

Grantee Perception Report®

PREPARED FOR
The James Irvine Foundation

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

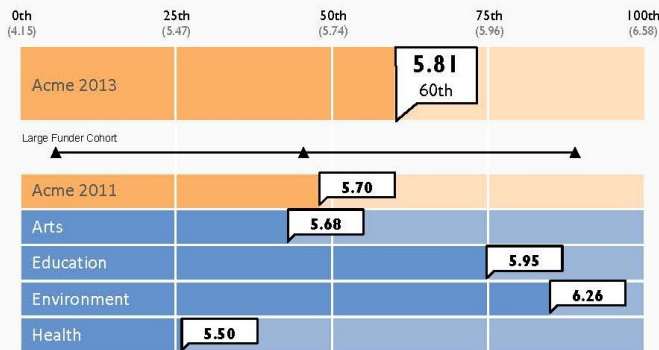
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INTERPRETING YOUR CHARTS

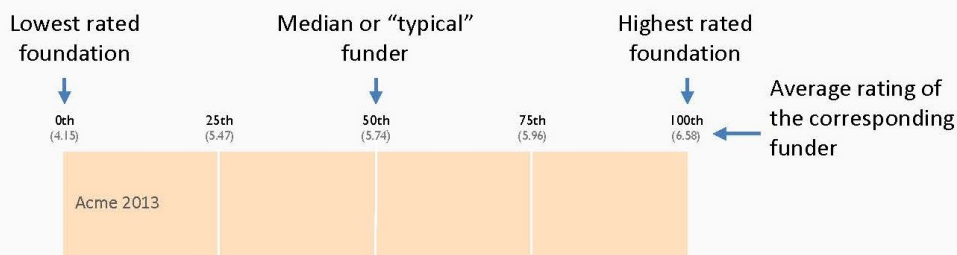
HOW TO READ CHARTS

Many of the charts in this report are shown in this format. See below for an explanation of the chart elements, or view the Video Tour.

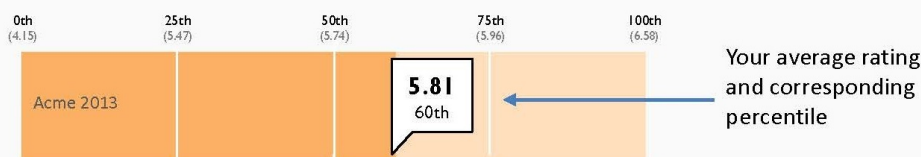


PERCENTILE SCALE

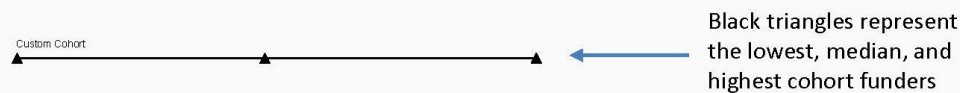
Every participating funder's average rating is ranked along a percentile scale.



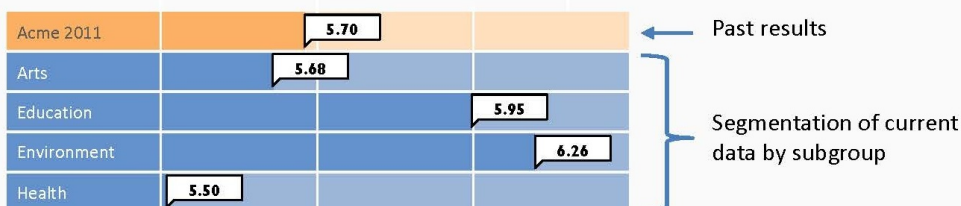
YOUR RESULTS



COMPARATIVE COHORT



PAST RESULTS/SEGMENTATION DATA



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 five 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

Executive Summary

The following summary highlights key findings about grantees' perceptions of The James Irvine Foundation compared to other foundations whose grantees CEP has surveyed.

Throughout this report, results are described as 'more positive' when an average rating is higher than that of 65 percent of funders in CEP's dataset, and 'less positive' when a rating is lower than that of 65 percent of funders.

Compared to grantees of the typical funder, Irvine grantees in 2014 have:

more positive perceptions regarding the Foundation's:

- » Impact on their organizations
- » Selection process

similarly positive perceptions regarding the Foundation's:

- » Impact on their fields
- » Reporting/evaluation process

less positive perceptions regarding the Foundation's:

- » Impact on their local communities
- » Relationships with grantees

Summary of Differences by Subgroups

Program Area: Ratings from Special Initiative grantees trend lower than other Irvine grantees on most measures.

Priority Region: Ratings from Priority Region grantees trend higher than other Irvine grantees on most measures of impact.

Region: Ratings from San Joaquin Valley grantees trend higher than other Irvine grantees on most measures.

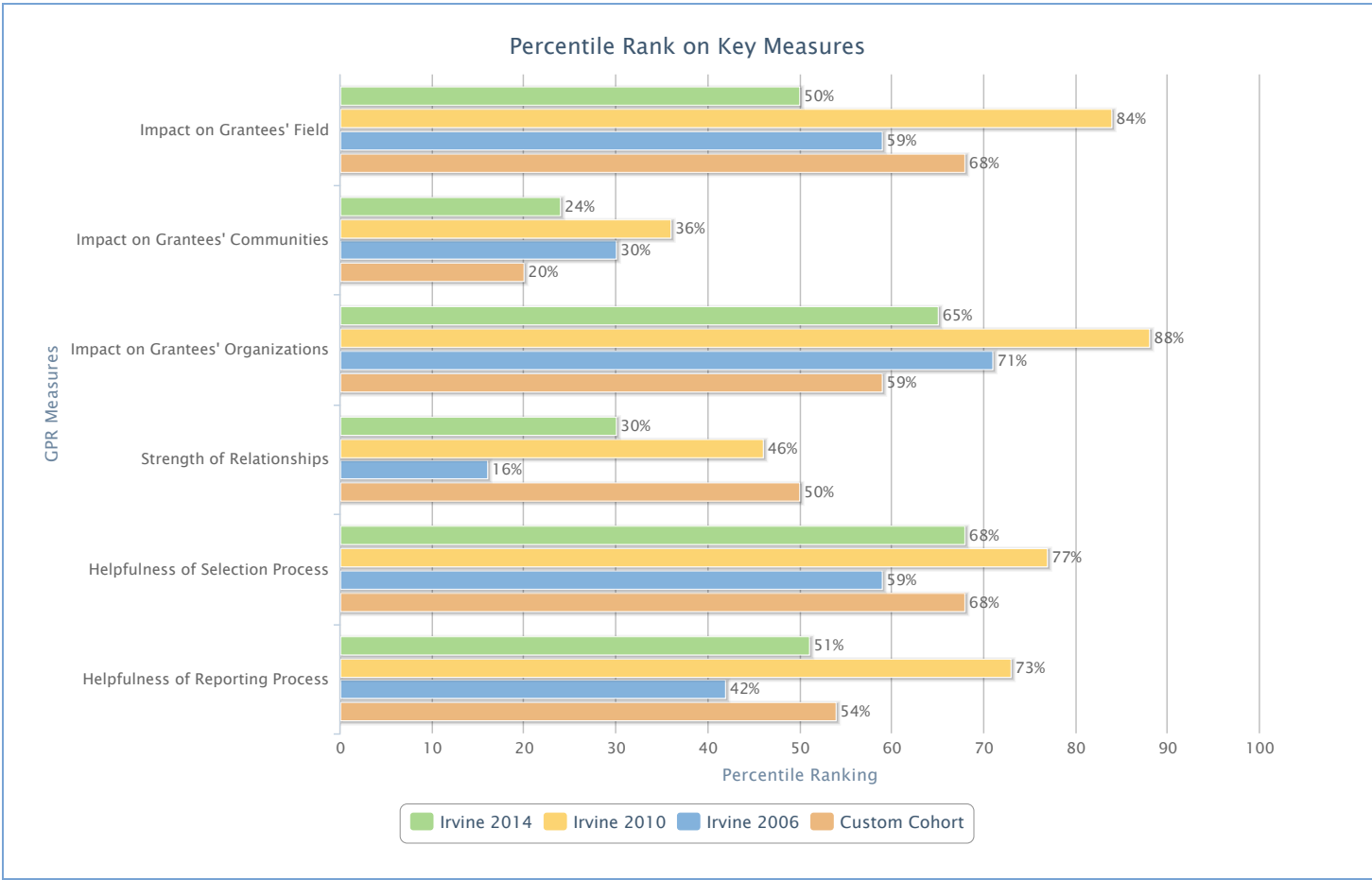
Transition Grantees: No group consistently rates higher or lower than others when grantees are segmented by exiting or transition grant.

Grant Size: Ratings from grantees receiving \$110K-\$200K trend lower than other grantees on most measures.

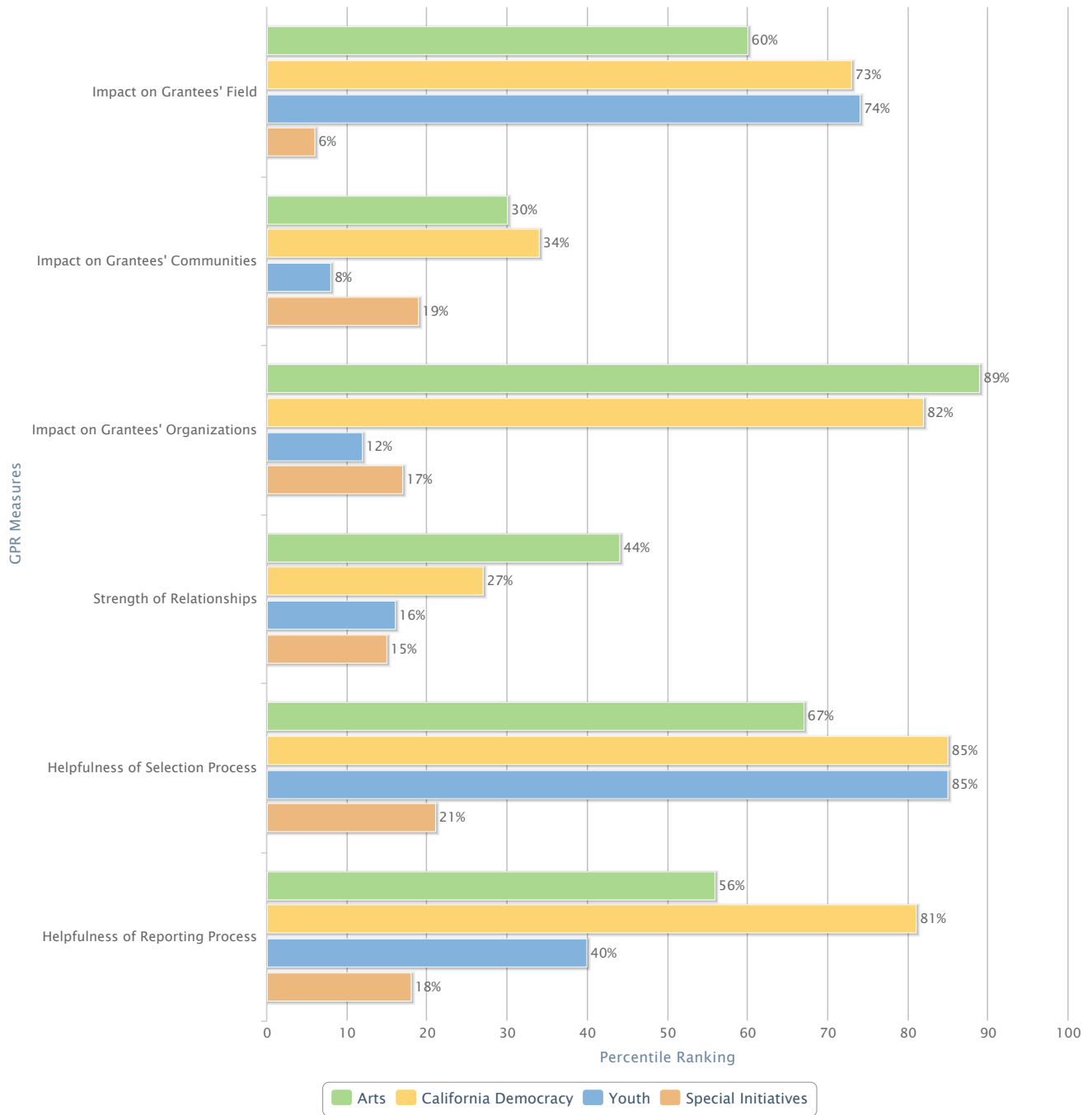
Grant Initiative: Ratings from The James Irvine Foundation Leadership Awards grantees trend lower than other grantees on most measures.

GPR Ratings Summary

The chart below shows The James Irvine Foundation's percentile ranking on key areas of the GPR relative to CEP's overall comparative dataset, where 0% indicates the lowest rated funder, and 100% indicates the highest rated funder. Rankings are also shown for Irvine's previous GPR data and the median funder in the selected peer cohort.



Percentile Rank on Key Measures by Subgroup



Word Cloud

Grantees were asked, "At this point in time, what is one word that best describes the Foundation?" In the "word cloud" below, the size of each word indicates the frequency with which it was written by grantees. Words used only once are not included. The color of each word is stylistic and not indicative of its frequency. Sixteen grantees described Irvine as "Innovative," the most commonly used word.



This image was produced using a free tool available at www.tagxedo.com. Copyright (c) 2006, ComponentAce. <http://www.componentace.com>.

SURVEY POPULATION

CEP surveyed Irvine's grantees in September and October of 2014. CEP has also previously surveyed Irvine's grantees.

Survey	Survey Fielded	Year of Active Grants	Number of Responses Received	Survey Response Rate
Irvine 2014	September and October 2014	2013	235	69%
Irvine 2010	May and June 2010	2009	305	74%
Irvine 2006	September and October 2006	2005	171	72%

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 decade of grantee surveys of more than 300 funders. The full list of participating funders can be found at <http://www.effectivephilanthropy.org/assessment-tools/gpr-apr>.

Subgroups

In addition to showing Irvine's overall ratings, this report shows ratings segmented by Program Area. The online version of this report also shows ratings segmented by Priority Region, Region, Transition Grant, Grant Size, and Grant Initiative.

Program Area	Number of Responses
Arts	132
California Democracy	39
Youth	32
Special Initiatives	30

Priority Region	Number of Responses
Other Region	209
Priority Region	26

Region	Number of Responses
Bay Area	40
CA Statewide	64
San Joaquin Valley	14
San Diego and Imperial	16
Riverside and San Bernardino	11
LA Metro	55
Central Coast	14

Transition Grant	Number of Responses
Other Grant	203
Exiting or Transition Grant	32

Grant Size	Number of Responses
\$100K or less	58
\$110K-\$200K	56
\$220K-\$500K	62
Greater than \$500K	52

Grant Initiative	Number of Responses
James Irvine Foundation Leadership Awards	19
Exploring Engagement Fund	68
Arts Regional Initiative	13
New California Arts Fund	15
Linked Learning District Initiative	25
Future of California Elections	9
Other Grant Initiative	13

COMPARATIVE COHORTS

Customized Cohort

Irvine selected a set of 15 funders to create a smaller comparison group that more closely resembles Irvine in scale and scope.

Custom Cohort
Bill & Melinda Gates Foundation
Doris Duke Charitable Foundation
Evelyn and Walter Haas, Jr. Fund
Lumina Foundation for Education, Inc.
Rockefeller Brothers Fund
Surdna Foundation, Inc.
The California Endowment
The David and Lucile Packard Foundation
The Duke Endowment
The Ford Foundation
The Heinz Endowments
The James Irvine Foundation
The Wallace Foundation
The William and Flora Hewlett Foundation
Weingart Foundation

Standard Cohorts

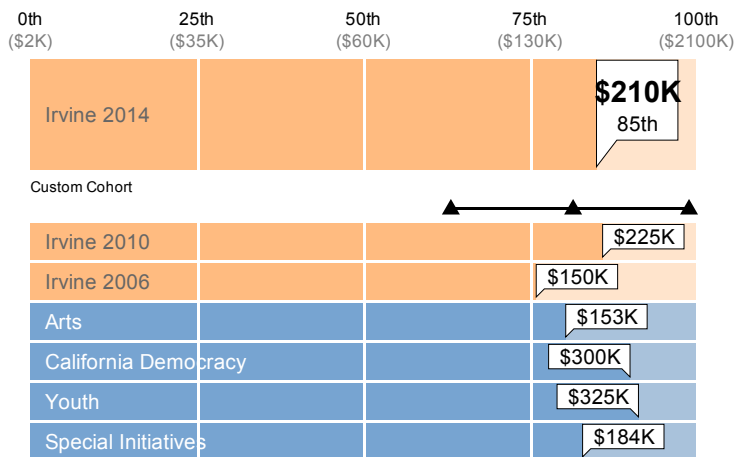
CEP also included nine standard cohorts to allow for comparisons to a variety of different types of funders. A full list of funders in each cohort is provided in the "Funders in Comparative Cohorts" section of the online report.

Cohort Name	Count	Description
Community Foundations	33	All community foundations in the GPR dataset
Health Conversion Foundations	28	All health conversion funders in the GPR dataset
Small Private Funders	60	Private funders with annual giving of less than \$10 million
Medium Private Funders	94	Private funders with annual giving of \$10 million - \$49 million
Large Private Funders	33	Private funders with annual giving of \$50 million or more
Regional Funders	194	Funders that make grants in a specific community or region of the US
National Funders	57	Funders that make grants across the US
International Funders	36	Funders that make grants outside the US

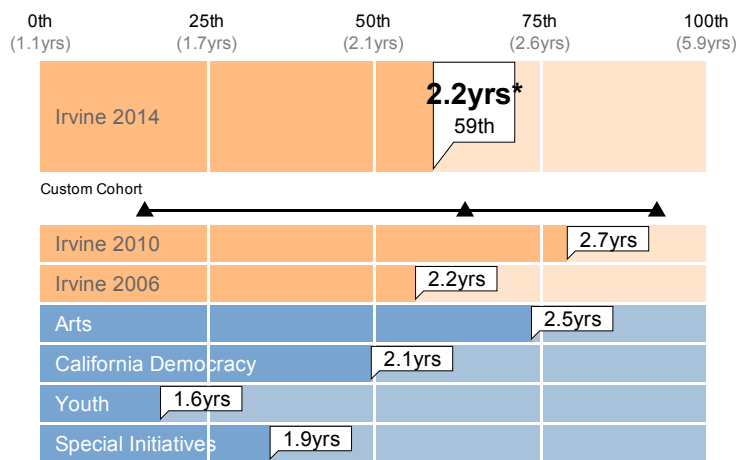
GRANTMAKING CHARACTERISTICS

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.

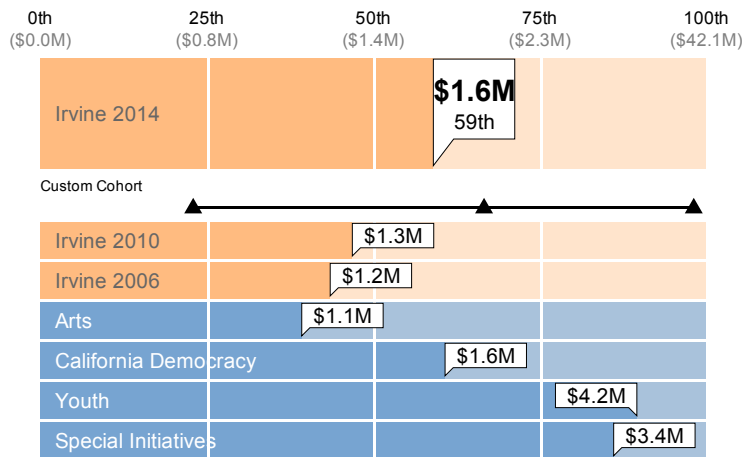
MEDIAN GRANT SIZE



AVERAGE GRANT LENGTH



TYPICAL ORGANIZATIONAL BUDGET

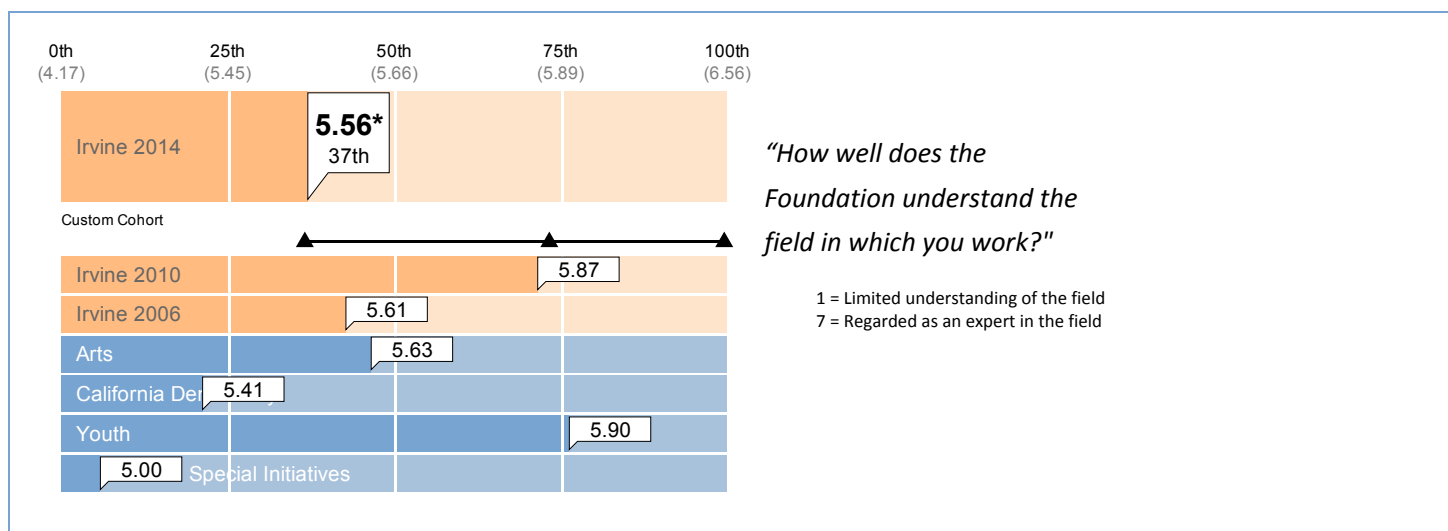
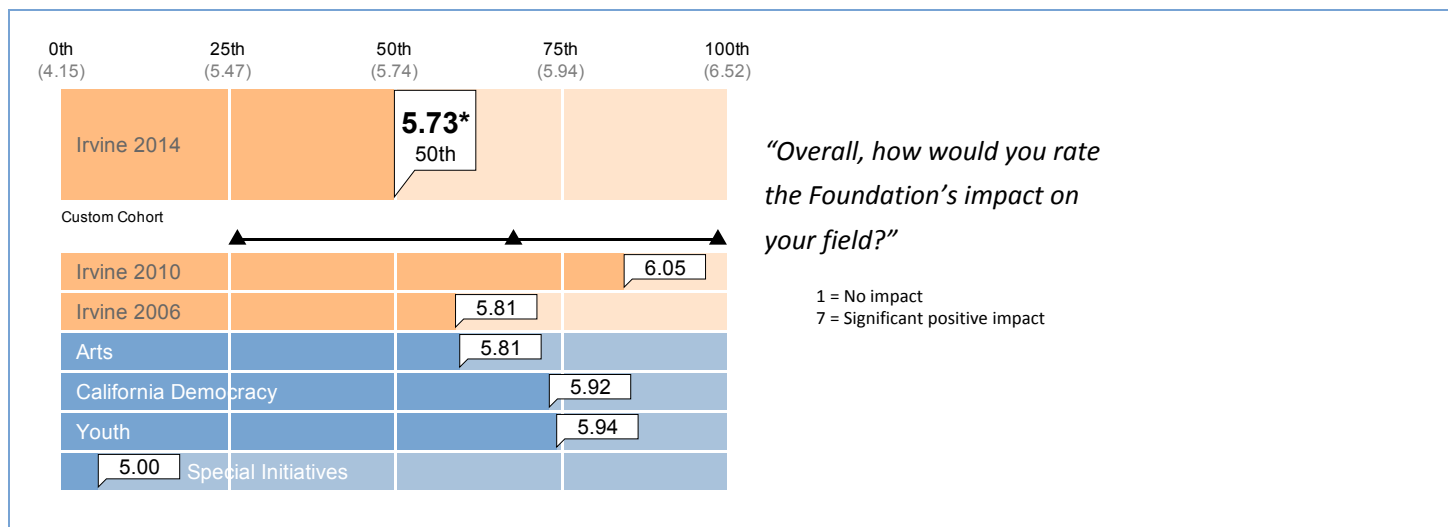


Type of Support (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Average Funder	Custom Cohort
Percent of grantees receiving operating support	14%	9%	8%	20%	21%
Percent of grantees receiving program/project support	79%	70%	80%	64%	66%
Percent of grantees receiving other types of support	7%	21%	12%	16%	13%

Grant History (Overall)	Irvine 2014	Irvine 2010	Average Funder	Custom Cohort
Percentage of first-time grants	22%	33%	29%	25%

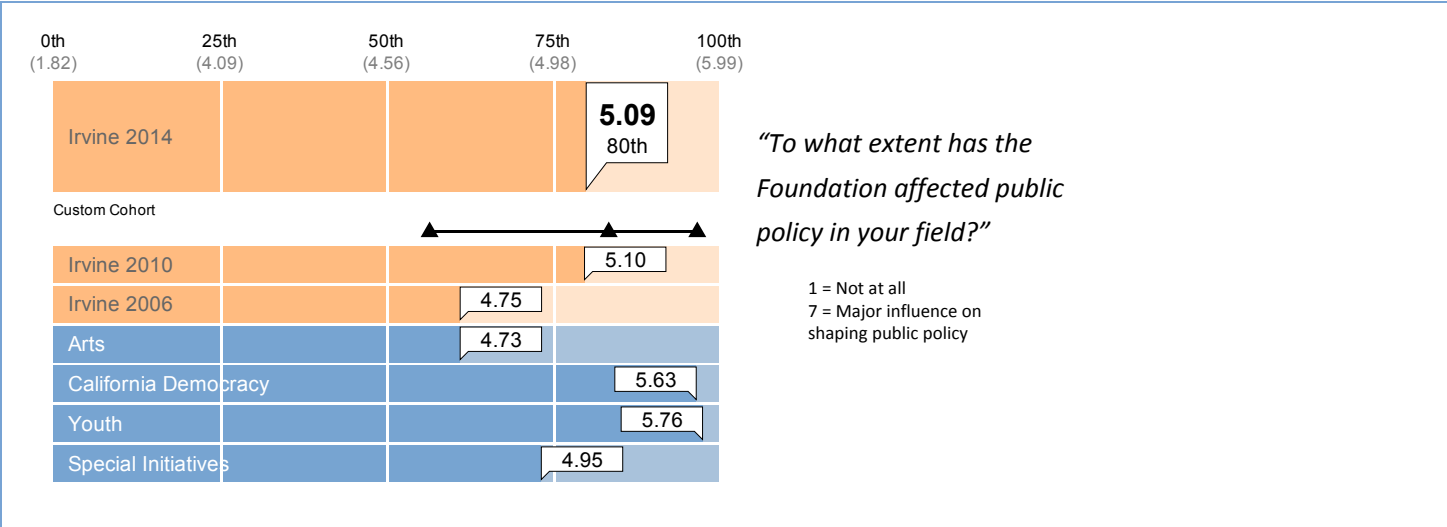
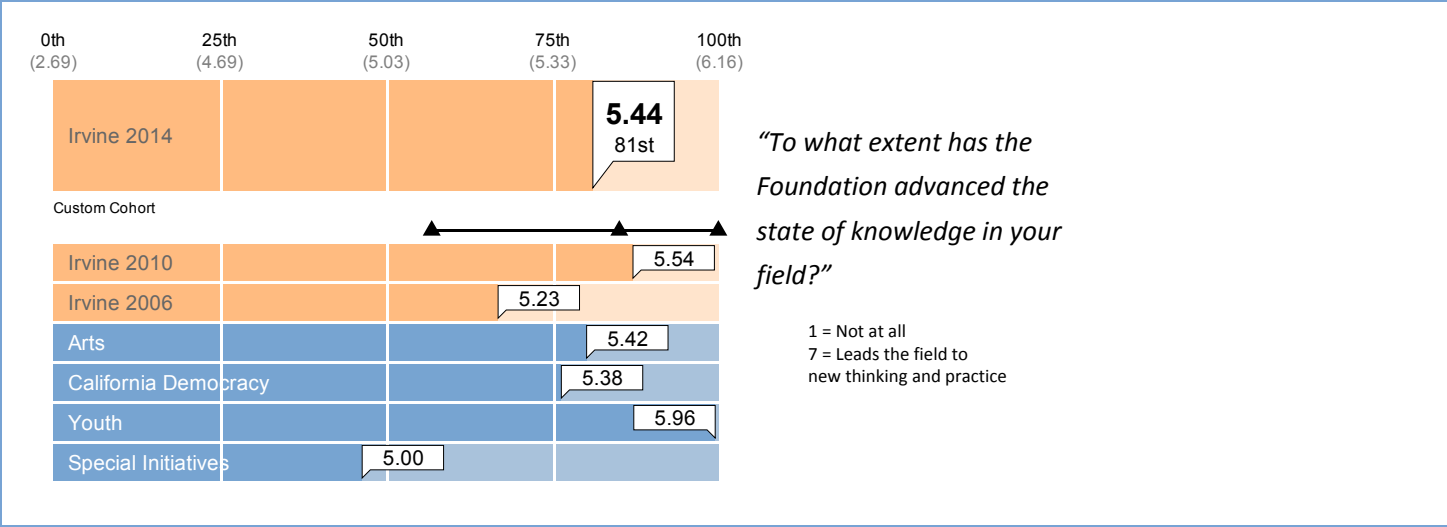
Program Staff Load (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Median Funder	Custom Cohort
Dollars awarded per program staff full-time employee	\$4.8M	\$4.2M	\$4.6M	\$2.6M	\$4.5M
Applications per program full-time employee	30	31	52	29	20
Active grants per program full-time employee	34	39	41	33	31

IMPACT ON AND UNDERSTANDING OF GRANTEES' FIELDS

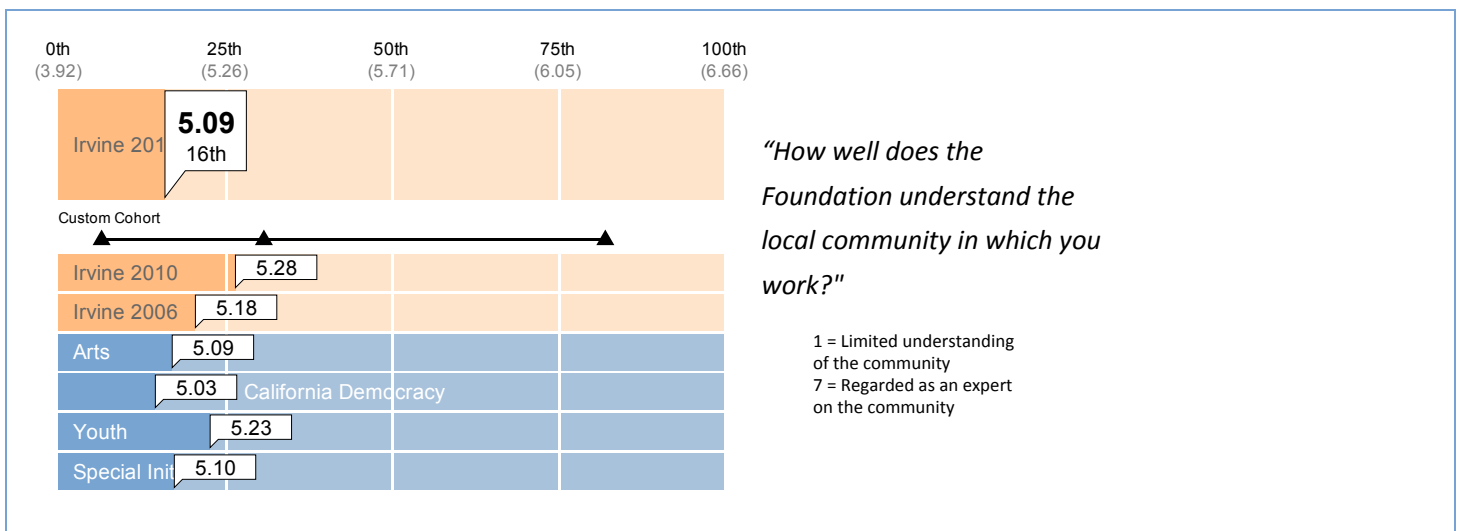
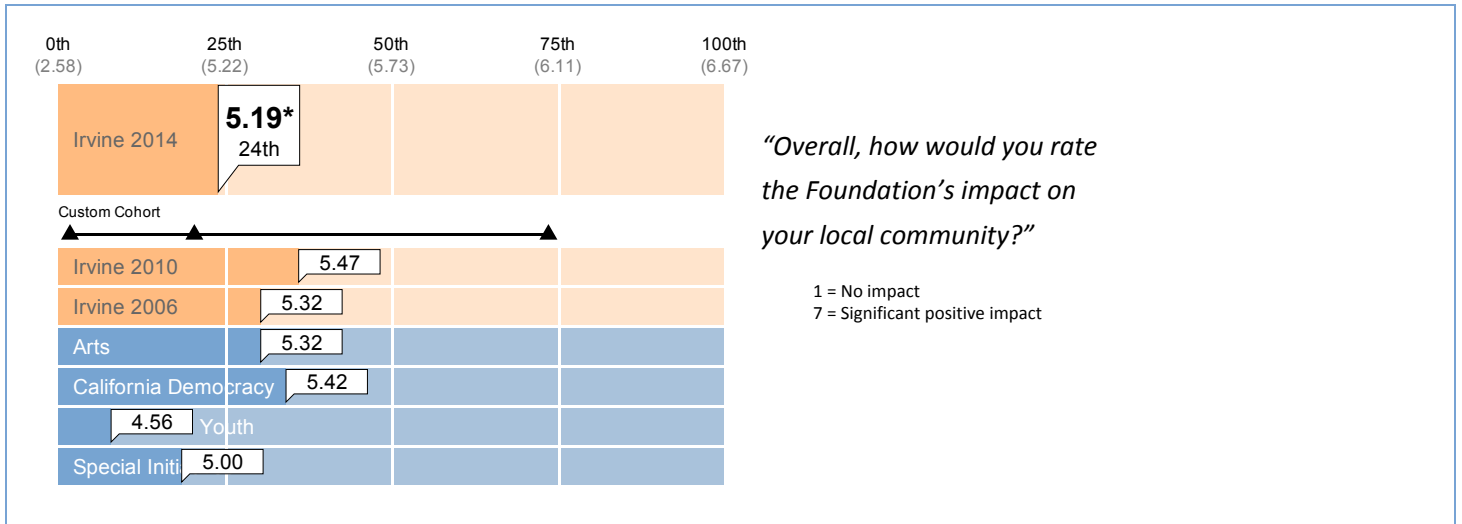


Selected Grantee Comments:

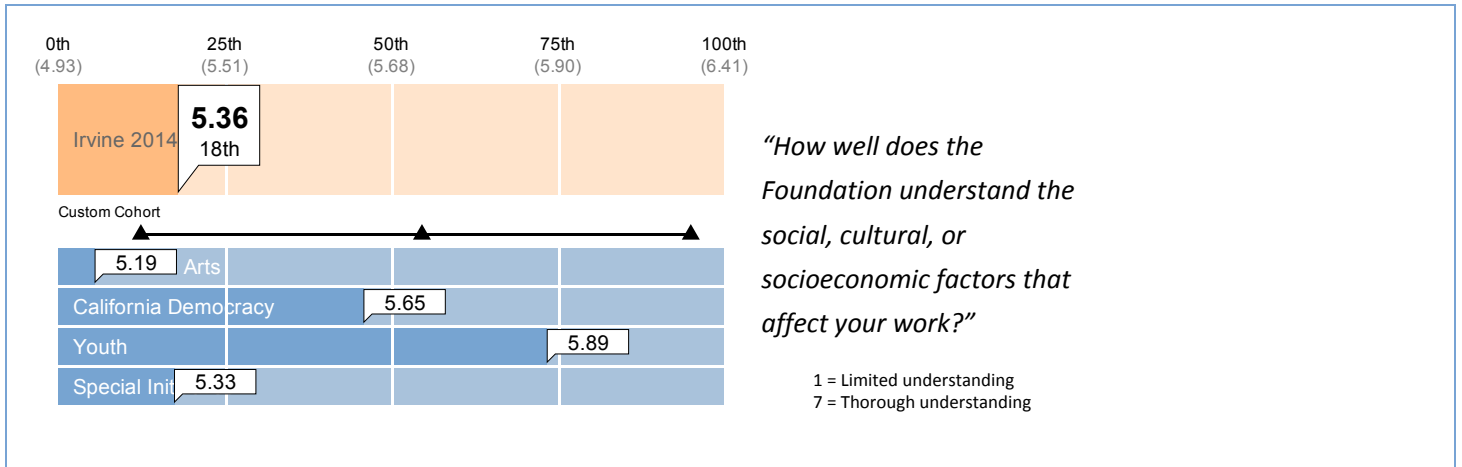
- » "Irvine has helped fill a huge void in the state's election community; its support for collaborative efforts to increase participation and improve elections has been vitally important over the last 3-plus years."
- » "Irvine has been a driving force in creating a movement around Linked Learning. It would not have the look, feel or impact that it does today without Irvine's - and [our program officer's] - vision on this front."
- » "The funding priorities changing almost every year is extremely frustrating."
- » "The Foundation has had a tremendous influence on the arts and culture field over the past 20 years. Their research and initiatives have helped lead significant movements that are evidenced in all of our work today."



IMPACT ON AND UNDERSTANDING OF GRANTEES' LOCAL COMMUNITIES



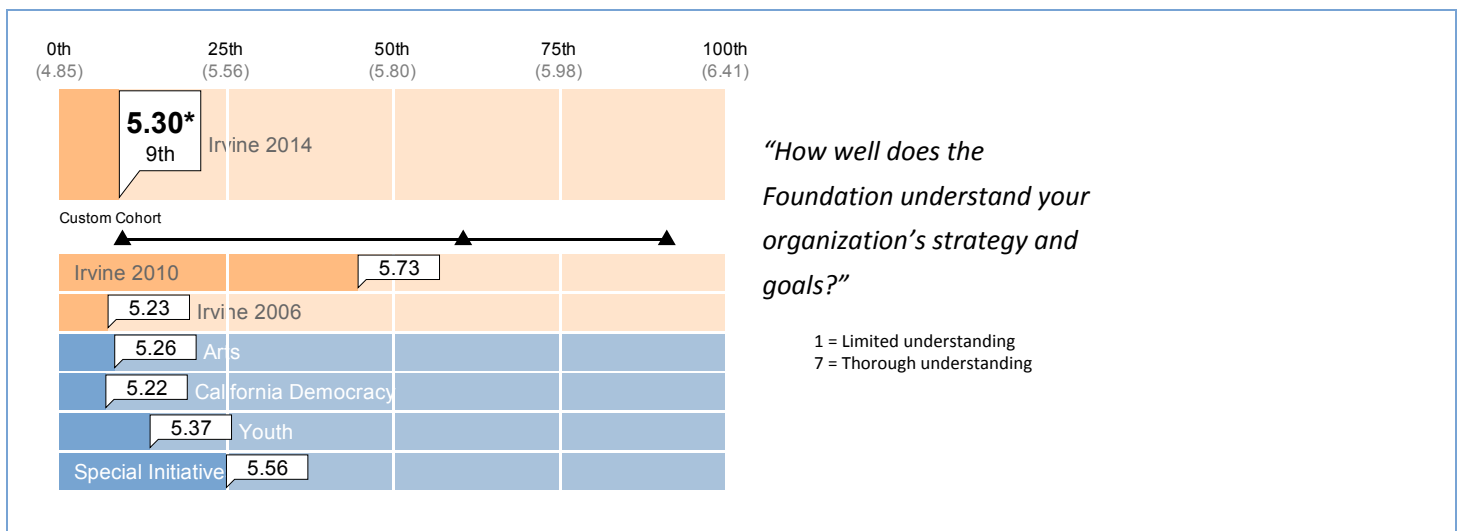
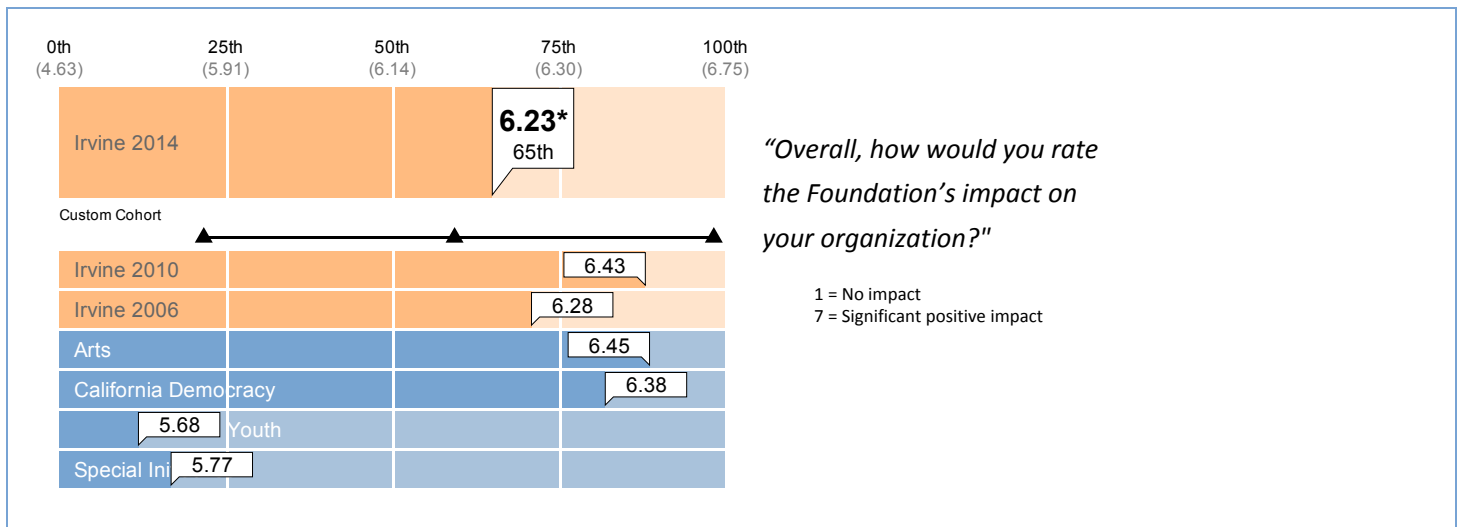
Understanding of Contextual Factors

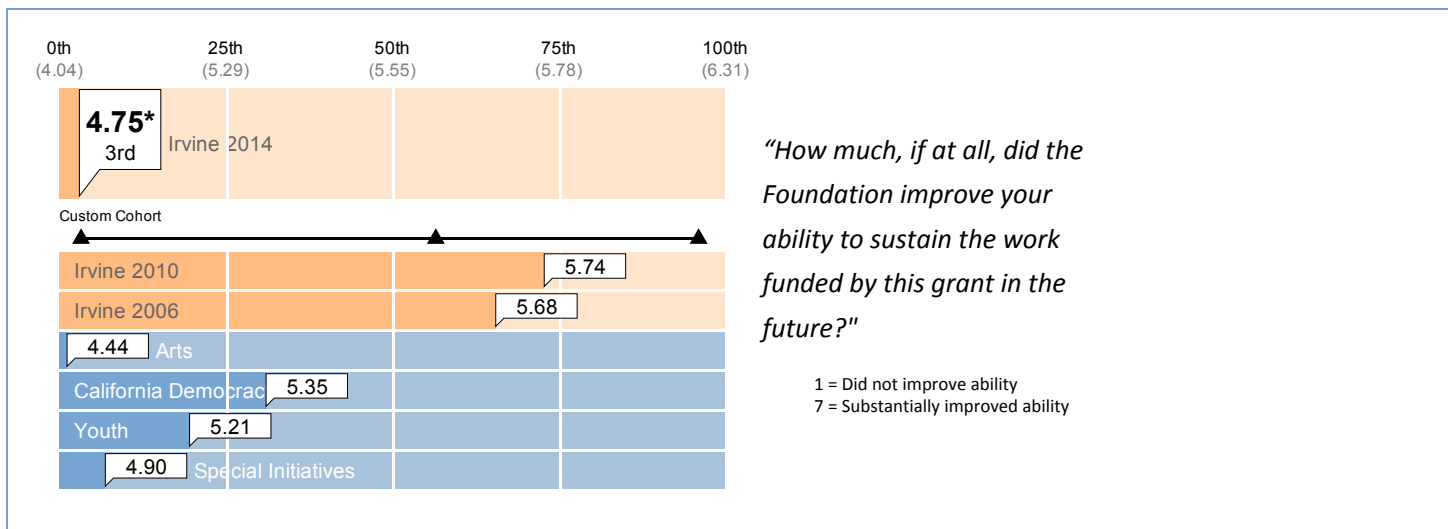


Selected Grantee Comments:

- » "Because we are based in Northern California, there doesn't seem to be as much of an impact on our field from that perspective.... The interest in community based arts is stated, but I'm not sure how much the Foundation is looking at models and activities to see who is doing what."
- » "Irvine is crucial to the ecology of the Arts community in Los Angeles."
- » "The Foundation has demonstrated limited interest in and understanding of the needs of the large Spanish speaking population in the state of California."

IMPACT ON AND UNDERSTANDING OF GRANTEES' ORGANIZATIONS





Selected Grantee Comments:

- » "The James Irvine Foundation has been an essential partner to our organization - overseeing our grant-writing process from beginning to end, making frequent contact with our staff members during the initial crafting of the funded project, to providing excellent final evaluation and review services at our project's conclusion."
- » "The Foundation and our organization might both benefit by more attention to (and conversations about) each other's theory of change, especially as the Foundation's funding interests and goals continue to evolve."
- » "Our missions are aligned, and we can be thought partners with Foundation staff to develop effective programs."
- » "I did not feel that the Foundation was invested in the overall success of the organization."

Effect of Grant on Organization

"Which of the following statements best describes the primary effect the receipt of this grant had on your organization's programs or operations?"

Primary Effect of Grant on Grantee's Organization (Overall)	Irvine 2014	Irvine 2010	Average Funder	Custom Cohort
Enhanced Capacity	27%	35%	29%	32%
Expanded Existing Program Work	24%	24%	26%	25%
Maintained Existing Program	14%	9%	19%	14%
Added New Program Work	36%	33%	25%	28%

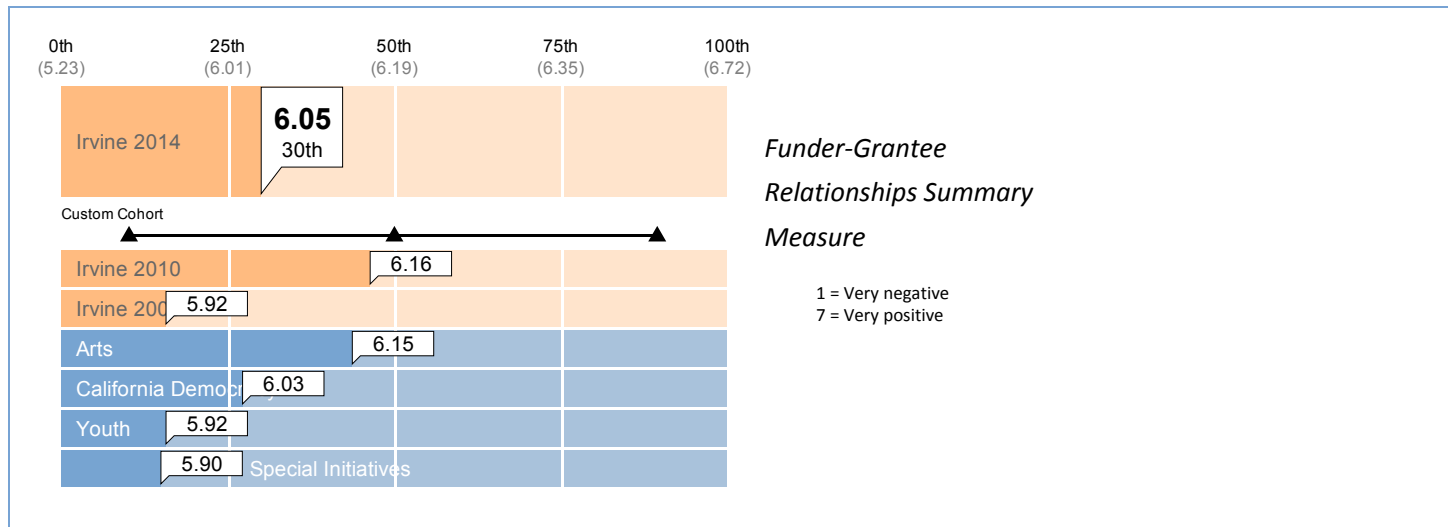
Primary Effect of Grant on Grantee's Organization (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
Enhanced Capacity	26%	26%	23%	31%
Expanded Existing Program Work	18%	39%	27%	31%
Maintained Existing Program	13%	16%	20%	8%
Added New Program Work	44%	18%	30%	31%

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



Selected Grantee Comments:

» "Whenever we had an issue, question or concern, we received a response that answered the question. However, the response or final answer sometimes took a week or longer to hear back."

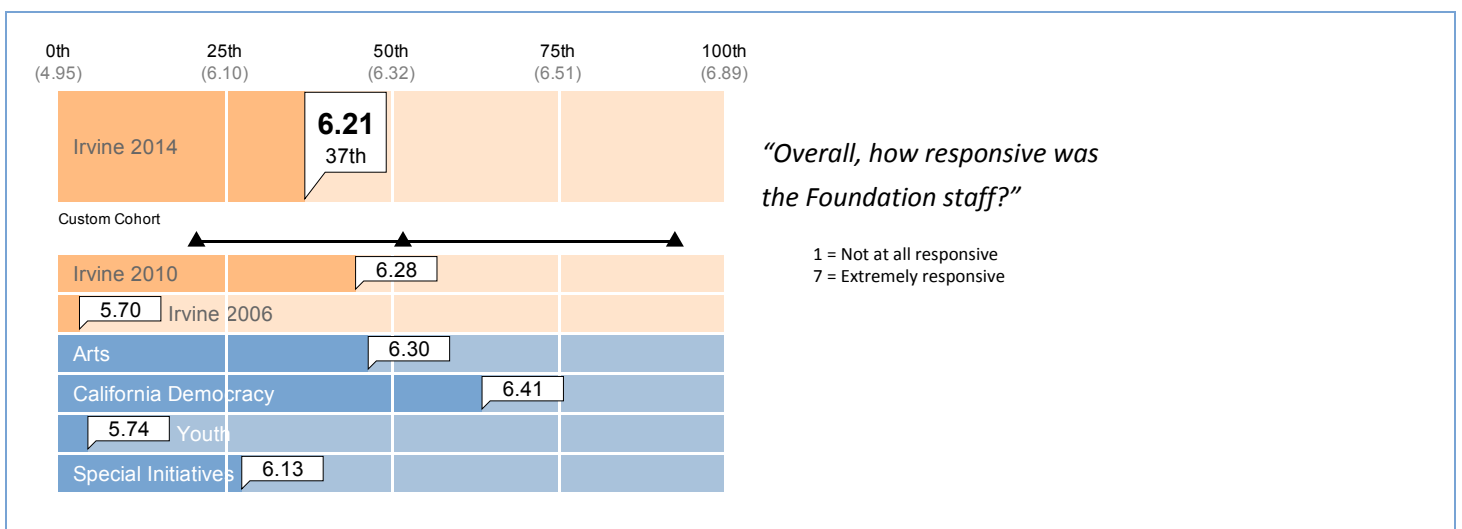
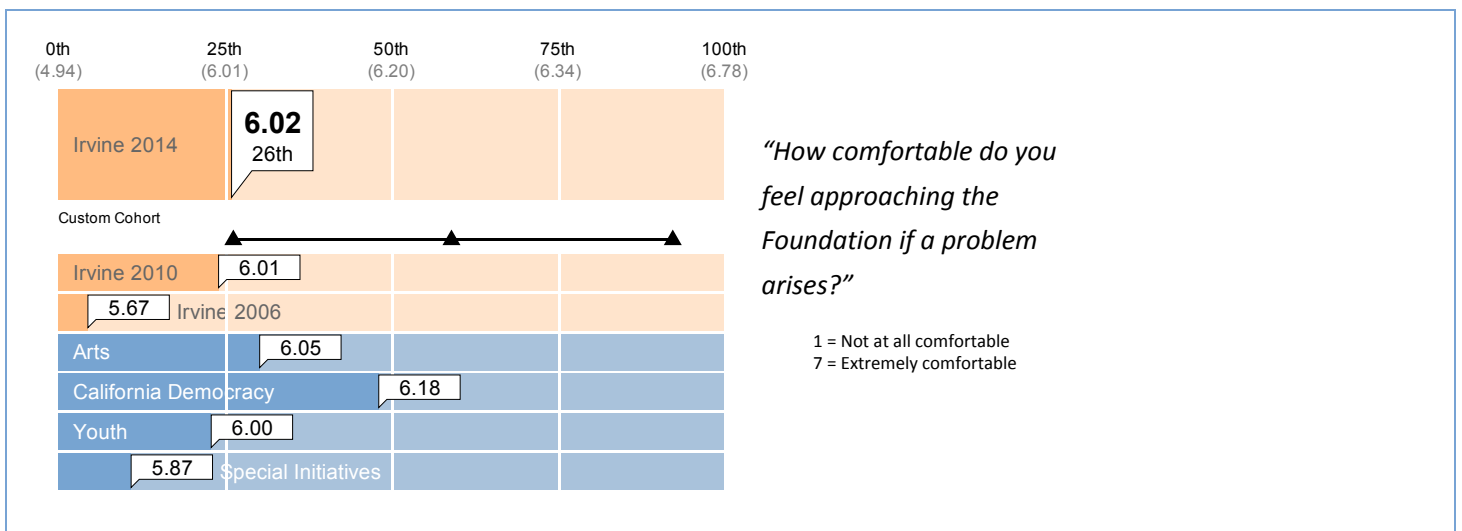
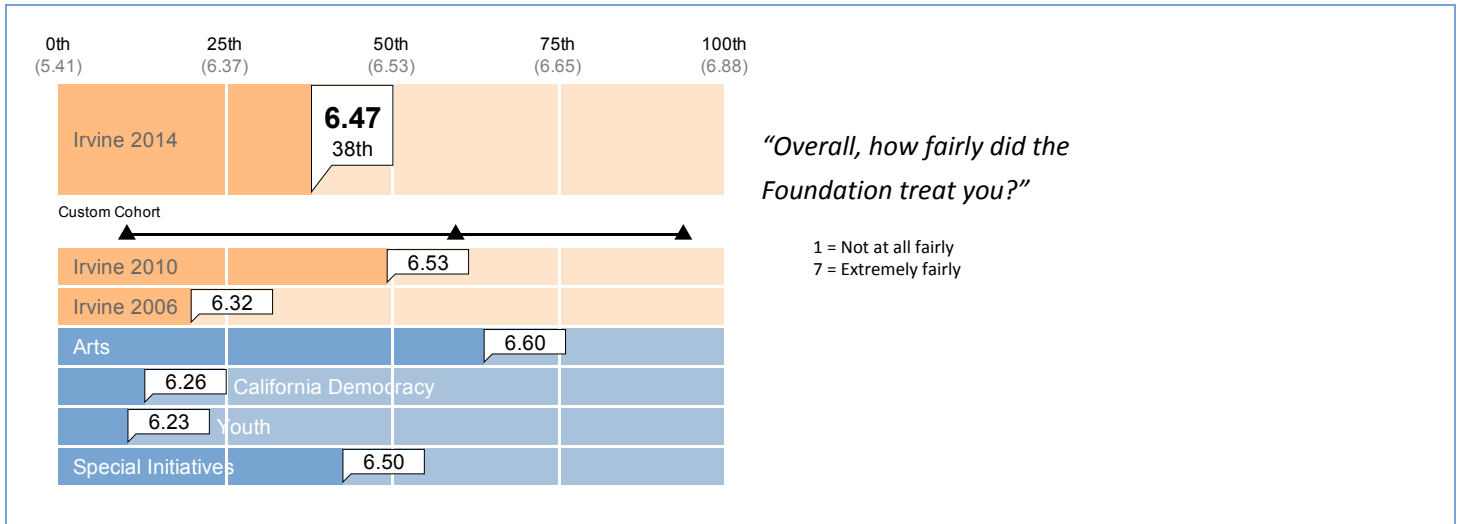
» "Communication was not regular and many times emails were sent with no response at all."

» "Interaction with Foundation staff has always been of the highest quality. However, after six years as a grantee the interaction did change significantly with the change in program officer. Possibly due to the new program staff needing more information to fully understand the organization and its program work."

» "Initially tough to establish contact with program officer. But once contact established interaction was very positive."

» "The clarity and quality of the Foundation's processes, interactions and communications has been affected by their ongoing development of strategy. We had to ask questions multiple times, sometimes the same question asked in a different manner, just to clarify certain points."

Quality of Interactions



Interaction Patterns

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

Frequency of Contact with Program Officer (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Average Funder	Custom Cohort
Weekly or more often	1%	0%	2%	3%	2%
A few times a month	9%	6%	7%	10%	13%
Monthly	15%	14%	11%	13%	19%
Once every few months	54%	59%	46%	51%	53%
Yearly or less often	20%	21%	35%	24%	13%

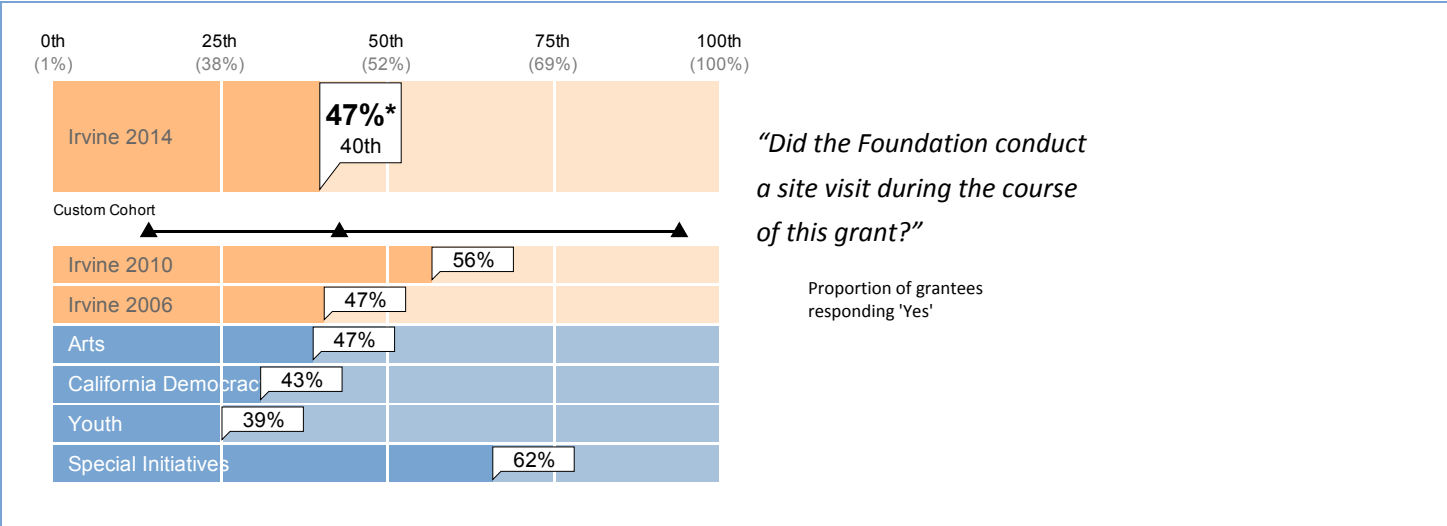
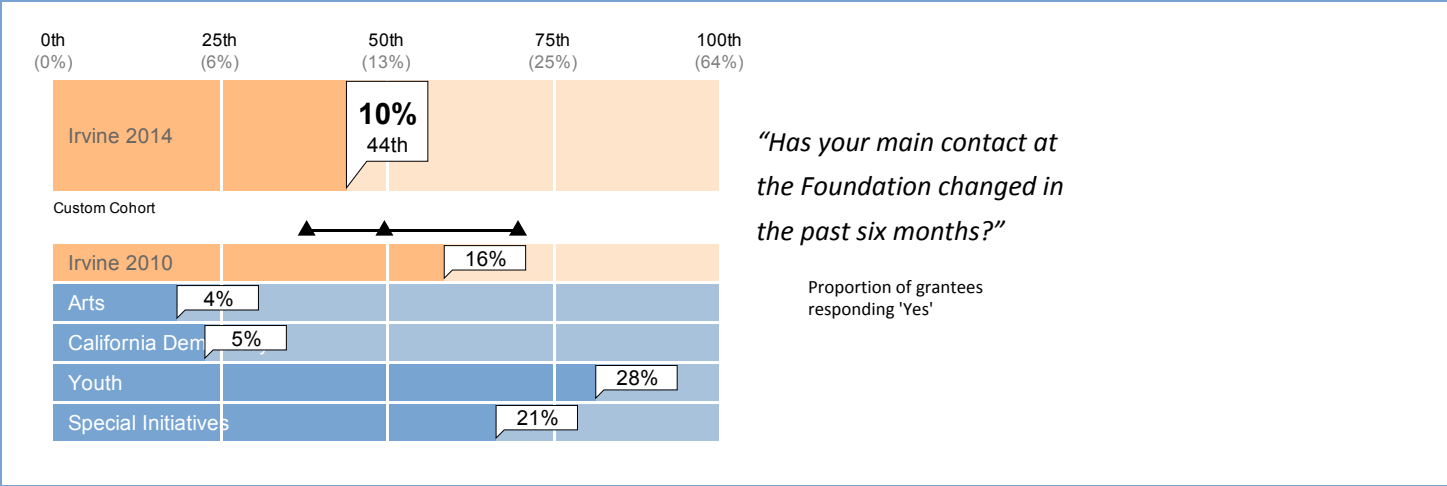
Frequency of Contact with Program Officer (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
Weekly or more often	0%	3%	3%	3%
A few times a month	4%	18%	16%	13%
Monthly	8%	23%	44%	7%
Once every few months	63%	44%	34%	50%
Yearly or less often	25%	13%	3%	27%

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

Initiation of Contact with Program Officer (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Average Funder	Custom Cohort
Program Officer	9%	12%	15%	15%	12%
Both of equal frequency	50%	43%	40%	49%	54%
Grantee	41%	45%	45%	36%	34%

Initiation of Contact with Program Officer (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
Program Officer	9%	14%	3%	11%
Both of equal frequency	45%	59%	72%	36%
Grantee	45%	27%	25%	54%

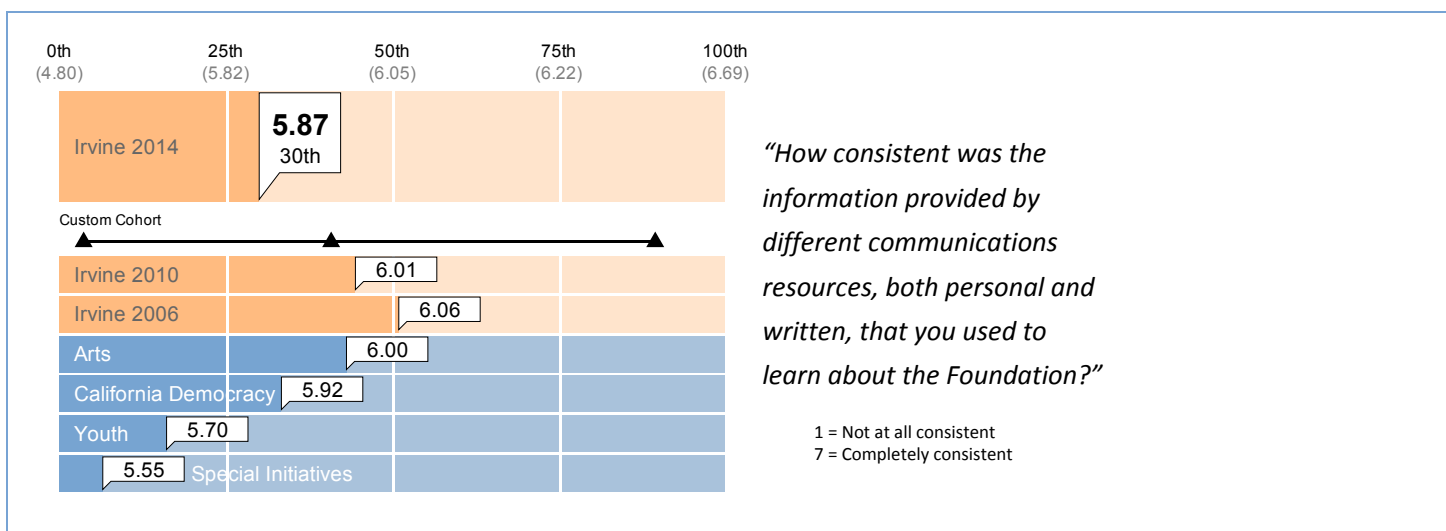
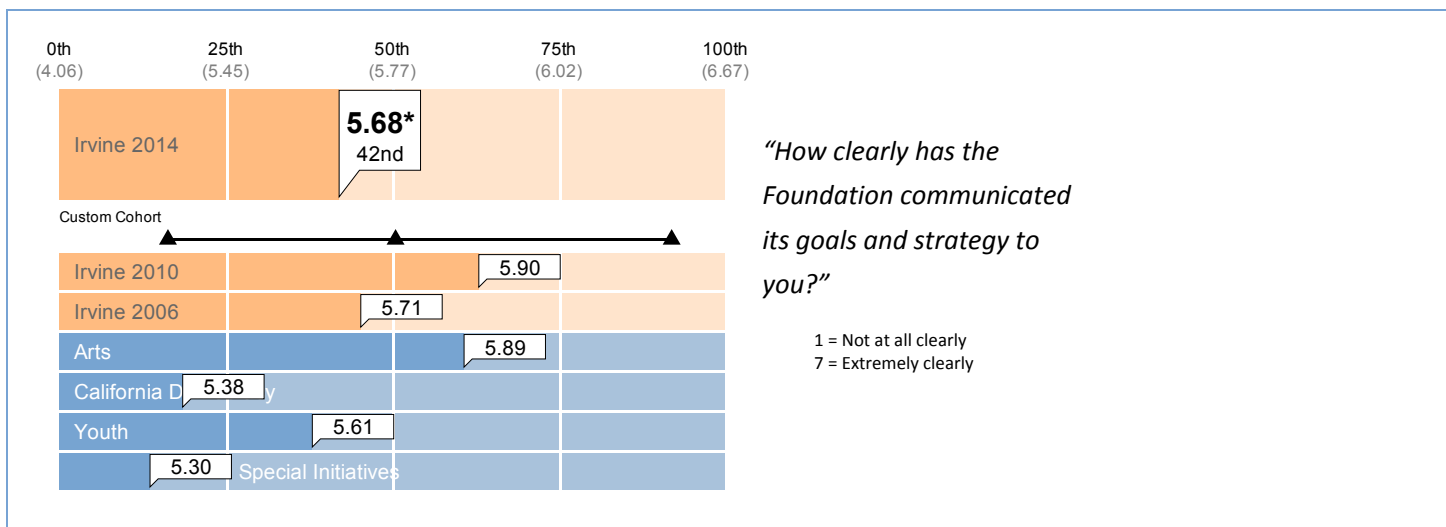
Contact Change and Site Visits



Behind the Numbers

Irvine grantees that report receiving a site visit rate the Foundation higher for its impact on local communities.

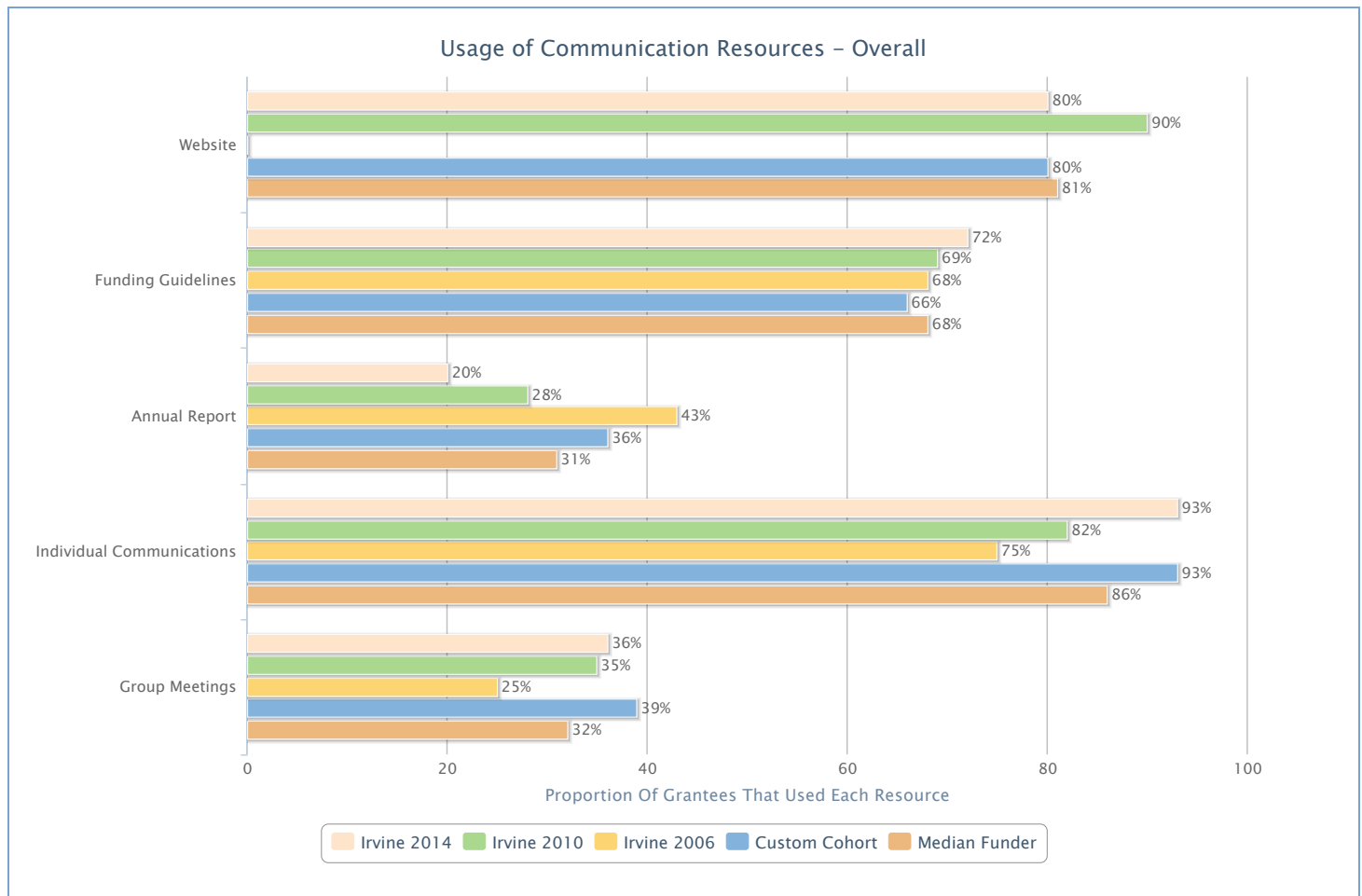
Foundation Communication



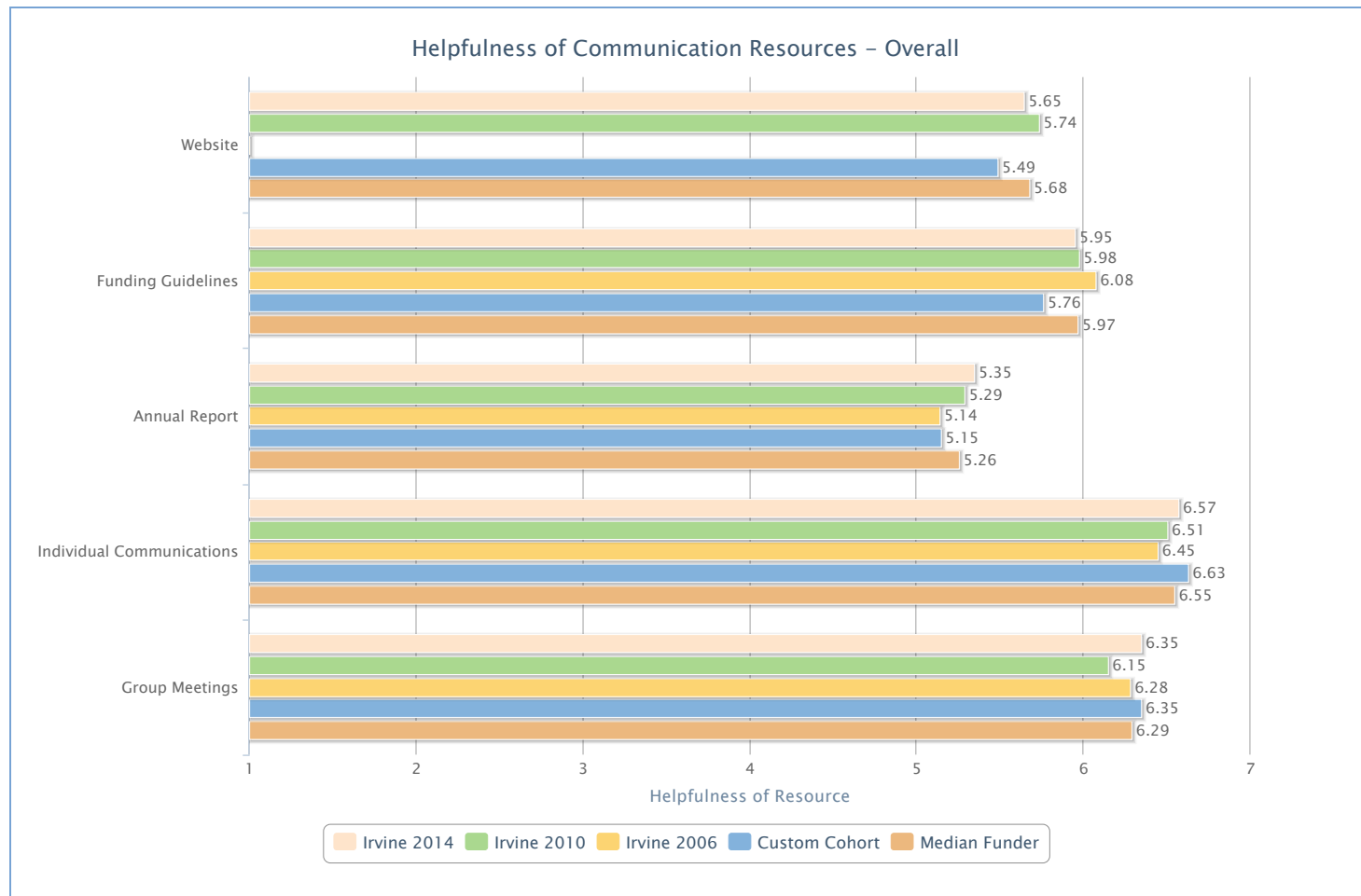
Communication Resources

Grantees were asked whether they used each of the following communications resources from Irvine and how helpful they found each resource. This chart shows the proportion of grantees who have used each resource.

"Please indicate whether you used any of the following resources, and if so how helpful you found each."

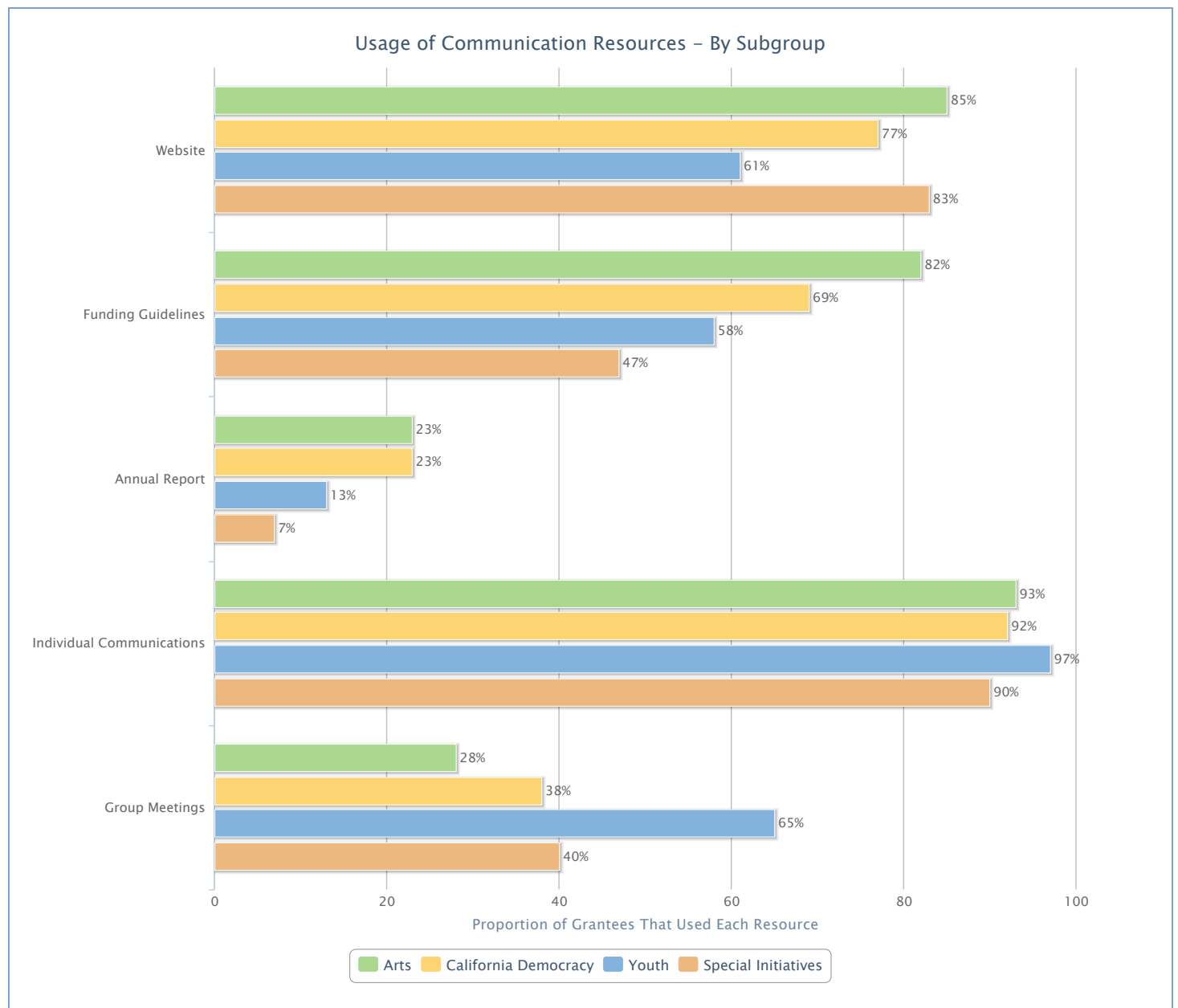


The chart below shows the perceived helpfulness of each resource, where 1 = "Not at all helpful" and 7 = "Extremely helpful."

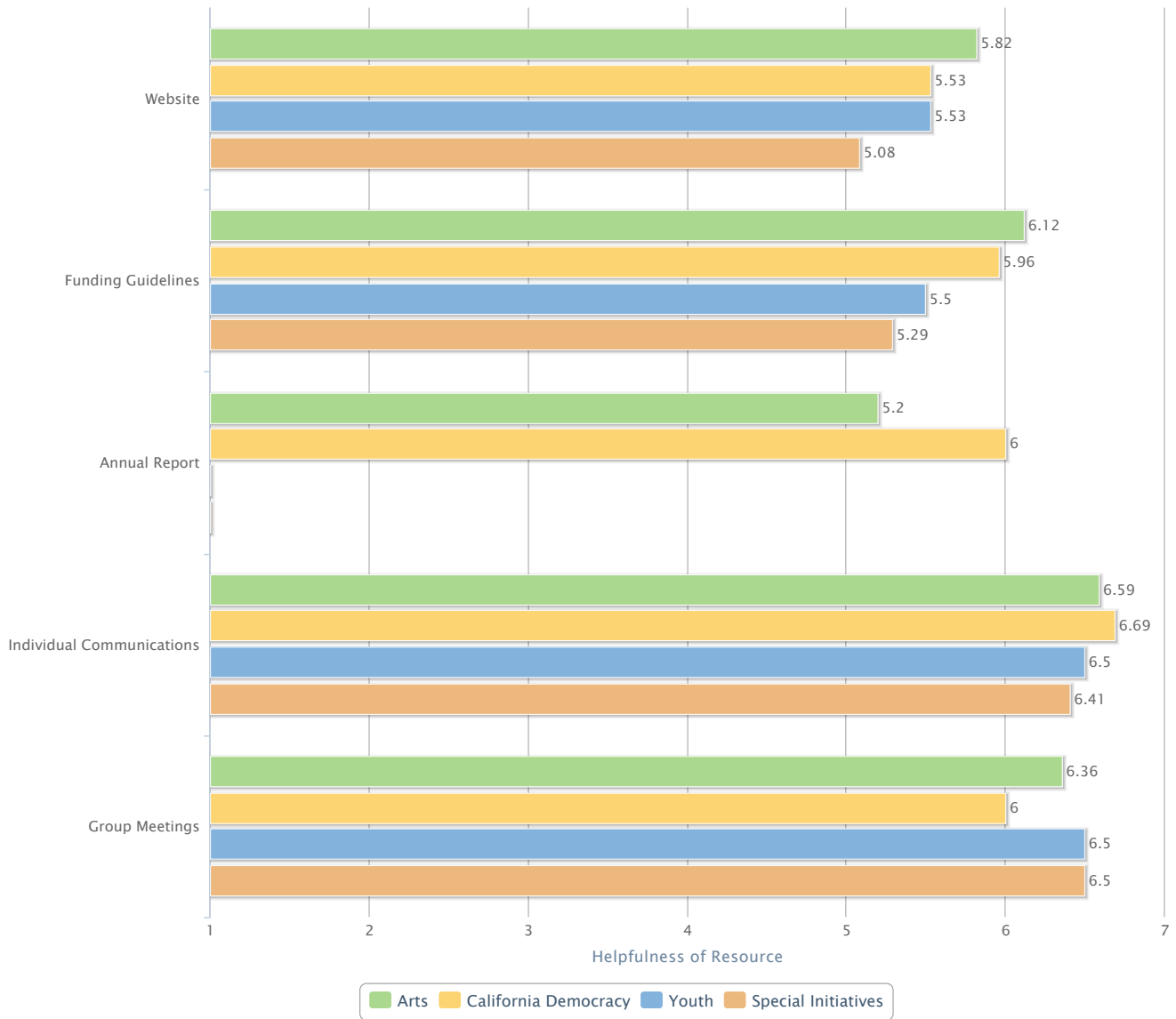


The following charts show the usage and helpfulness of communications resources segmented by subgroup.

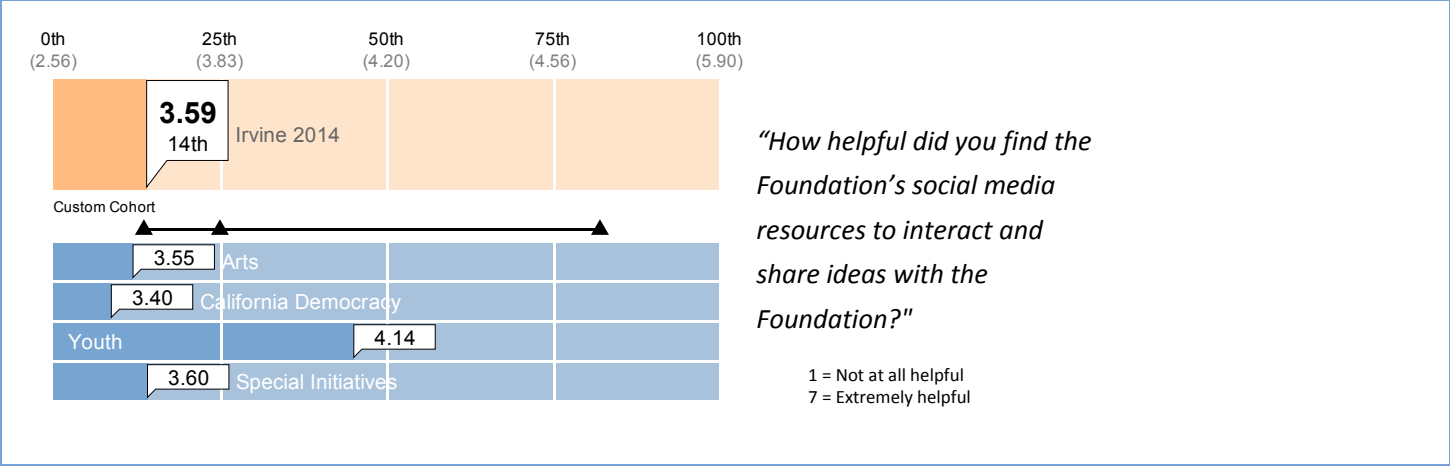
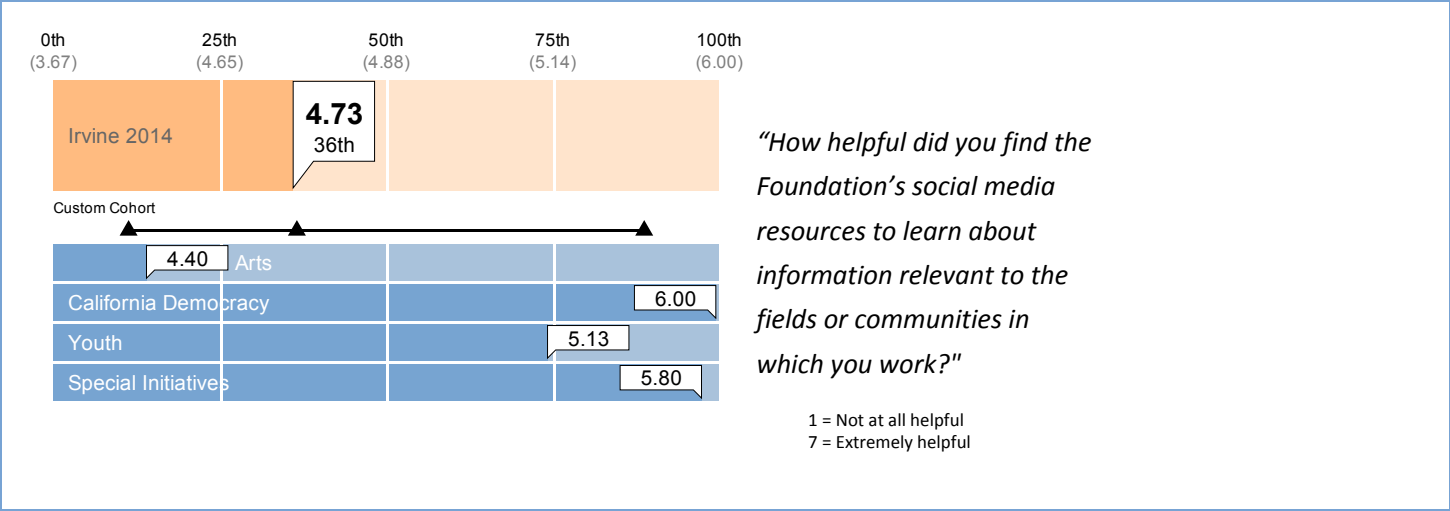
"Please indicate whether you used any of the following resources, and if so how helpful you found each."



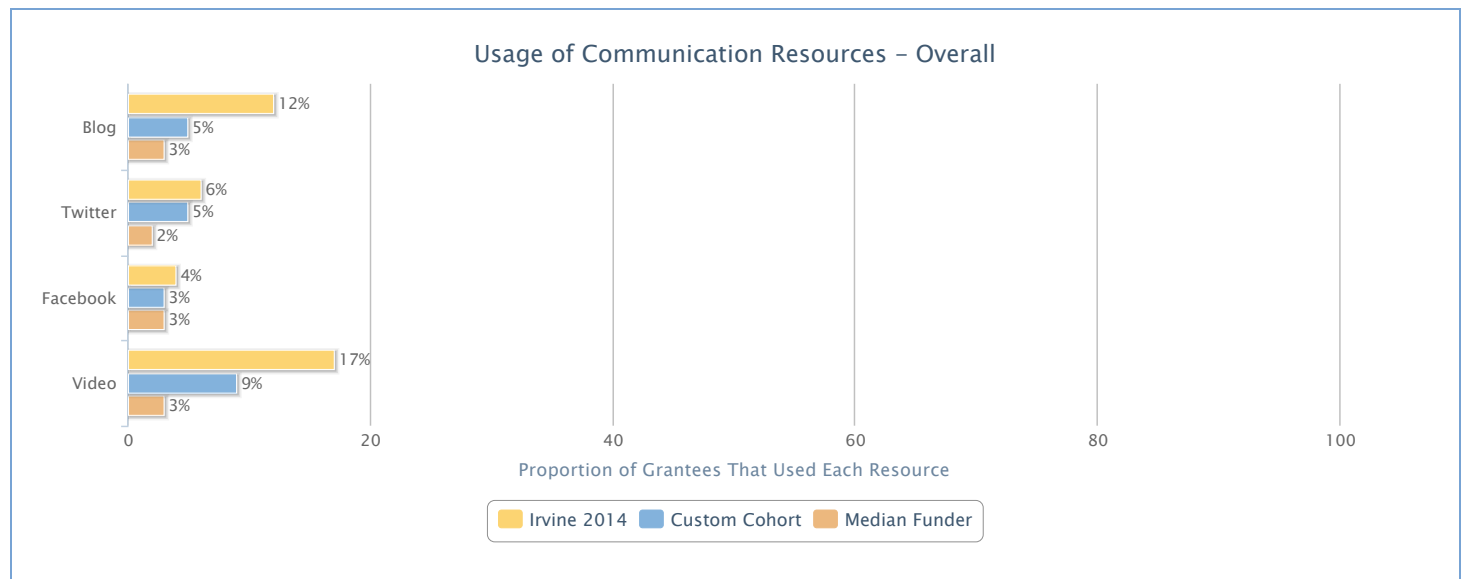
Helpfulness of Communication Resources – By Subgroup



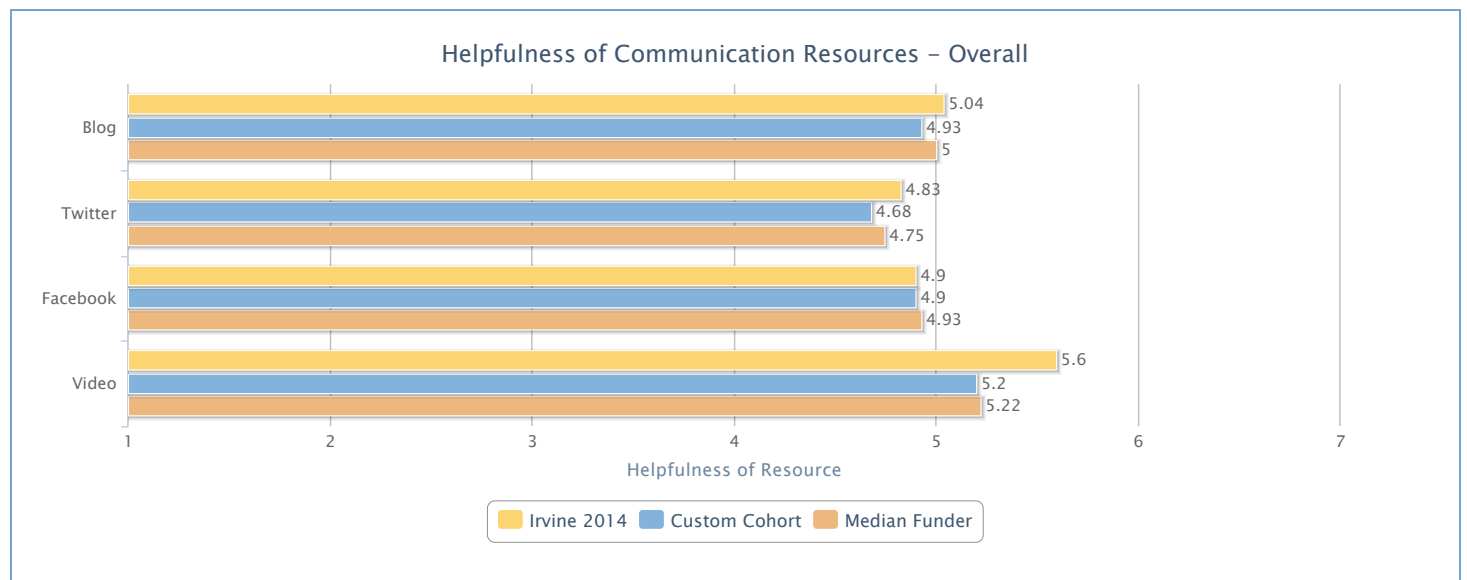
Social Media



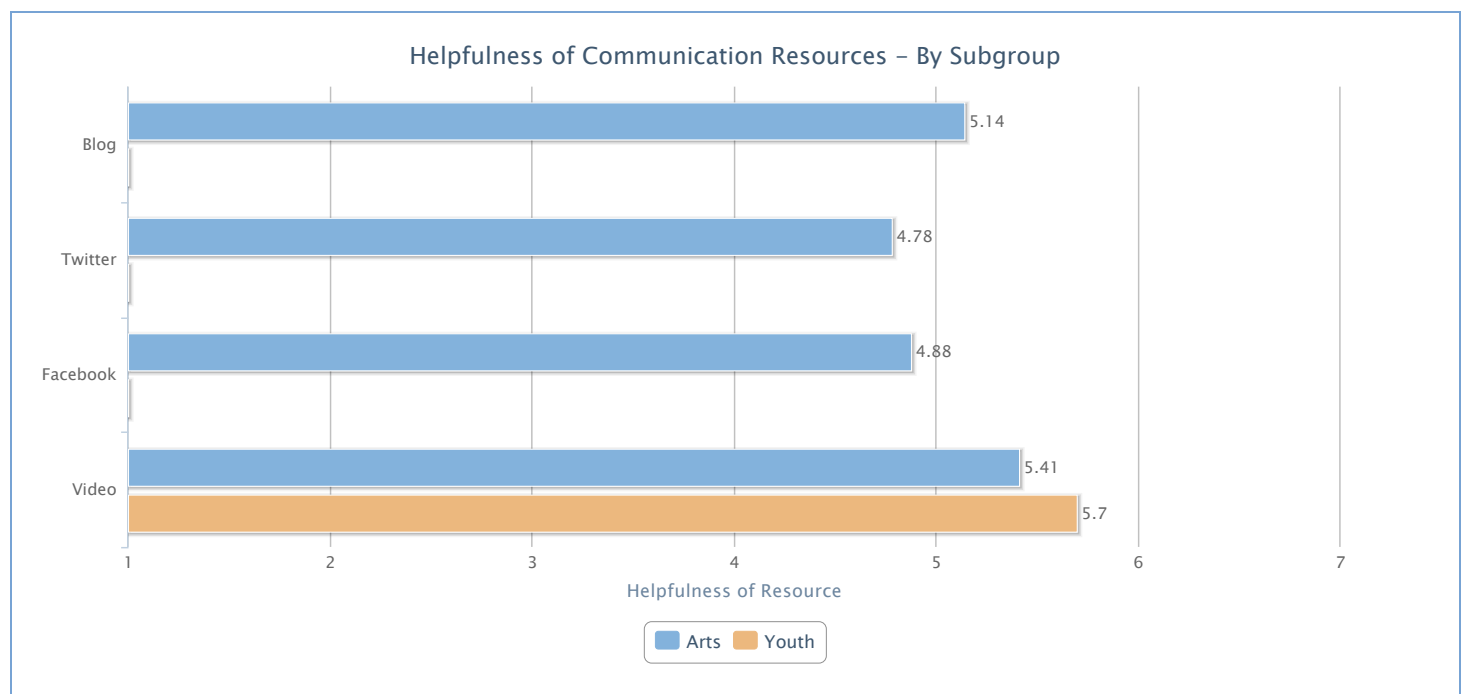
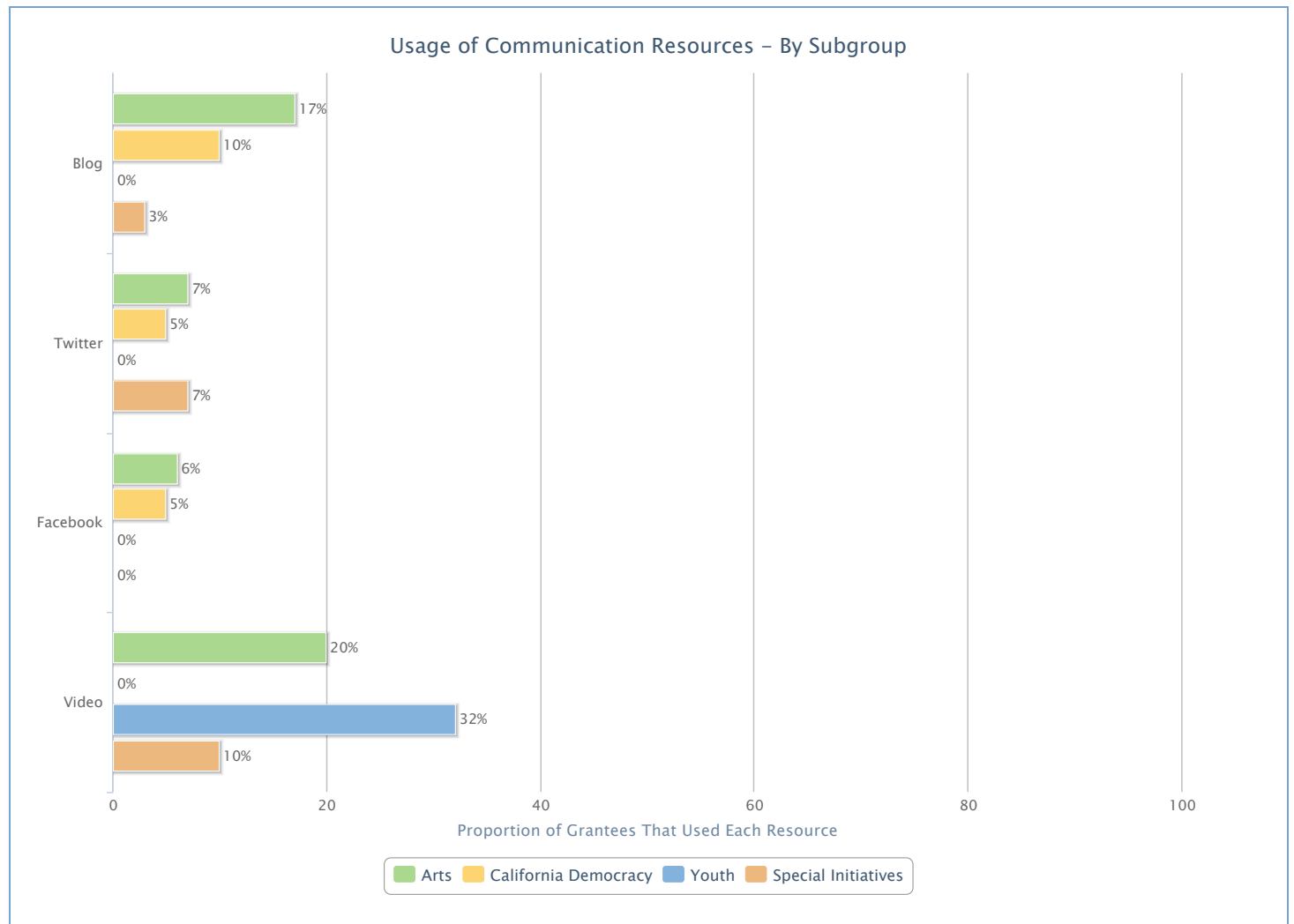
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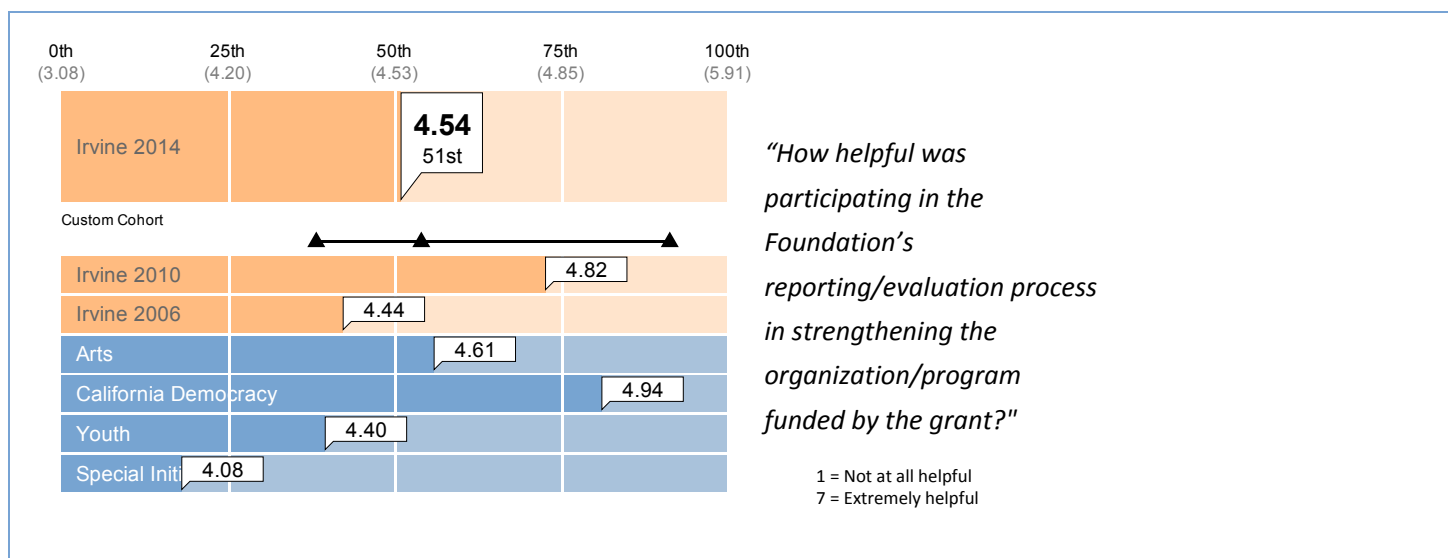
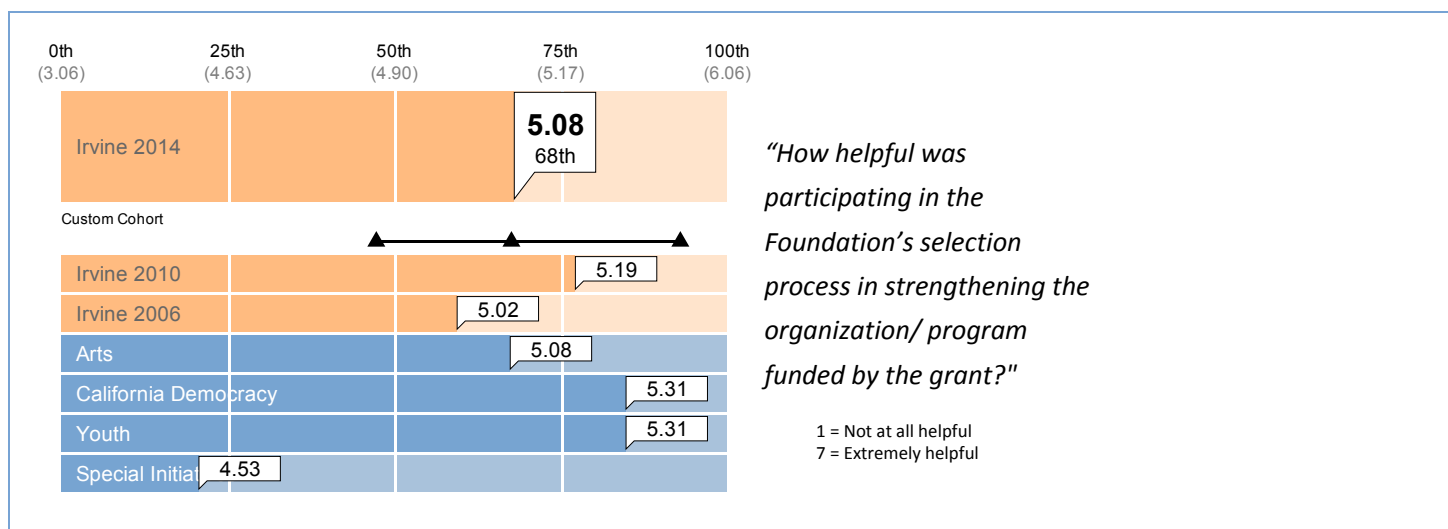
The chart below shows the perceived helpfulness of each resource, where 1 = "Not at all helpful" and 7 = "Extremely helpful."



The charts below show the usage and perceived helpfulness of social media segmented by subgroup.



GRANT PROCESSES



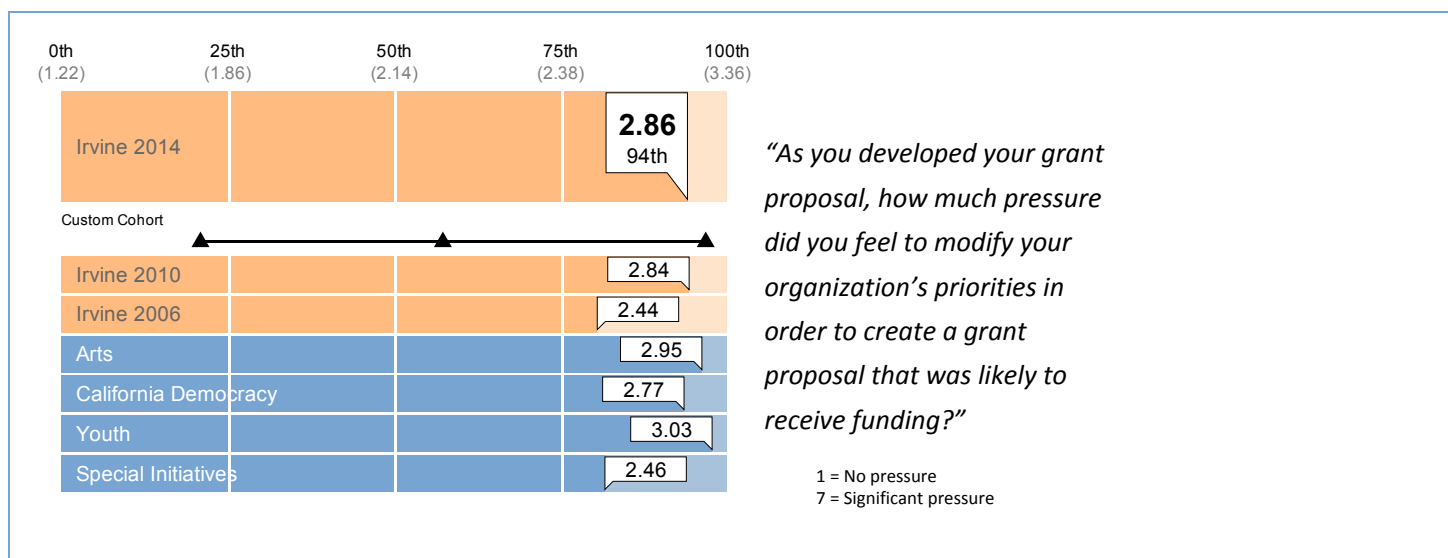
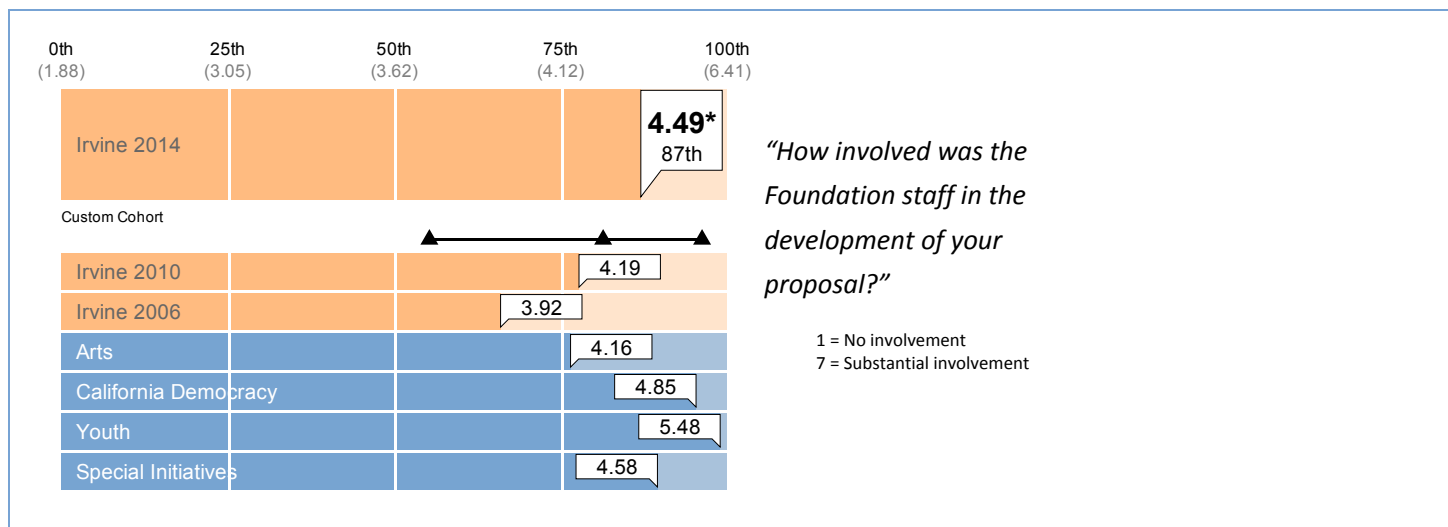
Selected Grantee Comments:

» "The instructions for the grant were very thorough and provided all the information needed for the granting process. We also appreciated the feedback we received from the staff after first submitting information to them, with the opportunity to include additional information and details they determined were necessary.... Subsequent grant reporting required many, many hours collecting information, and given our limited staffing this is quite cumbersome."

» "At this point the awards are not enough to truly make a difference and in fact can impede the development of the organization as they begin to focus on what Irvine 'wants.'"

» "The prior portal and website submission process was much easier. The newly revised process is complicated and somewhat frustrating to say the least."

Selection Process



Time Between Submission and Clear Commitment

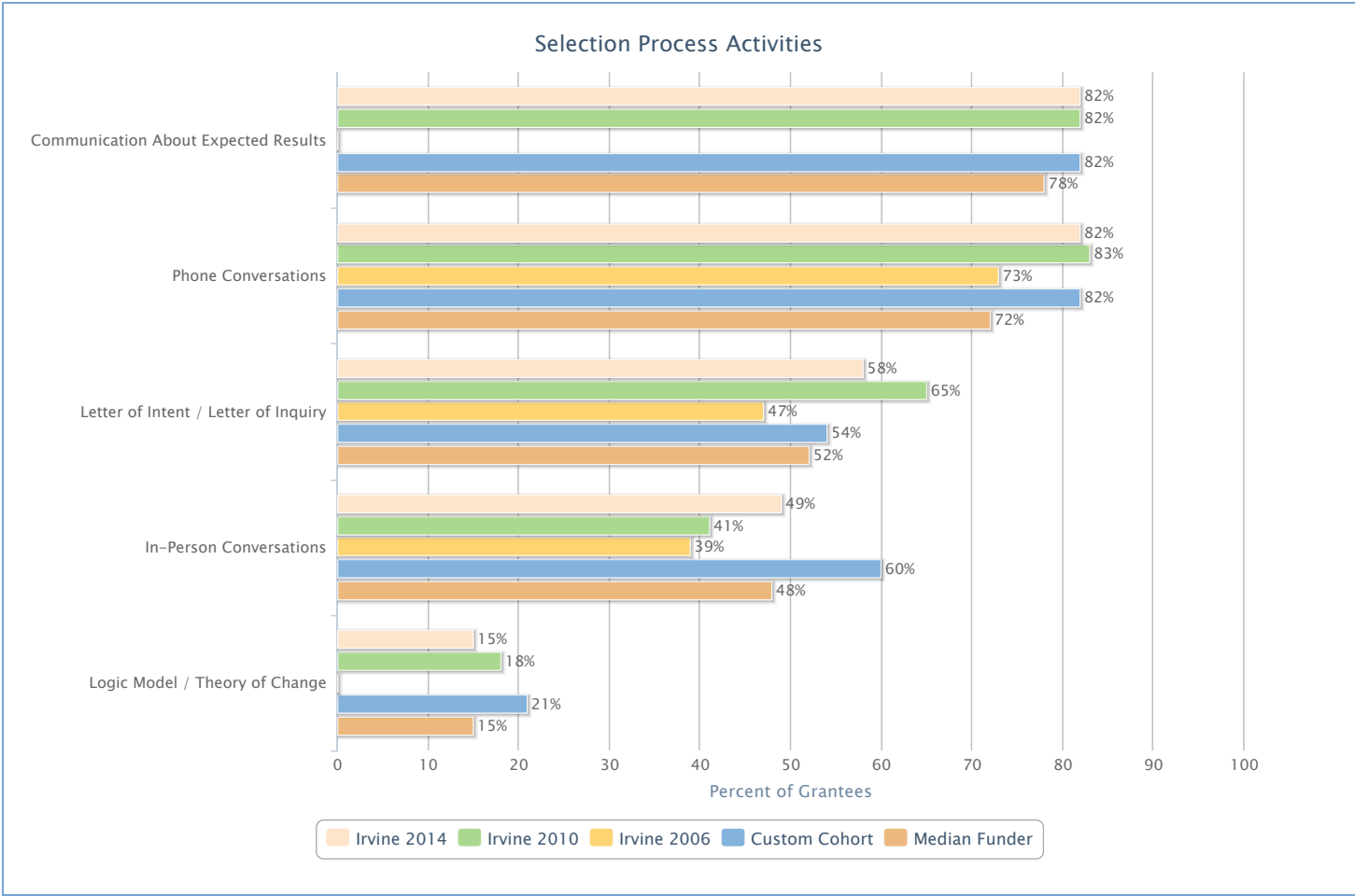
“How much time elapsed from the submission of the grant proposal to clear commitment of funding?”

Time Elapsed from Submission of Proposal to Clear Commitment of Funding (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Average Funder	Custom Cohort
Less than 1 month	3%	1%	4%	6%	5%
1 - 3 months	51%	49%	60%	54%	53%
4 - 6 months	38%	42%	31%	31%	33%
7 - 9 months	5%	5%	4%	5%	6%
10 - 12 months	2%	3%	0%	2%	2%
More than 12 months	0%	0%	1%	2%	1%

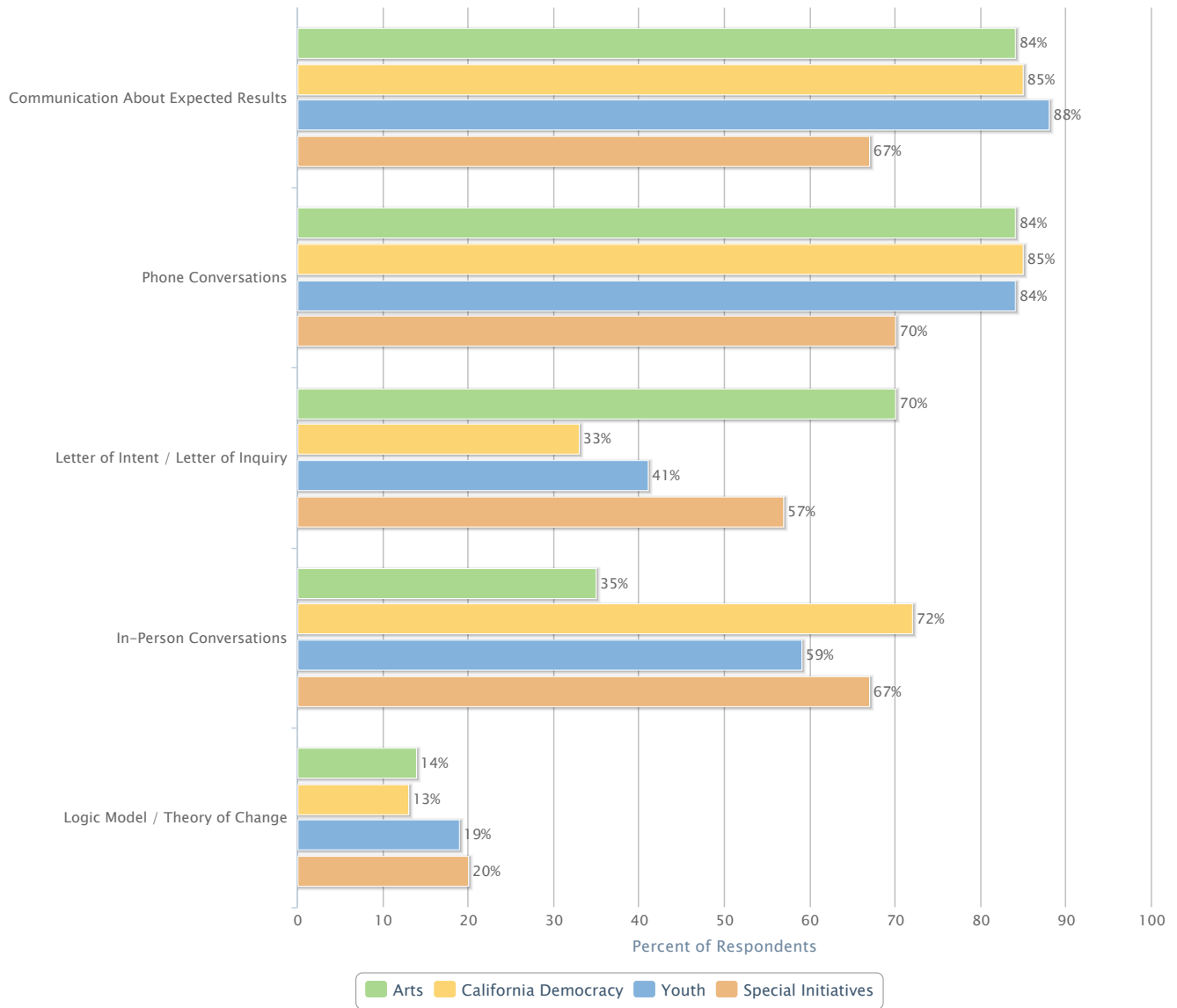
Time Elapsed from Submission of Proposal to Clear Commitment of Funding (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
Less than 1 month	2%	6%	7%	0%
1 - 3 months	40%	69%	60%	64%
4 - 6 months	49%	26%	27%	23%
7 - 9 months	7%	0%	7%	5%
10 - 12 months	3%	0%	0%	9%
More than 12 months	0%	0%	0%	0%

Selection Process Activities

"Which selection/proposal process activities were a part of your process?"

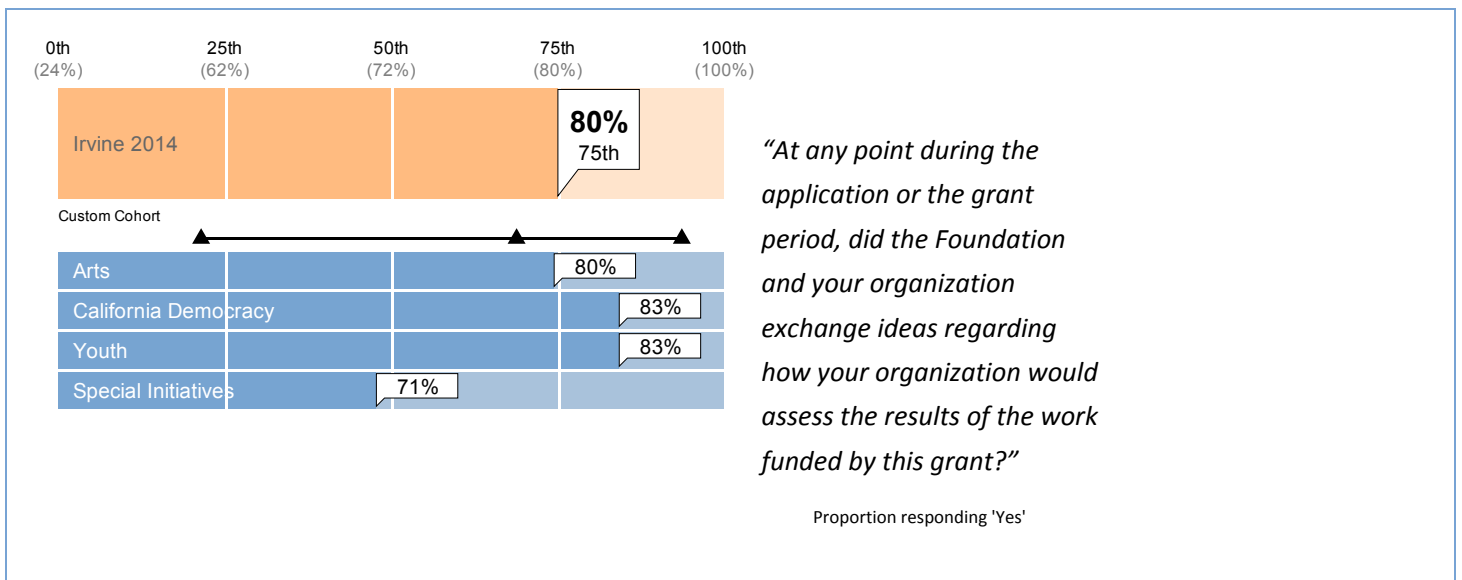
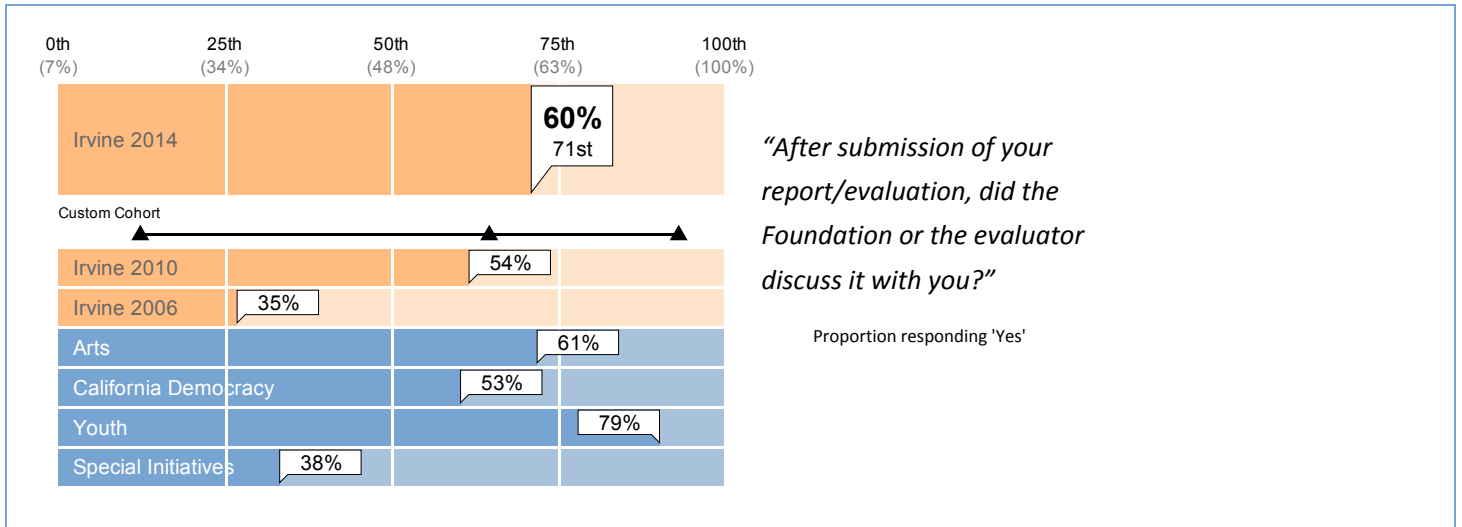


Selection Process Activities – By Subgroup



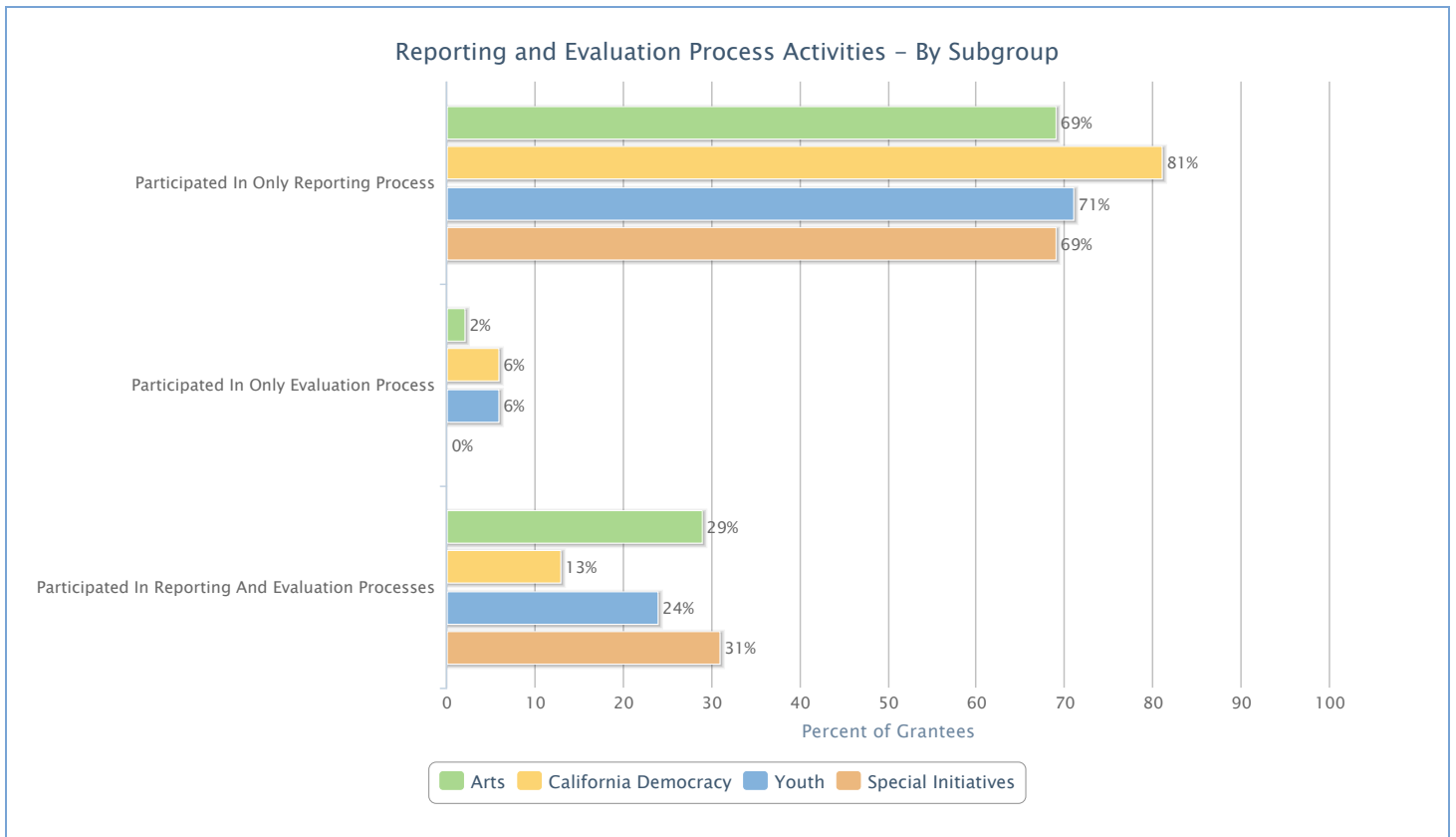
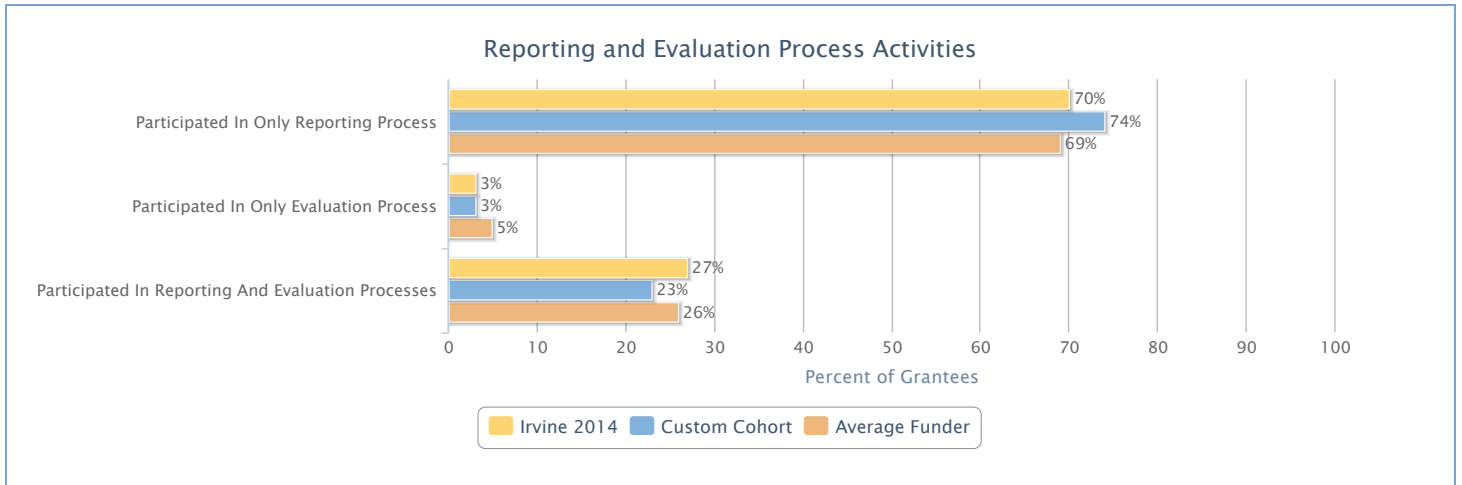
Reporting and Evaluation Process

Participation in Reporting and/or Evaluation Processes (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Average Funder	Custom Cohort
Participated in a reporting and/or evaluation process	63%	58%	72%	57%	61%
There will be a report/evaluation but it has not occurred yet	34%	41%	27%	33%	34%
There was/will be no report/evaluation	3%	1%	0%	6%	3%

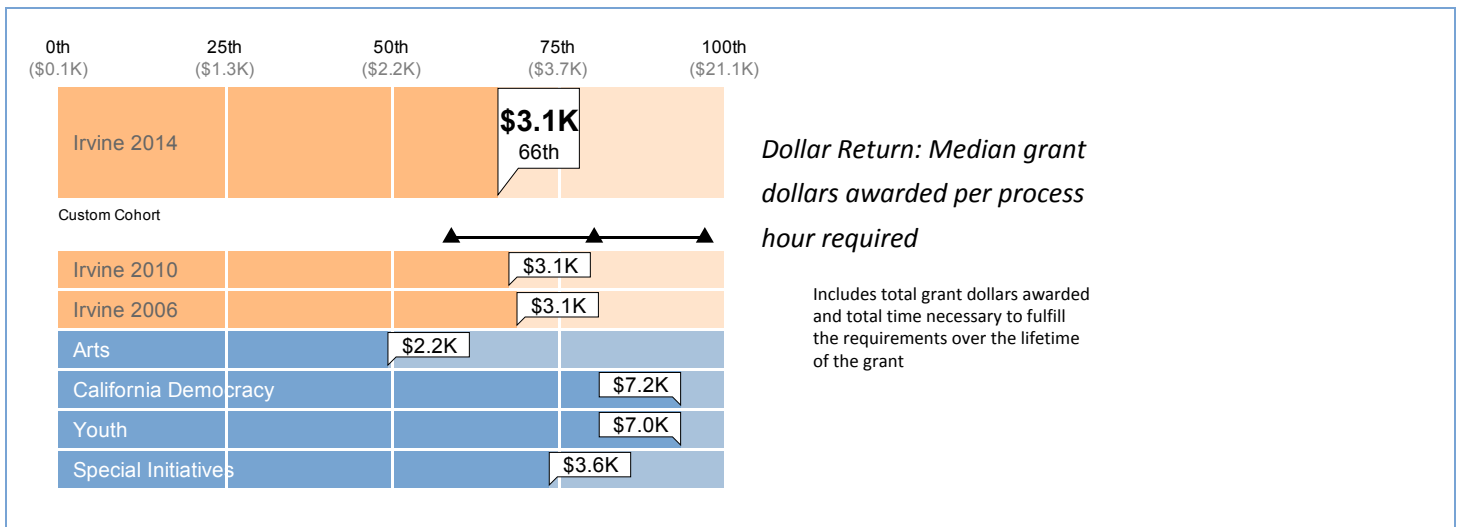


Reporting and Evaluation Process Activities

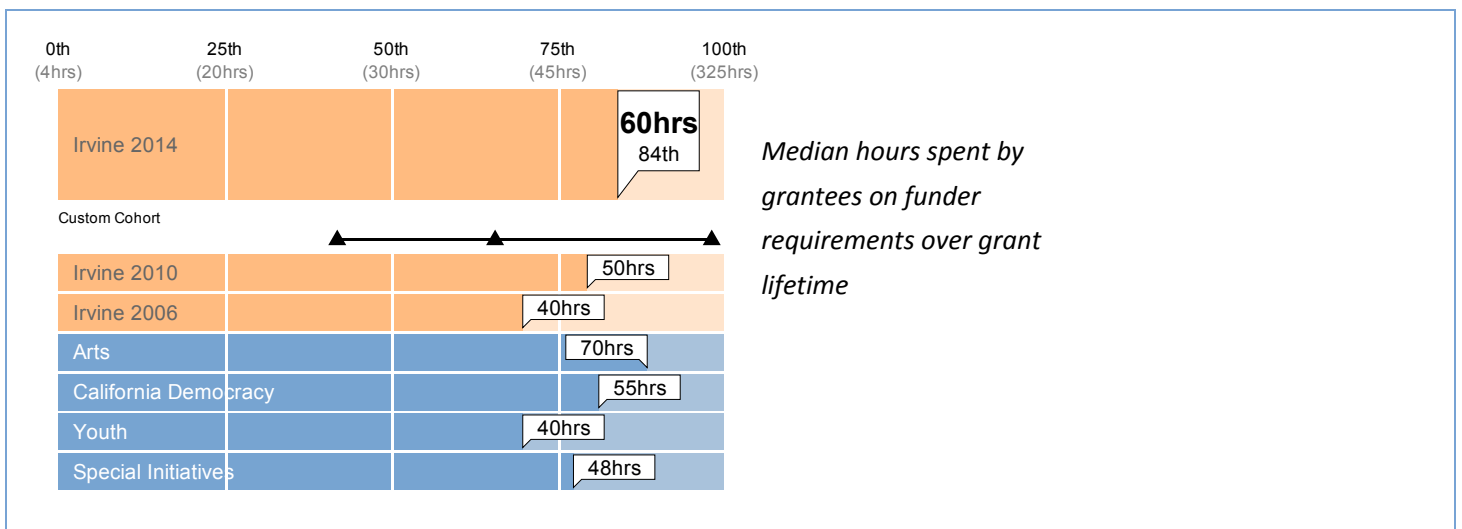
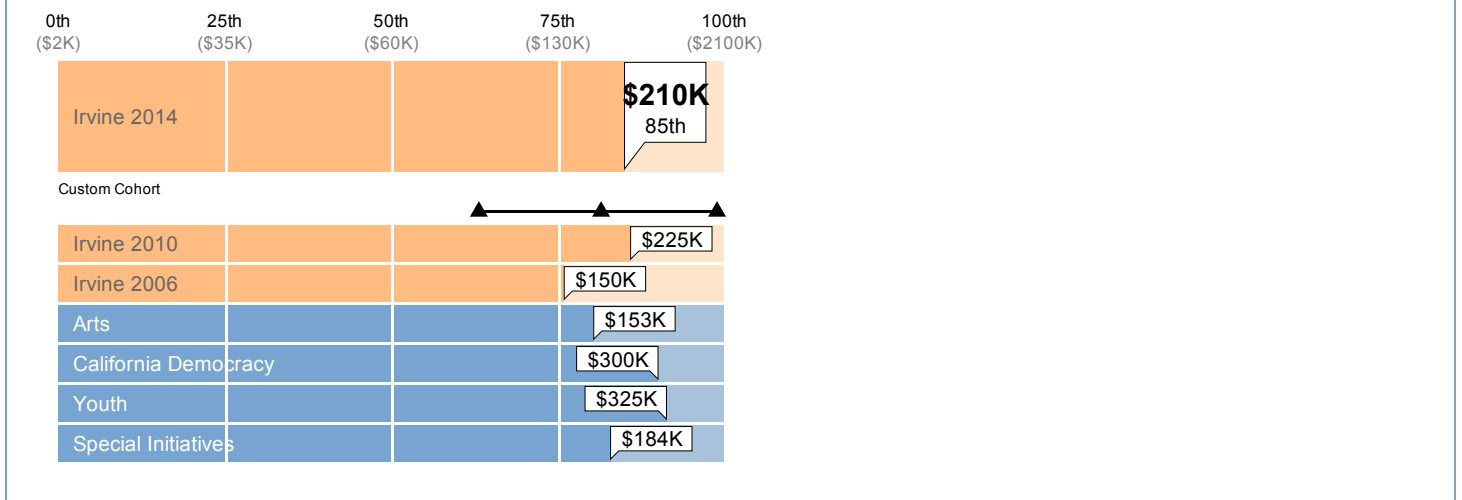
"Which reporting/evaluation process activities were a part of your process?"



DOLLAR RETURN AND TIME SPENT ON PROCESSES



MEDIAN GRANT SIZE



Time Spent on Selection Process

Time Spent On Proposal And Selection Process (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Average Funder	Custom Cohort
1 to 9 hours	5%	8%	10%	24%	12%
10 to 19 hours	13%	17%	21%	23%	18%
20 to 29 hours	22%	18%	23%	17%	18%
30 to 39 hours	9%	6%	6%	7%	9%
40 to 49 hours	20%	19%	25%	11%	14%
50 to 99 hours	18%	16%	8%	10%	15%
100 to 199 hours	8%	11%	7%	5%	9%
200+ hours	4%	4%	1%	3%	5%

Time Spent On Proposal And Selection Process (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Median Funder	Custom Cohort
Median Hours	40 hrs	40 hrs	25 hrs	20 hrs	24 hrs

Time Spent On Proposal And Selection Process (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
1 to 9 hours	2%	9%	7%	10%
10 to 19 hours	12%	14%	10%	17%
20 to 29 hours	17%	20%	41%	31%
30 to 39 hours	11%	11%	3%	7%
40 to 49 hours	23%	20%	7%	14%
50 to 99 hours	19%	17%	21%	14%
100 to 199 hours	9%	9%	7%	3%
200+ hours	6%	0%	3%	3%

Time Spent On Proposal And Selection Process (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
Median Hours	40 hrs	30 hrs	25 hrs	24 hrs

Time Spent on Reporting and Evaluation Process

Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Average Funder	Custom Cohort
1 to 9 hours	37%	55%	64%	56%	44%
10 to 19 hours	29%	25%	22%	19%	23%
20 to 29 hours	14%	8%	7%	10%	12%
30 to 39 hours	4%	4%	0%	4%	5%
40 to 49 hours	3%	2%	4%	3%	5%
50 to 99 hours	8%	4%	2%	4%	5%
100+ hours	6%	2%	1%	4%	5%

Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Median Funder	Custom Cohort
Median Hours Per Year	13 hrs	8 hrs	5 hrs	7 hrs	10 hrs

Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
1 to 9 hours	37%	31%	39%	36%
10 to 19 hours	31%	31%	9%	36%
20 to 29 hours	15%	7%	17%	14%
30 to 39 hours	6%	0%	0%	5%
40 to 49 hours	1%	10%	9%	0%
50 to 99 hours	8%	10%	13%	0%
100+ hours	2%	10%	13%	9%

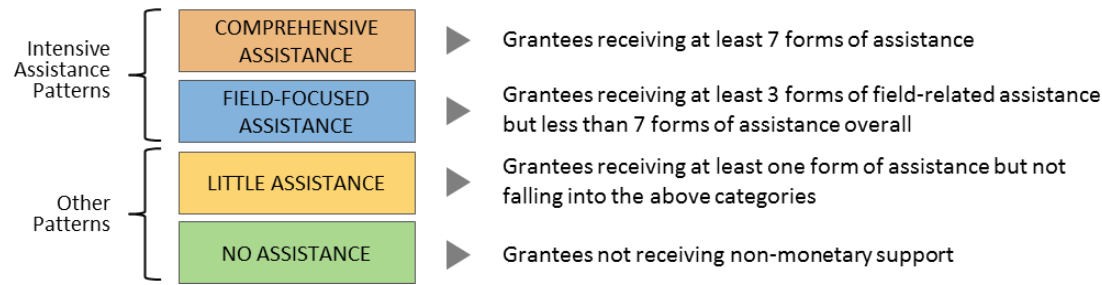
Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
Median Hours Per Year	13 hrs	12 hrs	20 hrs	13 hrs

NON-MONETARY ASSISTANCE

Non-Monetary Assistance Patterns

Grantees were asked to indicate whether they had received any of 14 types of assistance provided directly or paid for by the Foundation. The specific types of assistance asked about are listed at the end of this section.

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 (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Average Funder	Custom Cohort
Comprehensive	8%	10%	4%	6%	7%
Field-focused	14%	11%	8%	9%	15%
Little	42%	34%	31%	36%	39%
None	36%	45%	57%	50%	38%

Non-Monetary Assistance Patterns (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
Comprehensive	10%	3%	9%	3%
Field-focused	11%	13%	34%	10%
Little	39%	62%	28%	43%
None	40%	23%	28%	43%

Grantees were asked to select whether they had received any of the following types of assistance provided directly or paid for by the Foundation:

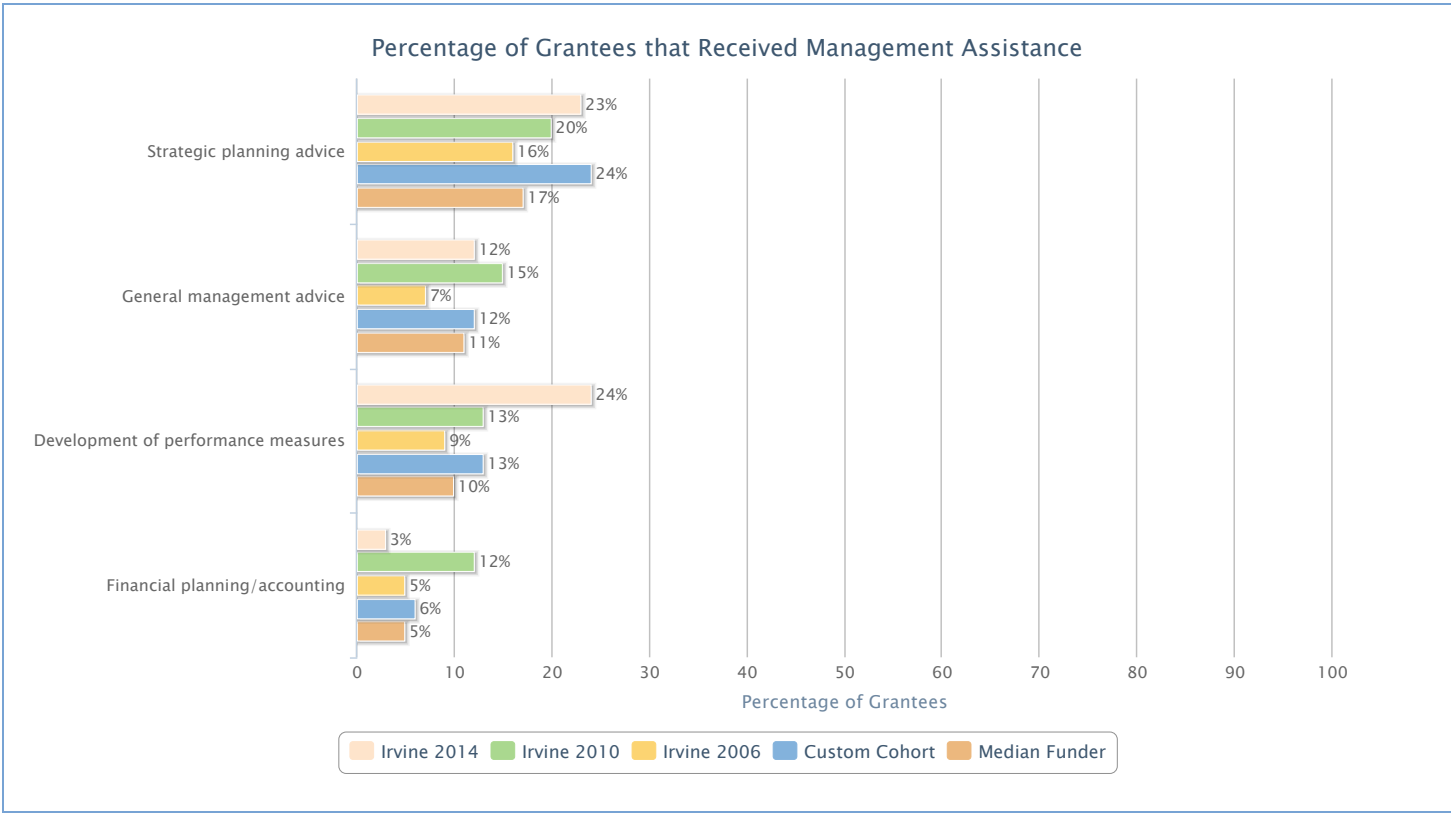
Management Assistance	Field-Related Assistance	Other Assistance
General management advice	Encouraged/facilitated collaboration	Board development/governance assistance
Strategic planning advice	Insight and advice on your field	Information technology assistance
Financial planning/accounting	Introductions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

Selected Comments

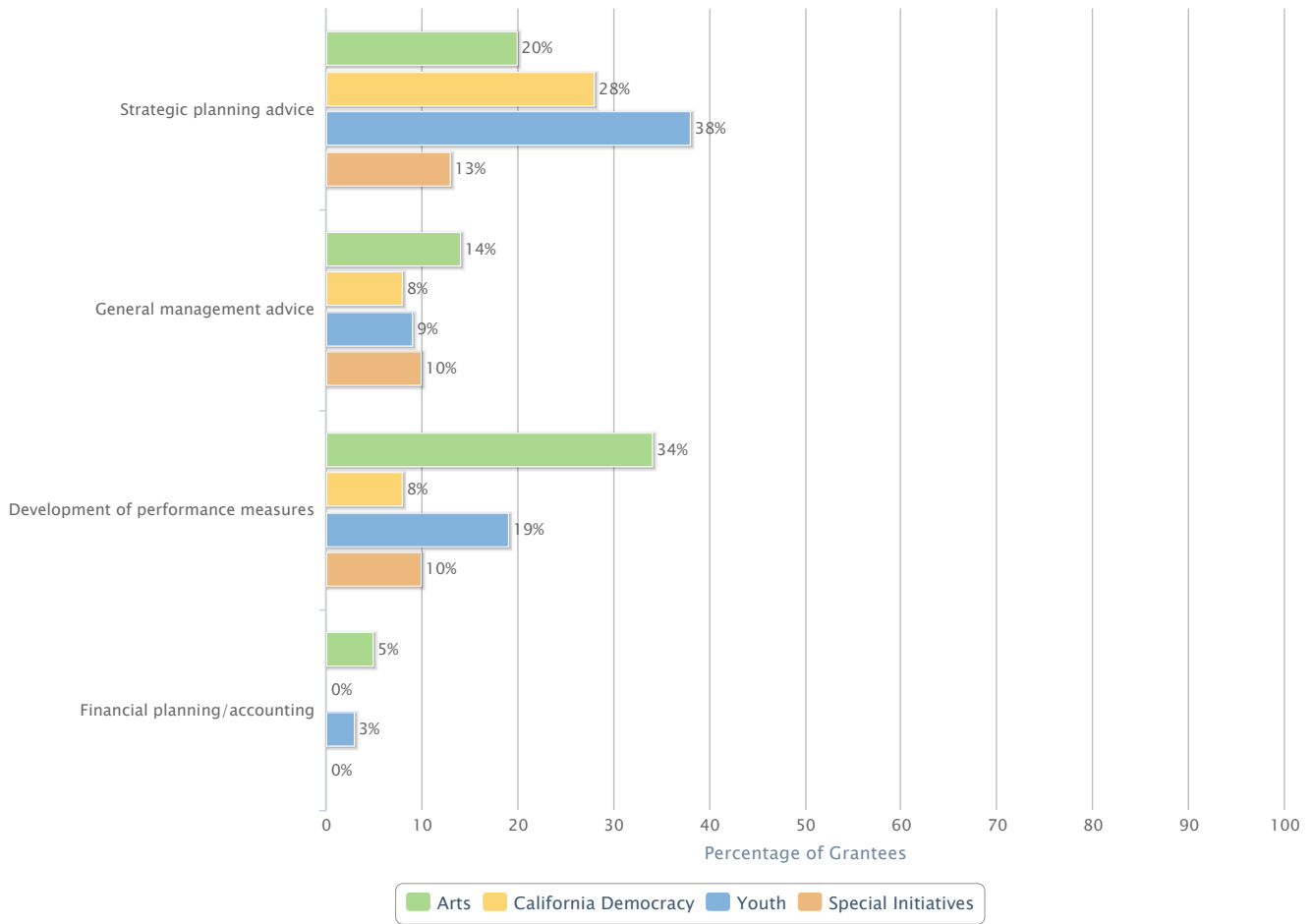
- » *"The amount of consultant engagement is both very helpful but expansive in its time demands. We appreciate these resources very much; however, we did not anticipate the amount of time it would take."*
- » *"The retreat [our organization] participated in was extremely helpful to network with peer grantees, to brainstorm and strategize, and to better understand the Foundation's goals and vision."*
- » *"The Youth grantee convening is always very well executed."*

Management Assistance Activities

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

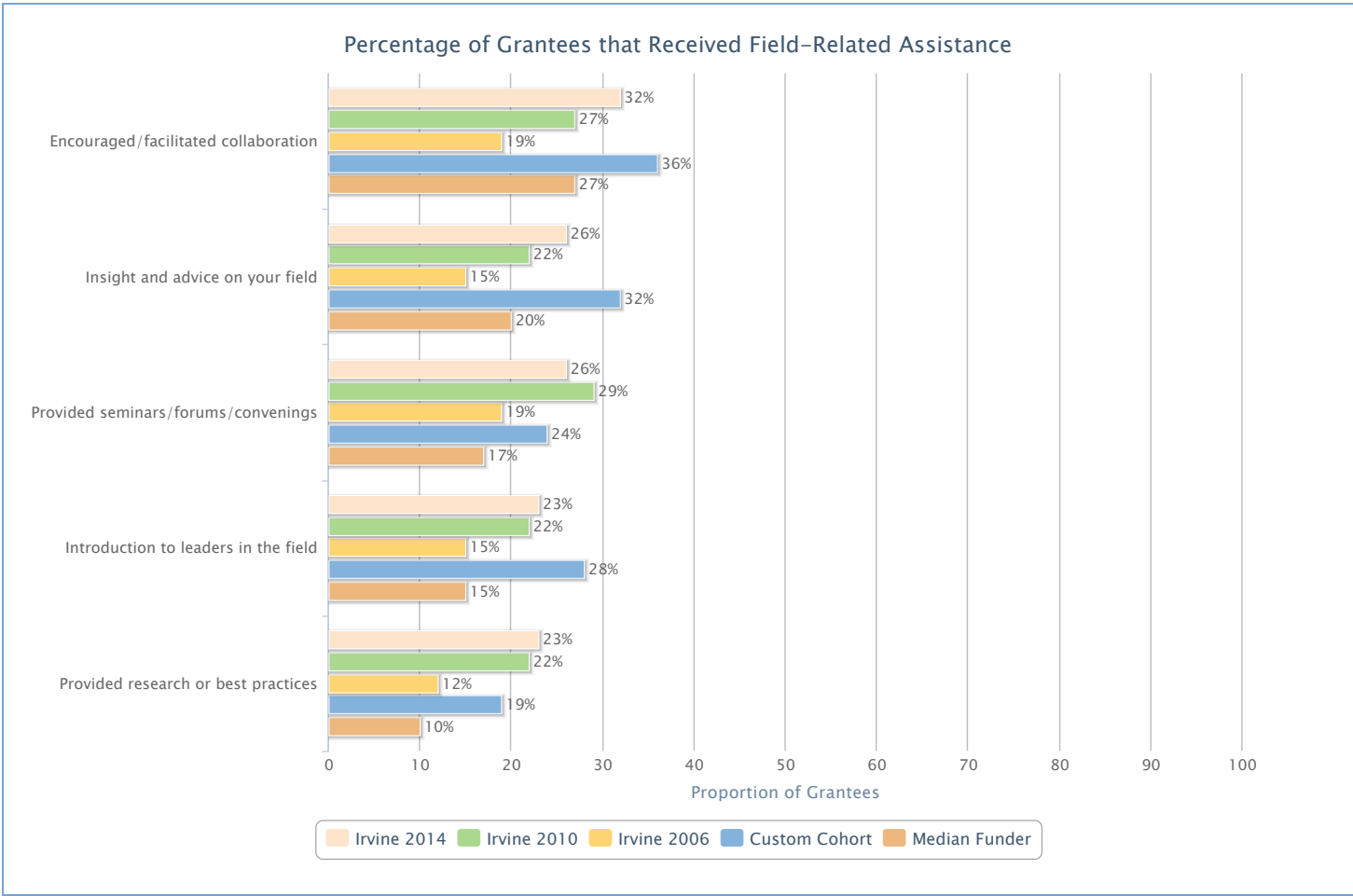


Percentage of Grantees that Received Management Assistance – By Subgroup

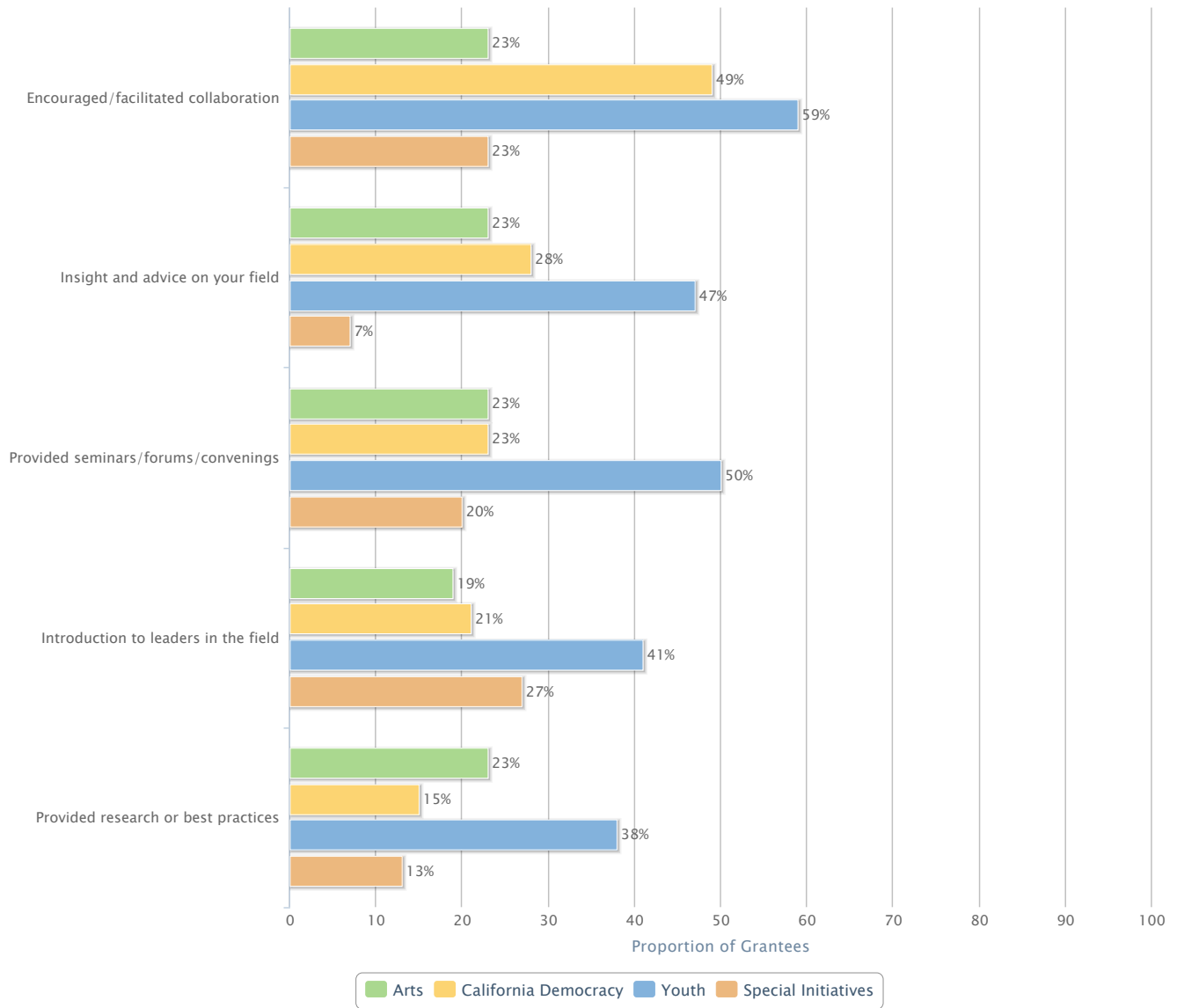


Field-Related Assistance Activities

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

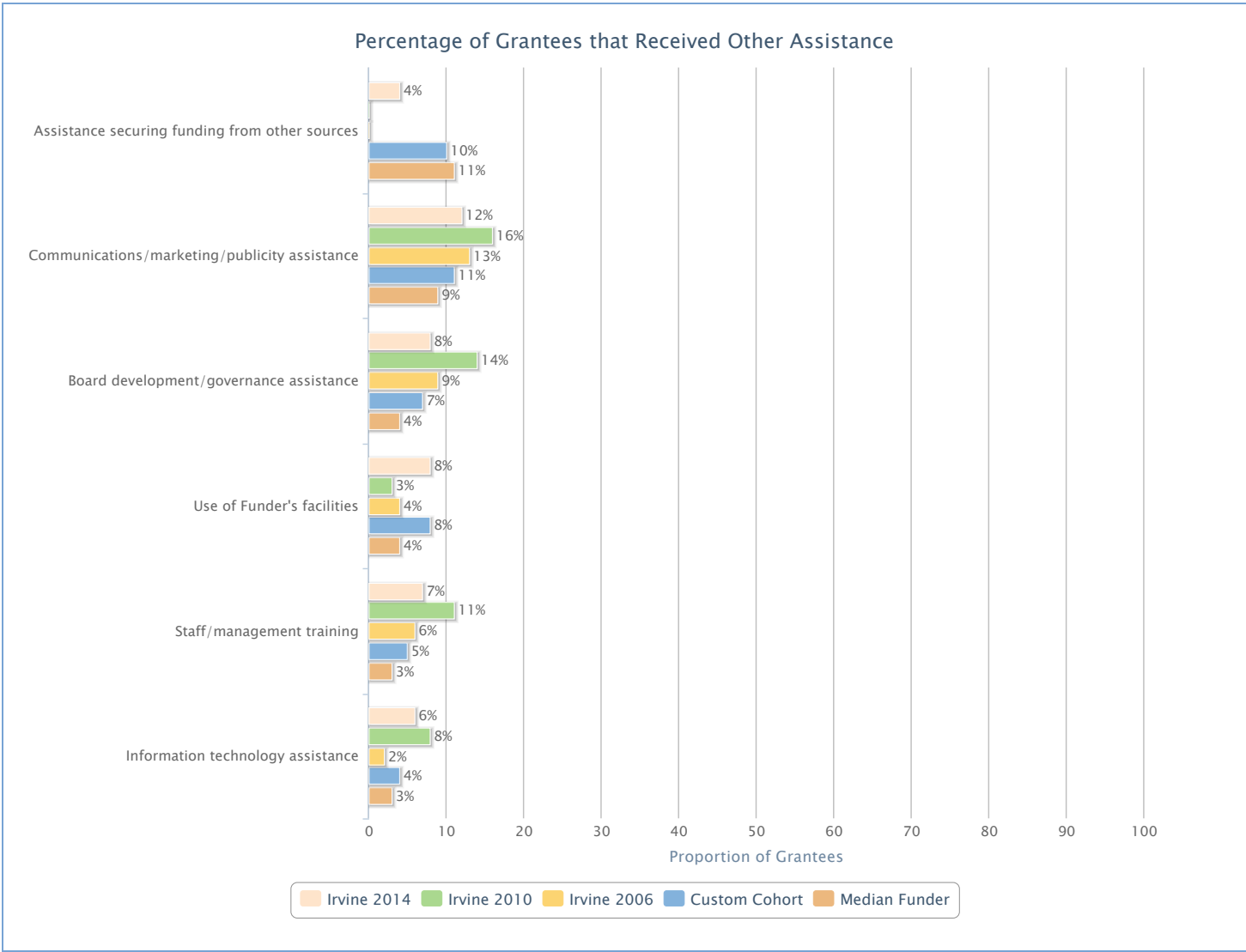


Percentage of Grantees that Received Field-Related Assistance – By Subgroup

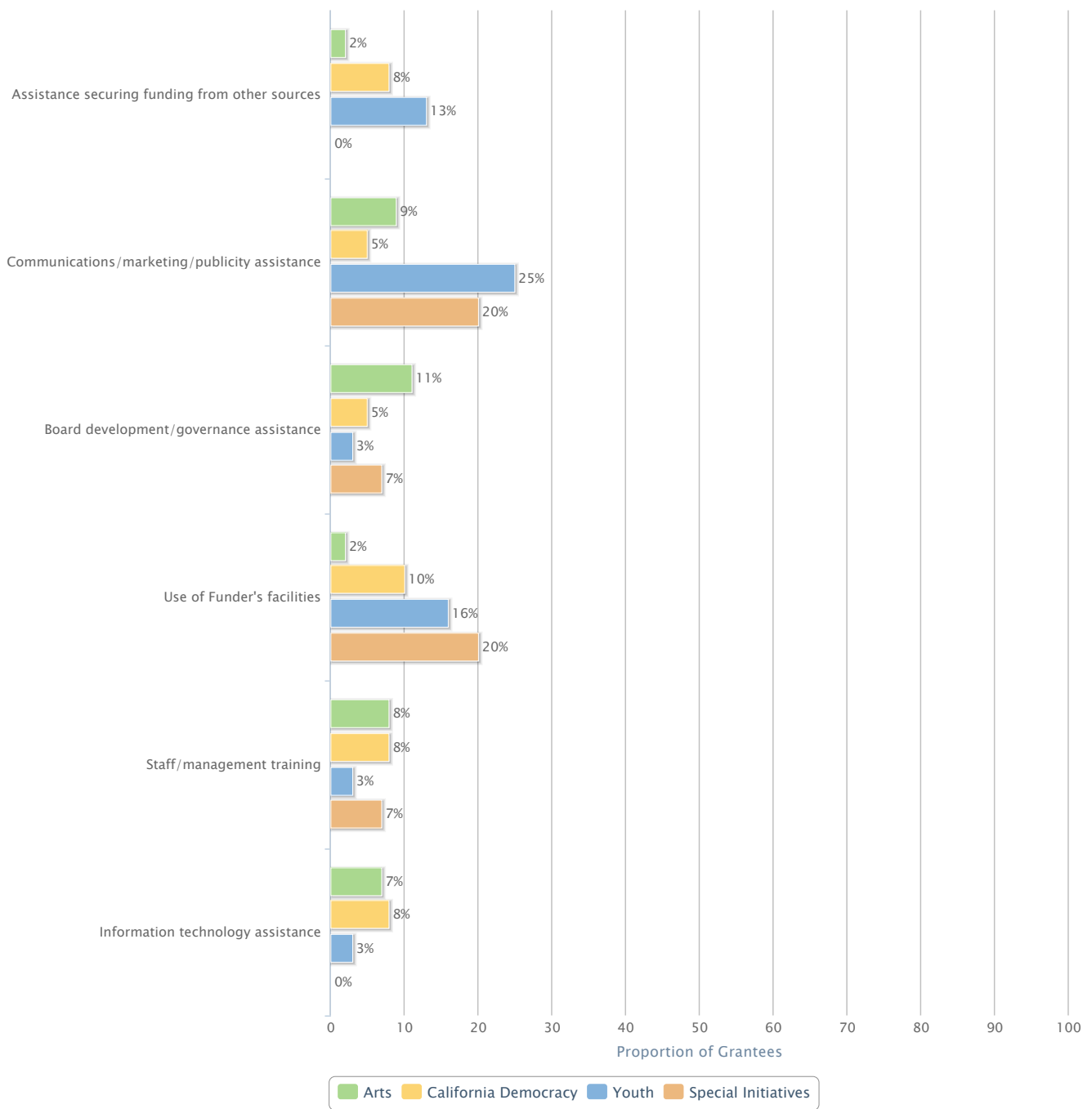


Other Assistance Activities

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



Percentage of Grantees that Received Other Assistance – By Subgroup



GRANTEE SUGGESTIONS FOR THE FOUNDATION

Grantees were asked to provide any suggestions for how the Foundation could improve. These suggestions were then categorized by CEP and grouped into the topics below.

To download the full set of grantee comments and suggestions, click [here](#). Please note that comments have been edited or deleted to protect the confidentiality of respondents.

Proportion of Grantee Suggestions by Topic

Topic of Grantee Suggestion	%
Grantmaking Approach	25%
Non-Monetary Assistance	17%
Impact on and Understanding of Grantees' Organizations	13%
Field Impact and Orientation	11%
Quantity and Quality of Interactions	9%
Clarity and Consistency of Communications	8%
Impact on and Understanding of Grantees' Local Communities	7%
Administrative Processes	7%
Other	3%

Selected Comments

Grantees were asked to provide any suggestions for how the Foundation could improve. These suggestions were then categorized by CEP and grouped into the topics below.

GRANTMAKING APPROACH (N=29)

» General Operating Support (N=16)

» "Do not limit funding to program activities only. Small organizations like ours find it difficult to obtain funding in support of ongoing operations and administrative costs."

» "Reconsider core organizational or artistic project support."

» Longer and Larger Grants (N=7)

» "Maintaining substantial grants over many years allows organizations to be stable and innovative."

» "Consider longer-term investments in organizations/fundees. It is hard to plan for sustainability if funding cycles are one to two years in length."

» General (N=6)

» "Consider allowing organizations that have activities that move horizontally across the Foundation's focus areas to apply for grants in multiple areas."

NON-MONETARY ASSISTANCE (N=19)

» Grantee Collaboration (N=5)

» "There is not much collaboration facilitated by the Irvine Foundation between grantees in our own community. I think that there is more work to be done in this area."

» "More opportunities to connect with foundation staff and other grantees."

» Assistance Securing Other Funding (N=5)

» "Follow through in connecting grantees to additional support sources."

» "We greatly value that the JIF is one of the few foundations paying attention to California Central Valley, an underfunded area with greater needs. Maybe support attracting other funders that completely ignore the Central Valley."

» Assistance With Organizational Development (N=5)

» "Help with strategic planning and support that could allow my organization to continue to grow and to sustain its capacity to impact our community and the field."

» "Expand professional Board training that could further engage our leadership in fundraising efforts. I would also like to ask the Foundation for professional help in training our fundraising staff as well. I would love to have had the benefit of a professional coach, who is familiar with my particular field/management."

» Grantee Convenings (N=4)

» "Convenings and continued professional development...are invaluable."

UNDERSTANDING OF AND IMPACT ON GRANTEE'S ORGANIZATIONS (N=15)

» Better Understanding of Grantees' Organizations (N=10)

» "Have more dialogue and interest in what we're doing."

» "Learn about our strategies and visit our work. Support the work as it evolves, not just the Foundation's vision."

» General (N=5)

» "For original projects that are supported by the Exploring Engagement Fund, I hope that the Irvine Foundation can provide strong suggestions for the sustainability of the project."

- » "I hope the Irvine Foundation will consider taking a leadership role in addressing how California's non-profits can develop more inclusive cultures within their organizations."

FIELD IMPACT AND ORIENTATION (N=13)

» Adjust Field Orientation (N=9)

- » "Include the smaller Community Based Organizations as part of your major grant funding process."
- » "Consider investing more money into smaller arts organizations."
- » "Continue to fund rural, small arts organizations."

» Continue Strengthening Irvine's Chosen Fields (N=4)

- » "Continuing to share information broadly, and stepping up its role as the conductor of the orchestra of many parties working on the same initiative."
- » "The Irvine Foundation has a rare and great opportunity to make a significant difference in the allied fields of cultural heritage/cultural production/public history/public humanities/digital humanities."

QUANTITY AND QUALITY OF INTERACTIONS (N=10)

» Increase Frequency of Interactions (N=4)

- » "More direct interaction with the organizations instead of relying on the consultants alone."
- » "Our contact person traveled a lot so timely communication was not always what it could have been."

» More Site Visits (N=3)

- » "Time for program officer site visits."

» General (N=3)

- » "Requests for meetings, convenings, and collaboration with other grantees and Foundation consultants are often unpredictable and very demanding, with little indication that grantee should be prepared to set aside the expected amount of time or provide for that in Foundation-supported budgets."

CLARITY AND CONSISTENCY OF COMMUNICATIONS (N=9)

» More Transparent Communications (N=7)

- » "Help us understand the Foundation's goals and performing arts direction."
- » "We would have appreciated more interaction with the Foundation in relation to understanding their internal thoughts about what constitutes the success of the Exploring Engagement initiative, and how our work measures up to this definition of success."

» More Consistent Communications (N=2)

- » "Communication with Foundation staff was not consistent nor did it appear to foster a deeper understanding of our organizational strategy or goals."

UNDERSTANDING OF AND IMPACT ON GRANTEE'S COMMUNITIES (N=8)

» Better Understanding of Local Communities (N=6)

- » "The Foundation needs to have staff that understands what is happening on the ground among non English speaking populations and the low income populations."
- » "It would be helpful to have more opportunities to have an exchange of learning and ideation between the program director and the community."

» Adjust Community Orientation (N=2)

- » "Find a way of channeling resources where most needed and expanding funding opportunities among underserved communities."

ADMINISTRATIVE PROCESSES (N=8)

» Streamline and Clarify Evaluation Process (N=5)

- » "Make sure that program evaluations are timed to start concurrently with program grants so that evaluation designs are part of program planning and so that results of the evaluation can have maximum formative impact."
- » "Less paperwork, especially for smaller grants."

» General (N=3)

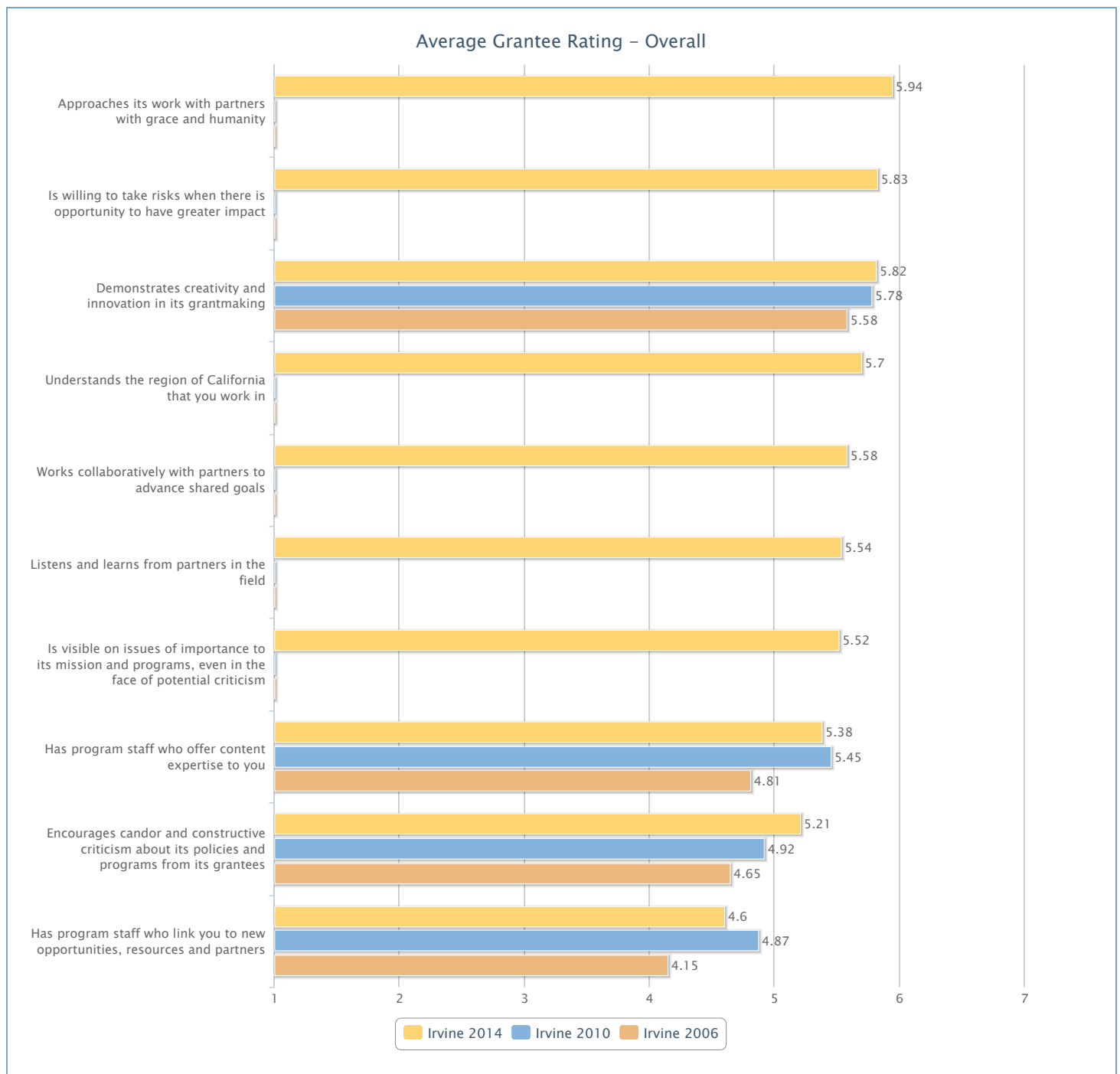
- » "At times the website can be difficult to navigate and gain information from."

OTHER (N=3)

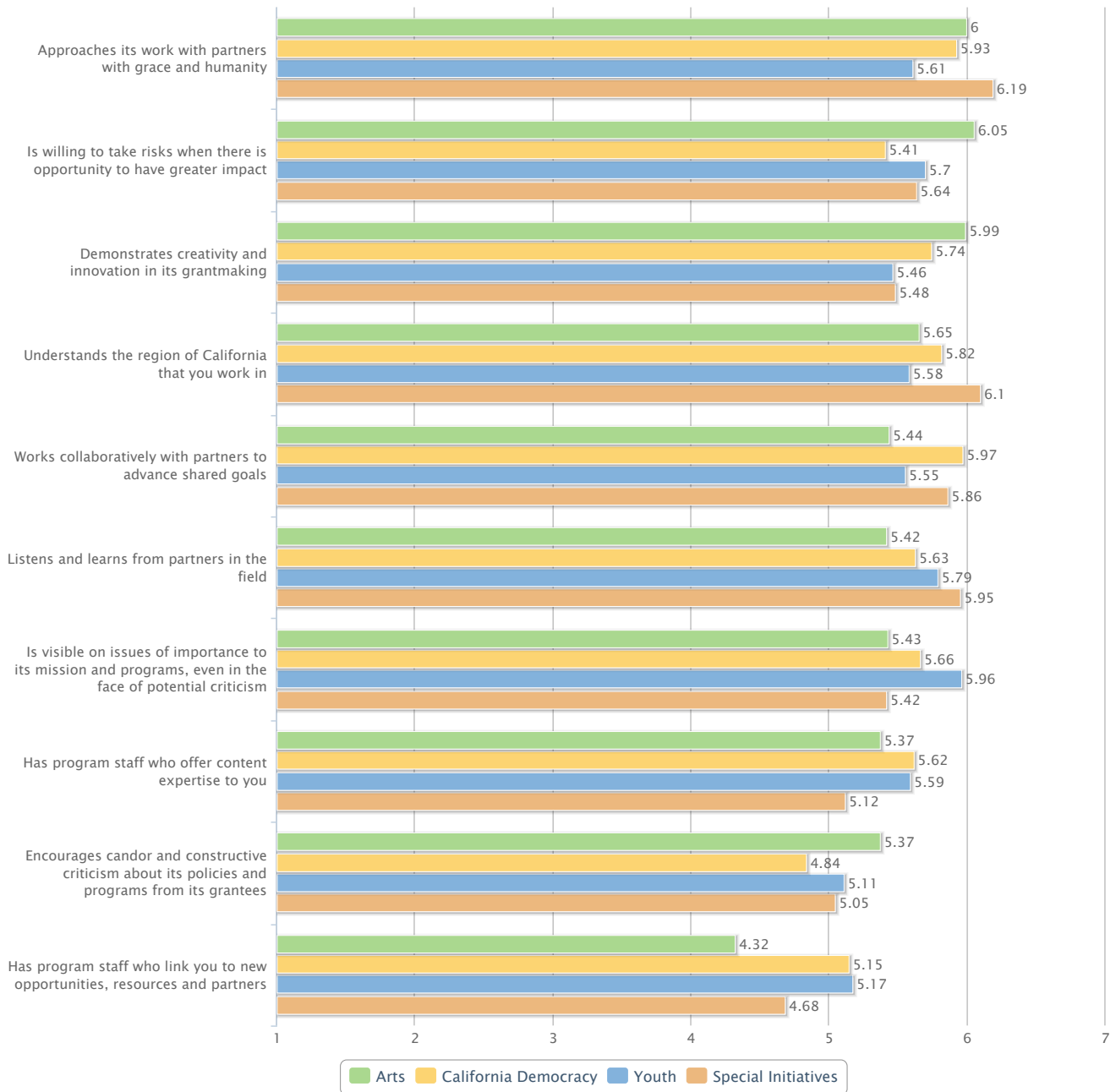
- » "Our monitoring by an outside consultant was overly time consuming and not as helpful as it might have been. I would suggest paying closer attention to the fit between consultant and grantee."

IRVINE-SPECIFIC QUESTIONS

From your experience, how much do you agree or disagree that the Foundation exhibits each of the characteristics listed below?
(1 = Strongly disagree, 4 = Neither agree nor disagree, 7 = Strongly agree)



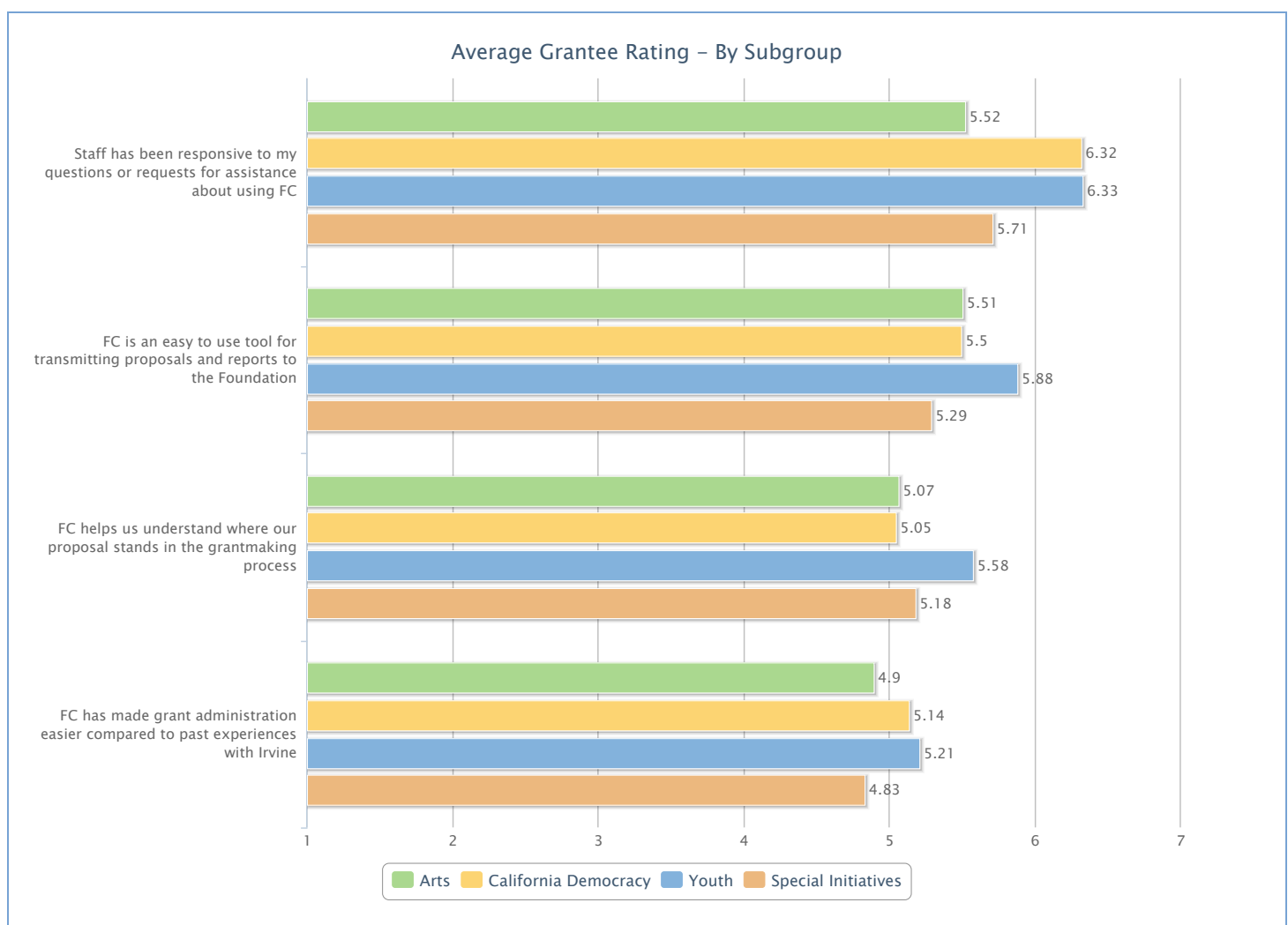
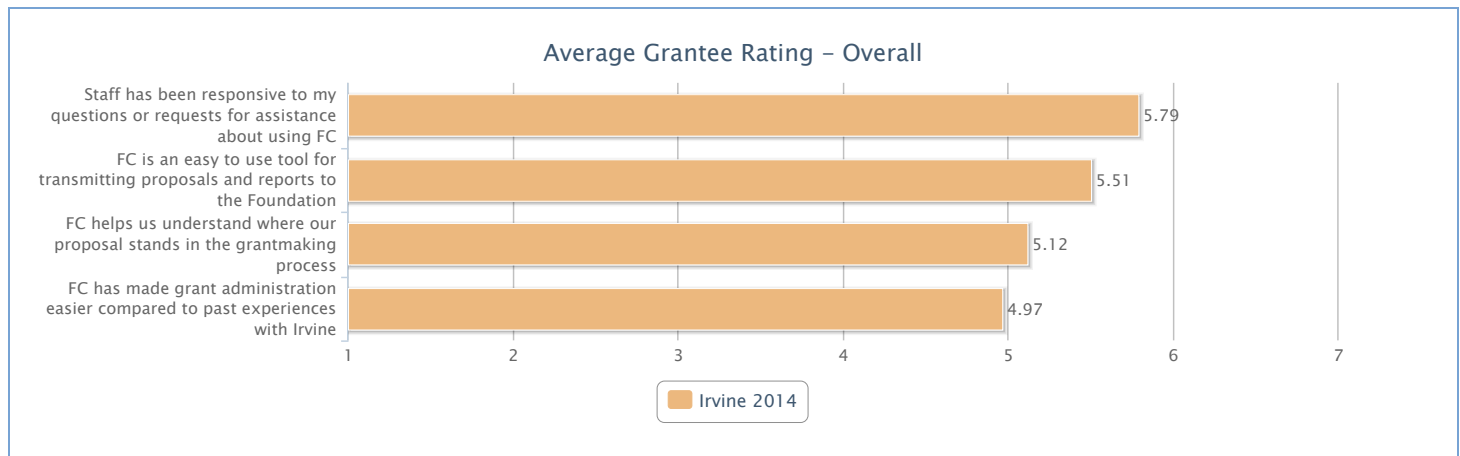
Average Grantee Rating – By Subgroup



FoundationConnect

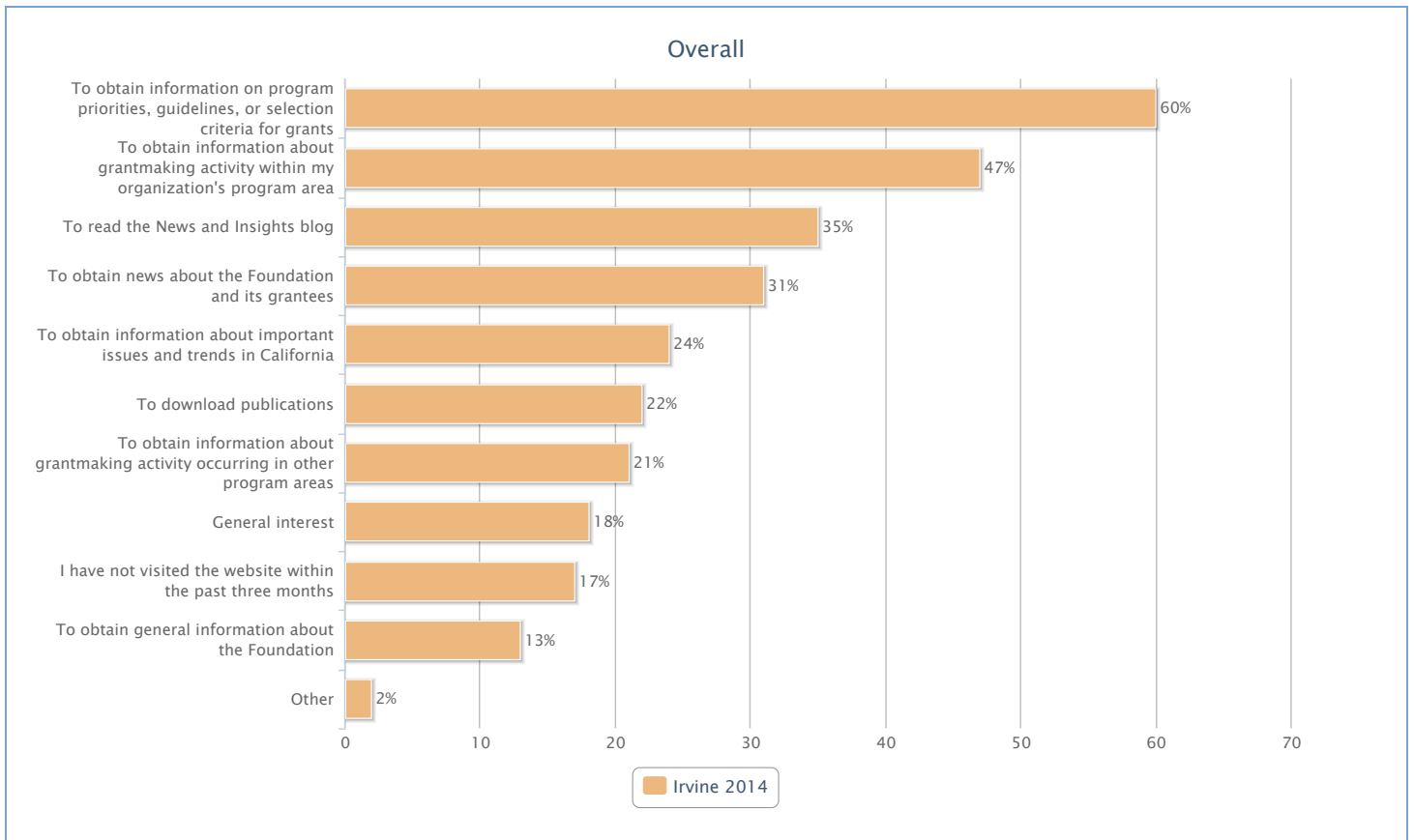
The Foundation recently transitioned to a new grants management system called FoundationConnect which you have likely used to submit grant proposal materials and reports online. Please select the extent to which you agree or disagree with the statements below based on your experience with FoundationConnect (FC):

(1 = Strongly disagree, 4 = Neither agree nor disagree, 7 = Strongly agree)

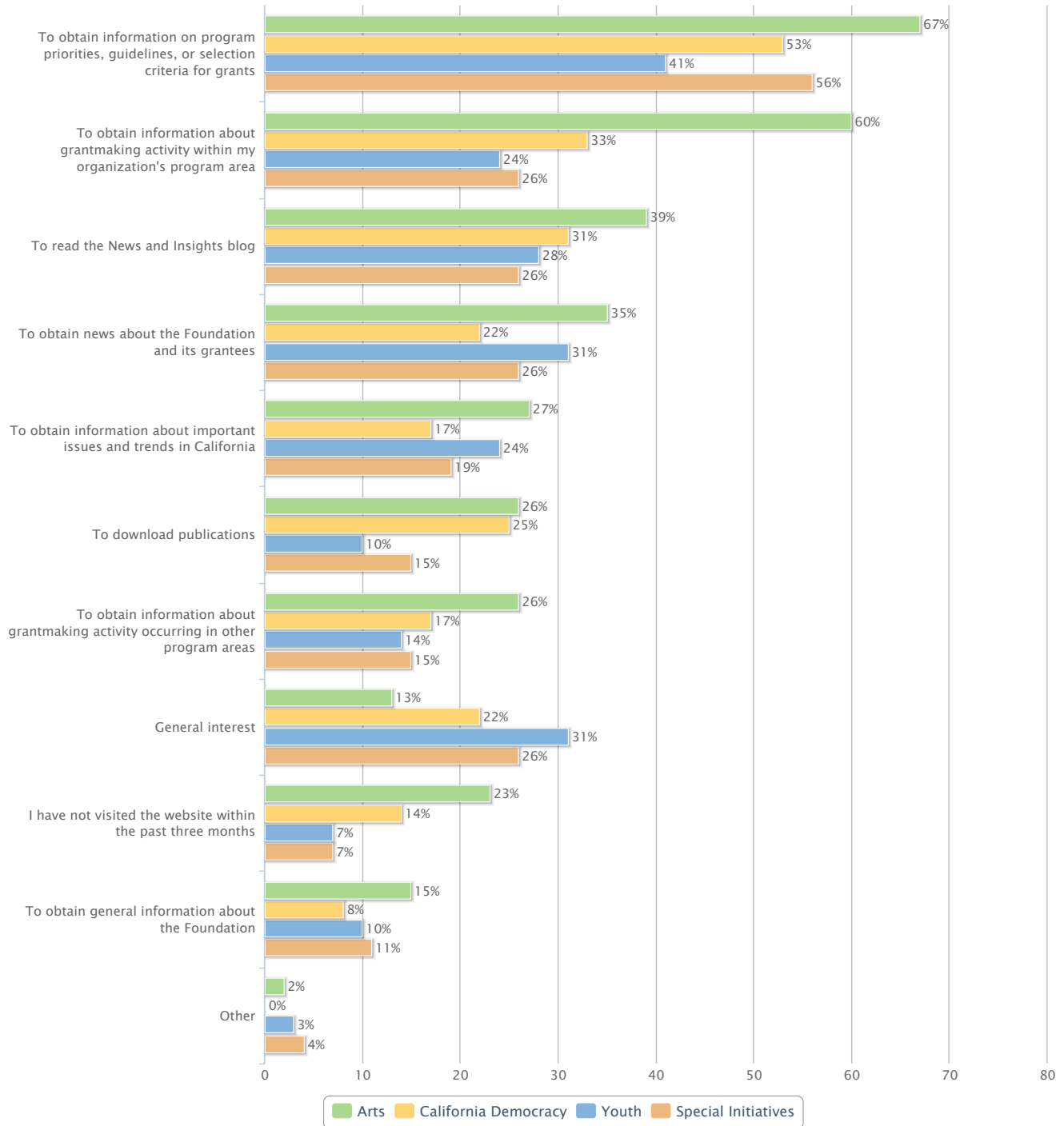


Online Resources

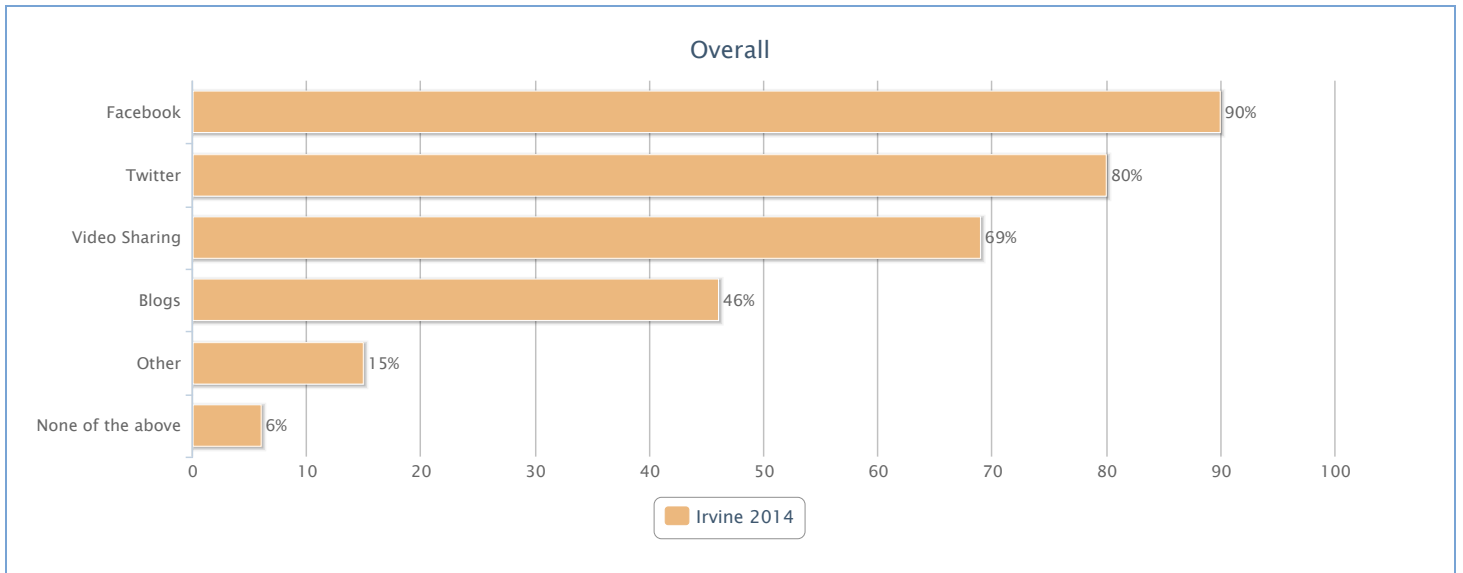
"If you have visited the Foundation's website within the past three months, what were your primary reasons for visiting?"



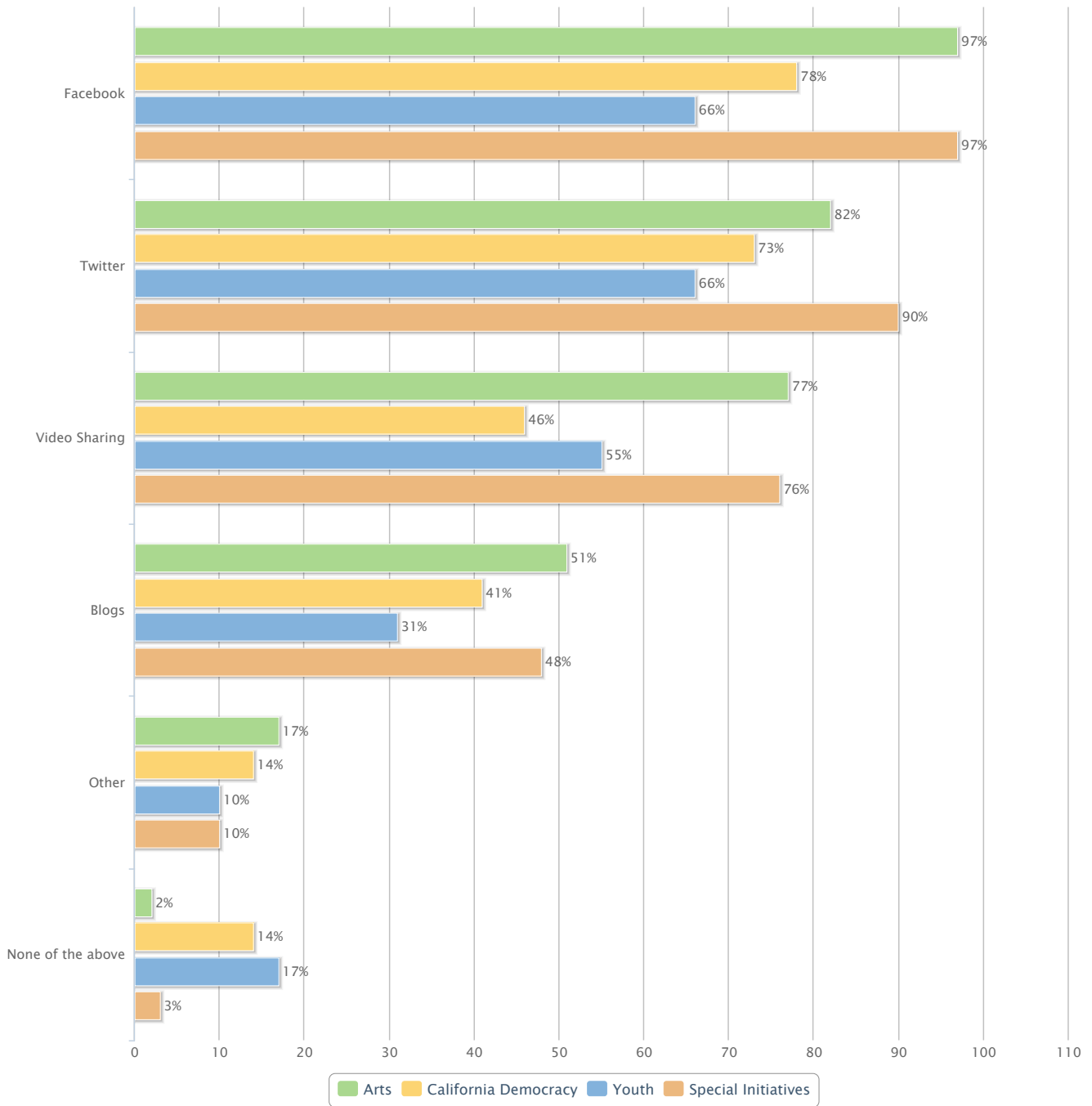
By Subgroup



"Does your organization currently utilize any of the following online media resources to communicate about its own work?"



By Subgroup



Do you follow the Twitter feeds of the Irvine Foundation? (Overall)	Irvine 2014
Yes	32%
No	68%

Do you follow the Twitter feeds of the Irvine Foundation? (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
Yes	30%	30%	42%	36%
No	70%	70%	58%	64%

Do you follow the Twitter feeds of any individual Irvine staff? (Overall)	Irvine 2014
Yes	20%
No	80%

Do you follow the Twitter feeds of any individual Irvine staff? (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
Yes	21%	15%	14%	21%
No	79%	85%	86%	79%

CONTEXTUAL DATA

Grantmaking Characteristics

Length of Grant Awarded (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Median Funder	Custom Cohort
Average grant length	2.2 years	2.7 years	2.2 years	2.1 years	2.3 years

Length of Grant Awarded (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Average Funder	Custom Cohort
1 year	20%	9%	25%	50%	31%
2 years	46%	37%	43%	21%	34%
3 years	29%	47%	28%	17%	24%
4 years	2%	3%	1%	3%	5%
5 or more years	3%	4%	3%	8%	7%

Type of Grant Awarded (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Average Funder	Custom Cohort
Program / Project Support	79%	70%	80%	64%	66%
General Operating / Core Support	14%	9%	8%	20%	21%
Capital Support: Building / Renovation / Endowment Support / Other	0%	1%	1%	8%	4%
Technical Assistance / Capacity Building	7%	19%	10%	5%	7%
Scholarship / Fellowship	0%	0%	1%	2%	1%
Event / Sponsorship Funding	0%	0%	0%	2%	1%

Grantmaking Characteristics - By Subgroup

Length of Grant Awarded (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
Average grant length	2.5 years	2.1 years	1.6 years	1.9 years

Length of Grant Awarded (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
1 year	5%	23%	63%	37%
2 years	51%	56%	20%	40%
3 years	38%	18%	10%	23%
4 years	3%	0%	0%	0%
5 or more years	3%	3%	7%	0%

Type of Grant Awarded (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
Program / Project Support	81%	77%	97%	54%
General Operating / Core Support	10%	23%	0%	32%
Capital Support: Building / Renovation / Endowment Support / Other	0%	0%	0%	0%
Technical Assistance / Capacity Building	9%	0%	3%	14%
Scholarship / Fellowship	0%	0%	0%	0%
Event / Sponsorship Funding	0%	0%	0%	0%

Grant Size

Grant Amount Awarded (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Median Funder	Custom Cohort
Median grant size	\$210K	\$225K	\$150K	\$60K	\$161K

Grant Amount Awarded (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Average Funder	Custom Cohort
Less than \$10K	1%	0%	1%	11%	2%
\$10K - \$24K	3%	4%	15%	15%	5%
\$25K - \$49K	7%	10%	16%	15%	6%
\$50K - \$99K	10%	16%	14%	17%	13%
\$100K - \$149K	14%	6%	4%	10%	12%
\$150K - \$299K	27%	23%	12%	14%	24%
\$300K - \$499K	14%	24%	21%	7%	11%
\$500K - \$999K	14%	9%	11%	5%	12%
\$1MM and above	11%	7%	7%	7%	15%

Median Percent of Budget Funded by Grant (Annualized) (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Median Funder	Custom Cohort
Size of grant relative to size of grantee budget	6%	6%	5%	3%	4%

Grant Size - By Subgroup

Grant Amount Awarded (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
Median grant size	\$153K	\$300K	\$325K	\$184K

Grant Amount Awarded (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
Less than \$10K	2%	0%	0%	0%
\$10K - \$24K	5%	3%	0%	0%
\$25K - \$49K	9%	0%	0%	10%
\$50K - \$99K	16%	0%	0%	7%
\$100K - \$149K	16%	8%	7%	23%
\$150K - \$299K	22%	32%	37%	33%
\$300K - \$499K	7%	37%	17%	10%
\$500K - \$999K	15%	13%	17%	10%
\$1MM and above	9%	8%	23%	7%

Median Percent of Budget Funded by Grant (Annualized) (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
Size of grant relative to size of grantee budget	6%	10%	5%	4%

Grantee Characteristics

Operating Budget of Grantee Organization (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Median Funder	Custom Cohort
Median Budget	\$1.6M	\$1.3M	\$1.2M	\$1.4M	\$2.0M

Operating Budget of Grantee Organization (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Average Funder	Custom Cohort
<\$100K	1%	1%	0%	9%	4%
\$100K - \$499K	18%	20%	29%	20%	14%
\$500K - \$999K	14%	19%	15%	14%	13%
\$1MM - \$4.9MM	40%	40%	32%	30%	33%
\$5MM - \$24MM	17%	15%	15%	17%	20%
>=\$25MM	8%	5%	10%	11%	16%

Grantee Characteristics - By Subgroup

Operating Budget of Grantee Organization (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
Median Budget	\$1.1M	\$1.6M	\$4.2M	\$3.5M

Operating Budget of Grantee Organization (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
<\$100K	2%	0%	0%	0%
\$100K - \$499K	26%	14%	0%	7%
\$500K - \$999K	19%	11%	5%	7%
\$1MM - \$4.9MM	30%	56%	55%	54%
\$5MM - \$24MM	15%	17%	27%	25%
>=\$25MM	9%	3%	14%	7%

Funding Relationship

Pattern of Grantees' Funding Relationship with the Foundation (Overall)	Irvine 2014	Irvine 2010	Average Funder	Custom Cohort
First grant received from the Foundation	22%	33%	29%	25%
Consistent funding in the past	55%	45%	52%	56%
Inconsistent funding in the past	24%	23%	19%	20%

Funding Status and Grantees Previously Declined Funding (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Median Funder	Custom Cohort
Percent of grantees currently receiving funding from the Foundation	84%	93%	82%	75%	84%
Percent of grantees previously declined funding by the Foundation	32%	36%	25%	26%	22%

Funding Relationship - By Subgroup

Pattern of Grantees' Funding Relationship with the Foundation (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
First grant received from the Foundation	16%	18%	38%	37%
Consistent funding in the past	55%	74%	56%	30%
Inconsistent funding in the past	29%	8%	6%	33%

Funding Status and Grantees Previously Declined Funding (By Subgroup)	Arts	California Democracy	Youth	Special Initiatives
Percent of grantees currently receiving funding from the Foundation	79%	97%	94%	87%
Percent of grantees previously declined funding by the Foundation	38%	29%	7%	28%

Grantee Demographics

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

Gender of Respondents (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Average Funder	Custom Cohort
Female	62%	62%	67%	63%	57%
Male	38%	38%	33%	37%	43%

Race/Ethnicity of Respondents (Overall)	Irvine 2014	Irvine 2010	Average Funder	Custom Cohort
Multi-racial	2%	2%	2%	3%
African-American/Black	6%	5%	7%	7%
Asian (incl. Indian subcontinent)	5%	7%	3%	5%
Hispanic/Latino	11%	8%	5%	8%
American Indian/Alaskan Native	1%	1%	1%	1%
Pacific Islander	1%	0%	0%	0%
Caucasian/White	71%	75%	80%	74%
Other	2%	2%	1%	1%

Funder Characteristics

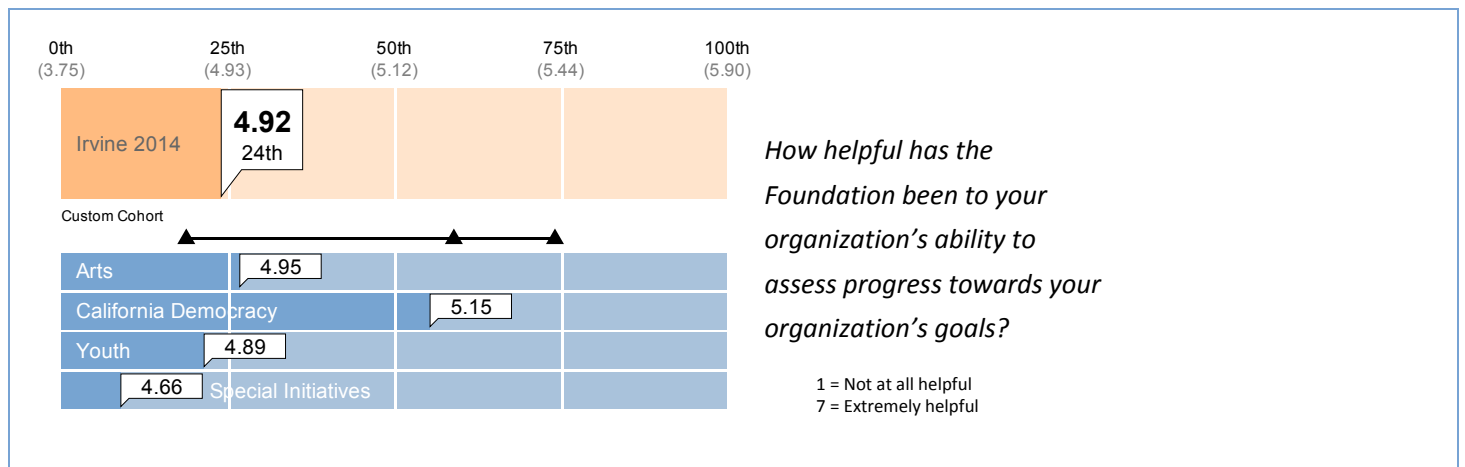
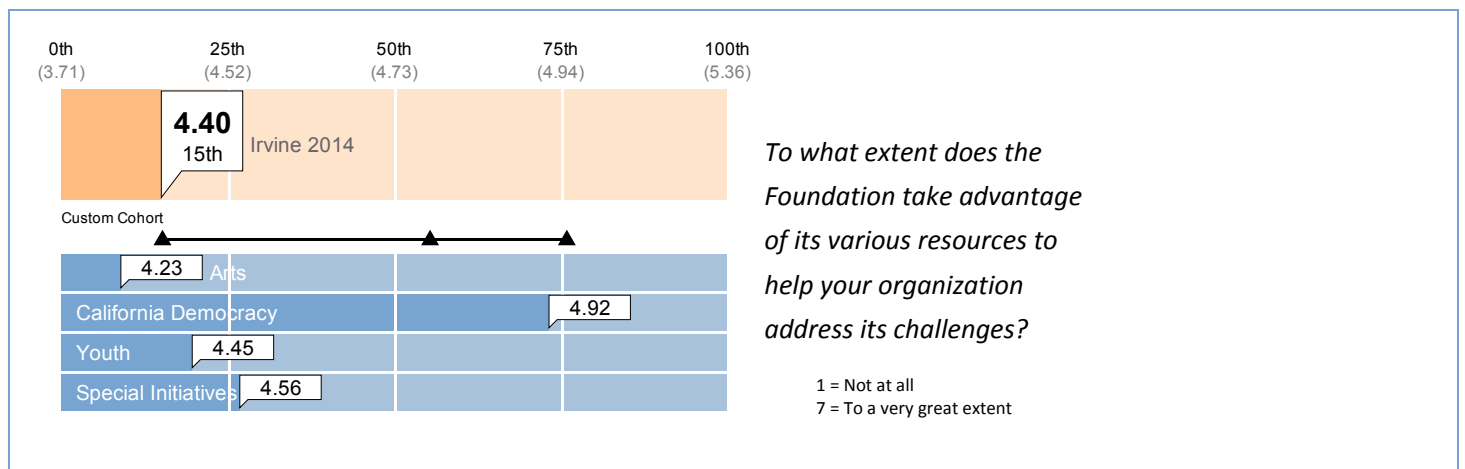
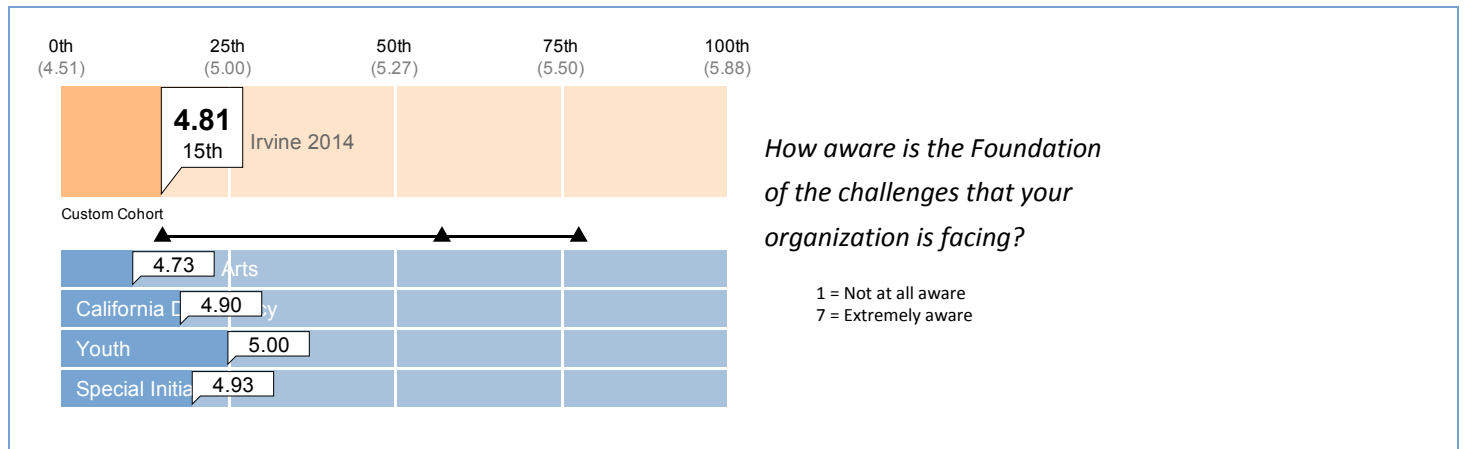
Financial Information (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Median Funder	Custom Cohort
Total assets	\$1.7M	\$1.4B	\$1.6B	\$232.1M	\$1.6B
Total giving	\$72.7M	\$67.0M	\$73.1M	\$14.0M	\$72.7M

Funder Staffing (Overall)	Irvine 2014	Irvine 2010	Irvine 2006	Median Funder	Custom Cohort
Total staff (FTEs)	43	42	36	13	45
Percent of staff (FTEs) actively managing grantee relationships	47%	N/A	N/A	40%	39%
Percent of staff who are program staff	35%	38%	44%	45%	44%

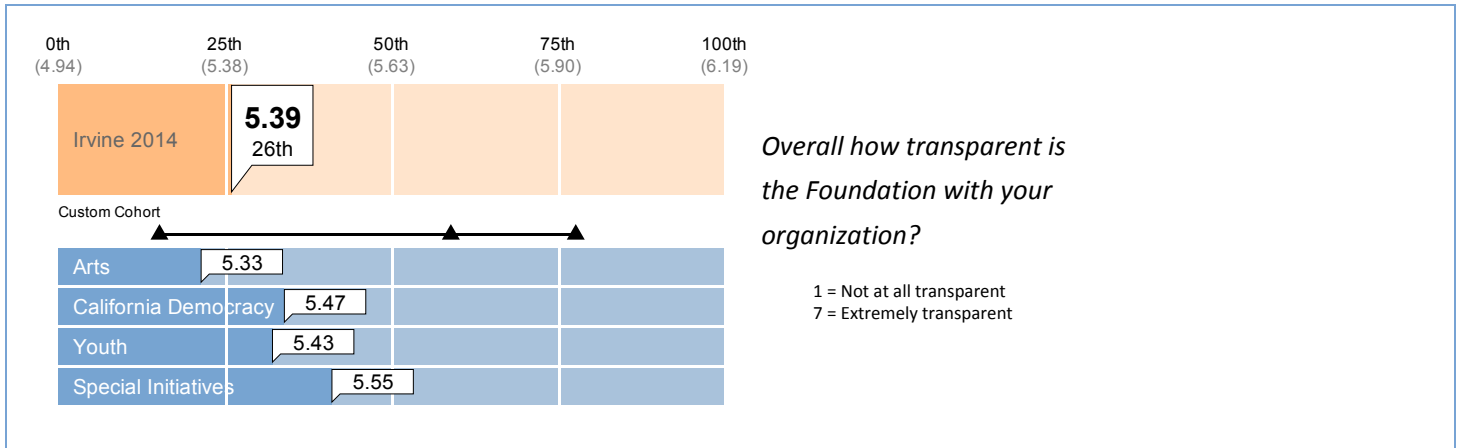
Grantmaking Processes (Overall)	Irvine 2014	Irvine 2010	Median Funder	Custom Cohort
Proportion of grants that are proactive	98%	90%	40%	88%
Proportion of grantmaking dollars that are proactive	98%	95%	44%	88%

ADDITIONAL MEASURES

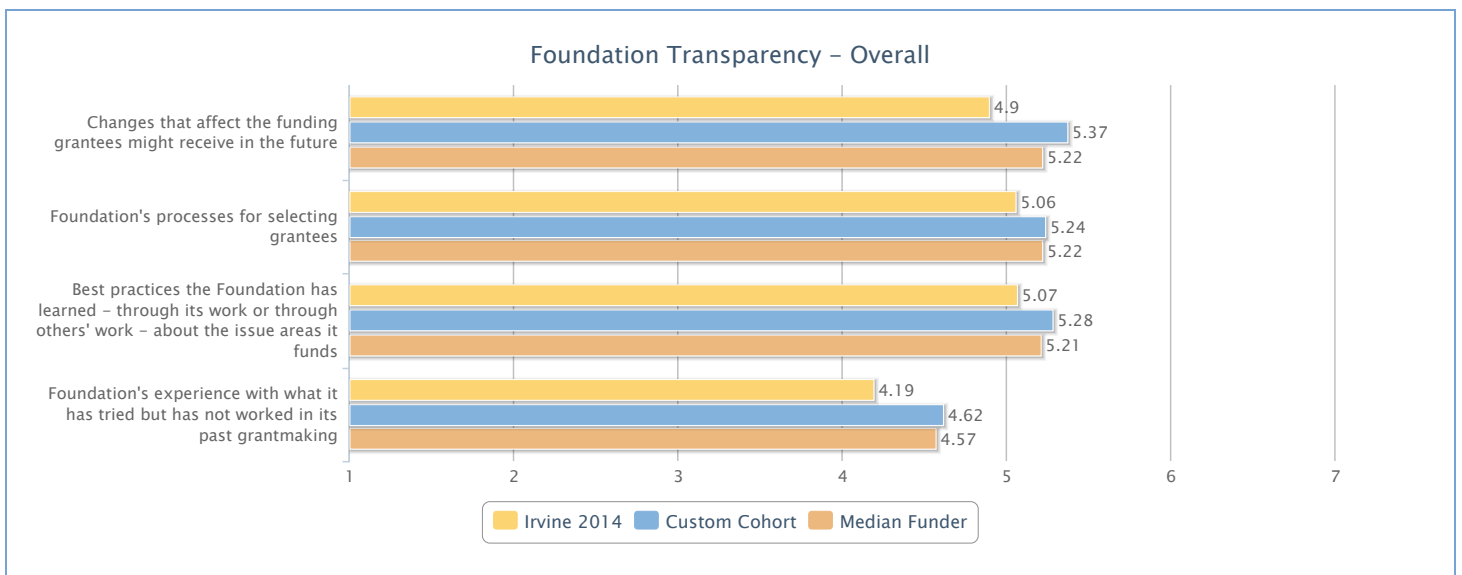
The following questions were recently added to the grantee survey and depict comparative data from only 41 funders.



Funder Transparency

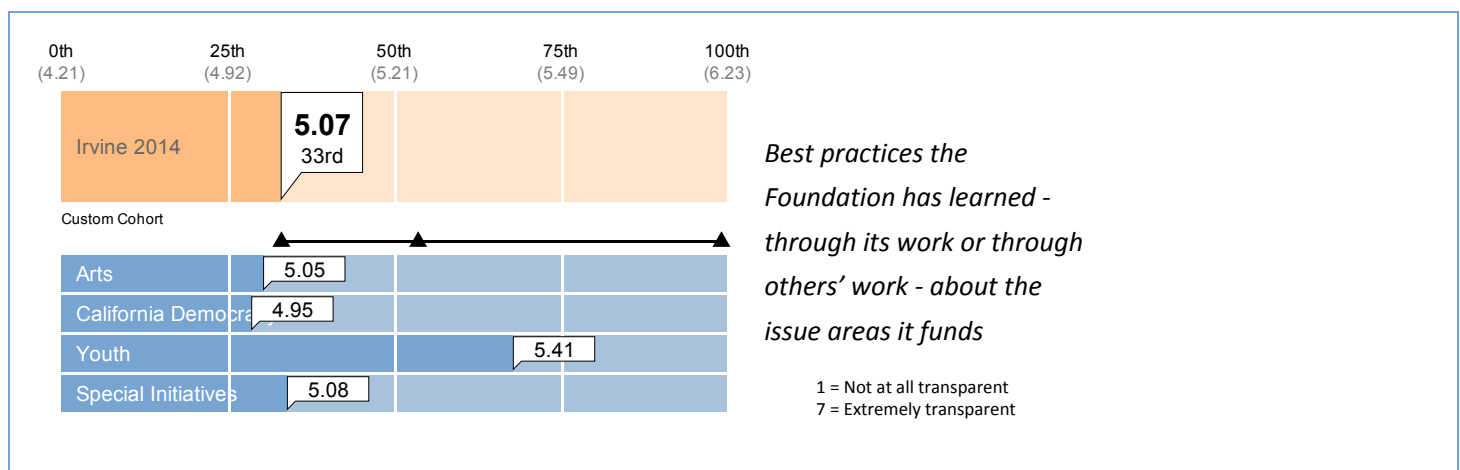
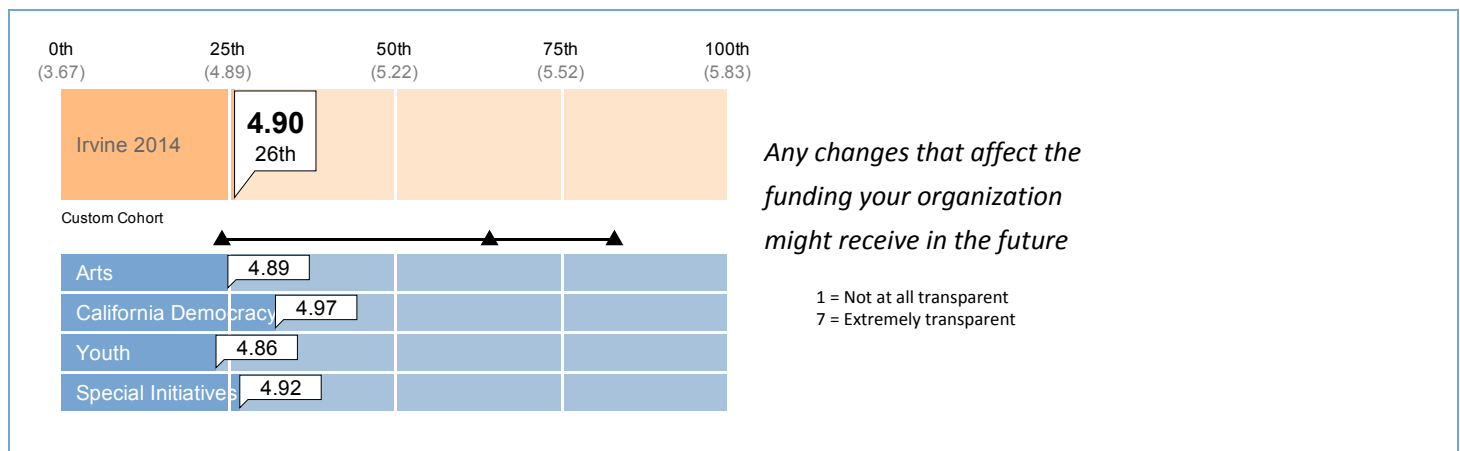
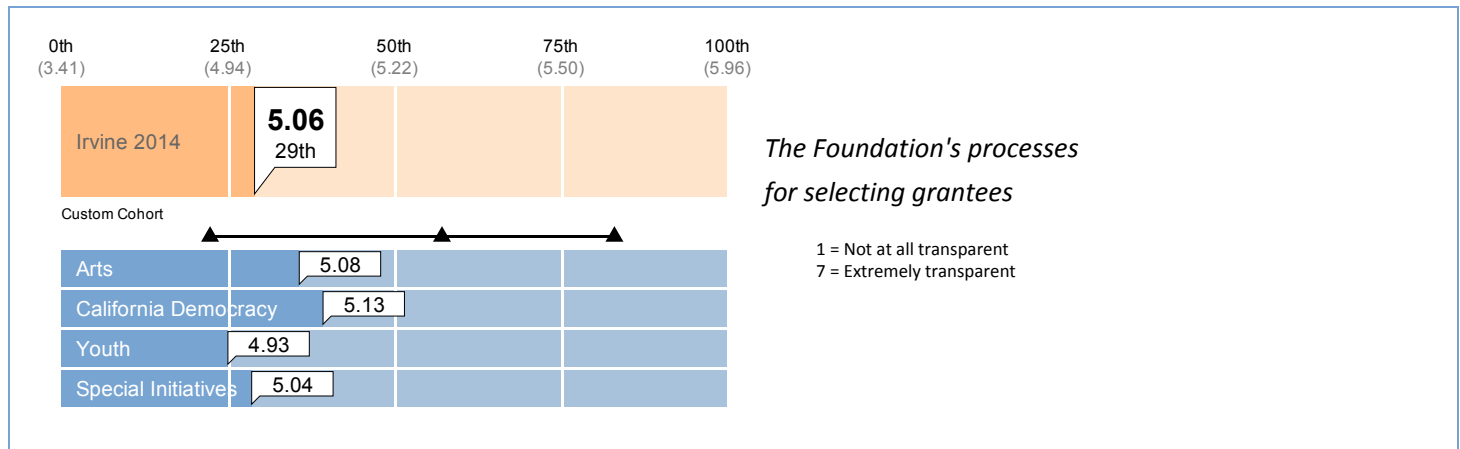


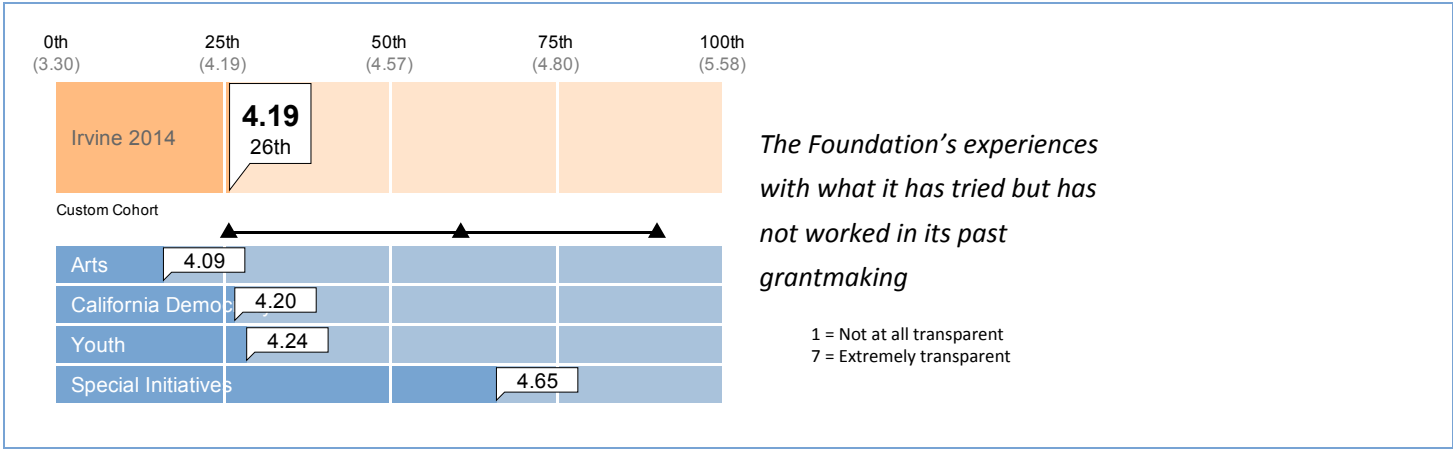
Grantees were asked to rate how transparent Irvine is in the following areas, where 1 = "Not at all transparent" and 7 = "Extremely transparent."



Aspects of Funder Transparency

The charts below show grantee ratings of Irvine's transparency in specific areas of its work.





ABOUT CEP & 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.

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