

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

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

Based on their responses, CEP categorized grantees by the pattern of assistance they received. CEP's analysis shows that providing three or fewer assistance activities is often ineffective; it is only when grantees receive one of the two intensive patterns of assistance described below that they have a substantially more positive experience compared to grantees receiving no assistance.
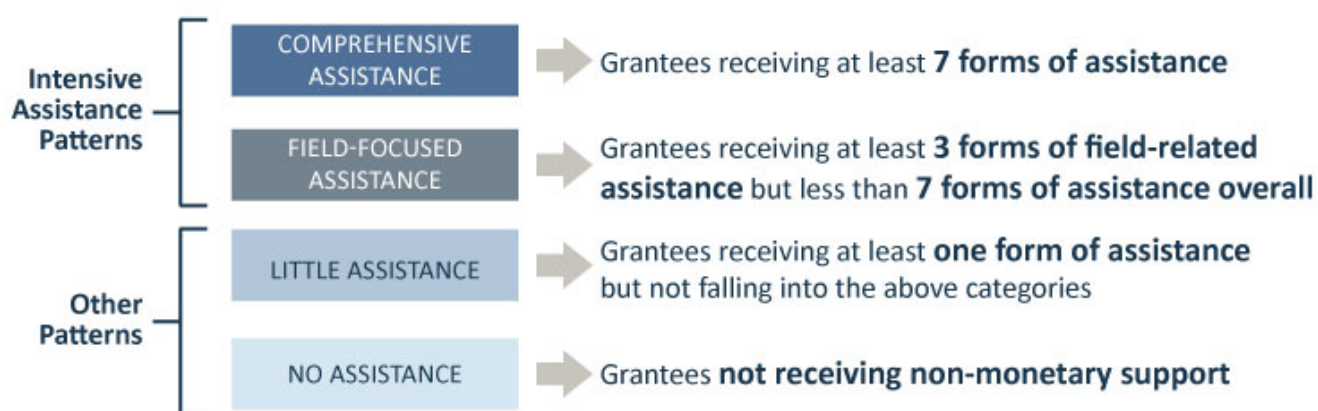
Non-Monetary Assistance Patterns	Irvine 2020	Irvine 2014	Irvine 2010	Irvine 2006	Average Funder	Custom Cohort
Comprehensive	7%	8%	10%	4%	7%	6%
Field-focused	15%	14%	11%	8%	12%	15%
Little	33%	42%	34%	31%	40%	39%
None	44%	36%	45%	57%	41%	40%

Selected Cohort: Custom Cohort

Selected Subgroup: Portfolio

| Non-Monetary Assistance Patterns (By Subgroup)	Current Work and Strategy	Leadership Awards	Culminating Grants
Comprehensive	6%	0%	11%
Field-focused	18%	21%	9%
Little	36%	21%	31%
None	41%	57%	48%

Proportion of grantees that received field-focused or comprehensive assistance
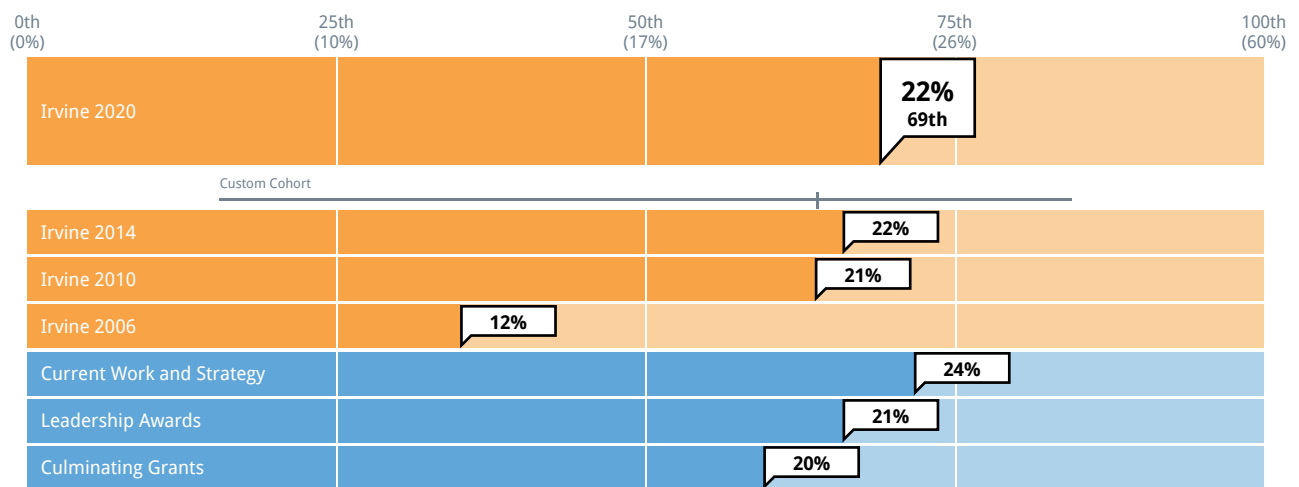
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** Portfolio

The following question was recently added to the grantee survey and depicts comparative data from 93 funders in the dataset.

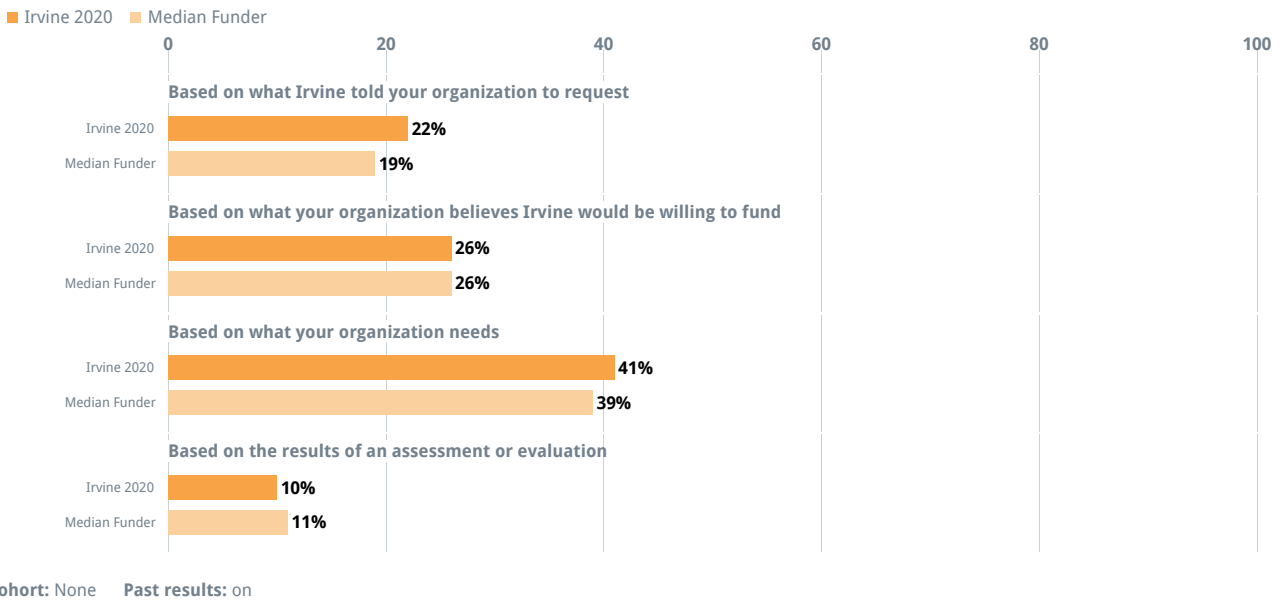## Have you ever requested support from the Foundation to help strengthen your organization?
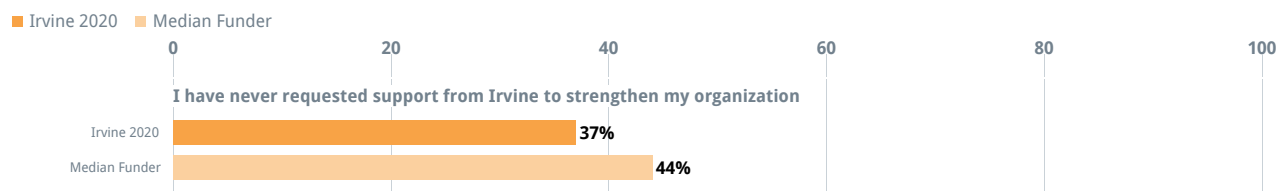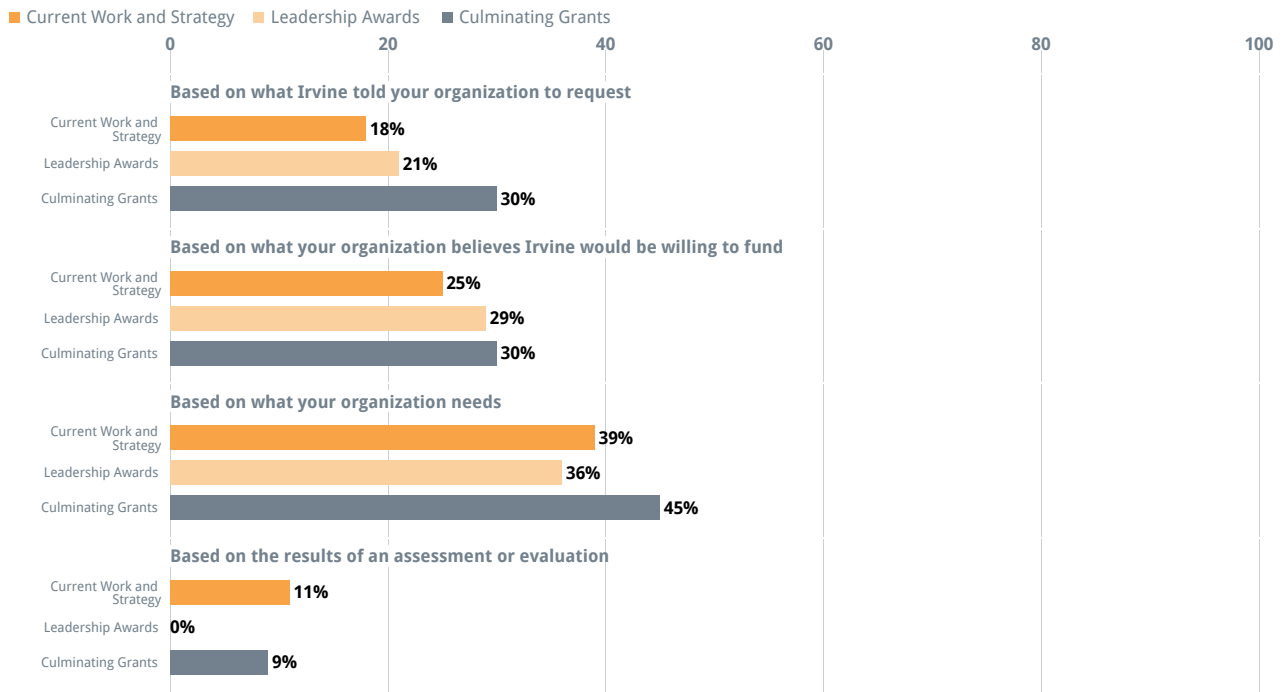

Cohort: None   **Past results:** on

Have you ever requested support from the Foundation to help strengthen your organization? - By Subgroup

■ Current Work and Strategy ■ Leadership Awards ■ Culminating Grants

I have never requested support from Irvine to strengthen my organization

Current Work and Strategy	41%
Leadership Awards	43%
Culminating Grants	28%

Subgroup: Portfolio

If you have ever requested support from the Foundation to help strengthen your organization, how did you determine what specific support to ask for?

■ Irvine 2020 ■ Median Funder

Based on what Irvine told your organization to request

Irvine 2020	22%
Median Funder	19%

Based on what your organization believes Irvine would be willing to fund

Irvine 2020	26%
Median Funder	26%

Based on what your organization needs

Irvine 2020	41%
Median Funder	39%

Based on the results of an assessment or evaluation

Irvine 2020	10%
Median Funder	11%

Cohort: None   **Past results:** on

If you have ever requested support from the Foundation to help strengthen your organization, how did you determine what specific support to ask for? - By Subgroup
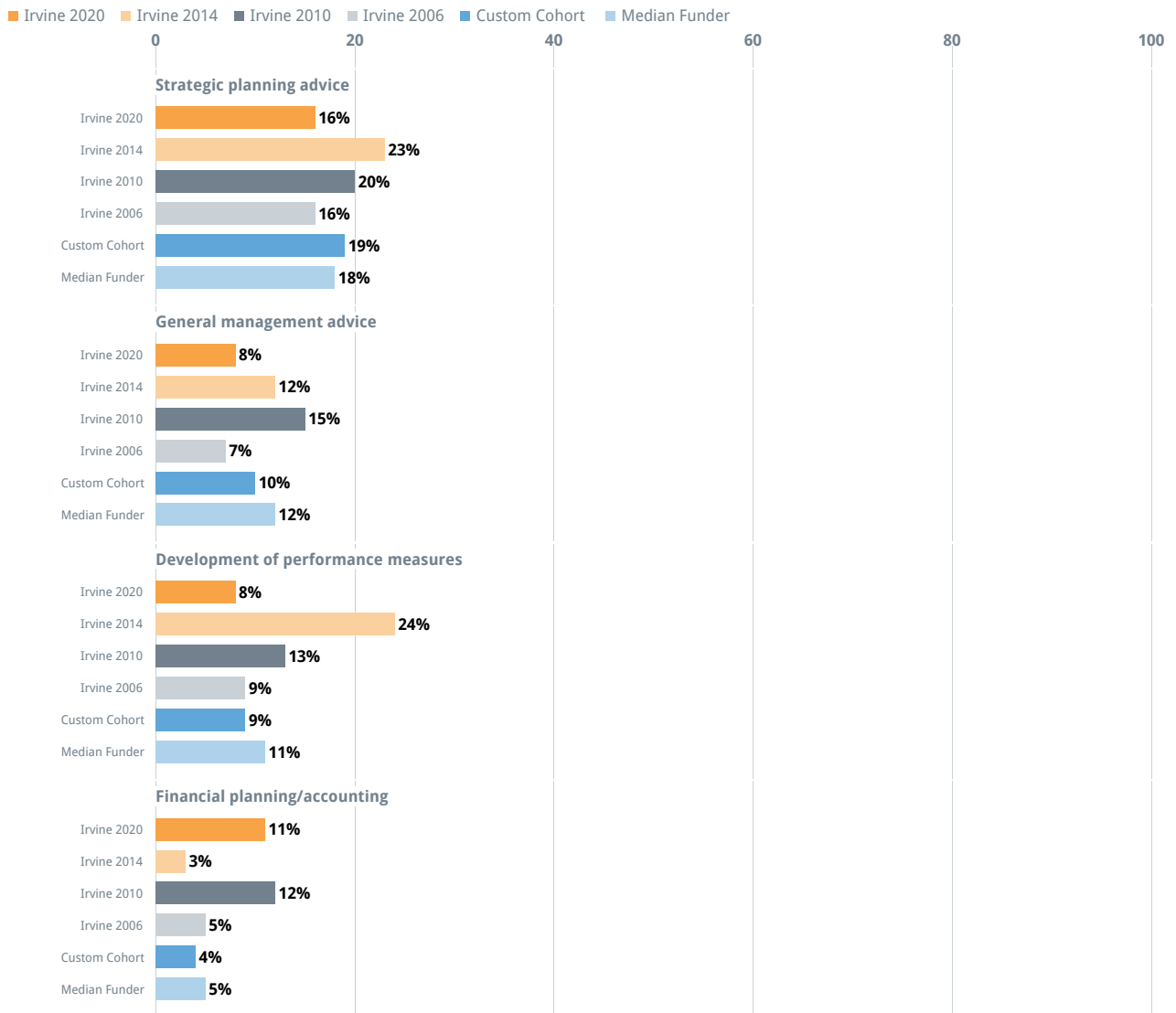
■ Current Work and Strategy ■ Leadership Awards ■ Culminating Grants

0   20   40   60   80   100

Based on what Irvine told your organization to request

Current Work and Strategy	18%
Leadership Awards	21%
Culminating Grants	30%

Based on what your organization believes Irvine would be willing to fund

Current Work and Strategy	25%
Leadership Awards	29%
Culminating Grants	30%

Based on what your organization needs

Current Work and Strategy	39%
Leadership Awards	36%
Culminating Grants	45%

Based on the results of an assessment or evaluation

Current Work and Strategy	11%
Leadership Awards	0%
Culminating Grants	9%

Subgroup: Portfolio

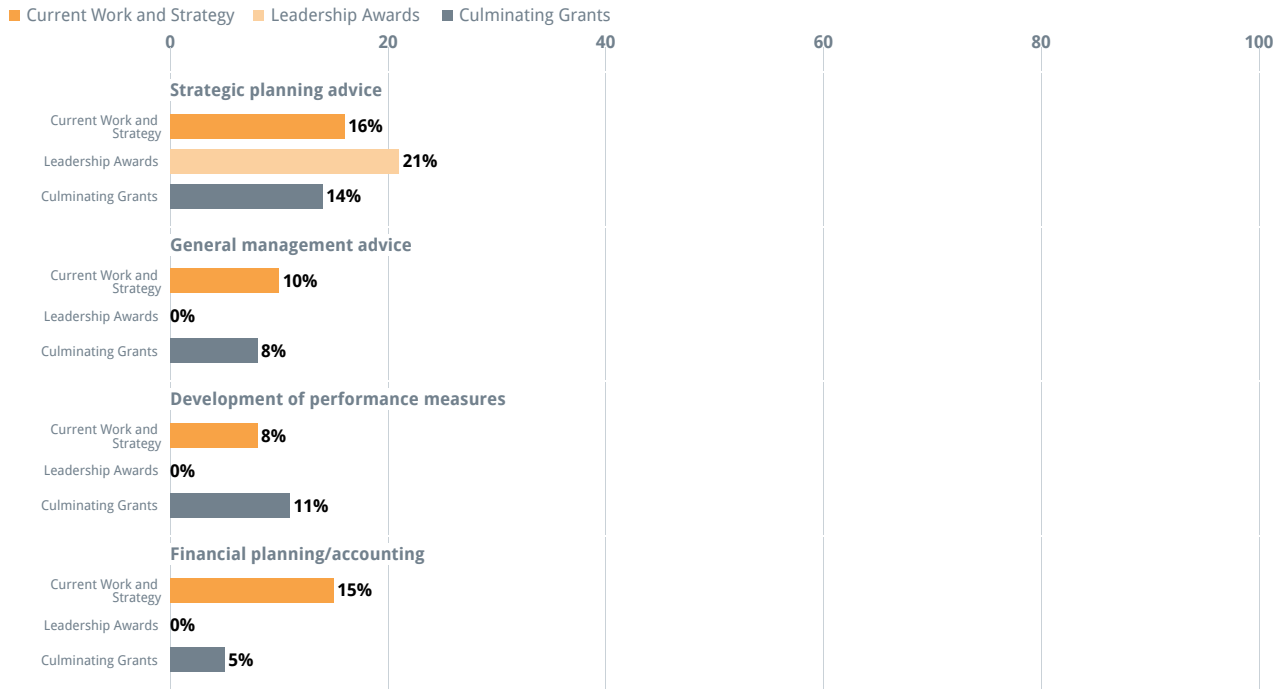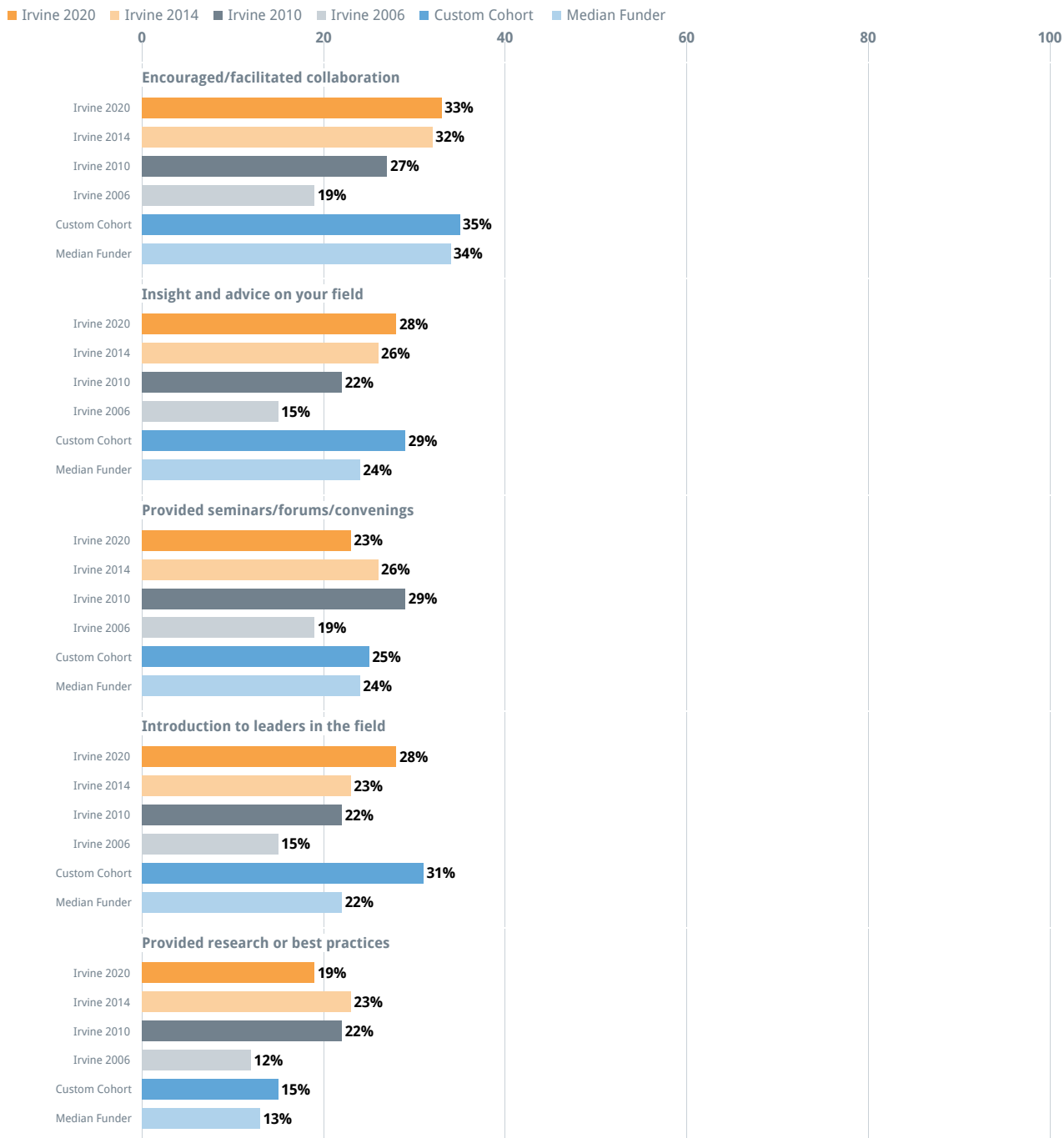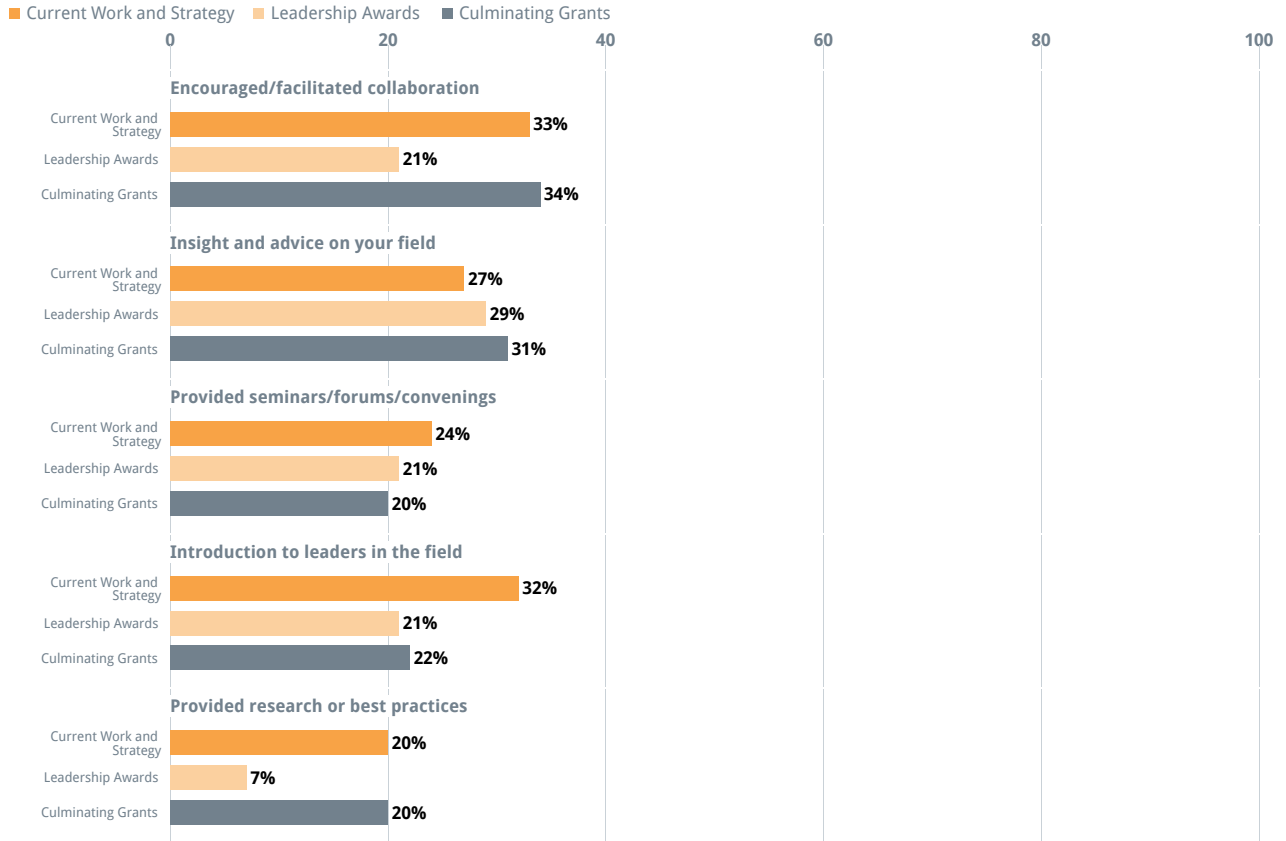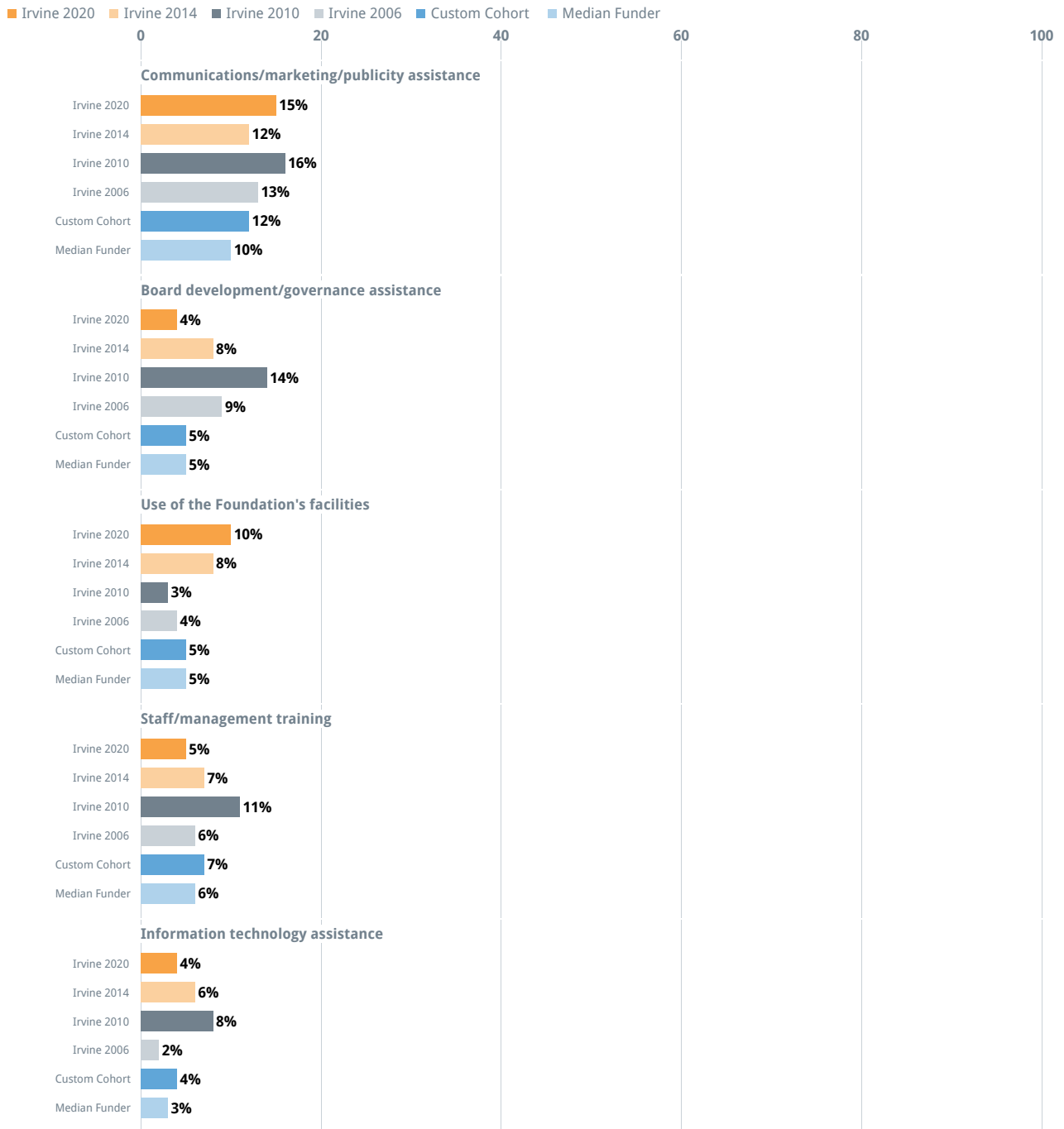## Management Assistance Activities

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

Percentage of Grantees that Received Management Assistance

■ Irvine 2020 ■ Irvine 2014 ■ Irvine 2010 ■ Irvine 2006 ■ Custom Cohort ■ Median Funder

Strategic planning advice

Irvine 2020	16%
Irvine 2014	23%
Irvine 2010	20%
Irvine 2006	16%
Custom Cohort	19%
Median Funder	18%

General management advice

Irvine 2020	8%
Irvine 2014	12%
Irvine 2010	15%
Irvine 2006	7%
Custom Cohort	10%
Median Funder	12%

Development of performance measures

Irvine 2020	8%
Irvine 2014	24%
Irvine 2010	13%
Irvine 2006	9%
Custom Cohort	9%
Median Funder	11%

Financial planning/accounting

Irvine 2020	11%
Irvine 2014	3%
Irvine 2010	12%
Irvine 2006	5%
Custom Cohort	4%
Median Funder	5%

Cohort: Custom Cohort **Past results:** on

Percentage of Grantees that Received Management Assistance - By Subgroup

■ Current Work and Strategy ■ Leadership Awards ■ Culminating Grants

Strategic planning advice
- Current Work and Strategy: 16%
- Leadership Awards: 21%
- Culminating Grants: 14%

General management advice
- Current Work and Strategy: 10%
- Leadership Awards: 0%
- Culminating Grants: 8%

Development of performance measures
- Current Work and Strategy: 8%
- Leadership Awards: 0%
- Culminating Grants: 11%

Financial planning/accounting
- Current Work and Strategy: 15%
- Leadership Awards: 0%
- Culminating Grants: 5%

Subgroup: Portfolio

Field-Related Assistance Activities

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

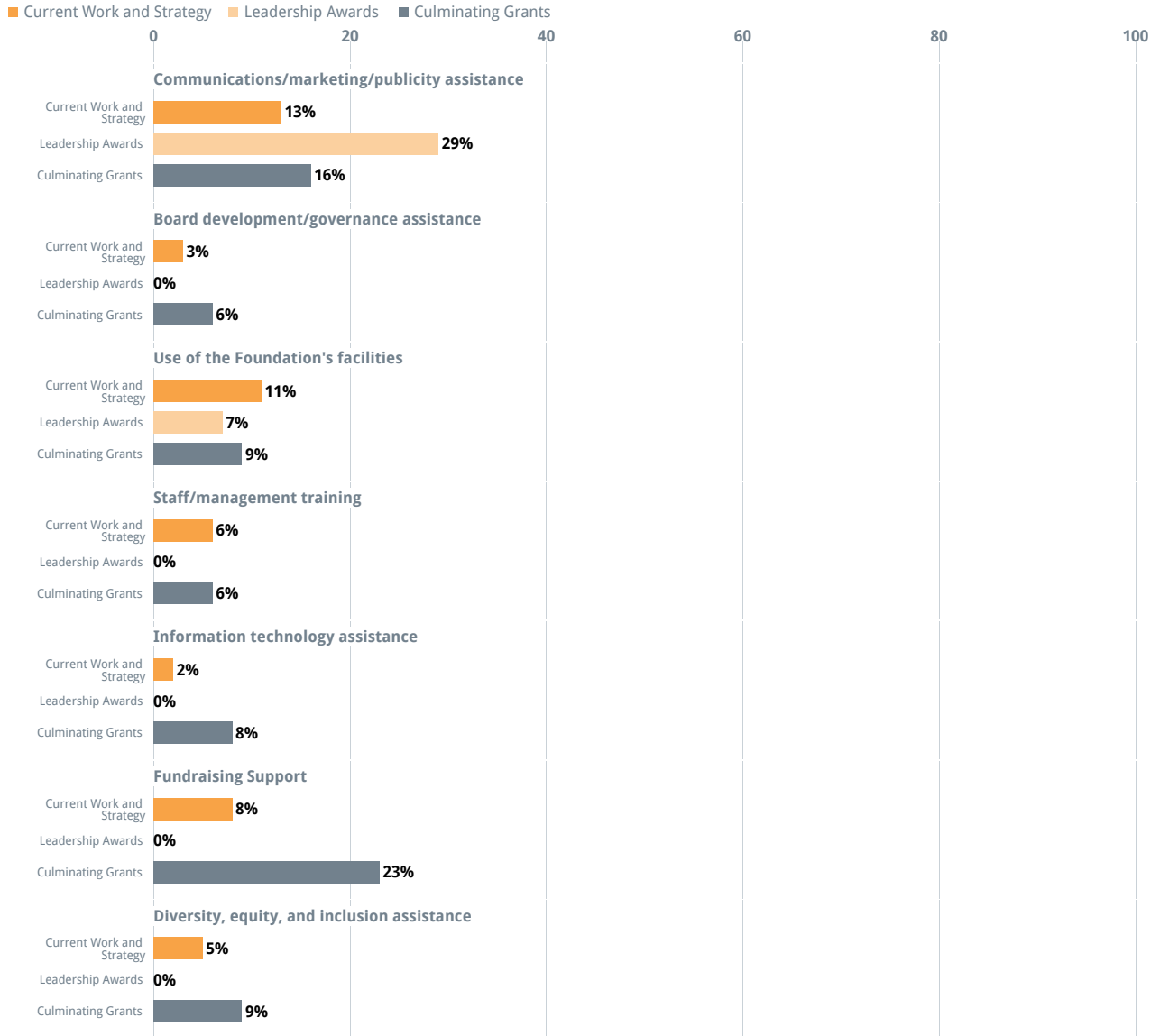**Percentage of Grantees that Received Field-Related Assistance**

■ Irvine 2020 ■ Irvine 2014 ■ Irvine 2010 ■ Irvine 2006 ■ Custom Cohort ■ Median Funder

Encouraged/facilitated collaboration

Irvine 2020	33%
Irvine 2014	32%
Irvine 2010	27%
Irvine 2006	19%
Custom Cohort	35%
Median Funder	34%

Insight and advice on your field

Irvine 2020	28%
Irvine 2014	26%
Irvine 2010	22%
Irvine 2006	15%
Custom Cohort	29%
Median Funder	24%

Provided seminars/forums/convenings

Irvine 2020	23%
Irvine 2014	26%
Irvine 2010	29%
Irvine 2006	19%
Custom Cohort	25%
Median Funder	24%

Introduction to leaders in the field

Irvine 2020	28%
Irvine 2014	23%
Irvine 2010	22%
Irvine 2006	15%
Custom Cohort	31%
Median Funder	22%

Provided research or best practices

Irvine 2020	19%
Irvine 2014	23%
Irvine 2010	22%
Irvine 2006	12%
Custom Cohort	15%
Median Funder	13%

Cohort: Custom Cohort   **Past results:** on

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

■ Current Work and Strategy ■ Leadership Awards ■ Culminating Grants

Encouraged/facilitated collaboration
- Current Work and Strategy: 33%
- Leadership Awards: 21%
- Culminating Grants: 34%

Insight and advice on your field
- Current Work and Strategy: 27%
- Leadership Awards: 29%
- Culminating Grants: 31%

Provided seminars/forums/convenings
- Current Work and Strategy: 24%
- Leadership Awards: 21%
- Culminating Grants: 20%

Introduction to leaders in the field
- Current Work and Strategy: 32%
- Leadership Awards: 21%
- Culminating Grants: 22%

Provided research or best practices
- Current Work and Strategy: 20%
- Leadership Awards: 7%
- Culminating Grants: 20%

Subgroup: Portfolio

Other Assistance Activities

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

Percentage of Grantees that Received Other Assistance

Legend: ■ Irvine 2020 ■ Irvine 2014 ■ Irvine 2010 ■ Irvine 2006 ■ Custom Cohort ■ Median Funder

Communications/marketing/publicity assistance

Cohort	Value
Irvine 2020	15%
Irvine 2014	12%
Irvine 2010	16%
Irvine 2006	13%
Custom Cohort	12%
Median Funder	10%

Board development/governance assistance

Cohort	Value
Irvine 2020	4%
Irvine 2014	8%
Irvine 2010	14%
Irvine 2006	9%
Custom Cohort	5%
Median Funder	5%

Use of the Foundation's facilities

Cohort	Value
Irvine 2020	10%
Irvine 2014	8%
Irvine 2010	3%
Irvine 2006	4%
Custom Cohort	5%
Median Funder	5%

Staff/management training

Cohort	Value
Irvine 2020	5%
Irvine 2014	7%
Irvine 2010	11%
Irvine 2006	6%
Custom Cohort	7%
Median Funder	6%

Information technology assistance

Cohort	Value
Irvine 2020	4%
Irvine 2014	6%
Irvine 2010	8%
Irvine 2006	2%
Custom Cohort	4%
Median Funder	3%

Cohort: Custom Cohort   **Past results:** on

Percentage of Grantees that Received Other Assistance (cont.)

■ Irvine 2020   ■ Irvine 2014   ■ Irvine 2010   ■ Irvine 2006   ■ Custom Cohort   ■ Median Funder

Fundraising Support

Irvine 2020	12%
Irvine 2014	N/A
Irvine 2010	N/A
Irvine 2006	N/A
Custom Cohort	10%
Median Funder	10%

Diversity, equity, and inclusion assistance

Irvine 2020	6%
Irvine 2014	N/A
Irvine 2010	N/A
Irvine 2006	N/A
Custom Cohort	7%
Median Funder	6%

Cohort: Custom Cohort   **Past results:** on

Percentage of Grantees that Received Other Assistance - By Subgroup

■ Current Work and Strategy ■ Leadership Awards ■ Culminating Grants

Communications/marketing/publicity assistance
- Current Work and Strategy: 13%
- Leadership Awards: 29%
- Culminating Grants: 16%

Board development/governance assistance
- Current Work and Strategy: 3%
- Leadership Awards: 0%
- Culminating Grants: 6%

Use of the Foundation's facilities
- Current Work and Strategy: 11%
- Leadership Awards: 7%
- Culminating Grants: 9%

Staff/management training
- Current Work and Strategy: 6%
- Leadership Awards: 0%
- Culminating Grants: 6%

Information technology assistance
- Current Work and Strategy: 2%
- Leadership Awards: 0%
- Culminating Grants: 8%

Fundraising Support
- Current Work and Strategy: 8%
- Leadership Awards: 0%
- Culminating Grants: 23%

Diversity, equity, and inclusion assistance
- Current Work and Strategy: 5%
- Leadership Awards: 0%
- Culminating Grants: 9%

Subgroup: Portfolio

COVID-19 Questions

As part of The James Irvine Foundation's August 2020 grantee perception survey, the Center for Effective Philanthropy (CEP) included questions to gather grantees' input and advice regarding the impact of the COVID-19 pandemic on their organizations.

Note: The questions in this section were recently added to the grantee survey and do not yet have comparative data.
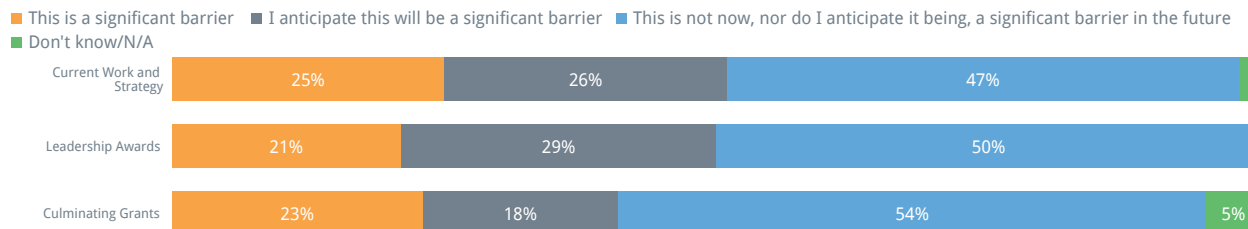
Impact of COVID-19 on Nonprofits

As a result of COVID-19, what barriers are inhibiting your organization from carrying out its work?

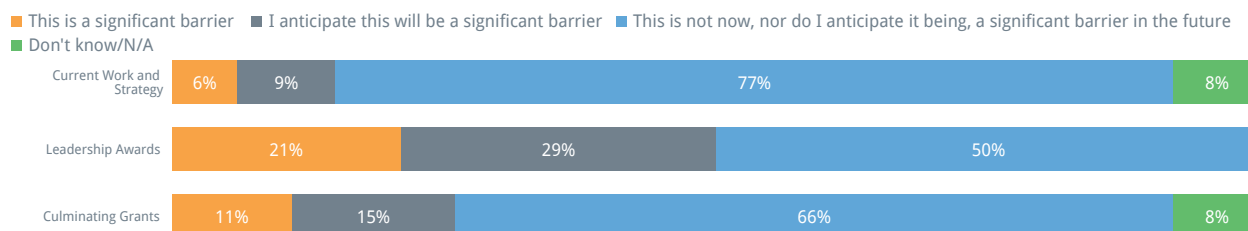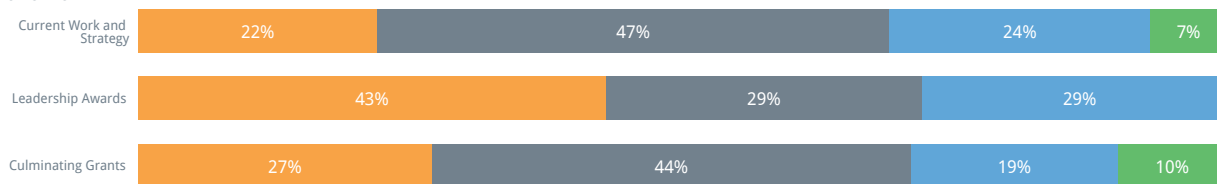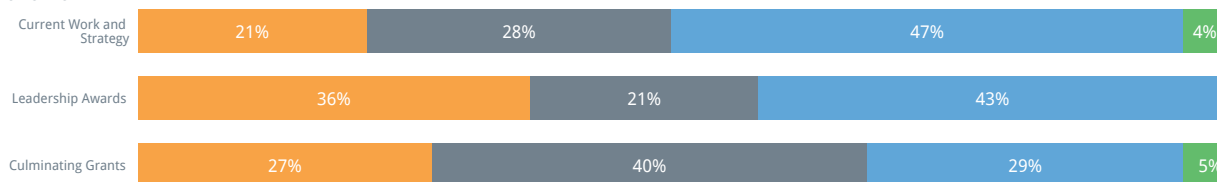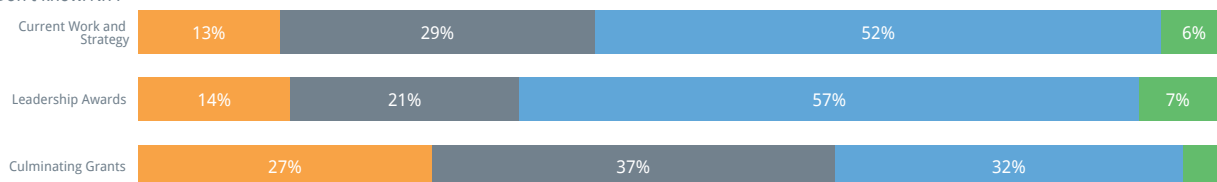| Barriers:	This is a significant barrier	I anticipate this will be a significant barrier	This is not now, nor do I anticipate it being, a significant barrier in the future	Don't know/N/A
Ability to create social distancing in your organization's physical space(s)	24%	24%	49%	3%
Creating social distancing while carrying out programming	44%	26%	25%	4%
Accessing beneficiary populations (due to mobility issues, lack of transportation, lack of internet connectivity)	40%	28%	27%	6%
Lack of necessary supplies required to safely conduct business (i.e. PPE, disinfectants, etc.)	9%	12%	72%	8%
Cash flow problems	11%	36%	40%	13%
Loss of revenue/Budget challenges	25%	44%	23%	8%
Infrastructure costs to accommodate COVID-19 (i.e. reconfiguring work and/or programmatic spaces, investing in technology, etc.)	24%	31%	41%	4%
Maintaining staff levels needed to resume and/or carry out programming	18%	31%	46%	5%
Other	55%	8%	3%	34%

Below are verbatim responses from grantees who selected "Other (please describe):" in the previous question:

To conduct the hands-on forklift training is the most challenging. To ensure social distancing, we dispatch 3 clients every 2 days. If we have 20 clients enrolled, it would take 2 weeks for the forklift training to ensure clients have sufficient time on the forklift. Over 20 clients, we will need to extend the forklift training to 3 weeks. This then increase our cost for the forklift training.

We have made the decision to end the lease agreement for our current office in Los Angeles due to concerns that we cannot ensure staff safety under the building's current conditions; barriers we will face in finding an appropriate new space are unclear.

Adding covid-related programming on top of existing, mission-critical work: we have staffing for our primary work but inadequate support for the pandemic work--which we are doing regardless because it is a necessity for our communities.

Lack of guidelines at the state level governing phased venue re-openings for the performing arts. Capital investments to purchase media equipment, new staff to produce content, curators to assist with new meda.

We will do what we have to do to accomodate all of our families, though space constraints may limit the ability to serve them all onsite for the same frequency each week.

Connecting with our immigrant community that is already dealing with a digital divide and almost everything now requires connectivity whether through computer or phone.

Having to push back launch dates due to Covid-19 which could ultimately impact our funding, staffing, capacity, etc. - depending on how long the pandemic persists

Capacity/Productivity of team members due to juggling home/childcare responsibilities and resolving internal team issues when not in person

Social Distancing strategies will not be a problem once the shelter in place is lifted. We have reconfigured our space to accommodate.

time before we are all back face to face and what can be done in the meantime, what cannot move while we are in COVID times

Staff levels are a problem in so far as COVID19 created significant work-life conflict for working parents on our team

Effectively collaborating with partner organizations as they are struggling with similar barriers and challenges

Providing proper equipment and working space for staff at their reomote locations.

Local shelter in place orders prohibit our operating all of our programming.

Flexible cash to respond to and be able to solve immediate community need

Networking and shifting hearts, minds and narratives virtually.

Mission (which includes live performance) cannot be fulfilled

Limits and risks assoc with travel to meet with key inst reps

Doing advocacy work that requires face to face interactions.

the unknown is very complicated to plan and take action

Mental health and wellness of staff + election results

there is a toll on morale that is not quantifiable

delays in hiring, and shift to online programming

Building trusting relationships with clients

Lack of capacity to do fundraising online

Not being able to hold in-person events.

Funding uncertainty is biggest worry.

Employee safety concerns/anxiety

unpredictable future of impact

Expanding staff to shift work

Additional staffing needs

conducting outreach

future fundraising

Does not apply

Mental health

None

Impact of COVID-19 on Nonprofits - by Subgroup

As a result of COVID-19, what barriers are inhibiting your organization from carrying out its work?

Ability to create social distancing in your organization's physical space(s) - By Subgroup

This is a significant barrier ■ I anticipate this will be a significant barrier ■ This is not now, nor do I anticipate it being, a significant barrier in the future
■ Don't know/N/A

Current Work and Strategy	25%	26%	47%
Leadership Awards	21%	29%	50%
Culminating Grants	23%	18%	54%	5%

Subgroup: Portfolio

Creating social distancing while carrying out programming - by Subgroup

This is a significant barrier ■ I anticipate this will be a significant barrier ■ This is not now, nor do I anticipate it being, a significant barrier in the future
■ Don't know/N/A

Current Work and Strategy	40%	27%	28%	5%
Leadership Awards	57%	29%	14%
Culminating Grants	50%	24%	23%
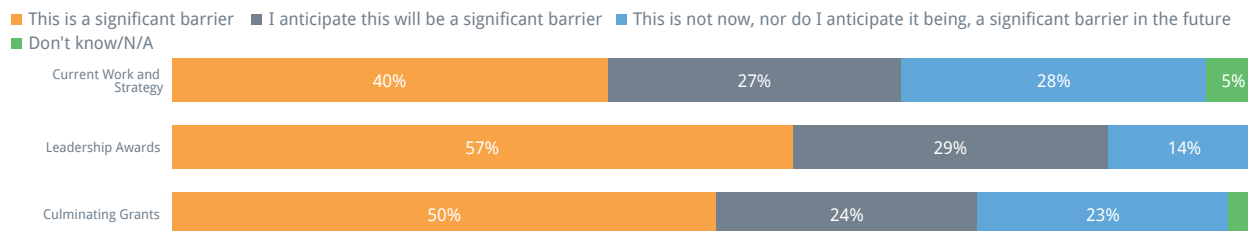
Subgroup: Portfolio

Accessing beneficiary populations (due to mobility issues, lack of transportation, lack of internet connectivity) - by Subgroup

This is a significant barrier ■ I anticipate this will be a significant barrier ■ This is not now, nor do I anticipate it being, a significant barrier in the future
■ Don't know/N/A

Current Work and Strategy	38%	27%	29%	6%
Leadership Awards	50%	14%	29%	7%
Culminating Grants	40%	32%	23%	5%
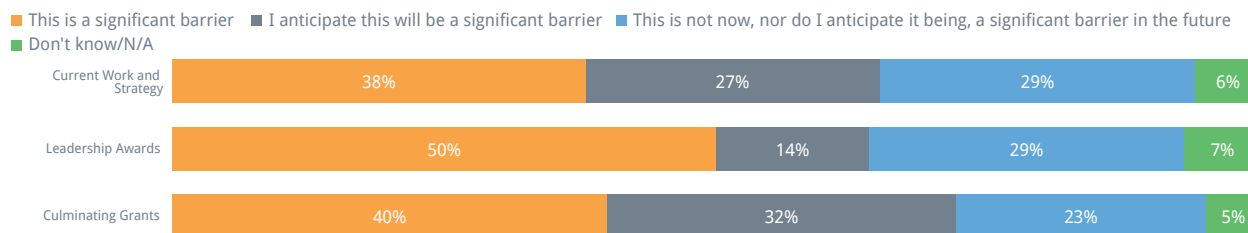
Subgroup: Portfolio

Lack of necessary supplies required to safely conduct business (i.e. PPE, disinfectants, etc.) - by Subgroup

This is a significant barrier ■ I anticipate this will be a significant barrier ■ This is not now, nor do I anticipate it being, a significant barrier in the future
■ Don't know/N/A

Current Work and Strategy	6%	9%	77%	8%
Leadership Awards	21%	29%	50%
Culminating Grants	11%	15%	66%	8%

Subgroup: Portfolio

Cash flow problems - by Subgroup

■ This is a significant barrier ■ I anticipate this will be a significant barrier ■ This is not now, nor do I anticipate it being, a significant barrier in the future
■ Don't know/N/A

Current Work and Strategy	9%	34%	45%	12%
Leadership Awards	21%	21%	43%	14%
Culminating Grants	11%	44%	30%	14%

Subgroup: Portfolio

Loss of revenue/Budget challenges - by Subgroup

■ This is a significant barrier ■ I anticipate this will be a significant barrier ■ This is not now, nor do I anticipate it being, a significant barrier in the future
■ Don't know/N/A

Current Work and Strategy	22%	47%	24%	7%
Leadership Awards	43%	29%	29%	
Culminating Grants	27%	44%	19%	10%

Subgroup: Portfolio

Infrastructure costs to accommodate COVID-19 (i.e. reconfiguring work and/or programmatic spaces, investing in technology, etc.) - by Subgroup

■ This is a significant barrier ■ I anticipate this will be a significant barrier ■ This is not now, nor do I anticipate it being, a significant barrier in the future
■ Don't know/N/A

Current Work and Strategy	21%	28%	47%	4%
Leadership Awards	36%	21%	43%	
Culminating Grants	27%	40%	29%	5%

Subgroup: Portfolio

Maintaining staff levels needed to resume and/or carry out programming - by Subgroup

■ This is a significant barrier ■ I anticipate this will be a significant barrier ■ This is not now, nor do I anticipate it being, a significant barrier in the future
■ Don't know/N/A

Current Work and Strategy	13%	29%	52%	6%
Leadership Awards	14%	21%	57%	7%
Culminating Grants	27%	37%	32%	

Subgroup: Portfolio

Other - by Subgroup

■ This is a significant barrier ■ I anticipate this will be a significant barrier ■ This is not now, nor do I anticipate it being, a significant barrier in the future
■ Don't know/N/A

Current Work and Strategy	54%	8%	38%
Culminating Grants	64%	9%	27%

Subgroup: Portfolio

Communicating COVID-19 Issues with the Foundation

When communicating with Irvine about the COVID-19 pandemic, I feel comfortable discussing the...

Evolving needs of the populations we serve

■ Yes ■ No ■ Don't know

Irvine 2020	95%

Cohort: None   **Past results:** on

Evolving needs of the populations we serve - By Subgroup

■ Yes ■ No ■ Don't know

Current Work and Strategy	95%
Leadership Awards	100%
Culminating Grants	95%
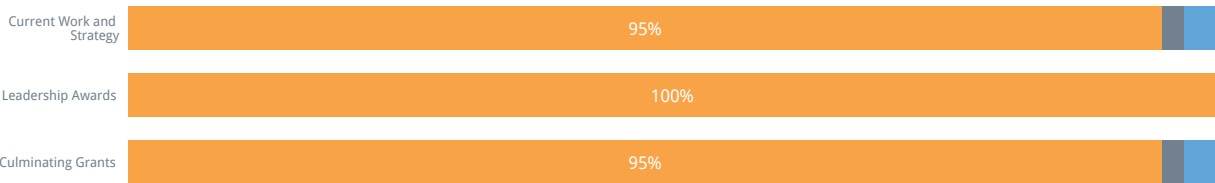
Subgroup: Portfolio

Evolving needs of our organization

■ Yes ■ No ■ Don't know
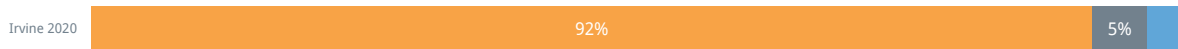
Irvine 2020	92%	5%

Cohort: None   **Past results:** on

Evolving needs of our organization - By Subgroup

■ Yes ■ No ■ Don't know

Current Work and Strategy	92%	5%
Leadership Awards	100%	
Culminating Grants	92%	5%
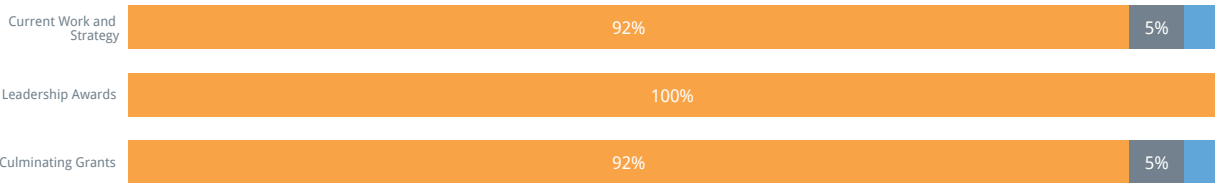
Subgroup: Portfolio

Implications of race in our organization's response to COVID-19

■ Yes ■ No ■ Don't know

Irvine 2020	93%	4%
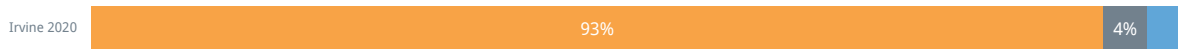
Cohort: None   **Past results:** on

Implications of race in our organization's response to COVID-19 - By Subgroup

■ Yes   ■ No   ■ Don't know

Current Work and Strategy	93% ... 5%
Leadership Awards	100%
Culminating Grants	92% ... 5%
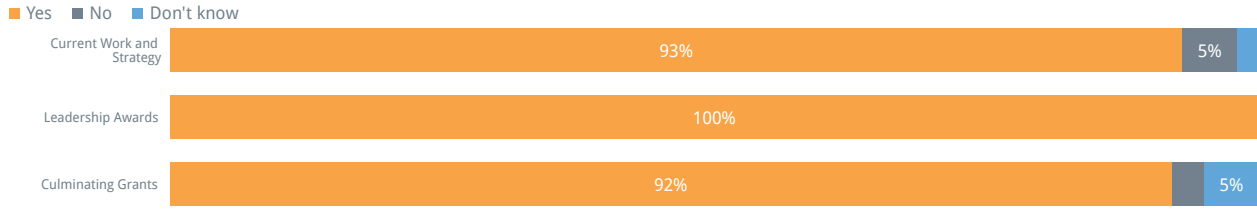
Subgroup: Portfolio

Customized Questions

Please rate the extent to which you agree or disagree with the following statements:

1 = Strongly disagree   **4** = Neither agree nor disagree   **7** = Strongly agree

■ Irvine 2020

	1	2	3	4	5	6	7

Foundation-sponsored gatherings provide meaningful opportunities to connect with and learn from grantee peers.
Irvine 2020 — **5.75**

The Foundation is visible on issues of importance to its mission and programs, even in the face of potential criticism.
Irvine 2020 — **5.62**

The Foundation is willing to take risks when there is opportunity to have greater impact.
Irvine 2020 — **5.58**

The Foundation partners with grantees to adapt to changes in context and resulting challenges and opportunities.
Irvine 2020 — **5.57**

Grantee input and expertise informs how the Foundation does its work.
Irvine 2020 — **5.19**

Cohort: None   **Past results:** on

Please rate the extent to which you agree or disagree with the following statements: - By Subgroup

1 = Strongly disagree   **4** = Neither agree nor disagree   **7** = Strongly agree

■ Current Work and Strategy   ■ Leadership Awards   ■ Culminating Grants

Foundation-sponsored gatherings provide meaningful opportunities to connect with and learn from grantee peers.

Current Work and Strategy	5.85
Leadership Awards	5.25
Culminating Grants	5.62

The Foundation is visible on issues of importance to its mission and programs, even in the face of potential criticism.

Current Work and Strategy	5.71
Leadership Awards	5.58
Culminating Grants	5.45

The Foundation is willing to take risks when there is opportunity to have greater impact.

Current Work and Strategy	5.72
Leadership Awards	5.18
Culminating Grants	5.38

The Foundation partners with grantees to adapt to changes in context and resulting challenges and opportunities.

Current Work and Strategy	5.86
Leadership Awards	5.17
Culminating Grants	5.02

Grantee input and expertise informs how the Foundation does its work.

Current Work and Strategy	5.53
Leadership Awards	4.78
Culminating Grants	4.57

Subgroup: Portfolio

Selected Cohort: None

How long has your organization been in operation?	Irvine 2020
Less than three years	5%
Between three years and eight years	16%
More than eight years	79%

Selected Subgroup: Portfolio

How long has your organization been in operation? (By Subgroup)	Current Work and Strategy	Leadership Awards	Culminating Grants
Less than three years	8%	0%	2%
Between three years and eight years	17%	21%	13%
More than eight years	76%	79%	85%

Full Cost Questions

(Only asked of the 60% of grantees who received restricted support.)

The following questions ask about the extent to which your grant covered the actual costs of the associated program/project and were only asked of the 60% of grantees that received restricted support.

- Direct costs are the costs to execute the project itself.
- Indirect costs are the organizational costs associated with executing the project but not directly used in the project (e.g., a proportional share of rent, a proportional share of finance staff salary).
- Indirect cost rate is a percentage applied to direct costs in budgeting to estimate indirect costs.
- If your program is supported by multiple funders, think about the proportion of costs that this grant represents within the total funding received from all funders.

Selected Cohort: None

Which best describes the process used to set an indirect cost rate for this project?	Irvine 2020
We provided an indirect rate, which the Foundation accepted	40%
The Foundation provided an indirect rate, without opportunity for discussion	14%
We settled on an indirect rate in discussion with Foundation staff	15%
In determining grant amount, we did not specifically address indirect costs	32%

Selected Subgroup: Portfolio

Which best describes the process used to set an indirect cost rate for this project? (By Subgroup)	Current Work and Strategy	Leadership Awards	Culminating Grants
We provided an indirect rate, which the Foundation accepted	43%	50%	31%
The Foundation provided an indirect rate, without opportunity for discussion	10%	0%	25%
We settled on an indirect rate in discussion with Foundation staff	14%	0%	19%
In determining grant amount, we did not specifically address indirect costs	33%	50%	25%

Selected Cohort: None

To what extent did the grant cover the full costs of the work it was meant to fund (or the costs of its share of work in a multi-funder project)?	Irvine 2020
The grant covered its direct and indirect costs plus extra that allows the organization to thrive over the long term (e.g., additions to reserves, assets, working capital, etc.)	10%
The grant covered direct and indirect costs, but no more	44%
The grant covered the direct costs of the work, but not all indirect costs	30%
This grant did not cover even the direct costs of the work	15%
Not Applicable: This multi-funder project was ultimately not fully funded, so a question of what costs this grant covered is not applicable	1%

Selected Subgroup: Portfolio

To what extent did the grant cover the full costs of the work it was meant to fund (or the costs of its share of work in a multi-funder project)? (By Subgroup)	Current Work and Strategy	Leadership Awards	Culminating Grants
The grant covered its direct and indirect costs plus extra that allows the organization to thrive over the long term (e.g., additions to reserves, assets, working capital, etc.)	9%	0%	16%
The grant covered direct and indirect costs, but no more	51%	40%	28%
The grant covered the direct costs of the work, but not all indirect costs	26%	20%	41%
This grant did not cover even the direct costs of the work	14%	40%	12%
Not Applicable: This multi-funder project was ultimately not fully funded, so a question of what costs this grant covered is not applicable	0%	0%	3%

Grantees' Open-Ended Comments

In the Grantee Perception Report survey, CEP asks three open-ended questions:

1. "Please comment on the quality of Irvine's processes, interactions, and communications. Your answer will help us better understand what it is like to work with Irvine."
2. "Please comment on the impact Irvine is having on your field, community, or organization. Your answer will help us to better understand the nature of Irvine's impact."
3. "What specific improvements would you suggest that would make Irvine a better funder?"

In addition to these three questions, Irvine added two custom open-ended questions:

1. What type of actions could the Foundation undertake to demonstrate its commitments to diversity, equity, and inclusion?
2. What thoughts, if any, would you like to share about the context on your responses to the question above? (Question above asked about grantees' agreement to a series of statements across different topics, such as partnership with grantees, risk-taking, and Foundation visibility.)

To download the full set of grantee comments and suggestions, please refer to the "Downloads" dropdown menu at the top right of your report. Please note that some comments may be redacted or removed to protect the confidentiality of respondents.

CEP's Qualitative Analysis

CEP thoroughly reviews each comment submitted and conducts comprehensive qualitative analysis on two of these questions in the GPR.

The following pages outline the results of CEP's analyses.

Quality of Processes, Interactions and Communications

Grantees were asked to comment on the quality of Irvine's processes, interactions, and communications. Their comments were then categorized by the nature of their content, specifically whether the content is positive, neutral or constructive.

For a comment to be categorized as constructive, there must have been at least one constructive topic in its content.

Positivity of Comments about the Quality of the Foundation's Processes, Interactions, and Communications

■ Positive comment ■ Comment with at least one constructive theme

	Positive comment	Comment with at least one constructive theme
Irvine 2020	76%	24%
Custom Cohort	72%	28%
Average Funder	73%	27%
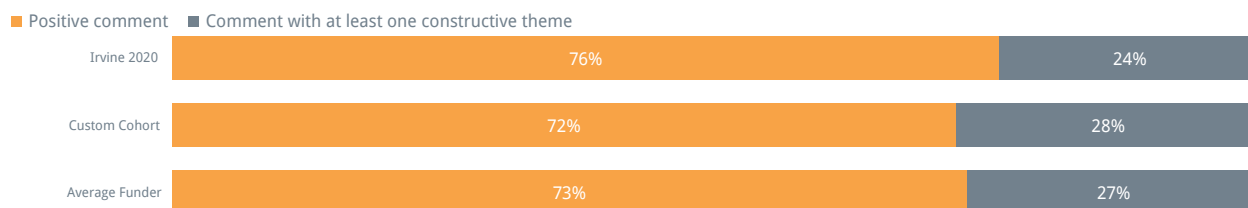
Cohort: Custom Cohort   **Past results:** on

Below is a selection of grantees' positive comments regarding the quality of Irvine's processes, interactions, and communications:

- "At this point, our organization works with about five Foundations. Irvine is FAR AND AWAY the easiest, most thoughtful, most useful of all of our funders. Their processes are logical and do not require more time and investment than is reasonable. Their interest in our organization and in our success of consistently in evidence and drives their questions, their responses, and their communication. Irvine has an excellent reputation among grantees for being flexible and responsive."
- "Foundation staff have been very prompt and attentive, active and deep listeners, and true partners throughout this relationship. They have also been flexible and trusting, giving us space to do our work and acting as a partner in growing and learning."
- "I cannot speak for all my colleagues, but this is the best foundation with which I've ever partnered: transparent, clear in communication and expectations, always accessible, respectful and supportive of grantee goals/mission even as it meets its own, recognizes and pays for the real costs of running an organization, not just delivering programs -- just to name a few examples. Thank you!"
- "Irvine has a much simpler and less-intensive proposal and reporting process than most foundations, especially given the large size of the grants from Irvine. Thank you!"

Below is a selection of grantees' written comments about the Foundation's impact on their fields, communities, or organizations:

- "Irvine Foundation's explicit focus on low income workers is having an immense impact. Irvine is investing in a complex ecosystem of organizations throughout the state."
- "Irvine has been a vocal leader in the field, particularly as it relates to special populations and vulnerable communities. There are lots of good ideas in the field but limited implementation through an equity lens and that have broad-scale, replicable impact on vulnerable communities and related systems. By investing in those strategies explicitly, it promotes the value and accountability to address those communities and populations."
- "The Foundation has become the gold-standard in the field. Already out ahead of so many issues, the Foundation has done even more in the last 18-24 months to raise the bar. Without the Foundation, we would be a perfectly average, normal CBO providing adequate service to our community. Everyone would feel fine about us. But, with the Support of the Foundation, we are a community leader, we are able to take risks and bold action, and we have the leverage to create real change. We do our very best to uphold the high expectations of a James Irvine Foundation grantee and to leverage the investment to its fullest for additional funding and partners."

Grantees' Suggestions

Grantees were asked to provide any suggestions for how the Foundation could improve. The 201 grantees that responded to the survey provided 121 constructive suggestions. These suggestions were thematically categorized by CEP and grouped into the topics below.

Proportion of Grantee Suggestions by Topic

Topic of Suggestion	Proportion
Funder-Grantee Interactions	24%
Non-monetary Support	17%
Foundation Communications	13%
Grantmaking Characteristics	9%
Impact on and Understanding of Grantees' Communities	7%
Impact on and Understanding of Grantees' Fields	5%
Proposal and Selection Processes	5%
Impact on and Understanding of Grantees' Organizations	2%
Reporting and Evaluation Processes	2%
Other	16%

Selected Comments

Grantees were asked to provide any suggestions for how the Foundation could improve. The 201 grantees that responded to the survey provided a total of 121 distinct suggestions. These suggestions were thematically categorized by CEP and grouped into the topics below.

Funder-Grantee Interactions (24% N=29)

- More Frequent Interactions (N = 13)

  ◦ "I would appreciate more opportunity to meet directly with program officers and explain how our work supports their broader goals and explore ways to work together."
  ◦ "Engage with grantee organizations more regularly and more deeply."
  ◦ "I would like for The Irvine Foundation to build relationships with their grantees beyond 1-2 calls a year."
  ◦ "I would request bi-monthly meetings via phone or zoom so we can brief foundations on success stories and challenges that we might be facing."
  ◦ "We also feel it would be helpful to have check-in calls (perhaps quarterly or twice a year) to share updates about our work."

- Reduce Contact Changes (N = 5)

  ◦ "We have had a number of program officers in the past several years, each with their own funding strategy, which has been difficult for us."
  ◦ "Our contact keeps changing. We send emails and make phone calls and do not hear back. Months later we hear our contact has been changed."
  ◦ "Program officers have changed several times for us and we're not sure who our program officer is now or if we have one since we are in a tie-off status."

- Understanding Overlap of Work (N = 3)

  ◦ "It could be helpful for us to understand where the work we do connects with other work the Foundation is doing. Our partnership with the Foundation is a bit unique, but we really haven't had a conversation about other parts of their work and if there are opportunities to leverage them."

- More Site Visits (N = 3)

  ◦ "In order to better know our organization and when feasible, we would welcome a site visit from the James Irvine Foundation."

- More Proactive Interactions (N = 2)

  ◦ "I wish there was at least some foundation-led outreach specific to grantees. It often feels one-sided, that the onus is on me to reach out. This can be challenging - we don't know our new program officer well, we don't want to appear ungrateful, and we as the nonprofit are often in the position of needing something - whether a grant report extension, additional dollars, greater flexibility in funds."

- Staff Responsiveness (N = 2)

  ◦ "More responsive to emails."

- Other (N = 1)

Non-monetary Support (17% N=20)

- Facilitate Collaboration and Convenings between Grantees (N = 10)

  ◦ "This may be a big ask right now, but I wonder if there is a way to have a short virtual get together for the Better Careers Initiative. I always greatly enjoy the fall retreats together to celebrate, meet new people, and learn from each other."
  ◦ "One improvement I would recommend is doing more frequent convenings of grantees who are working in the same field. It would be helpful for different grantees to know more about the work each other are doing, to examine potential ways to collaborate and leverage their collective efforts."
  ◦ "It would be great if the Foundation could bring together its media grantees to share best practices and undertake collaborative projects."
  ◦ "Irvine has such an incredible network of grantees and was hosting powerful convenings prior to COVID. Even though we cannot meet in person for the time-being, I would love for the Foundation to continue virtual or small group/subregional convenings where possible (and safe)."

- Build Grantees' Capacity (N = 6)

  ◦ "I would like the Foundation to consider funding continued capacity building services for nonprofits in the future. It is essential that the nonprofit community has access to the expertise and professionals in areas such as technology, marketing, strategic planning, diversity, equity and inclusion, board development, budgeting, etc."
  ◦ "Exploring shared resources, especially staff e.g., CMO, CFO, office/co-working space. Advancing tech adoption and strategies. Providing professional development opportunities and mentorship to cultivate rising leaders within the organization."

- Assistance Securing Additional Funding (N = 3)

  ◦ "The Foundation should connect its grantees with additional resources and funding opportunities to carry out their work in California and beyond. Hosting briefings where grantees can highlight our work and inviting colleagues is a great way to elevate organizations you support and also connect them to potential new funding."

- Other (N = 1)

Foundation Communications (13% N=16)

- Clearer Communications about the Foundation's Goals and Strategy (N = 9)

  - "More regular communication and opportunity to provide programmatic and landscape updates especially during difficult political times."
  - "More responsive communication and transparency around strategic funding objectives of the Foundation."
  - "Clear communication of the foundation's priorities...."
  - "More explicit communication about the various initiatives, expectations on how grantees can work within and across those, and clarity on the way that the Foundation and our work align would be helpful."

- Maintaining a Consistent Strategy (N = 3)

  - "Pick a lane and stick with it."

- Communicating about Impact of the Foundation's Grantees (N = 2)

  - "The Foundation should leverage learnings from these organizations on their website and in social media channels more frequently."

- Response to COVID-19 (N = 2)

  - "As grantees, we would appreciate the opportunity to learn about how the foundation's grantmaking is evolving given the outbreak of COVID-19."

Grantmaking Characteristics (9% N=11)

- Grant Type (N = 5)

  - "Focusing funding on core operating support would be great."
  - "Switching to funding focused on supporting general operations vs programming. It signals deep trust in the organization and a belief that the grantee knows best where/how to direct funding."

- Grant Length (N = 3)

  - "Longer-term grants. We are on a one-year cycle which makes us feel very precarious."

- Other (N = 3)

Impact on and Understanding of Grantees' Communities (7% N=9)

- Building Understanding of and More Visibility in Local Communities (N = 6)

  - "I would love to see Irvine take a nuanced approach to their regional funding work - to understand deeply that every community is in a different place developmentally and to tailor their funding in different communities according to these developmental stages."
  - "Various regions in CA have different needs and approaches to addressing community development. It would be good if the Foundation had local program officers within their priority communities vs staff being located at headquarters so as to understand the different nuances of each community."

- Orientation Change (N = 3)

  - "Another thing that comes to mind is for Irvine Fndn to invest more in the Central Valley. .... There seems to be little to no locally rooted organizational infrastructure dedicated to worker organizing in the Central Valley. This sets back the statewide systemic justice we need for workers."

Impact on and Understanding of Grantees' Fields (5% N=6)

- Orientation Change (N = 3)

  - "We hope that foundation will create on-going funding to support work in ending the housing affordability crisis in CA. I also think there is a need for targeted investment into strategic programming that can would enable us to address the home ownership wealth disparities."

- Other (N = 1)

Proposal and Selection Processes (5% N=6)

- More Open Pathways in Proposal Process (N = 3)

  - "Open up opportunities for grant application from non profits and community-based organizations without "invite-only" approach and model."

- Other (N = 3)

Impact on and Understanding of Grantees' Organizations (2% N=3)

- Build Understanding of Grantees' Organizations (N = 3)

  - "I fear that Irvine made decisions about our non-alignment without any conversation and based on assumptions about our work."

Reporting and Evaluation Processes (2% N=2)

- More Relevant Reporting Questions and Metrics (N = 2)

  - "Improve some of the reporting questions. What is the information that the Foundation is trying to measure and why?"

Other (16% N=19)

- Incorporate Diversity, Equity, and Inclusion throughout Work (N = 7)

  ◦ "Consider the entrenched nature of racism and racist policies and the time it took for these patterns to be embedded in our cities. Hire more Black men and women to bring a diversity of experiences and frameworks for expanding the dialogue and practices -addressing root causes and seeing new solutions to old problems."
  ◦ "I believe the foundation has to do better in integrating women of color into its leadership and in ensuring that practitioners can succeed in the organization."
  ◦ "Focus on equity and high expectations for all even if it makes programming more difficult."

- Return to Funding Exited Work (N = 6)

  ◦ "It would be a wonderful time for the Foundation to engage in a strategic assessment and develop a new funding strategy for the arts sector."
  ◦ "Would like to see civic engagement still part of the overall work."

- Other (N = 6)

Contextual Data

Grantmaking Characteristics

Selected Cohort: Custom Cohort						
Length of Grant Awarded	**Irvine 2020**	**Irvine 2014**	**Irvine 2010**	**Irvine 2006**	**Median Funder**	**Custom Cohort**
Average grant length	2.1 years	2.2 years	2.7 years	2.2 years	2.2 years	2 years

Selected Cohort: Custom Cohort						
Length of Grant Awarded	**Irvine 2020**	**Irvine 2014**	**Irvine 2010**	**Irvine 2006**	**Average Funder**	**Custom Cohort**
1 year	28%	20%	9%	25%	43%	35%
2 years	51%	46%	37%	43%	24%	37%
3 years	15%	29%	47%	28%	20%	20%
4 years	2%	2%	3%	1%	4%	3%
5 or more years	4%	3%	4%	3%	9%	5%

Selected Cohort: Custom Cohort			
Proportion of Unrestricted Funding	**Irvine 2020**	**Average Funder**	**Custom Cohort**
No, this funding was not restricted to a specific use (i.e. general operating, core support)	40%	22%	30%
Yes, this funding was restricted to a specific use (e.g. supported a specific program, project, capital need, etc.)	60%	78%	70%

Grantmaking Characteristics - By Subgroup

Selected Subgroup: Portfolio			
Length of Grant Awarded (By Subgroup)	**Current Work and Strategy**	**Leadership Awards**	**Culminating Grants**
Average grant length	1.9 years	1.3 years	2.5 years

Selected Subgroup: Portfolio			
Length of Grant Awarded (By Subgroup)	**Current Work and Strategy**	**Leadership Awards**	**Culminating Grants**
1 year	25%	71%	25%
2 years	60%	21%	40%
3 years	11%	7%	24%
4 years	2%	0%	3%
5 or more years	2%	0%	8%

Selected Subgroup: Portfolio			
Proportion of Unrestricted Funding (By Subgroup)	**Current Work and Strategy**	**Leadership Awards**	**Culminating Grants**
No, this funding was not restricted to a specific use (i.e. general operating, core support)	36%	57%	44%
Yes, this funding was restricted to a specific use (e.g. supported a specific program, project, capital need, etc.)	64%	43%	56%

Grant Size

Selected Cohort: Custom Cohort						
Grant Amount Awarded	**Irvine 2020**	**Irvine 2014**	**Irvine 2010**	**Irvine 2006**	**Median Funder**	**Custom Cohort**
Median grant size	$300K	$210K	$225K	$150K	$100K	$200K

Selected Cohort: Custom Cohort						
Grant Amount Awarded	**Irvine 2020**	**Irvine 2014**	**Irvine 2010**	**Irvine 2006**	**Average Funder**	**Custom Cohort**
Less than $10K	1%	1%	0%	1%	9%	2%
$10K - $24K	1%	3%	4%	15%	12%	4%
$25K - $49K	5%	7%	10%	16%	12%	8%
$50K - $99K	3%	10%	16%	14%	15%	12%
$100K - $149K	5%	14%	6%	4%	9%	10%
$150K - $299K	25%	27%	23%	12%	16%	27%
$300K - $499K	23%	14%	24%	21%	9%	13%
$500K - $999K	23%	14%	9%	11%	8%	11%
$1MM and above	16%	11%	7%	7%	9%	13%

Selected Cohort: Custom Cohort						
Median Percent of Budget Funded by Grant (Annualized)	**Irvine 2020**	**Irvine 2014**	**Irvine 2010**	**Irvine 2006**	**Median Funder**	**Custom Cohort**
Size of grant relative to size of grantee budget	6%	6%	6%	5%	4%	5%

Grant Size - By Subgroup

Selected Subgroup: Portfolio			
Grant Amount Awarded (By Subgroup)	**Current Work and Strategy**	**Leadership Awards**	**Culminating Grants**
Median grant size	$300K	$62.5K	$400K

Selected Subgroup: Portfolio			
Grant Amount Awarded (By Subgroup)	**Current Work and Strategy**	**Leadership Awards**	**Culminating Grants**
Less than $10K	1%	0%	2%
$10K - $24K	1%	0%	0%
$25K - $49K	1%	50%	3%
$50K - $99K	3%	0%	2%
$100K - $149K	4%	7%	6%
$150K - $299K	30%	29%	13%
$300K - $499K	18%	14%	34%
$500K - $999K	23%	0%	27%
$1MM and above	20%	0%	13%

Selected Subgroup: Portfolio			
Median Percent of Budget Funded by Grant (Annualized) (By Subgroup)	**Current Work and Strategy**	**Leadership Awards**	**Culminating Grants**
Size of grant relative to size of grantee budget	7%	4%	8%

Grantee Characteristics

Selected Cohort: Custom Cohort

Operating Budget of Grantee Organization	Irvine 2020	Irvine 2014	Irvine 2010	Irvine 2006	Median Funder	Custom Cohort
Median Budget	$3.1M	$1.6M	$1.3M	$1.2M	$1.5M	$2.3M

Selected Cohort: Custom Cohort

Operating Budget of Grantee Organization	Irvine 2020	Irvine 2014	Irvine 2010	Irvine 2006	Average Funder	Custom Cohort
<$100K	1%	1%	1%	0%	8%	3%
$100K - $499K	7%	18%	20%	29%	18%	13%
$500K - $999K	12%	14%	19%	15%	13%	12%
$1MM - $4.9MM	42%	40%	40%	32%	30%	37%
$5MM - $24MM	26%	17%	15%	15%	19%	23%
>=$25MM	12%	8%	5%	10%	12%	13%

Grantee Characteristics - By Subgroup

Selected Subgroup: Portfolio

Operating Budget of Grantee Organization (By Subgroup)	Current Work and Strategy	Leadership Awards	Culminating Grants
Median Budget	$3.5M	$2.8M	$3M

Selected Subgroup: Portfolio

Operating Budget of Grantee Organization (By Subgroup)	Current Work and Strategy	Leadership Awards	Culminating Grants
<$100K	0%	7%	0%
$100K - $499K	8%	7%	5%
$500K - $999K	13%	0%	13%
$1MM - $4.9MM	36%	57%	50%
$5MM - $24MM	26%	21%	27%
>=$25MM	17%	7%	5%

Funding Relationship

Selected Cohort: Custom Cohort

Funding Status	Irvine 2020	Irvine 2014	Irvine 2010	Irvine 2006	Median Funder	Custom Cohort
Percent of grantees currently receiving funding from the Foundation	79%	86%	94%	83%	82%	85%

Selected Cohort: Custom Cohort

Pattern of Grantees' Funding Relationship with the Foundation	Irvine 2020	Irvine 2014	Irvine 2010	Average Funder	Custom Cohort
First grant received from the Foundation	26%	22%	33%	28%	28%
Consistent funding in the past	49%	55%	45%	54%	52%
Inconsistent funding in the past	24%	24%	23%	18%	20%

Funding Relationship - by Subgroup

Selected Subgroup: Portfolio

Funding Status (By Subgroup)	Current Work and Strategy	Leadership Awards	Culminating Grants
Percent of grantees currently receiving funding from the Foundation	91%	21%	69%

Selected Subgroup: Portfolio

Pattern of Grantees' Funding Relationship with the Foundation (By Subgroup)	Current Work and Strategy	Leadership Awards	Culminating Grants
First grant received from the Foundation	32%	50%	9%
Consistent funding in the past	43%	14%	69%
Inconsistent funding in the past	24%	36%	22%

Grantee Demographics

Selected Cohort: Custom Cohort

Job Title of Respondents	Irvine 2020	Irvine 2014	Irvine 2010	Irvine 2006	Average Funder	Custom Cohort
Executive Director	54%	62%	62%	51%	47%	48%
Other Senior Management	21%	13%	11%	11%	17%	18%
Project Director	6%	7%	7%	11%	13%	12%
Development Director	8%	9%	8%	11%	8%	9%
Other Development Staff	8%	5%	5%	6%	8%	8%
Volunteer	0%	0%	0%	0%	1%	0%
Other	3%	4%	7%	9%	5%	3%

Note: Survey questions about race and ethnicity and gender were recently modified to match best practices, so do not yet have comparative data.

Survey language and response options for questions about race and ethnicity are guided by best practices shared by National Institutes of Health, Pew Research Center, Psi Chi Journal of Psychological Research, and the US Census Bureau.

Survey language and response options for questions about gender are guided by best practices shared by Funders For LGBTQ Issues, HRC Foundation's Welcoming Schools, and the Williams Institute of the University of California – Los Angeles School of Law.

In CEP's previous version of the question on gender identity, 63% of the the average funder's respondents identified as female, 34% male, 0% preferred to self-identify, and 3% indicated they preferred not to say. Respondents could only select one answer option to this question.

Please select the option that represents how you describe yourself:

■ Irvine 2020

Gender non-conforming
Irvine 2020   2%

Man
Irvine 2020   40%

Non-binary
Irvine 2020   1%

Woman
Irvine 2020   57%

Prefer to self-identify
Irvine 2020   1%

Prefer not to say
Irvine 2020   2%
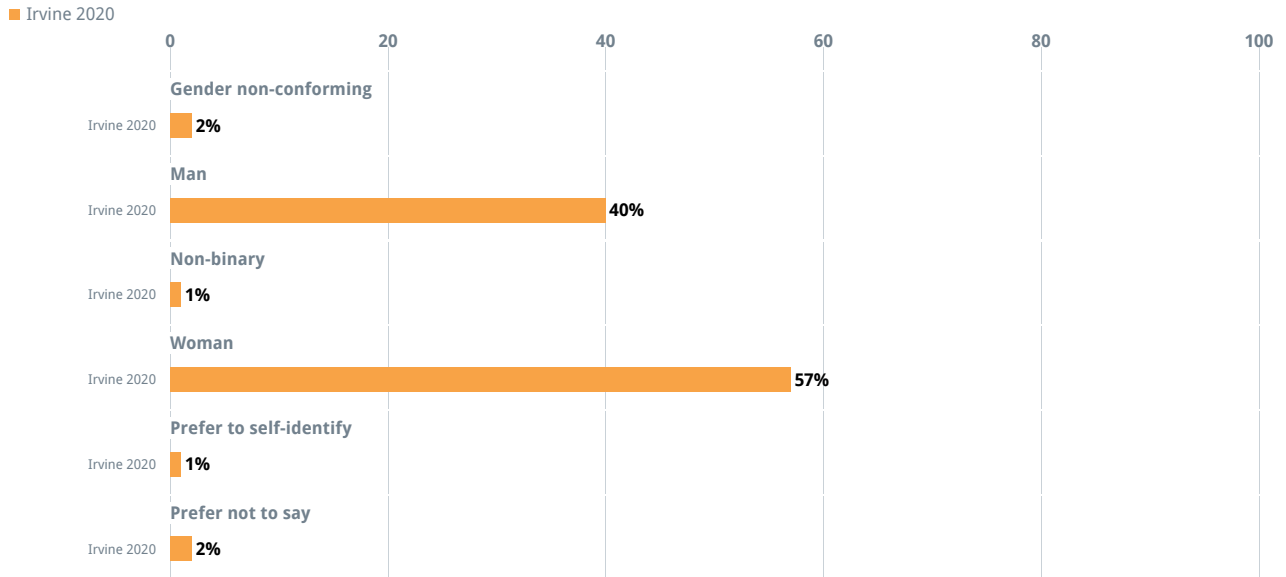
Cohort: None   **Past results:** on

Please select the option that represents how the CEO/Executive Director of your organization describes themselves:
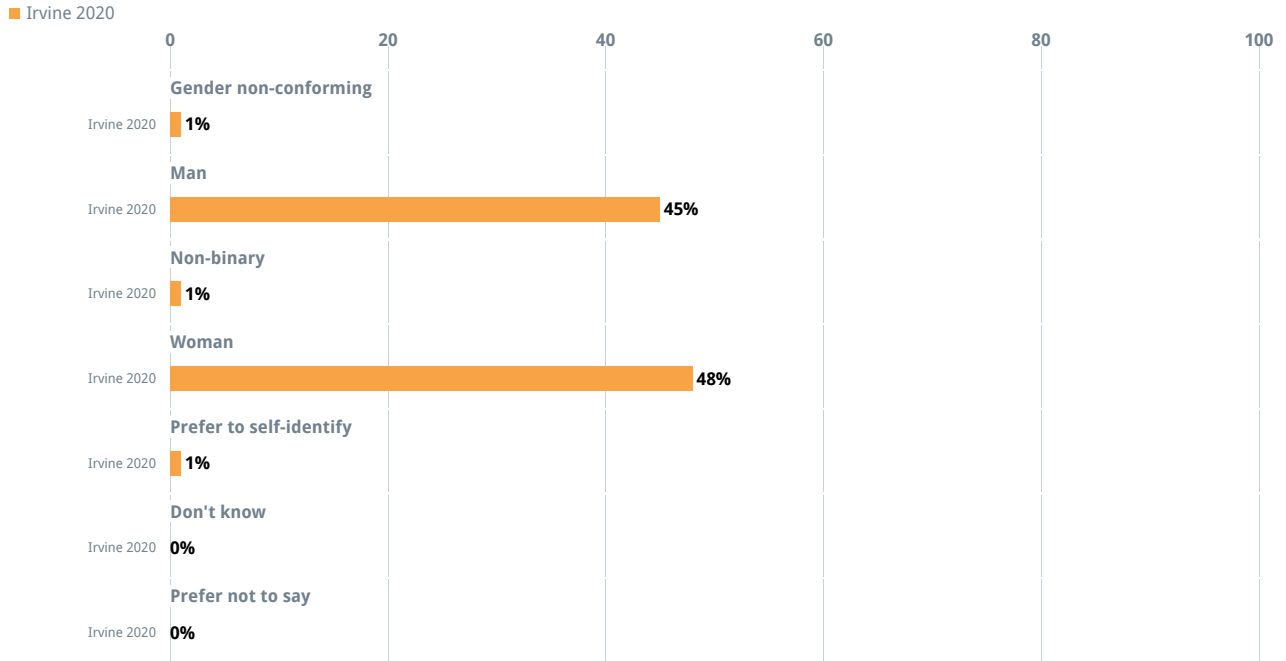
Cohort: None   Past results: on

In CEP's previous version of the question on racial/ethnic identity, 7% of the the average funder's respondents identified as African-American or Black, 1% American Indian or Alaskan Native, 4% Asian (incl. Indian subcontinent), 5% Hispanic or Latinx, 0% Pacific Islander or Native Hawaiian, 78% White, and 1% indicated their race/ethnicity was not included in the above options. Respondents could select multiple answers to this question.

What is your race/ethnicity?

■ Irvine 2020

African-American or Black
Irvine 2020 — **9%**

American Indian or Alaska Native
Irvine 2020 — **0%**

Asian (including the Indian subcontinent)
Irvine 2020 — **11%**

Hispanic or Latinx
Irvine 2020 — **24%**

Middle Eastern or North African
Irvine 2020 — **1%**

Multiracial or Multi-ethnic
Irvine 2020 — **2%**

Pacific Islander or Native Hawaiian
Irvine 2020 — **0%**

White
Irvine 2020 — **55%**

Race/ethnicity not included above
Irvine 2020 — **2%**

Prefer not to say
Irvine 2020 — **2%**

Cohort: None   **Past results:** on

This following questions were recently added to the grantee survey and depict comparative data from 36 funders in the dataset.

Selected Cohort: None

Do you identify as a person of color?	Irvine 2020	Average Funder
Yes	44%	17%
No	55%	78%
Prefer not to say	2%	6%

Selected Cohort: None

Does the CEO/Executive Director of your organization identify as a person of color?	Irvine 2020	Average Funder
Yes	48%	17%
No	51%	75%
Don't know	1%	3%
Prefer not to say	1%	4%

Funder Characteristics

Selected Cohort: Custom Cohort

Financial Information	Irvine 2020	Irvine 2014	Irvine 2010	Irvine 2006	Median Funder	Custom Cohort
Total assets	$2607M	$1675.3M	$1433.8M	$1610.5M	$243M	$2990.7M
Total giving	$100.8M	$72.7M	$67M	$73.1M	$17.4M	$108.3M

Selected Cohort: Custom Cohort

Funder Staffing	Irvine 2020	Irvine 2014	Irvine 2010	Irvine 2006	Median Funder	Custom Cohort
Total staff (FTEs)	56	43	42	36	16	105
Percent of staff who are program staff	46%	35%	38%	44%	43%	43%

Selected Cohort: Custom Cohort

Grantmaking Processes	Irvine 2020	Irvine 2014	Irvine 2010	Median Funder	Custom Cohort
Proportion of grants that are invitation-only	94%	98%	90%	44%	90%
Proportion of grantmaking dollars that are invitation-only	97%	98%	95%	60%	92%

About CEP and Contact Information

Mission:

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

Vision:

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

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

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

About the GPR

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

The GPR's quantitative and qualitative data helps foundation leaders evaluate and understand their grantees' perceptions of their effectiveness, and how that compares to their philanthropic peers.

Contact Information

Amber Bradley, Director
(415) 636-8541
amberb@cep.org

Alice Mei, Senior Analyst
(415) 937-0851
alicem@cep.org

Additional Survey Information

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

As a result, there are some measures where only a subset of responses is included in the reported results. The table below shows the number of responses included on each of these measures. The total number of respondents to Irvine's grantee survey was 201.

Question Text	Number of Responses
Overall, how would you rate the Foundation's impact on your field?	190
How well does the Foundation understand the field in which you work?	188
To what extent has the Foundation advanced the state of knowledge in your field?	157
To what extent has the Foundation affected public policy in your field?	135
Overall, how would you rate the Foundation's impact on your local community?	162
How well does the Foundation understand the local community in which you work?	167
How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?	192
How well does the Foundation understand your organization's strategy and goals?	188
How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Foundation?	185
How well do you understand the way in which the work funded by this grant fits into the Foundation's broader efforts?	194
How often do/did you have contact with your program officer during this grant?	200
Who most frequently initiated the contact you had with your program officer during this grant?	201
Did the Foundation conduct a site visit during the selection process or during the course of this grant?	188
Has your main contact at the Foundation changed in the past six months?	186
Did you submit a proposal to the Foundation for this grant?	199
As you developed your grant proposal, how much pressure did you feel to modify your organization's priorities in order to create a grant proposal that was likely to receive funding?	187
How much time elapsed from the submission of the grant proposal to clear commitment of funding?	177
Are you currently receiving funding from the Foundation?	198
Which of the following best describes the pattern of your organization's funding relationship with the Foundation?	198
How well does the Foundation understand your intended beneficiaries' needs?	183
To what extent do the Foundation's funding priorities reflect a deep understanding of your intended beneficiaries' needs?	187
Have you participated in a reporting or evaluation process?	197
To what extent was the Foundation's reporting process...Adaptable, if necessary, to fit your circumstances?	157
To what extent was the Foundation's reporting process...A helpful opportunity for you to reflect and learn?	168
To what extent was the Foundation's reporting process...Relevant, with questions and measures pertinent to the work funded by this grant?	166
To what extent was the Foundation's reporting process...Straightforward?	164
Did the Foundation provide financial support for the evaluation?	30
To what extent did the evaluation...Result in you making changes to the work that was evaluated?	34
To what extent did the evaluation...Incorporate your input in the design of the evaluation?	31
To what extent did the evaluation...Generate information that you believe will be useful for other organizations?	33
Funder-Grantee Relationships Summary Measure	182
Understanding Summary Measure	175
To what extent did the Foundation exhibit the following during this grant…Trust in your organization's staff	199

Question Text	Number of Responses
To what extent did the Foundation exhibit the following during this grant…Candor about the Foundation's perspectives on your work	198
To what extent did the Foundation exhibit the following during this grant…Respectful interaction	200
To what extent did the Foundation exhibit the following during this grant…Compassion for those affected by your work	199
Was the funding you received restricted to a specific use?	200
If you have ever requested support from the Foundation to help strengthen your organization, how did you determine what specific support to ask for?	
Based on what the Foundation told your organization to request	200
Based on what your organization believes the Foundation would be willing to fund	200
Based on what your organization needs	200
Based on the results of an assessment or evaluation	200
Not applicable - I have never requested support from the Foundation to strengthen my organization	200
Please rate the extent to which you agree or disagree with the following statements about Diversity, Equity and Inclusion:	
The Foundation has clearly communicated what Diversity, Equity and Inclusion means for its work	184
Overall, the Foundation demonstrates an explicit commitment to Diversity, Equity and Inclusion in its work	184
Overall, most staff I have interacted with at the Foundation embody a strong commitment to Diversity, Equity and Inclusion	176
I believe that the Foundation is committed to combatting racism	177
Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?	198
Specifically, are Black, Indigenous and/or people of color (BIPOC) communities or individuals the primary intended beneficiaries of the efforts funded by this grant?	176
Does the CEO/Executive Director of your organization identify as a person of color?	184
Please select the option that represents how the CEO/Executive Director of your organization describes themselves (gender)	193
Please rate the extent to which you agree or disagree with the following statements: Grantee input and expertise informs how the Foundation does its work.	154
Please rate the extent to which you agree or disagree with the following statements: Foundation-sponsored gatherings provide meaningful opportunities to connect with and learn from grantee peers.	143
Please rate the extent to which you agree or disagree with the following statements: The Foundation partners with grantees to adapt to changes in context and resulting challenges and opportunities.	164
Please rate the extent to which you agree or disagree with the following statements: The Foundation is visible on issues of importance to its mission and programs, even in the face of potential criticism.	166
Please rate the extent to which you agree or disagree with the following statements: The Foundation is willing to take risks when there is opportunity to have greater impact.	157
How long has your organization been in operation?	195
Which best describes the process used to set an indirect cost rate for this project?	110
To what extent did the grant cover the full costs of the work it was meant to fund (or the costs of its share of work in a multi-funder project)?	107