LISTENING TO OUR GRANTEES: *OUR 2020 GRANTEE PERCEPTION REPORT*

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INTRODUCTION & KEY CONTEXT

The [Center for Effective Philanthropy](#) (CEP) specializes in providing data and creating insight so philanthropic funders can better define, assess, and improve their effectiveness. CEP's [Grantee Perception Report](#) (GPR) allows for confidential grantee feedback on different aspects of our work and has been implemented by hundreds of funders across the globe, facilitating funder comparisons. Tested over time for validity, this rich dataset supports our reflection and learning and the opportunity to look at changes from our previous GPR results, celebrate our strengths, and identify areas for growth.

At Irvine, we pride ourselves in listening deeply and acting upon that feedback. Based on feedback from our last GPR in 2014, Irvine took important actions that continue to influence our grantmaking today:

- Deepened our engagement in priority regions, including new hires and further expansion of resources

- Bolstered our commitment to flexible support for grantees

- Strengthened our policies allowing for higher indirect costs in grant budgets

- Expanded flexibility regarding grants (e.g., timeframes, objectives, reporting) given changing grantee circumstances

This year's GPR findings reflect data collected August-September 2020. Of the 317 active Irvine grants, 201 responded for a 63 percent response rate. All partners with active grants between June 2019 and May 2020 were invited to participate in the survey; the exceptions were support for memberships and sponsorships as well as staff and board discretionary grants. Due to our strategy shift, we delayed our normal practice of conducting the GPR every four years.

The 2020 GPR is Irvine's first under its singular goal of a California where all low-income workers have the power to advance economically. Alongside this new focus, we culminated three long-standing program areas, launched new initiatives, and a new approach to our work. This approach for our grantmaking includes:

- A focus on time-defined initiatives with specific outcomes and resources

- Multiyear, flexible investments to a select number of core grantees who provide direct service or critical supports to achieve the initiatives' target outcomes

- Partnering with core grantees to identify other areas of support (e.g., research, strategic communication, and innovation) that can help core grantees and the broader field.

The 2020 GPR offers a glimpse into how grantees have experienced these changes in what we fund and how we fund.

In this document, we highlight key report findings. This includes grantee perceptions of our support on their fields, communities, and organizations; our funder-grantee interactions; our commitment to diversity, equity, and inclusion; and our grant processes. We conclude with our action steps to address grantees' constructive feedback. Full survey results can be viewed here.

KEY HIGHLIGHTS

Despite many changes in the Foundation's work and context, grantee ratings on most measures have remained stable or increased since 2014. Key highlights include:

- **Grantees reported significant improvements on the Foundation's understanding of grantees' organizational goals and contextual factors** affecting their work, impact on grantees' local communities, and overall transparency.

- **They expressed a desire for more clarity and communications** about Irvine's goals and strategies and what diversity, equity, and inclusion means for our work.

- **Grantees also reported significant improvements in our grantmaking processes,** including less time spent on selection, reporting, and evaluation and more dollars per process hour as compared to previous years and our funder peers.

- **Those funded within Irvine's current strategy rate the Foundation significantly higher than grantees with culminating grants,** including measures related to relationships and understanding, such as understanding of grantees' contexts, awareness of their organizational challenges, and the clarity and consistency of its communications.

INTERPRETING THE RESULTS

On the following charts, Irvine's grants are separated into three categories:

- **Current Work and Strategy** includes Better Careers, Fair Work, Priority Communities, Program Development, and other ongoing work (such as Media, Impact Assessment and Learning, and Additional Grantmaking).

- **Leadership Awards** includes grants specific to the Leadership Awards.

- **Culminating Grants** includes grants in Arts Engagement, Election Policies and Practices, Immigrant Integration, Linked Learning, Postsecondary Success, Protecting Immigrant Rights, Voter and Civic Engagement, and Special Initiatives.

This summary focuses on results for Irvine 2020 (all grants) and most heavily on Current Work and Strategy to inform next steps. Irvine has a different type of relationship with Leadership Awards grantees due to the design of that program — Awardees' organizations are offered a one-time grant in recognition of their leadership in the field, and there are defined points of contact focused on promotional activities and supports relating to their award.

The "custom cohort" consists of a comparison group of peer funders who are similar on a number of factors such as assets, grantmaking budget, staff size, and/or content focus.[1]

Important things to note when reviewing the charts:

- The top of each chart shows the range of scores among funders, with the lowest average score on the left and the highest average score on the right.

- The orange bars show Irvine's overall scores in 2020 and 2014, allowing a comparison over time.

- The line between those two orange bars indicates the highest and lowest scores in our custom cohort, along with a vertical notch that indicates the median.

- The three blue bars on the bottom offer a breakdown of Irvine's 2020 results by the three grant categories noted earlier.

- An asterisk (*) denotes a statistically significant difference between the 2020 and 2014 ratings.
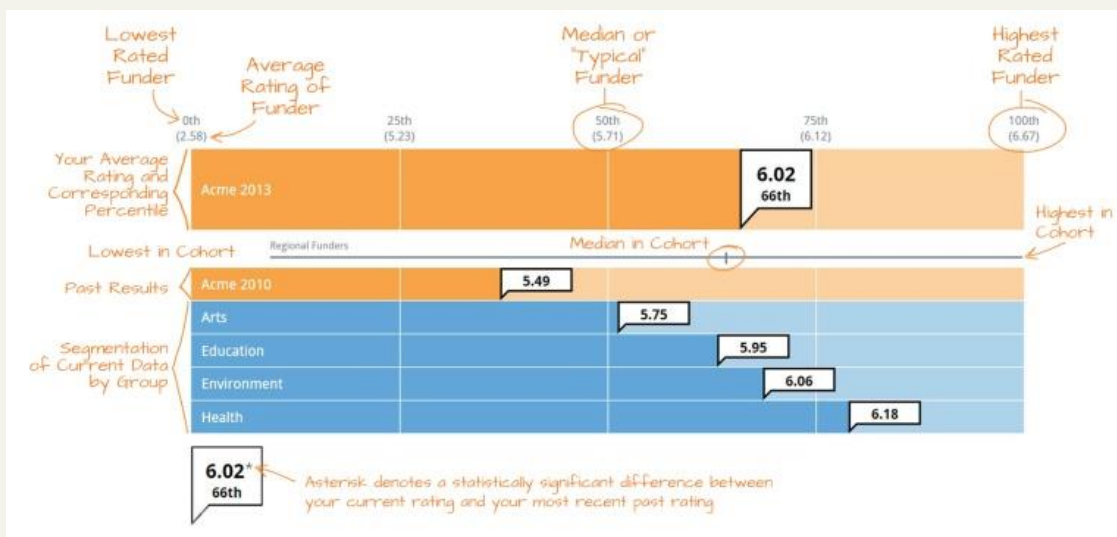
IMPACT ON GRANTEES' FIELDS, COMMUNITIES, AND ORGANIZATIONS

Five years into a new strategy and area of work, grantees rate Irvine as having positive impacts on their fields, their communities, and particularly, their organizations. Since 2014, grantee ratings of Irvine's impact on their fields have remained fairly steady (Figure 1). Impact on grantee communities has improved — a statistically significant change from 2014 that outperforms our custom cohort of peer foundations (Figure 2).

Grantees commented on the positive impact of Irvine funding in our new strategy areas. Illustrative examples include:

> " *It seems that workforce services are a relatively new area for the Foundation as an institution – although many of its program officers are quite knowledgeable. [As] a new player in this field, it seems to be having strong impact, including actively participating in/supporting networks and coalitions.*"

> " *For the first time – as far as I am aware – we are able to collectively build a diverse statewide coordinated effort to advance low-wage worker justice, rooted in local communities. I believe the field of low-wage worker justice will be significantly changed over the next 5-10 years.*"

Figure 1: Overall, how would you rate the Foundation's impact on your field?
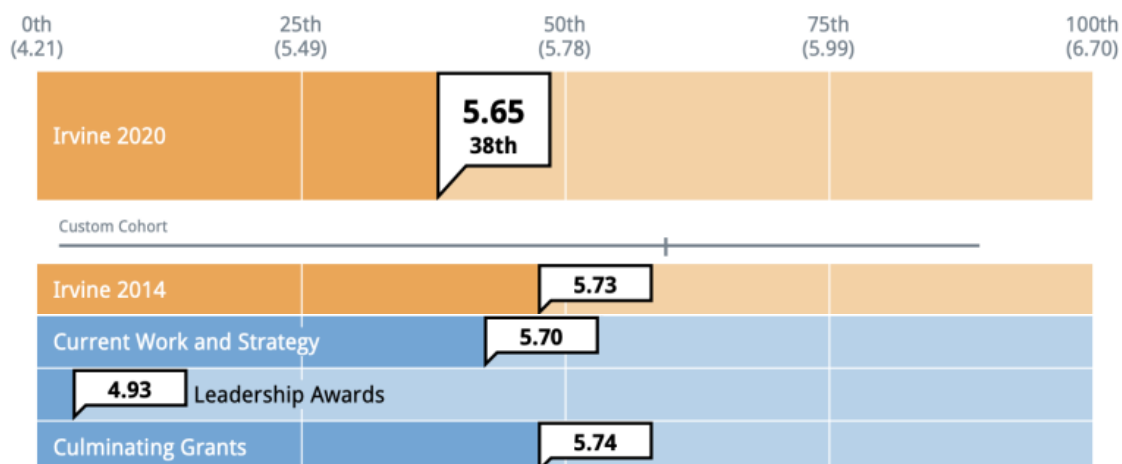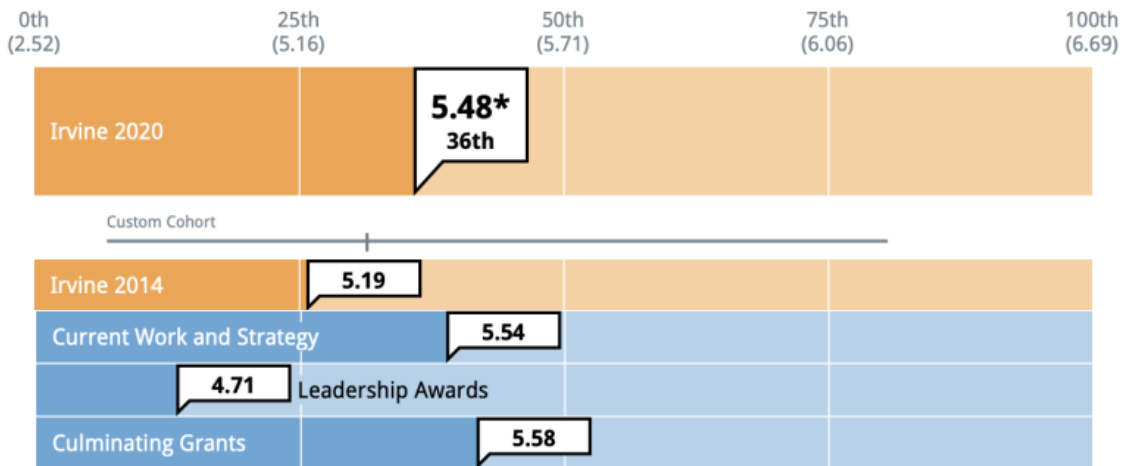*1 = No impact, 7 = Significant positive impact*

Figure 2: Overall, how would you rate the Foundation's impact on your community?
1 = No impact, 7 = Significant positive impact

Grantees perceive Irvine as filling important gaps in the broader field. Key areas include:

Supporting systems and organizations to complement public investments. "I can't think of another private organization that has done as much in the state [in work-based learning strategies]. It is very important because it is providing support for systems development and long-term organizational development. It is a unique role for the Foundation to play, and it complements the public investments in a very effective way."

Innovating on public-private partnerships to address wage theft. "I can't think of any funder that resources organizations to address wage theft. The James Irvine Foundation is not only funding the organizations that are working on the ground with low-wage workers; it is also leading innovative strategies to address wage theft...That partnership in particular is a bolder model for what public-private partnerships can look like in the future."

Strengthening a worker movement. "Through the Fair Work initiative, we've developed synergy among worker centers, grassroots advocacy organizations, and research institutions to coordinate and advance worker justice policy and initiatives at local and statewide levels."

Combining advocacy/power-building efforts with city-wide strategies, employers, and civic institutions. "Many foundations in California choose to focus only on advocacy and power building, which are fundamental to inclusive economies. Irvine places an important emphasis on advocacy and power building, but they also help connect those efforts to city-wide strategies and align them with the employer community and civic institutions. The 'both/and' approach of Irvine in the field of inclusive economic development is what is so valuable."

Deepening community capacity to drive change. "Irvine is having a very positive impact in the Central Valley. In a [place] where the poor have been considered a deficit, a drain of resources, and an embarrassment, Irvine has come in to help the locals see the potential for positive change including economic development by tapping the potential of the young, low-income families that drive the economy of this Valley."

Broadening public discourse on inequality. "Irvine's support of journalism focused on inequality is incredibly important to both our organization and to the field. Funding from Irvine has been an important validator as we seek to bring in new foundation donors for our work, while Irvine's support for reporting on inequality has expanded the capacity of journalists in California to cover this issue."

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

Current Work and Strategy — 6.27

5.57 **Leadership Awards**

Culminating Grants — 6.37
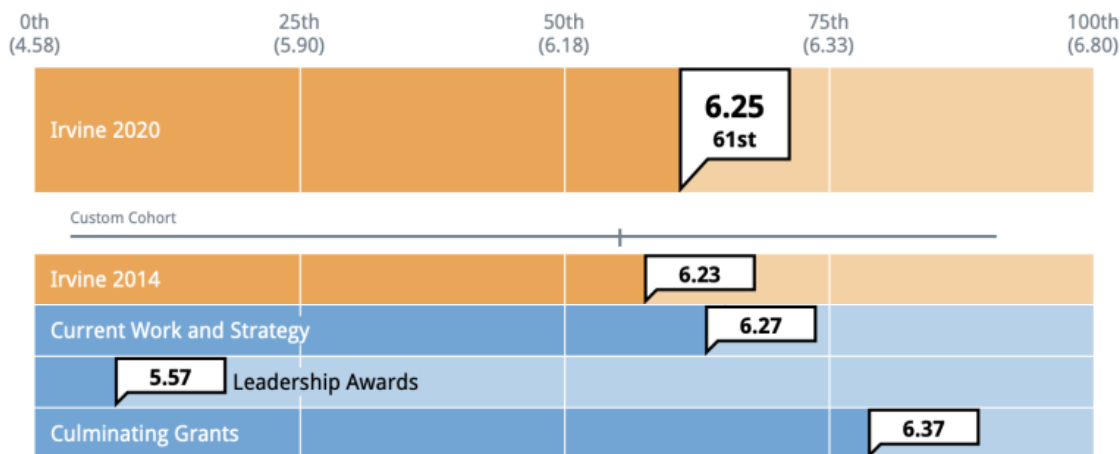
Grantees rated Irvine as having a strong positive impact on their organizations (Figure 3). They shared three key ways that Irvine's investment and partnership have been critical to strengthening their organizations:

Enhanced internal leadership and communication.
"Because of Irvine's funding, our organization has been able to expand and build our organization's leadership skills of staff. This has been critical during this historic moment to ensure staff has the supports and skills to respond to the needs of families in the midst of the COVID crisis...The dividends it has paid and will continue to pay are huge, [as it makes] it possible to be more effective in our communication with stakeholders and partners. This has a direct impact on our ability to provide services and secure funding opportunities."

Organizational expansion and growth. "Having their support has opened the doors to other sources of funding, which has allowed for exponential growth of our organization. And — probably more than anything else — having Irvine funding for GENERAL OPERATING EXPENSES has made so many things possible that other funders ignore or disregard. That has been CRITICAL to our success!!!"

Strengthened position in the field. "Without the Foundation, we would be a perfectly average, normal CBO providing adequate services 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."

FUNDER-GRANTEE INTERACTIONS

Overall, grantees report positive interactions with Irvine staff, with high ratings on fair treatment, responsiveness, transparency, compassion for those they serve, and comfort approaching Irvine if a problem arises (Figures 4-8 on the following two pages). Grantees in our current work and strategy tend to rate Irvine more highly than those with culminating grants. Many grantees describe their experience with Irvine as one of partnership.

> " *What makes the Foundation unique is when the community sees the Foundation as a partner, and not solely as a funder. There are certain qualities as a partner that differ from being a grant recipient. A partner has a voice in the decision-making process. They are flexible and supportive when conditions change. Partners can be trusted without fear of repercussions. And partners can be honest with each other.*"

> " *The Irvine Foundation stands out, for us, in being the largest foundation that we have a working partnership with and yet our working relationship feels as if the Irvine Foundation were a small foundation located in our local community…It's a testament to a culture of program officers who are readily available, conduct themselves as peers and partners in work that is mutual, and communicate care and interest for me, as their point of contact, the organization, and this region as a whole.*"

Figure 4: 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
Current Work and Strategy: 6.66
Leadership Awards: 6.21
Culminating Grants: 6.23
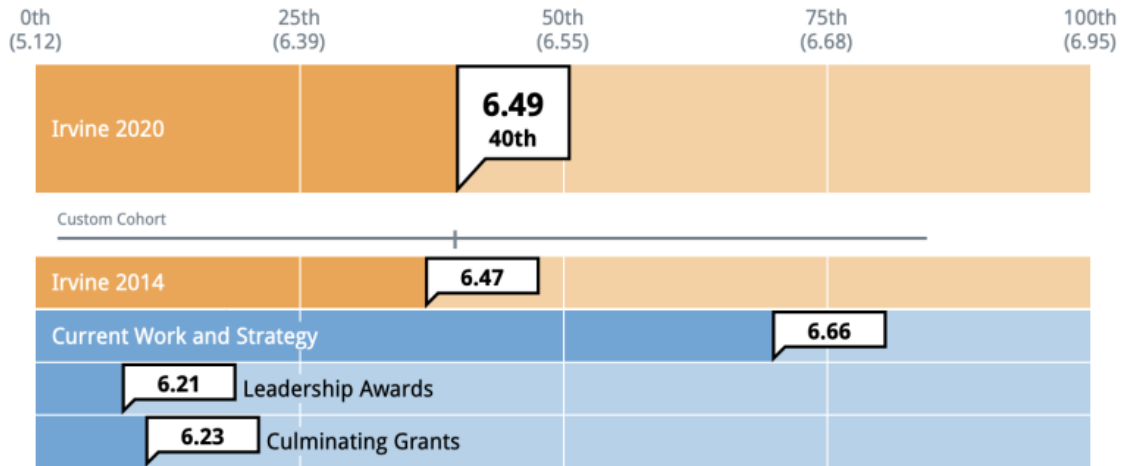
Figure 5: Overall, how responsive was Foundation staff?
1 = Not at all responsive, 7 = Extremely responsive

	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
Current Work and Strategy: 6.45
Leadership Awards: 6.21
Culminating Grants: 6.05

Figure 6: 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
Culminating Grants: 5.25

Figure 7: 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
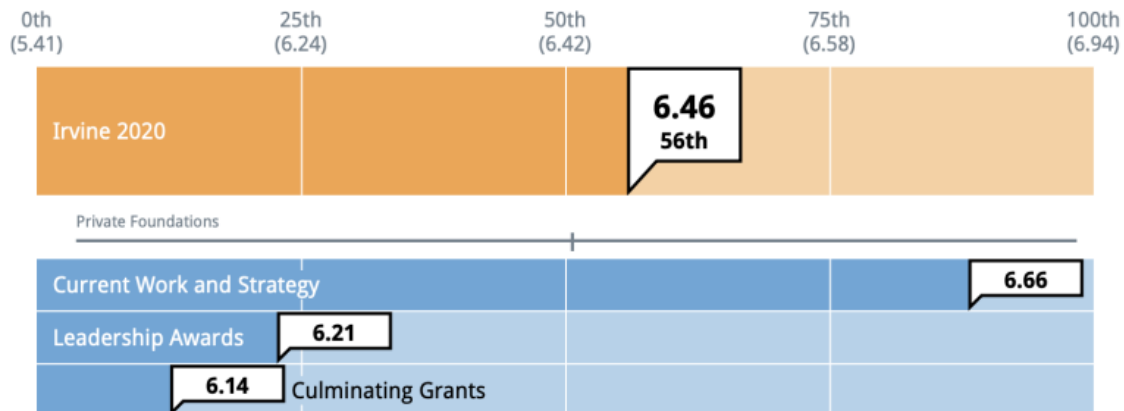
Figure 8: How comfortable do you feel approaching the Foundation if a problem exists?
1 = Not at all comfortable, 7 = Extremely comfortable

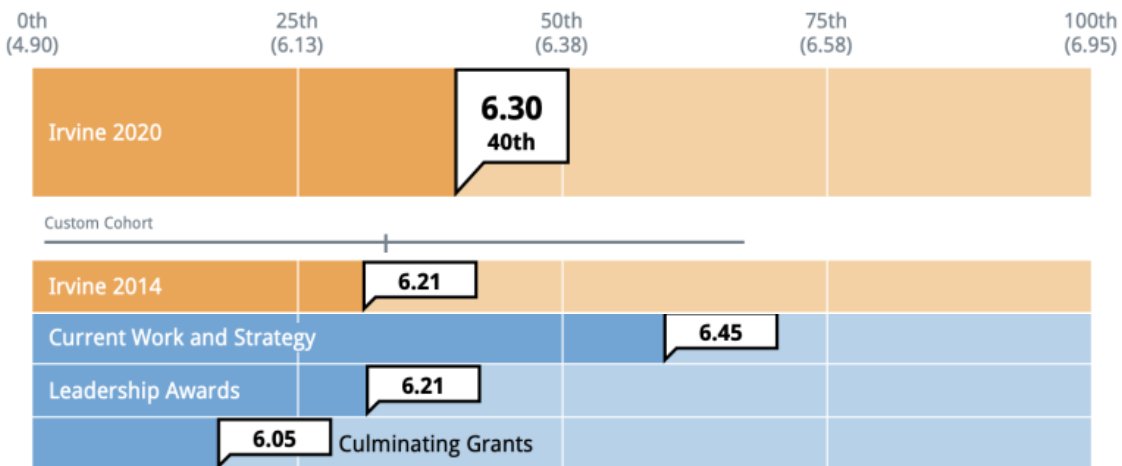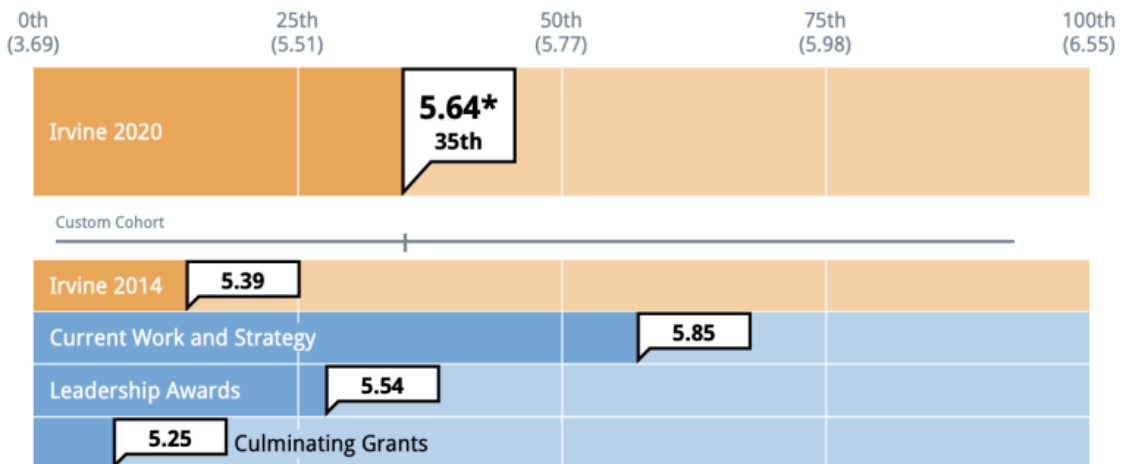|	0th (4.80)	25th (6.06)	50th (6.24)	75th (6.40)	100th (6.84)

Irvine 2020 — **6.03** 23rd

Custom Cohort

Irvine 2014 — 6.02
Current Work and Strategy — 6.20
5.57 — Leadership Awards
5.78 — Culminating Grants
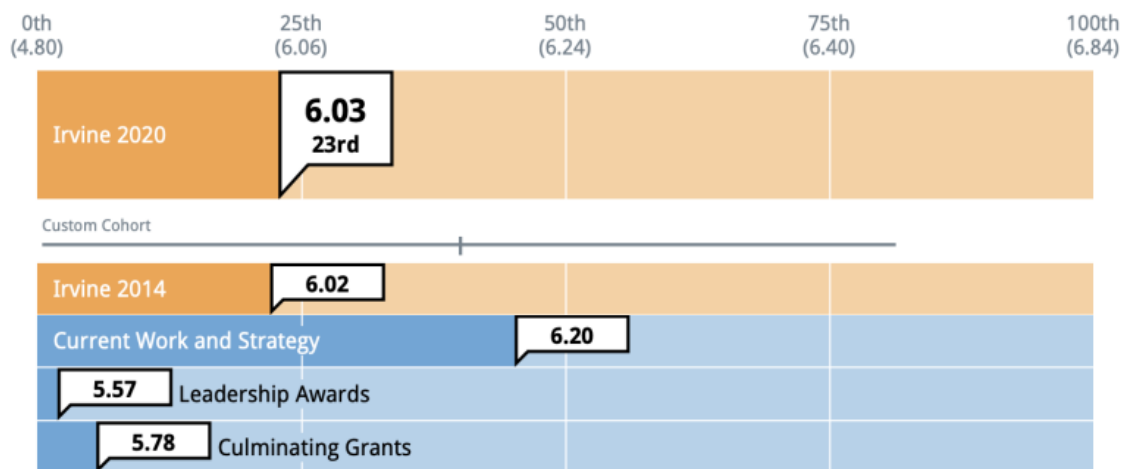
For example, when asked about communicating with Irvine about the COVID-19 pandemic, most grantees said they feel comfortable discussing different aspects of their work:

- Evolving needs of the populations that they serve **(95%)**

- Evolving needs of their organization **(92%)**

- Implications of race in their organization in response to COVID-19 **(93%)**

- Flexibility they need from the Foundation regarding its grant requirements **(90%)**

COMMUNICATION AND UNDERSTANDING

O verall, grantees are pleased with the clarity and consistency of Irvine's communications, with many sharing positive statements about their communication with Irvine:

> " *[Irvine] 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.*"

> " *The quality of our communications and interactions with the foundation have been outstanding. We speak to each other from a foundation of mutual respect and shared interests. I find our interactions to be generative, insightful, and valuable. As a result, our conversations are deeply probing about what we're doing, and open to new ideas.*"

Figure 9: 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

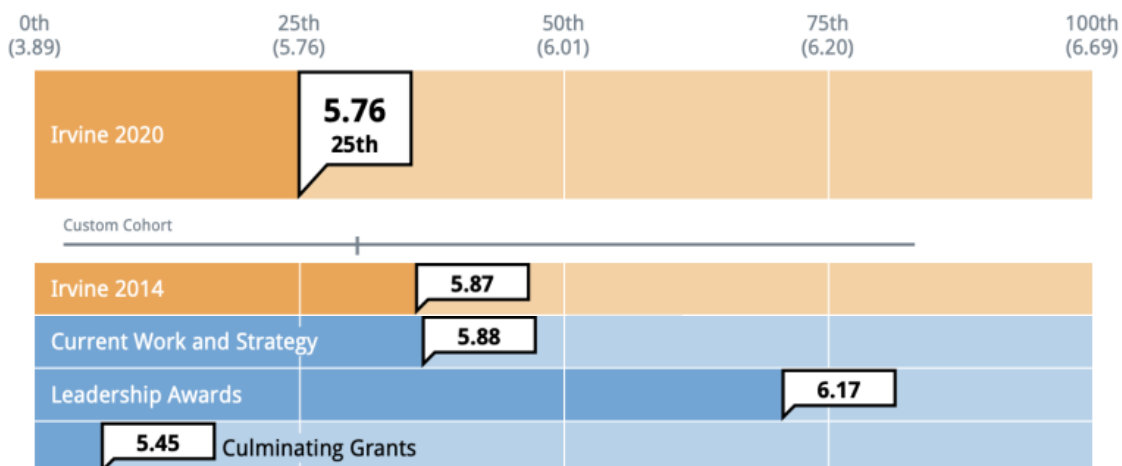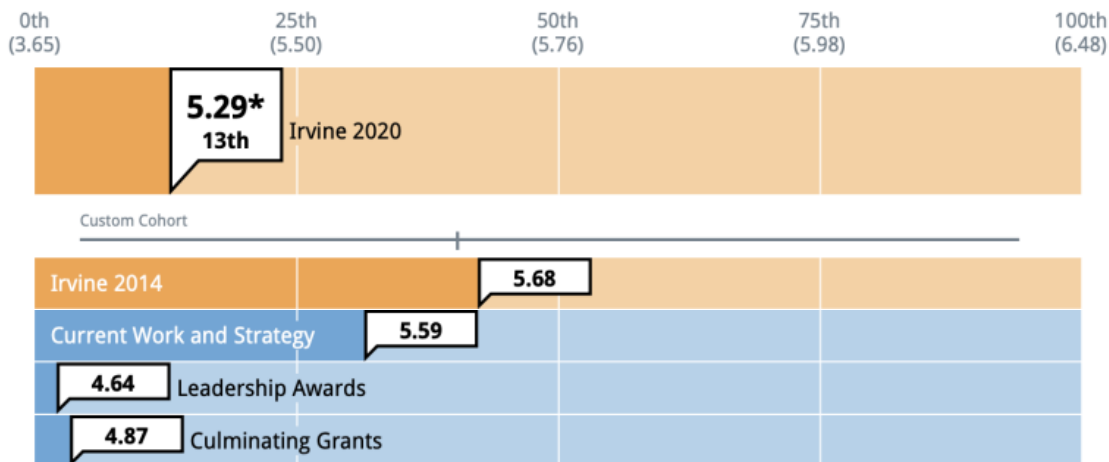|	0th (3.89)	25th (5.76)	50th (6.01)	75th (6.20)	100th (6.69)
Irvine 2020		5.76 25th			
Custom Cohort					
Irvine 2014		5.87			
Current Work and Strategy		5.88			
Leadership Awards				6.17	
Culminating Grants	5.45				

Figure 10: How clearly has the Foundation communicated its goals and strategy to you?
*1 = Not at all clearly, 7 = Extremely clearly*

Where grantees see opportunity for growth is in clearer communications on Irvine's broader goals and strategy (Figure 10) – not only for their specific initiative, but for the work of the Foundation at large (Figure 11). This desire stems from the desire to both understand the role of their grant as well as draw connections with other grantees and partners in service of shared goals.

> " *Because there has been a strategy shift over the last few years, and then changing external conditions, there are still some knowledge gaps of the way the Foundation works. 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.*"

> " *Like any organization, the Foundation sometimes can feel a little siloed. Our organization's work seems to crossover multiple portfolios. Our program officer is skilled at engaging colleagues from related portfolios when there seems to be overlap, but it feels like resources and strategies could sometimes be leveraged more intentionally.*"

Figure 11: How well do you understand the way in which the work funded by this grant fits into the Foundation's broader efforts?
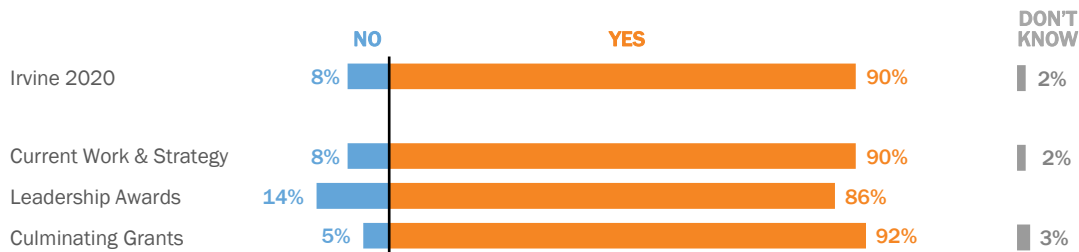*1 = Limited understanding, 7 = Thorough understanding*
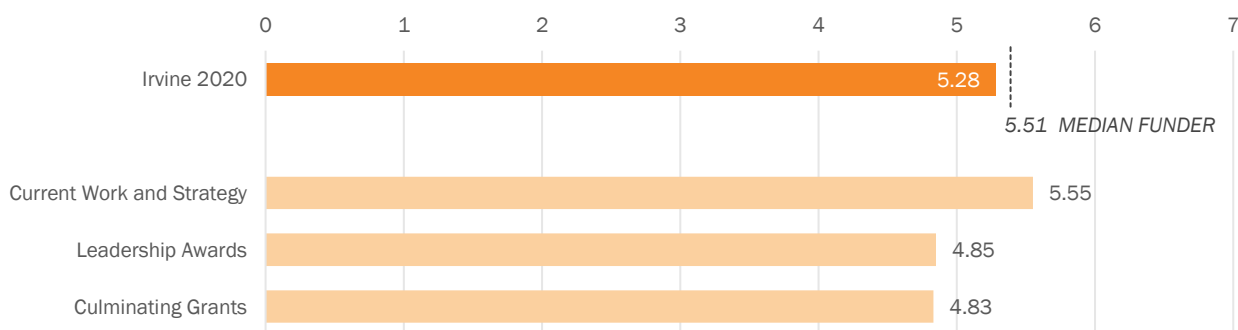
Note: As a newer question in the Grantee Perception Report, this question does not offer a full set of benchmark comparisons. The chart depicts comparative data from 30 funders who have recently conducted the Grantee Perception Report.

COMMITMENT TO DIVERSITY, EQUITY, AND INCLUSION

The vast majority of Irvine's grants are primarily meant to benefit historically disadvantaged groups (Figure 12), particularly communities and individuals who are Black, Indigenous, and/or people of color (BIPOC) (Figure 13). Irvine's investments through its current work and strategy reflect an understanding of these communities, though grantee ratings indicate that there is still room for improvement (Figure 14).

Figure 12: Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?

	NO	YES	DON'T KNOW
Irvine 2020	8%	90%	2%
Current Work & Strategy	8%	90%	2%
Leadership Awards	14%	86%	
Culminating Grants	5%	92%	3%

Note: Since this question was newly added, comparison data is unavailable.

Figure 13: Specifically, are Black, Indigenous and/or people of color (BIPOC) communities or individuals the primary intended beneficiaries of the efforts funded by this grant?

	NO	YES	DON'T KNOW
Irvine 2020	10%	87%	3%
Current Work & Strategy	15%	81%	4%
Leadership Awards	9%	91%	
Culminating Grants	2%	97%	1%

Note: Since this question was newly added, comparison data is unavailable.

Figure 14: 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
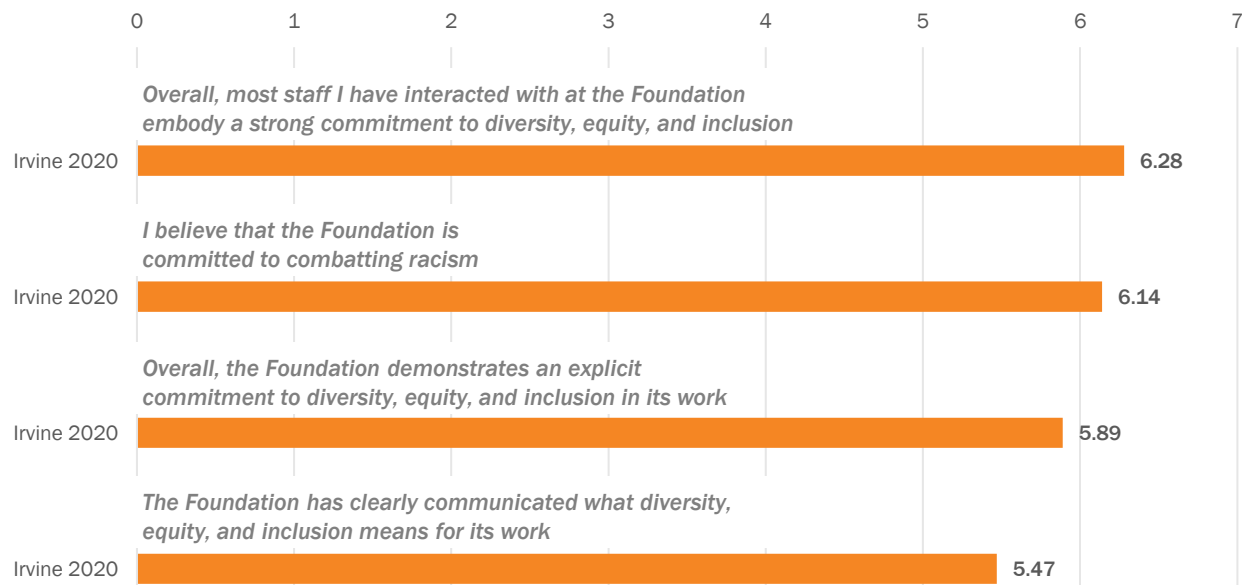Culminating Grants — 4.74
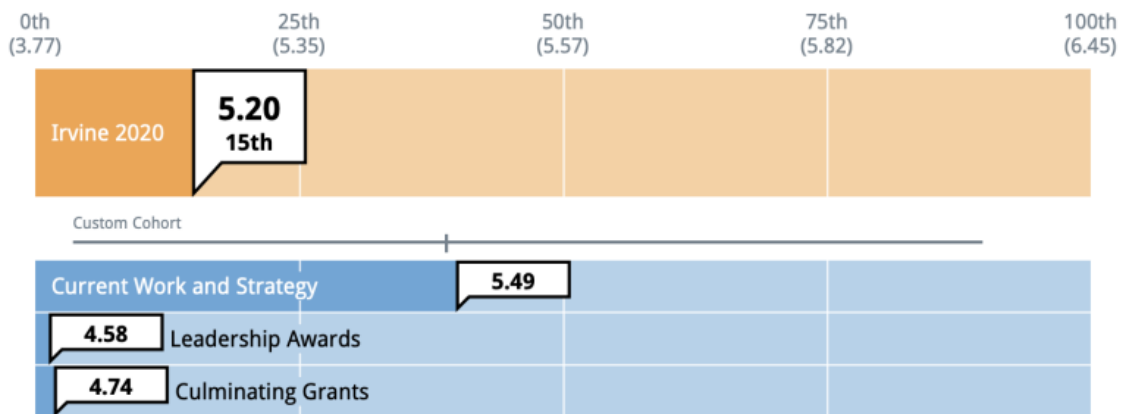
Note: This question did not appear in Irvine's GPR in prior years.

Overall, grantees see Irvine as embodying a strong commitment to diversity, equity, and inclusion based on the quality of their interactions. However, they rate Irvine lower in explicitly demonstrating a commitment to diversity, equity, and inclusion and communicating what diversity, equity, and inclusion means for its' work (Figure 15).

Figure 15: 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

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

Note: Since this question was newly added, comparison data is unavailable.

The survey asked about actions the Foundation could undertake to demonstrate its commitment to diversity, equity, and inclusion. Key themes from grantee responses are:

- **Be more explicit with your values.** "Make an explicit commitment to racial equity as a guiding priority. Explore what it would look like to demonstrate this commitment from the perspective of grantees, staff, executives, and board members. Look for convergence and divergence around those ideas and ways to bridge across them."

- **Ask for feedback from people of color.** "The Foundation has taken an important first step discussing race more openly. In the next few years, it will be important to be open to feedback as people of color express their thoughts to the first step."

- **Support grantees' DEI capacity.** "Diversity, equity and inclusion aren't easy issues to be addressed. Although the issues aren't new, only recently we started including it on our work. I feel we need to spend more time/resources to bring our staff/board/partners and ourselves to better implement. [Irvine] could play this role."

- **Encourage greater diversity, equity, and inclusion among your grantees and partners.** "As a straight white male in my late fifties, I am constantly weighing the experience, competence, and relationships I bring to my work against the opportunity to replace myself with someone who is closer to the experience of the people we work with. There are no simple answers here, but the Foundation could challenge grantees for something more than a headcount on DEI. Ask for details on staff change process and ways in which we integrate the voices of those we work with into management and governance."

- **Bring your foundation peers along.** "Organizing the private philanthropic foundation sector. Irvine is the 12th largest private foundation in California and of those 12, I would say, Irvine Foundation is 1 of only 3 foundations that deeply understands and is committed to DEI and add to that 'justice.' Just as no 1 person, no 1 nonprofit organization, no 1 foundation can change a system and we need systemic change in the philanthropic sector."

Gender differences. The Center for Effective Philanthropy conducted additional analysis on differences of grantee experience by grant type and grantee characteristics. This included gender identity and identity as a person-of-color. Analyses show that respondents identifying exclusively as a woman (57 percent of respondents) rate the Foundation significantly lower than those who identify exclusively as a man (40 percent of respondents) across multiple survey measures including:

- 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

A deeper analysis reveals that there are no significant gender differences related to identifying as a person-of-color, grantmaking characteristics, organizational characteristics, and most funder-grantee interaction patterns. This includes no significant differences in terms of grant length, grant size, grant type (unrestricted vs. restricted), annual organizational budget, or whether the foundation or grantee tended to initiate contact.

Female respondents were, however, more likely to interact with staff less than once a year. This may be related to the larger share of women responding for culminating grants – 67 percent compared to 33 percent. Grantees from our current work and strategy had a slightly larger share of men than women respondents – 55 percent compared to 45 percent. However, CEP's analysis finds that status as a culminating grantee does not fully explain the differences reported by gender identity.
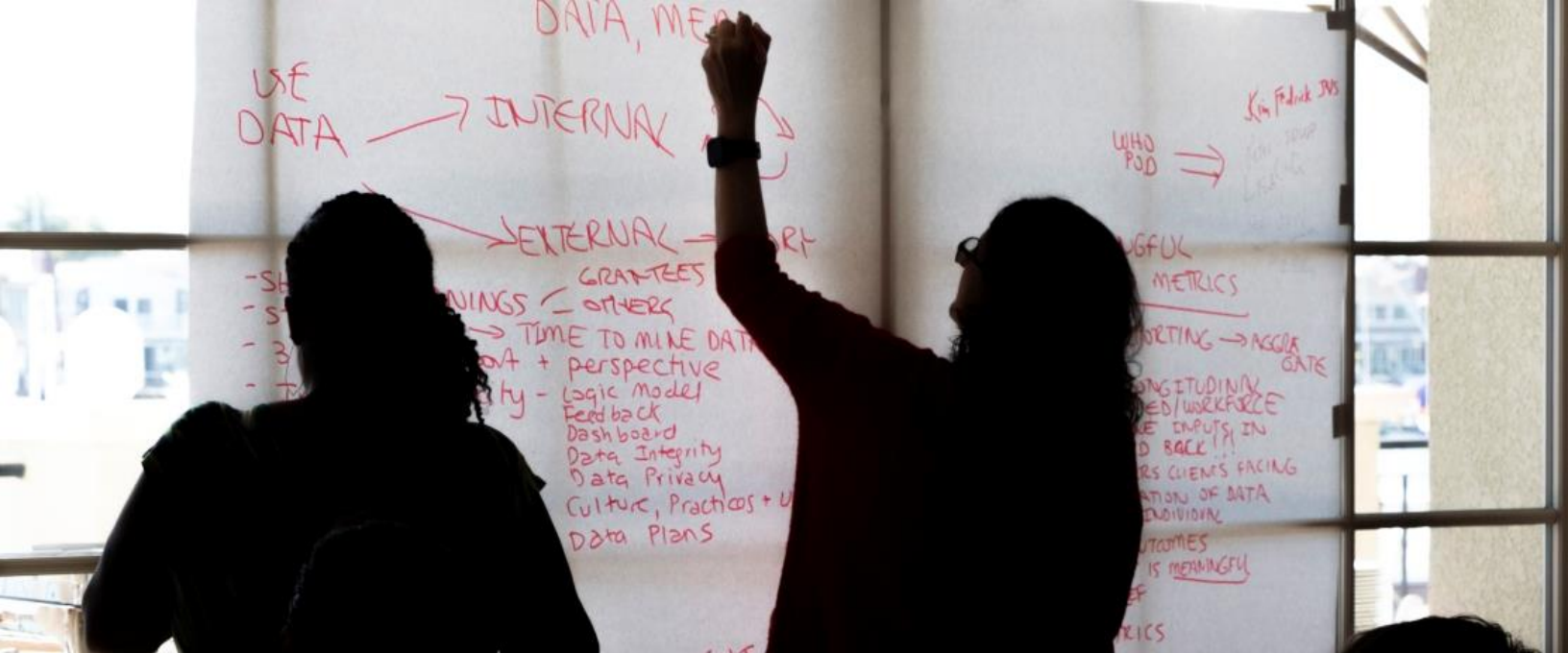
GRANT PROCESSES

I rvine's grant selection, reporting, and evaluation processes have become more streamlined since our last GPR in 2014. Overall, grantees find our processes to be clear and a low burden.

Selection Process. 80 percent of Irvine's grantees receive a clear commitment of funding within three months of proposal submission, an improvement from 2014 and higher than the custom cohort of foundation peers (Figure 16). The median Irvine grantee spends 20 hours on the proposal and selection process (Figure 17), a decrease from 40 hours in 2014.

> " *The Foundation has a good balance of collecting the necessary information without making it an onerous process. Submitting a proposal is a straightforward process, and it is clear through the Irvine's team communications what is required."*

> " *Irvine is far and away the easiest, most thoughtful, most useful of all our funders. The processes are logical and do not require more time and investment than is reasonable. [Irvine's] interest in our organization and in our success is consistently evident and drives their questions, their responses, and their communication."*

Figure 16: Time Elapsed From Submission of Proposal to Clear Commitment of Funding
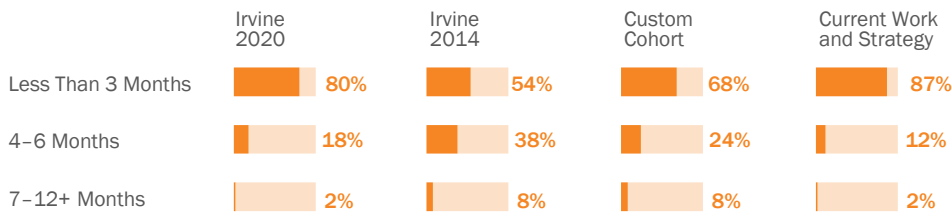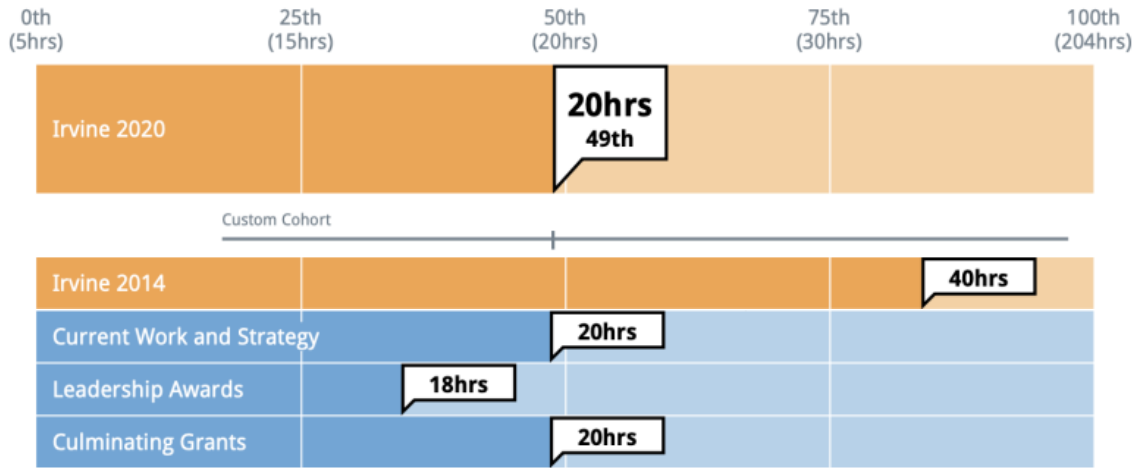
	Irvine 2020	Irvine 2014	Custom Cohort	Current Work and Strategy
Less Than 3 Months	80%	54%	68%	87%
4–6 Months	18%	38%	24%	12%
7–12+ Months	2%	8%	8%	2%

Figure 17: 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	
Current Work and Strategy			20hrs		
Leadership Awards		18hrs			
Culminating Grants			20hrs		

Compared to foundation peers, the grant amount Irvine awards relative to the hours spent on grant requirements is high (Figure 18) and has increased more than three-fold since 2014.

Figure 18: Median 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		
Current Work and Strategy					$12.1K
Leadership Awards				$3.8K	
Culminating Grants					$10.0K
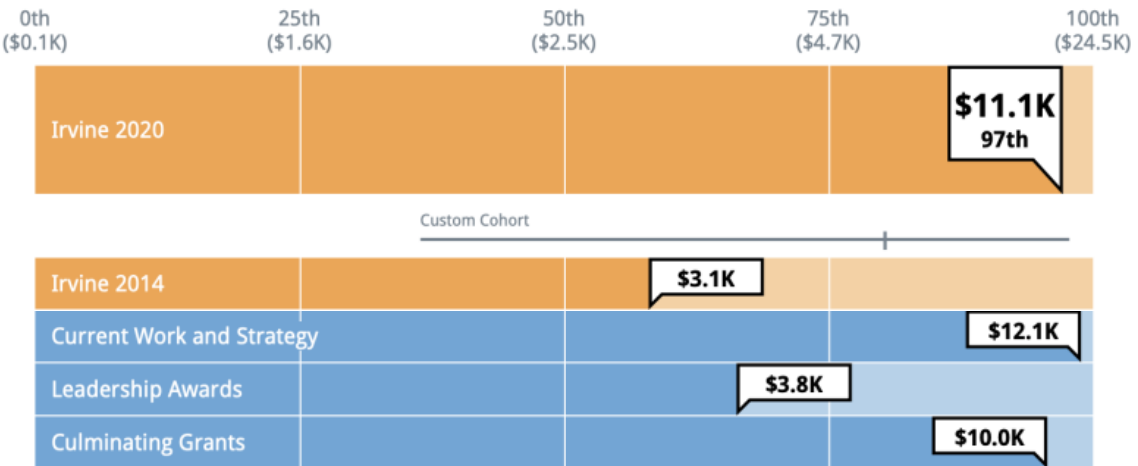
Grantees report that the Foundation's selection process helped to strengthen the organization/ program funded by the grant (Figure 19). Grantees also report relatively higher pressure to change organizational priorities in their grant proposal (Figure 20). While significantly lower than 2014, it is higher than foundation peers.

Figure 19: 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
- Current Work and Strategy: 5.32
- Leadership Awards: 4.43
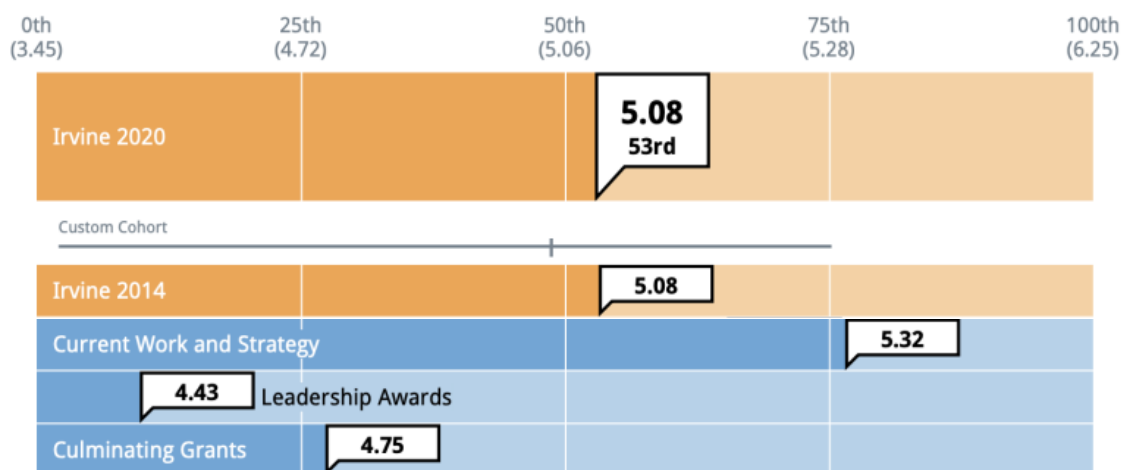- Culminating Grants: 4.75

Figure 20: 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
- Current Work and Strategy: 2.54
- Leadership Awards: 2.00
- Culminating Grants: 2.69
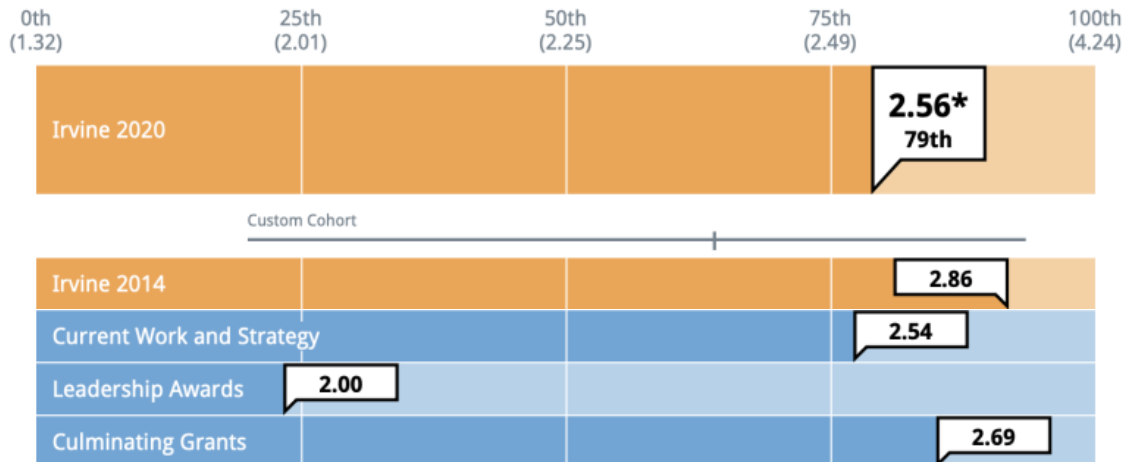
Based on grantee feedback in the 2014 GPR, Irvine increased its allowance for indirect costs in its project-based grants. Support for indirect costs (overhead beyond direct project costs) can be included in project support grant budgets and is discussed as part of the proposal development process. In 2020, more than half (60 percent) of grantees receiving project-based grants in our current work and strategy report that their grant covered both direct and indirect costs (Figure 21).
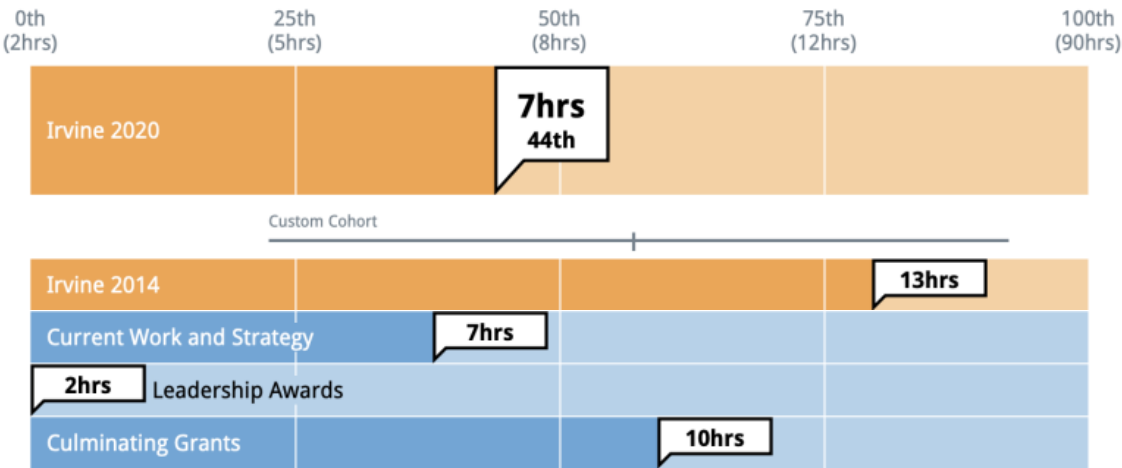
Figure 21: To what extent did the grant cover the full costs of the work it was meant to fund (or the costs of its share of work in a multi-funder project)?

Current work and strategy

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%
The grant covered direct and indirect costs, but no more	51%
The grant covered the direct costs of the work, but not all indirect costs	26%
The grant did not cover even the direct costs of the work	14%

Grantee reporting and evaluation. CEP distinguishes between reporting and evaluation in their survey. They define reporting as *Irvine's standard oversight, monitoring, and grant reporting.* Evaluation consists of *formal activities <u>beyond reporting</u> undertaken by Irvine to assess or learn about a grant, a program, or Irvine's efforts*.

Regarding grant reporting, results show a reduction in the burden of reporting and evaluation on grantees with the median grantee spending seven hours annually on grantee reports and evaluation as compared to 13 hours in 2014 (Figure 22).

Figure 22: Median Hours Spent on Monitoring, Reporting, and Evaluation Process Per Year

	0th (2hrs)	25th (5hrs)	50th (8hrs)	75th (12hrs)	100th (90hrs)
Irvine 2020			**7hrs** 44th		

Custom Cohort

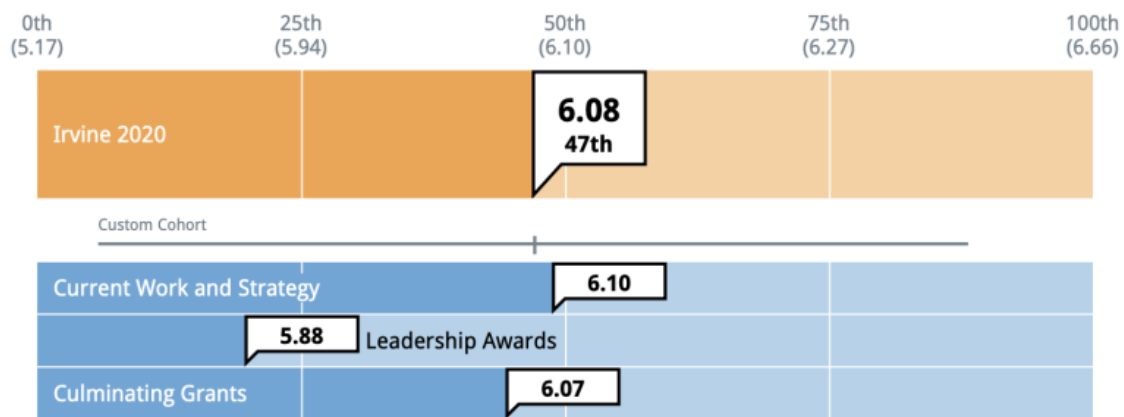|					
Irvine 2014				13hrs	
Current Work and Strategy		7hrs			
Leadership Awards	2hrs				
Culminating Grants			10hrs		

Though grantees report that Irvine's grant reports are pertinent to their work (Figure 23), they have not found them as helpful for their own reflection and learning (Figure 24). Additionally, about half (49 percent) report having a substantive conversation about their grantee report with the Foundation.

Figure 23: To what extent was the Foundation's reporting process relevant, with questions and measures pertinent to the work funded by this grant?
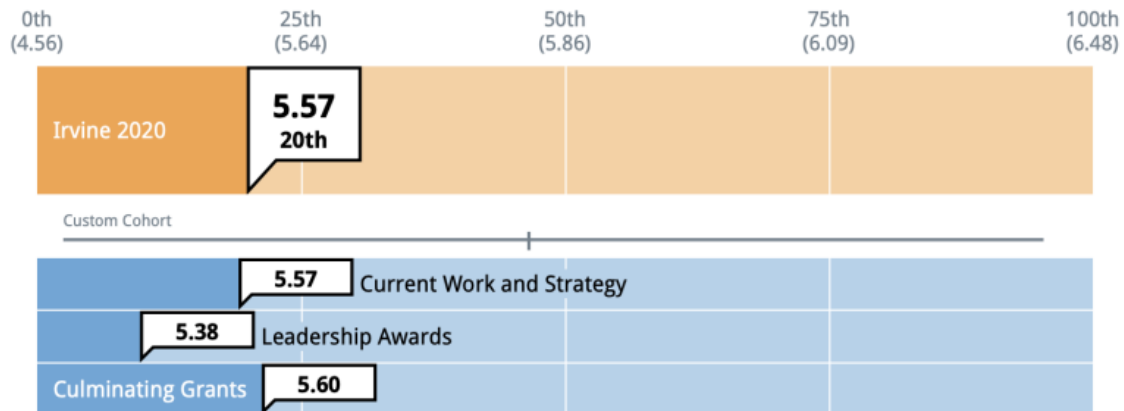*1 = Not at all, 7 = To a great extent*

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

Note: Trend data is not available since this question did not appear in Irvine's Grantee Perception Report in prior years.

Figure 24: 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
- Current Work and Strategy — 5.57
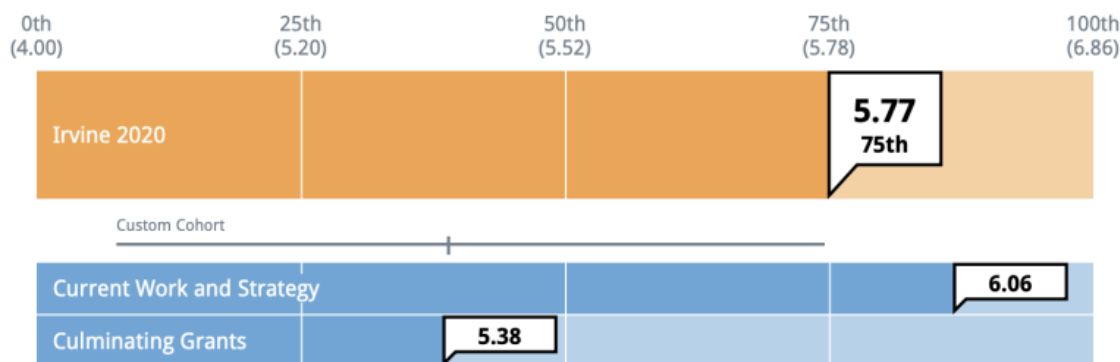- Leadership Awards — 5.38
- Culminating Grants — 5.60

Note: Trend data is not available since this question did not appear in Irvine's Grantee Perception Report in prior years.

Grantees report that evaluation activities incorporate input from their organizations (Figure 25). Similarly, they report using evaluation results to make changes to their work (Figure 26). Both scores are higher as compared to foundation peers in Irvine's custom cohort.

Figure 25: To what extent did the evaluation incorporate input from your organization in the design of the evaluation?
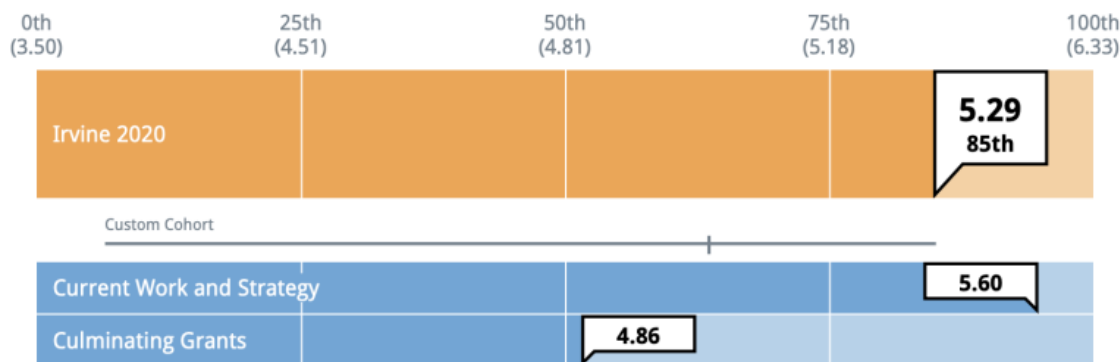*1 = Not at all, 7 = To a great extent*

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

Note: Trend data is not available since this question did not appear in Irvine's Grantee Perception Report in prior years. Evaluation questions are not applicable to Leadership Awards grants.

Figure 26: 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

Note: Trend data is not available since this question did not appear in Irvine's Grantee Perception Report in prior years. Evaluation questions are not applicable to Leadership Awards grants.

ACTION STEPS TO BE TAKEN BY IRVINE

We are grateful for the input we received from our grantees and appreciate their time and thoughtfulness in offering areas of strength as well as areas to improve. Strong grantee partnerships are fundamental to the impact we seek, and we are pleased to hear that grantees see a strong partner in Irvine. The GPR offered a valuable opportunity to reflect on what it takes to support transformative change and work in deep partnership with grantees.

Moving forward, we strive to further strengthen that partnership by communicating more regularly and transparently about our strategy and DEI efforts, and by engaging grantees in ways that allow them to maximize their impact. Some of these areas we might have expected to rate lower in this GPR given where we are in our strategy transition, and some of these areas we didn't necessarily expect and want to take action to improve upon. The following proposed action steps (in order of their related findings in this document) focus on areas in which we rate notably lower than our peers and that we hope to strengthen.

Communication

In response to grantees' desire to better understand the role of their grant within the initiative and larger Foundation strategy — and to draw connections with Irvine partners and others relevant to their work — we will:

- Communicate more regularly to grantees with updates relating to the initiative that they participate in as well as news about other initiatives and the Foundation more broadly
- Support greater consistency in communications Foundation-wide through regularly updated and easily accessible tools for staff communication (e.g., talking points on key messages for external audiences)
- Use existing grantee touchpoints (e.g., grant agreements and grant report reminders) to reinforce key messages

Diversity, Equity, and Inclusion

Grantees would like Irvine to be more explicit about its commitment to diversity, equity, and inclusion and what it means for their work with Irvine. As a result, as part of our Racial Equity Project, we will:

- Continue to communicate our commitment to DEI, and racial equity specifically
- Obtain input from grantees and others to guide our racial equity efforts
- Let grantees, and others as relevant, know what the Foundation is doing to address racial inequities and what that means for them
- Determine how we will hold ourselves accountable to our racial equity work as an organization

Gender Differences

We are concerned that grantee respondents identifying as women rated Irvine lower in their grantee experiences (e.g., understanding grantees goals and context, strength of relationships, and overall transparency). Even with more in-depth analysis, the reasons behind this trend remain unclear. As a result, we will:

- Partner with a consultant to have confidential conversations with some of our grantees who identify as women to understand what would improve their experience with Irvine
- Hold conversations internally to reflect on these findings and decide on a course of action

Pressure to modify organizational priorities to increase likelihood of funding

Compared to peer funders, Irvine grantees reported greater pressure to modify organizational priorities to create grant proposals that are more likely to receive funding. Given our strategy change in recent years, this finding is not surprising. For example, Irvine has engaged some grantees previously funded under a culminating area of work (e.g., civic engagement) as a partner, or potential partner, under our new strategy. Some grantees may feel pressure to fit into Irvine's new strategy in order to maintain funding. Moving forward, we will:

- Maintain focus on how we engage potential grantees during our due diligence and proposal development processes, with particular attention to past grantees with whom we are exploring new areas of work

Indirect Costs

As a result of our 2014 GPR, Irvine bolstered its policy on the amount of indirect costs (overhead beyond direct project costs) that could be included in project grant budgets; yet 40 percent of grantees receiving project-based support reported that their grant did not cover the full cost of their funded project. Moving forward, we will:

- Review Irvine's indirect cost policy with all grantmaking staff, including our existing flexible indirect cost allowances and considerations for project grant budgets
- Provide training and tools for grantmaking staff on engaging grantees in conversations about indirect costs; this could potentially lead to providing training and tools for grantees on how to determine their true full costs
- Ensure all grantmaking staff discuss full-cost options as part of the proposal development process for project grants