
The James Irvine Foundation 2023 Grantee Perception Report

Generated on October 18, 2023



THE CENTER FOR
EFFECTIVE PHILANTHROPY

675 Massachusetts Avenue
7th Floor
Cambridge, MA 02139
617-492-0800

131 Steuart Street
Suite 501
San Francisco, CA 94105
415-391-3070

cep.org

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

Interpreting Your Charts..... 1

Key Ratings Summary 2

Survey Population 3

Subgroup Methodology and Differences 5

Comparative Cohorts 6

Grantmaking Characteristics..... 8

Impact on and Understanding of Grantees' Fields..... 11

Advancing Knowledge and Public Policy..... 12

Impact on and Understanding of Grantees' Local Communities 13

Impact on and Understanding of Grantees' Organizations..... 14

Grantee Challenges..... 15

Non-Monetary Assistance 16

Funder-Grantee Relationships..... 19

Interaction Patterns 22

Communication..... 25

Contextual Understanding..... 27

Diversity, Equity, and Inclusion..... 28

Grant Processes 30

Selection Process 31

Reporting and Evaluation Process 33

Reporting Process 34

Evaluation Process..... 36

Dollar Return and Time Spent on Processes..... 37

Time Spent on Selection Process 38

Time Spent on Reporting and Evaluation Process..... 40

Customized Questions 42

Hybrid Approach 43

Costs of Project..... 44

Grantees' Written Comments 45

Quality of Processes, Interactions and Communications 46

Suggestion Topics..... 47

Suggestions 48

Respondents and Communities Served 52

Respondent Demographics 54

Grantee Organizations' Demographics..... 58

Respondent Job Title 60

Contextual Data 61

Grantee Characteristics 66

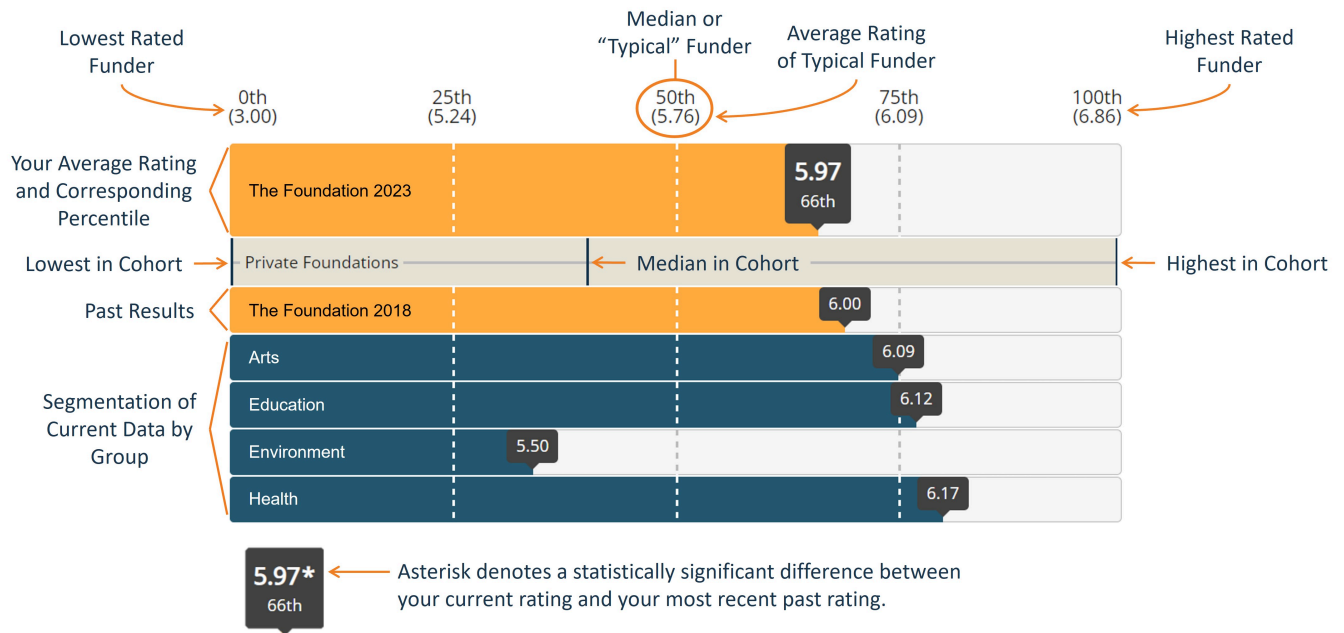
Funder Characteristics 69

Additional Survey Information 70

About CEP and Contact Information..... 72

Interpreting Your Charts

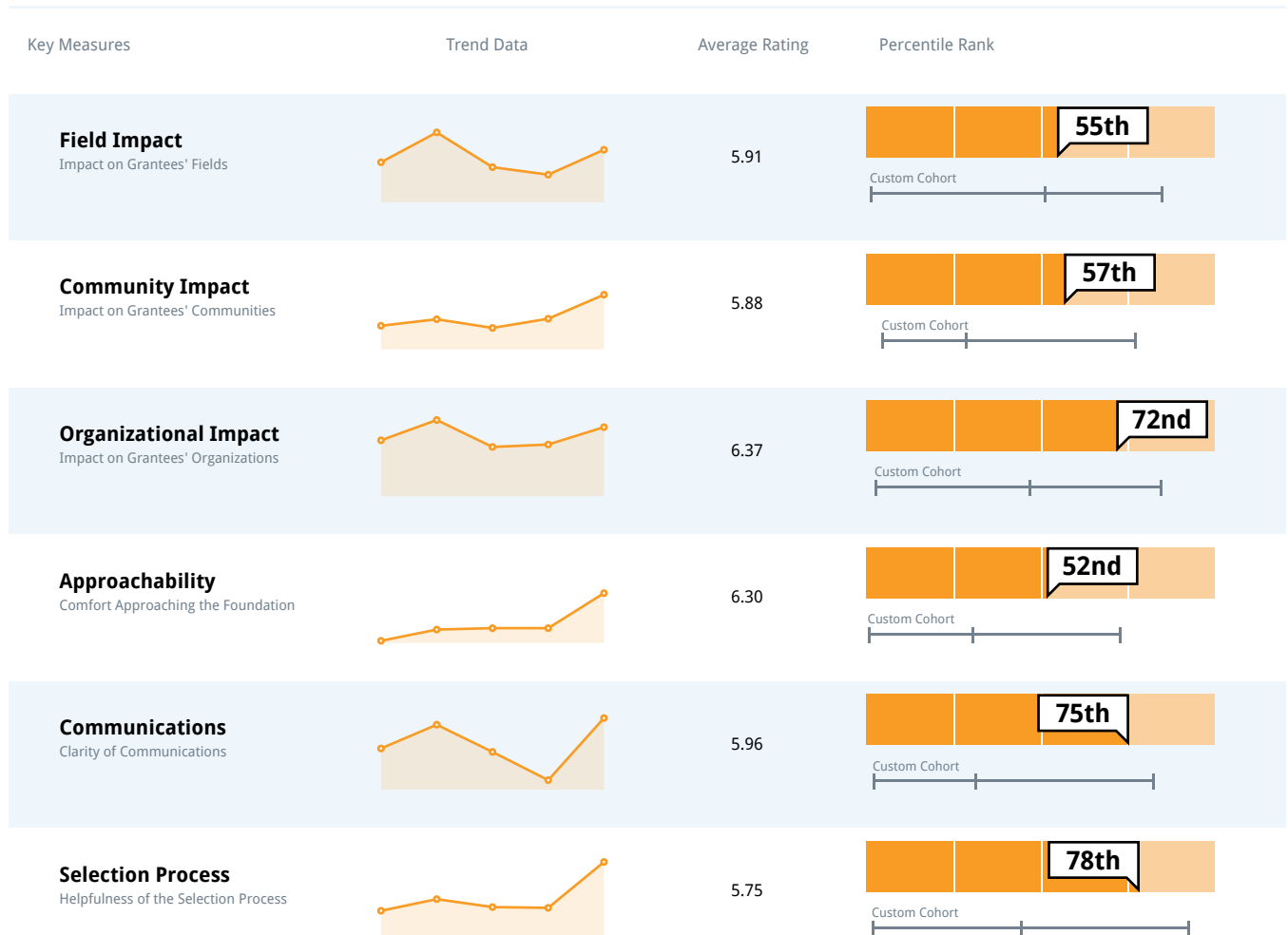
Many of the charts in this report are shown in this format. See below for an explanation of the chart elements.



Missing data: Selected grantee ratings are not displayed in this report due to changes in the survey instrument, or when a question received fewer than 10 responses.

Key Ratings Summary

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



Survey Population

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
Irvine 2023	May and June 2023	293	169	58%
Irvine 2020	August and September 2020	317	201	63%
Irvine 2014	September and October 2014	340	235	69%
Irvine 2010	May and June 2010	411	305	74%
Irvine 2006	September and October 2006	237	171	72%

Survey Year	Year of Active Grants
Irvine 2023	June 2022 - May 2023
Irvine 2020	June 2019 - May 2020
Irvine 2014	2013
Irvine 2010	2009
Irvine 2006	2005

Throughout this report, The James Irvine Foundation's survey results are compared to CEP's broader dataset of more than 50,000 grantee responses from over 300 funders built up over more than a decade of grantee surveys. A list of some funders who have recently participated in the GPR can be found at <https://cep.org/gpr-participants/>.

In order to protect the confidentiality of respondents results are not shown when CEP received fewer than 10 responses to a specific question.

Subgroups

In addition to showing Irvine's overall ratings, this report shows ratings segmented by Initiative. The online version of this report also shows ratings segmented by Geographic Area Served, Support Type, Grantee Organization Demographics, Respondent Gender, Respondent Person of Color Identity, and Respondents' Intersectional Identities.

Initiative	Number of Responses
Better Careers	43
Fair Work	21
Just Prosperity	28
Priority Communities	27
Program Development	26

Geographic Area Served	Number of Responses
Bay Area Region	22
Los Angeles Metro	26
CA Statewide	78
Riverside and San Bernardino	15
San Joaquin Valley	12

Support Type	Number of Responses
Flexible Project Support	71
General Operating Support	15
Project Support	83

Grantee Organization Demographics	Number of Responses
Minority-led	144

Grantee Organization Demographics	Number of Responses
Not Minority-led	22
Respondent Gender	Number of Responses
Identifies as a Man	54
Identifies as a Woman	102
Respondent Person of Color Identity	Number of Responses
Does not identify as a Person of Color	63
Identifies as a Person of Color	93
Respondents' Intersectional Identities	Number of Responses
Identifies as a Man and Person of Color	34
Identifies as a Woman and Person of Color	56
Identifies as Man and Not a Person of Color	19
Identifies as Woman and Not a Person of Color	42

Subgroup Methodology and Differences

The following page outlines the methodology used to determine the subgroups that are displayed in the report, along with any differences in grantee perceptions. Differences should be interpreted in the context of the Foundation's goals and strategy.

CEP conducts statistical analysis on groups of 10 or larger. Ratings described as "significantly" higher or lower reflect statistically significant differences at a P-value less than or equal to 0.1. Ratings described as "trending" higher or lower reflect a 0.3-point difference larger or smaller than the overall average rating.

Subgroup Methodology

Initiative: Using the grantee list provided by the Foundation, CEP tagged grantees based on Initiative.

- Program Development includes the following initiatives: Housing Affordability, New Initiatives in Development, Research and Development, and Strategic Partnerships.
- Due to small group size, grantee responses from Additional Grantmaking, Impact Assessment & Learning, Leadership Awards, Media, Postsecondary Success, Protecting Immigrant Rights, Racial Equity, and Voter and Civic Engagement initiatives are excluded from the subgroup display.

Geographic Area Served: Using the grantee list provided by the Foundation, CEP tagged grantees based on the geographic area they serve.

- Due to small group size, grantee responses from Central Coast, Central Valley - Sacramento Metro, North Coast and State, Orange County, and San Diego and Imperial regions are excluded from the subgroup display.

Support Type: Using the grantee list provided by the Foundation, CEP tagged grantees based on the type of support grantees receive from Irvine.

Grantee Organization Demographics: Using data grantees provided in the survey, CEP tagged grantees based on whether their organizations are minority-led or not based on input from Irvine.

- Grantees are tagged as "Minority-led" if they meet one of the three criteria: 1) the CEO/ED identifies as a person of color (self-reported by CEO/ED or by the respondent), 2) 50% or more of the individuals on the board identify as a person of color, or 3) 50% or more of the individuals on the staff identify as a person of color.

Respondent Gender: Using data grantees provided in the survey, CEP tagged grantees based on their gender identity. Those segmented as "Identifies as a Man" selected "Man" only, and those segmented as "Identifies as a Woman" selected "Woman" only.

Respondent Person of Color Identity: Using data grantees provided in the survey, CEP tagged grantees based on their person of color identity.

Respondents' Intersectional Identities: Using data grantees provided in the survey, CEP tagged grantees based on their gender and person of color identity.

Subgroup Differences

Initiative: Ratings from Fair Work grantees trend lower on many measures related to funder-grantee relationships, communication, and grant processes.

Geographic Area Served: There are no consistent differences in ratings when segmented by geographic area served.

Support Type: Grantees receiving Flexible Project Support rate significantly higher than General Operating Support grantees on the Foundation's impact on grantees' local communities and some measures on funder-grantee relationships and communication.

Grantee Organization Demographics: Minority-led grantees rate significantly lower than grantees who are not minority-led on most measures related to diversity, equity, and inclusion.

Respondent Gender: Grantees who identify as a woman rate significantly lower than grantees who identify as a man on some measures related to diversity, equity, and inclusion.

Respondent Person of Color Identity: Grantees who identify as a person of color rate significantly higher than grantees who do not identify as a person of color on all measures related to non-monetary assistance, but they rate significantly lower on most measures related to diversity, equity, and inclusion.

Respondents' Intersectional Identities: Grantees who identify as a man and not a person of color rate significantly higher than grantees who identify as a woman and a person of color on some measures of diversity, equity, and inclusion.

For more information on respondent demographics, please see the ["Respondent Demographics"](#) section.

Comparative Cohorts

Customized Cohort

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

Custom Cohort

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

Standard Cohorts

CEP also included 18 standard cohorts to allow for comparisons to a variety of different types of funders.

Strategy Cohorts

Cohort Name	Count	Description
Small Grant Providers	36	Funders with median grant size of \$20K or less
Large Grant Providers	110	Funders with median grant size of \$200K or more
High Touch Funders	34	Funders for which a majority of grantees report having contact with their primary contact monthly or more often
Proactive Grantmakers	106	Funders that make at least 90% of grants by invitation only
Responsive Grantmakers	103	Funders that make at most 10% of grants by invitation only
Intermediary Funders	23	Funders that primarily regrant philanthropic dollars
International Funders	66	Funders that fund outside of their own country
European Funders	27	Funders that are headquartered in Europe

Annual Giving Cohorts

Cohort Name	Count	Description
Funders Giving Less Than \$5 Million	58	Funders with annual giving of less than \$5 million
Funders Giving \$50 Million or More	88	Funders with annual giving of \$50 million or more

Foundation Type Cohorts

Cohort Name	Count	Description
Private Foundations	170	All private foundations in the GPR dataset
Family Foundations	85	All family foundations in the GPR dataset
Community Foundations	41	All community foundations in the GPR dataset
Health Conversion Foundations	30	All health conversion foundations in the GPR dataset
Corporate Foundations	25	All corporate foundations in the GPR dataset

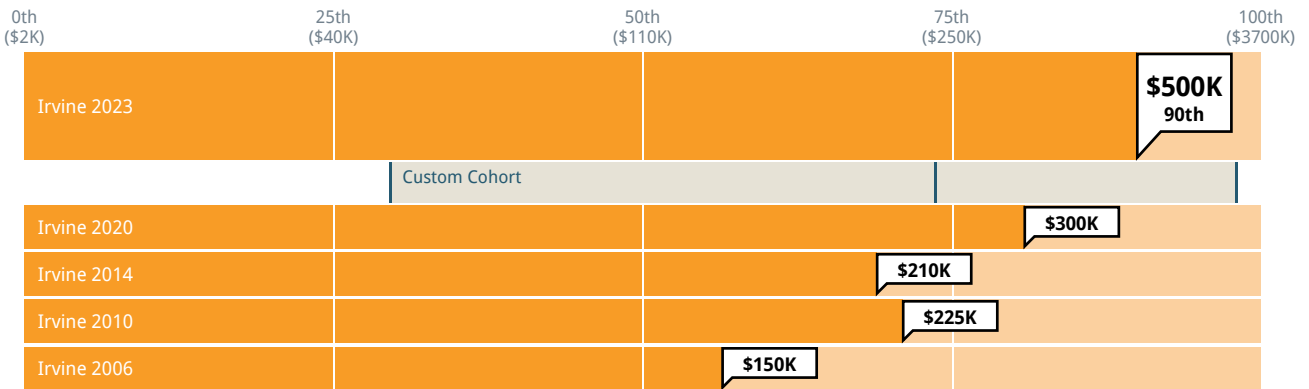
Other Cohorts

Cohort Name	Count	Description
Funders Outside the United States	42	Funders that are primarily based outside the United States
Recently Established Foundations	52	Funders that were established in 2000 or later
Funders Surveyed During COVID-19	172	Funders who surveyed grantees during COVID-19 (2020 - 2022)

Grantmaking Characteristics

Funders 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.

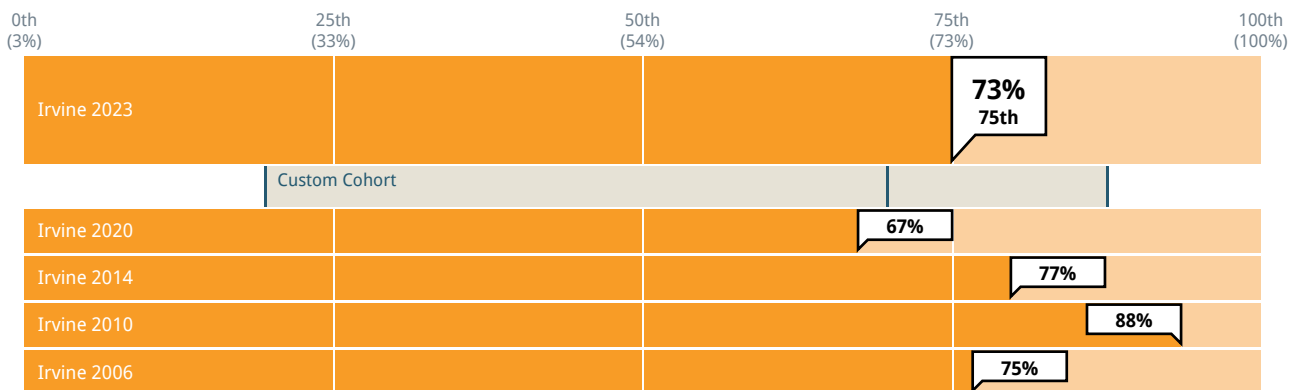
Median Grant Size



Cohort: Custom Cohort Past results: on Subgroup: None

Proportion of Multi-year Grants

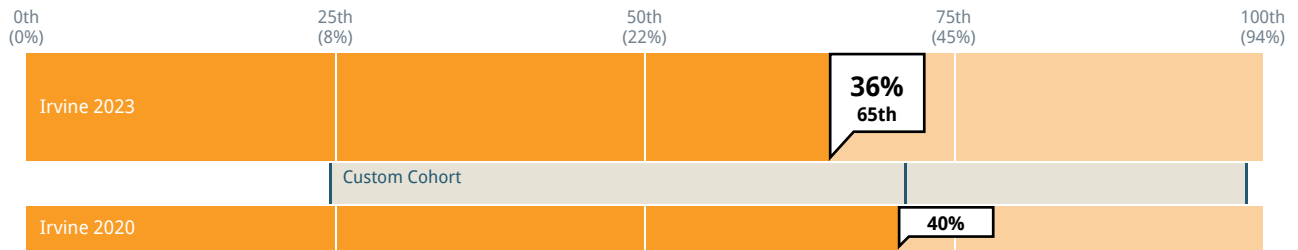
Proportion of grantees that report receiving grants for two years or longer



Cohort: Custom Cohort Past results: on Subgroup: None

Proportion of Unrestricted Funding

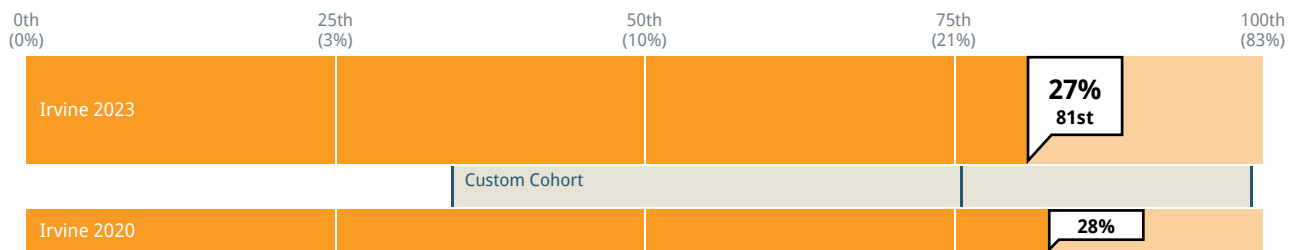
Proportion of grantees responding 'No, this funding was not restricted to a specific use (e.g., general operating, core support)'



Cohort: Custom Cohort Past results: on Subgroup: None

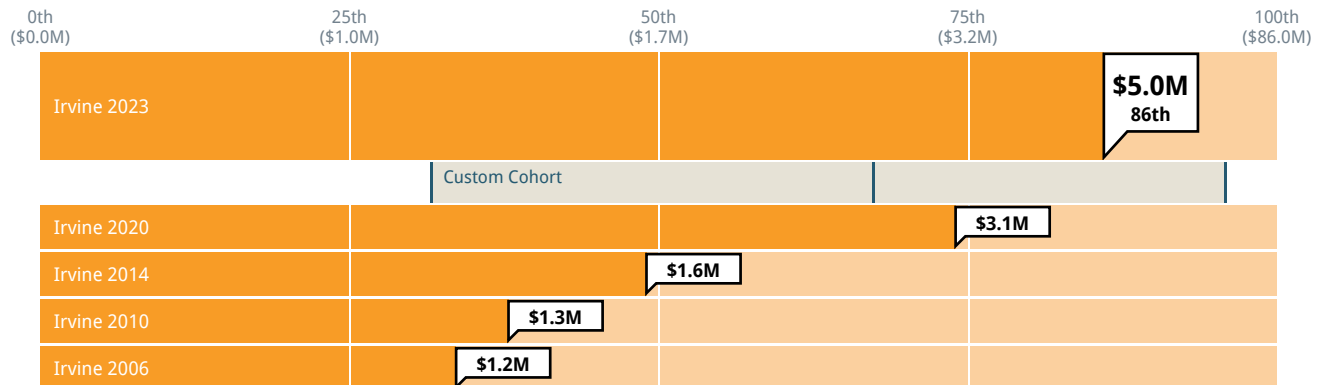
Proportion of Multi-year Unrestricted Grants

Proportion of grantees that report receiving grants for two years or longer and who report receiving general operating support funding that was not restricted to a specific use.



Cohort: Custom Cohort Past results: on Subgroup: None

Median Organizational Budget



Cohort: Custom Cohort Past results: on Subgroup: None

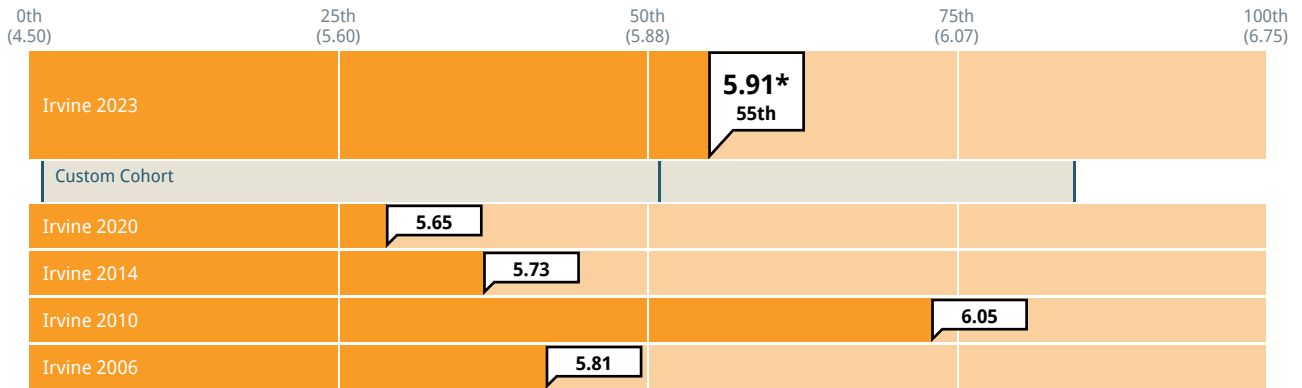
Selected Cohort: Custom Cohort						
Grant History	Irvine 2023	Irvine 2020	Irvine 2014	Irvine 2010	Average Funder	Custom Cohort
Percentage of first-time grants	34%	26%	22%	33%	29%	27%

Selected Cohort: Custom Cohort			
Program Staff Load			
	Dollars awarded per program full-time employee	Applications per program full-time employee	Active grants per program full-time employee
Irvine 2023	\$4.2M	6	8
Irvine 2020	\$3.9M	11	24
Irvine 2014	\$4.8M	30	34
Irvine 2010	\$4.2M	31	39
Irvine 2006	\$4.6M	52	41
Median Funder	\$2.6M	24	31
Custom Cohort	\$3.4M	13	20

Impact on and Understanding of Grantees' Fields

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

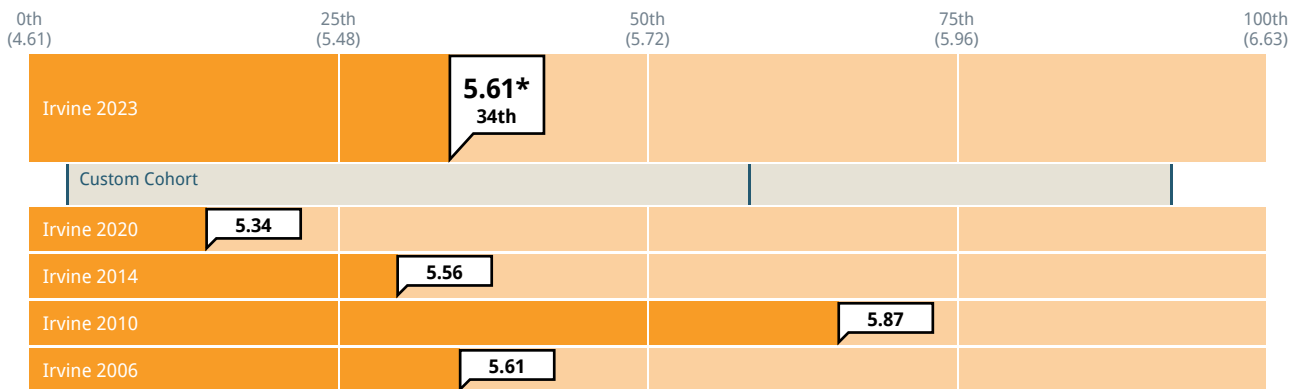
1 = No impact 7 = Significant positive impact



Cohort: Custom Cohort Past results: on Subgroup: None

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

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

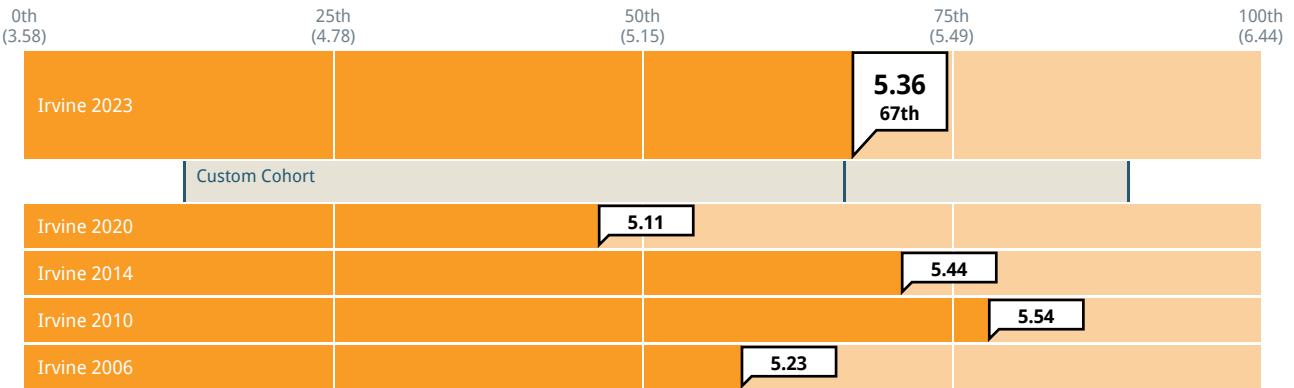


Cohort: Custom Cohort Past results: on Subgroup: None

Advancing Knowledge and Public Policy

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

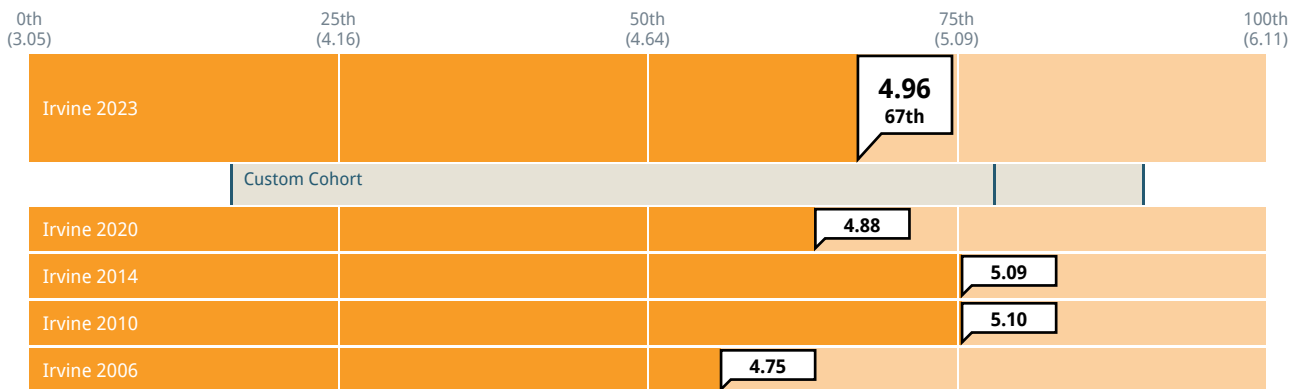
1 = Not at all 7 = Leads the field to new thinking and practice



Cohort: Custom Cohort Past results: on Subgroup: None

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

1 = Not at all 7 = Major influence on shaping public policy

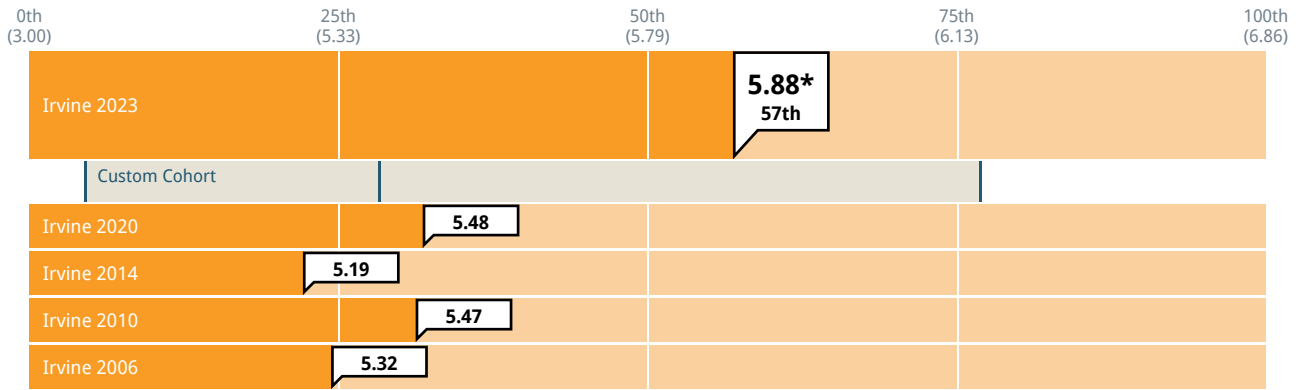


Cohort: Custom Cohort Past results: on Subgroup: None

Impact on and Understanding of Grantees' Local Communities

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

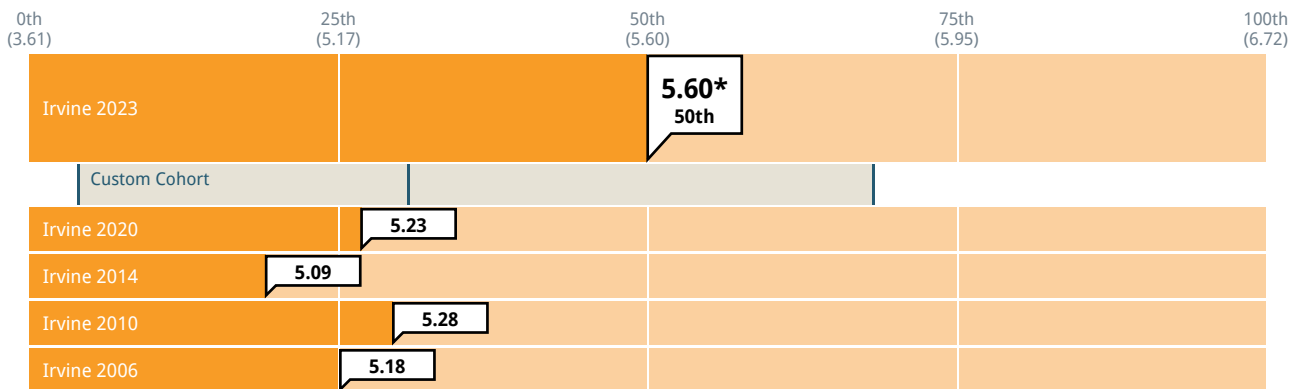
1 = No impact 7 = Significant positive impact



Cohort: Custom Cohort Past results: on Subgroup: None

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

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

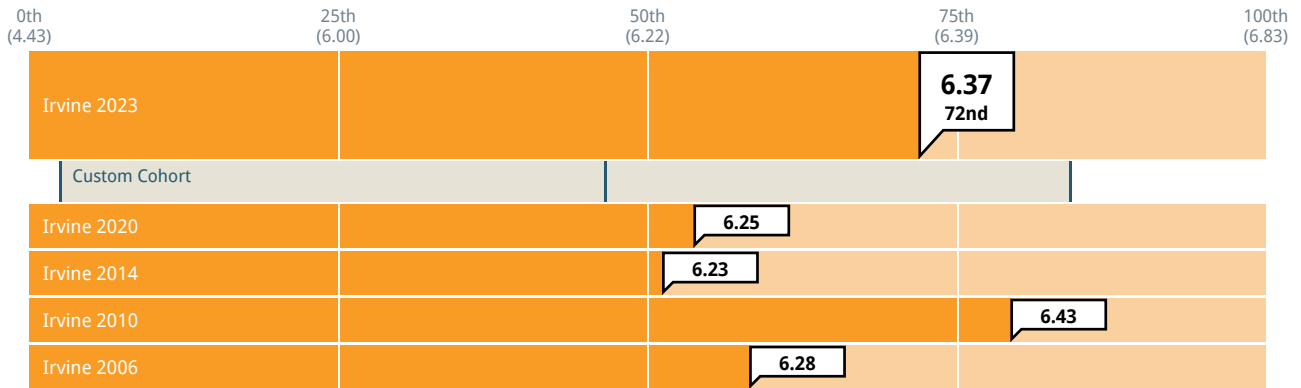


Cohort: Custom Cohort Past results: on Subgroup: None

Impact on and Understanding of Grantees' Organizations

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

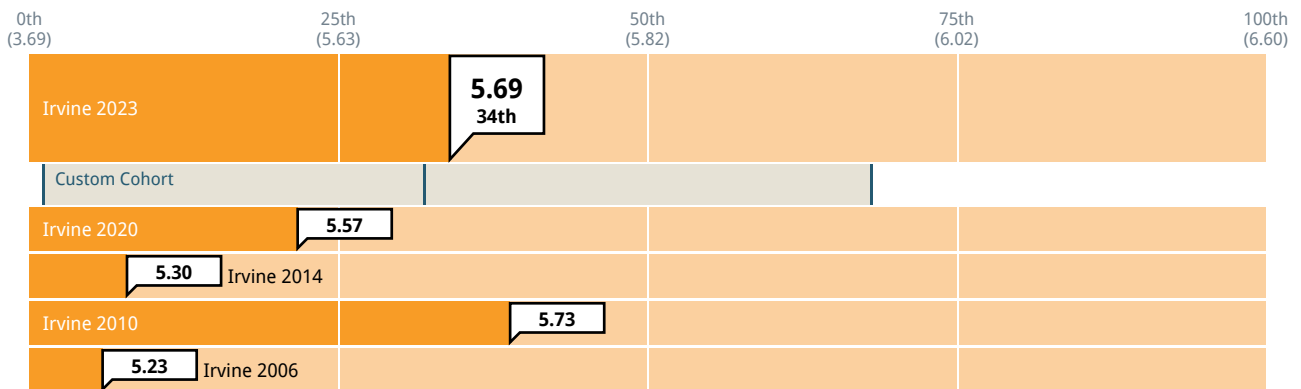
1 = No impact 7 = Significant positive impact



Cohort: Custom Cohort Past results: on Subgroup: None

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

1 = Limited understanding 7 = Thorough understanding

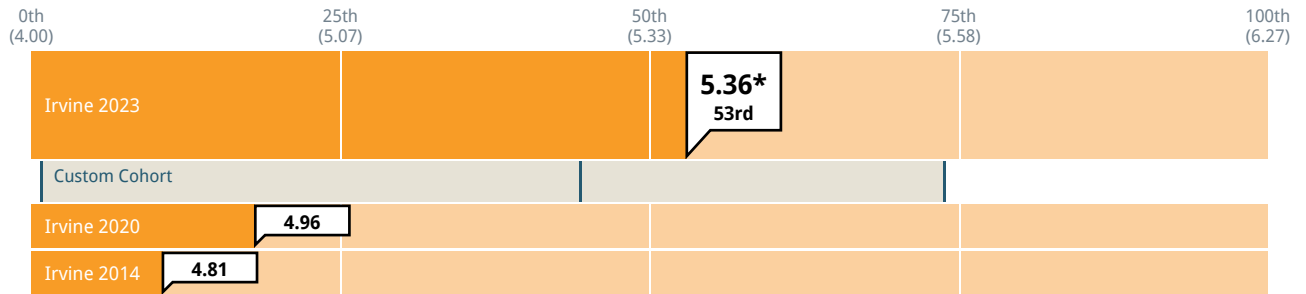


Cohort: Custom Cohort Past results: on Subgroup: None

Grantee Challenges

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

1 = Not at all aware 7 = Extremely aware



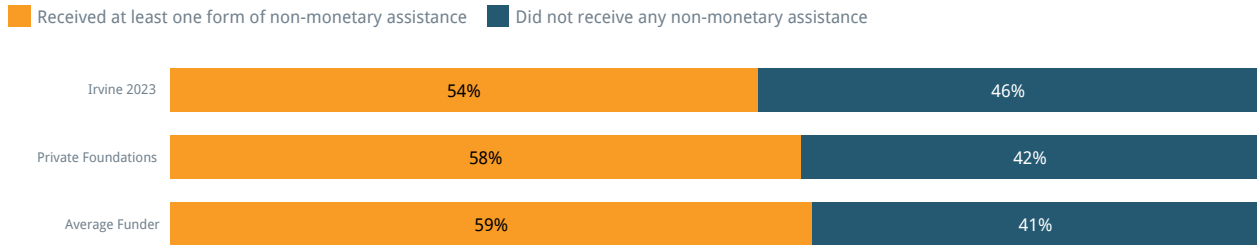
Cohort: Custom Cohort Past results: on Subgroup: None

Non-Monetary Assistance

Note: Respondents could select all forms of non-monetary assistance they received in the survey. Therefore, the following chart provides a summary of the proportion of grantees who indicated that they received at least one form of non-monetary assistance.

The following questions were recently added to the grantee survey and depict comparative data from fewer than 50 funders in the dataset.

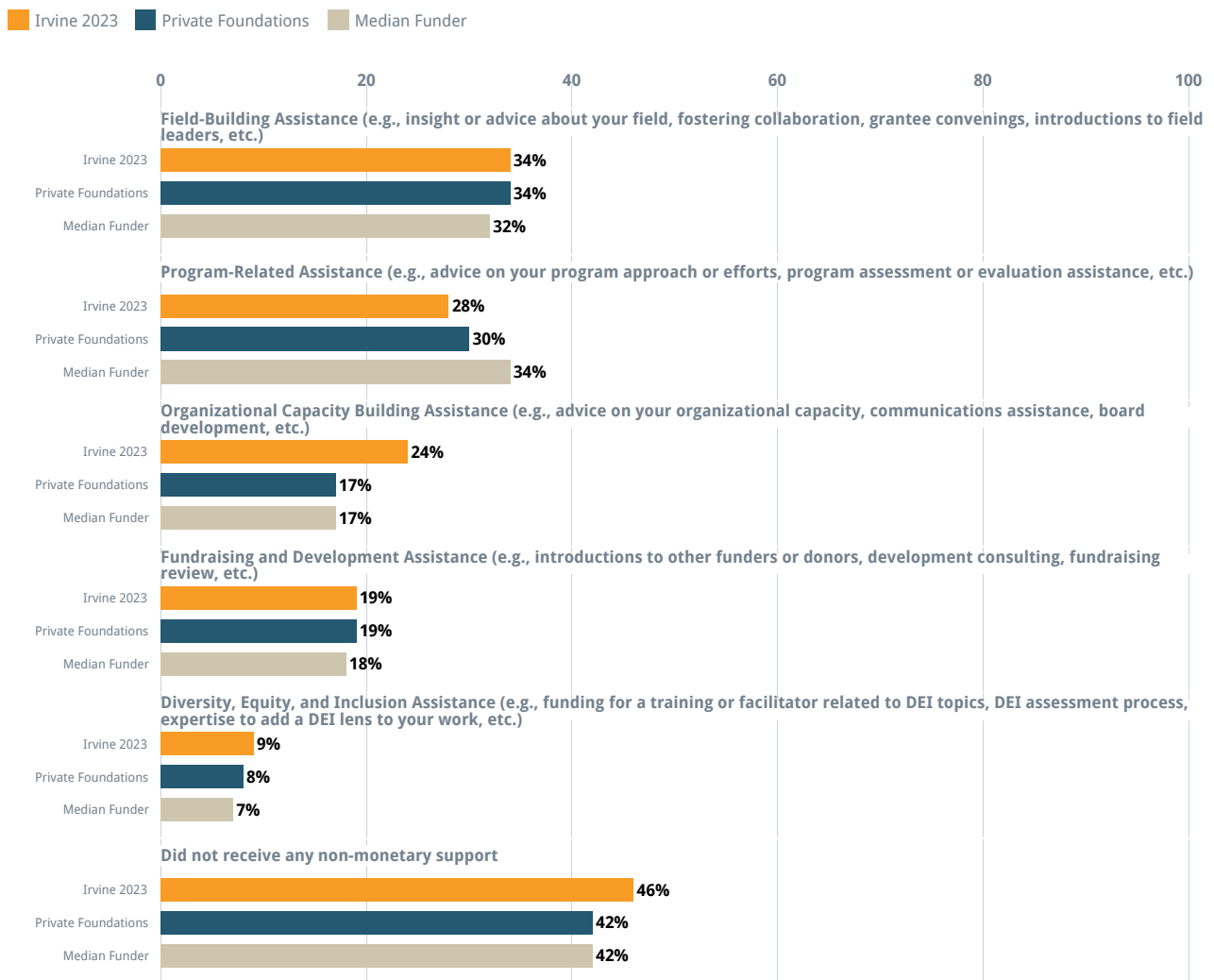
Proportion of Grantees Receiving Non-Monetary Assistance



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

In the survey, respondents were asked about the the non-monetary assistance they received in a check-all-that-apply format. Therefore, the following charts provide greater detail on the previous non-monetary assistance question.

Please indicate any types of non-monetary assistance that were a component of what you received from the Foundation (from staff or a third party paid for by the Foundation).



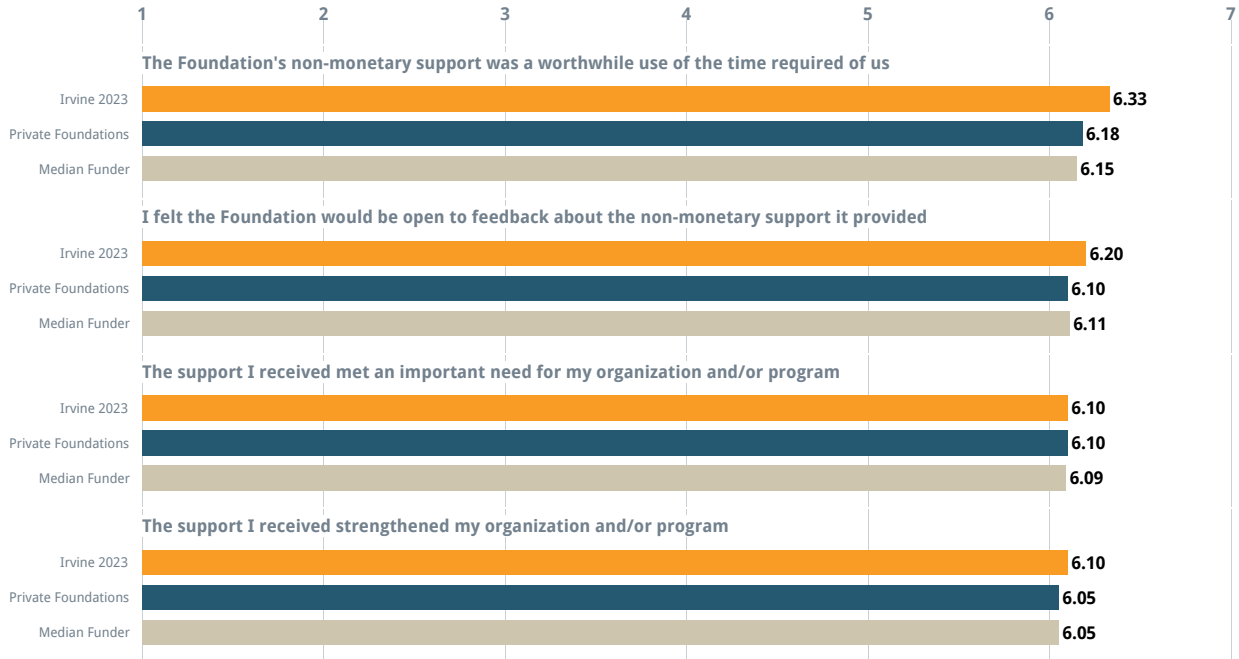
Cohort: Private Foundations Past results: on

Note: The following question was asked only of grantees who indicated receiving at least one form of non-monetary assistance in the previous question.

Please rate the extent to which you agree with the following statements about the non-monetary support you received from the Foundation:

1 = Not at all 7 = To a great extent

Irvine 2023 Private Foundations Median Funder

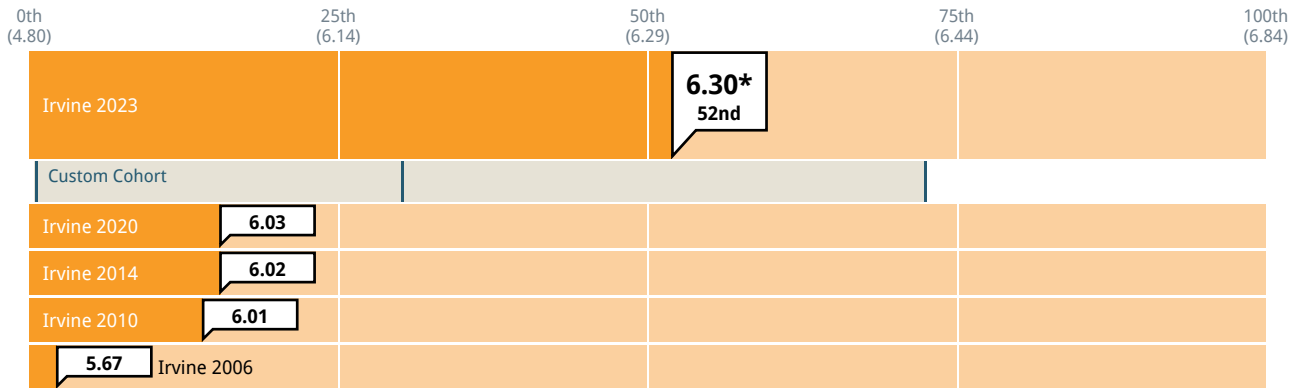


Cohort: Private Foundations Past results: on

Funder-Grantee Relationships

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

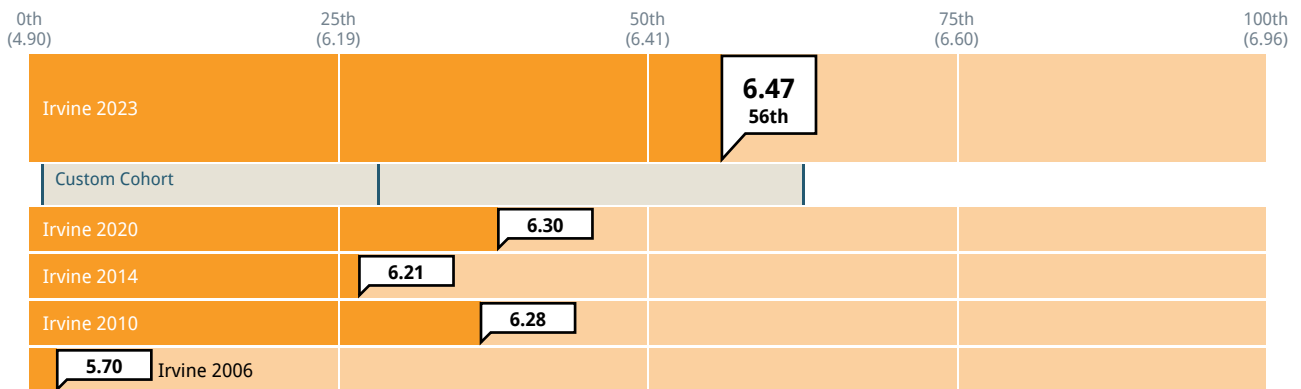
1 = Not at all comfortable 7 = Extremely comfortable



Cohort: Custom Cohort Past results: on Subgroup: None

Overall, how responsive was Foundation staff?

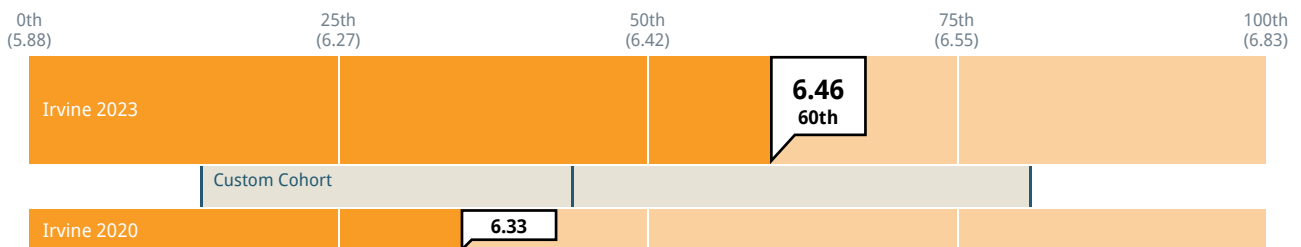
1 = Not at all responsive 7 = Extremely responsive



Cohort: Custom Cohort Past results: on Subgroup: None

To what extent did the Foundation exhibit trust in your organization's staff during this grant?

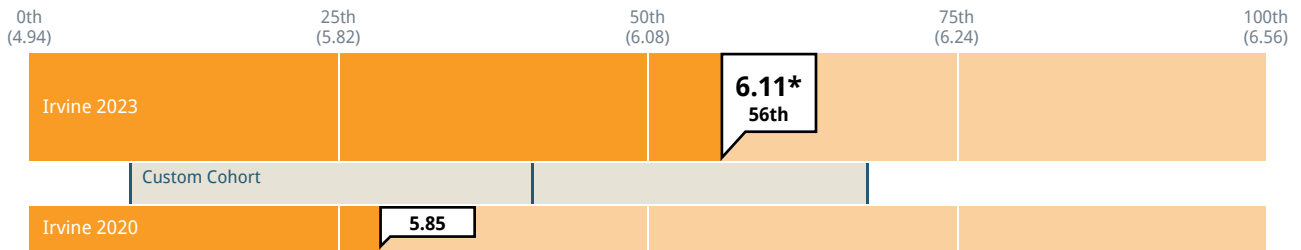
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

To what extent did the Foundation exhibit candor about the Foundation's perspectives on your work during this grant?

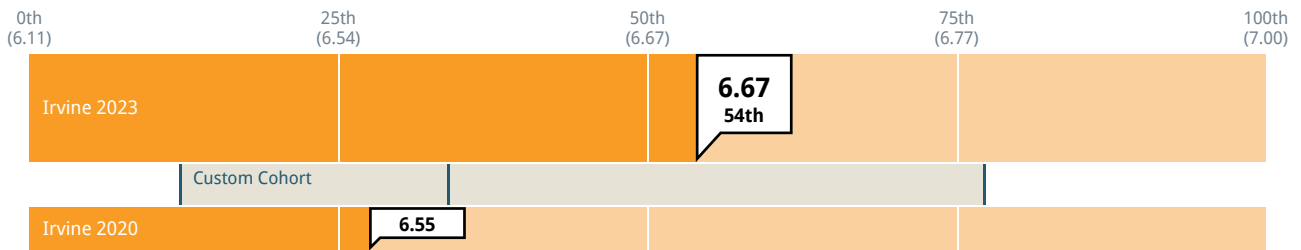
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

To what extent did the Foundation exhibit respectful interaction during this grant?

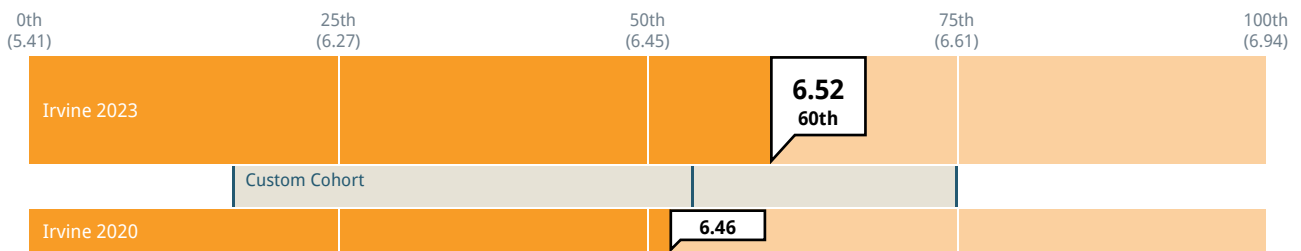
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

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

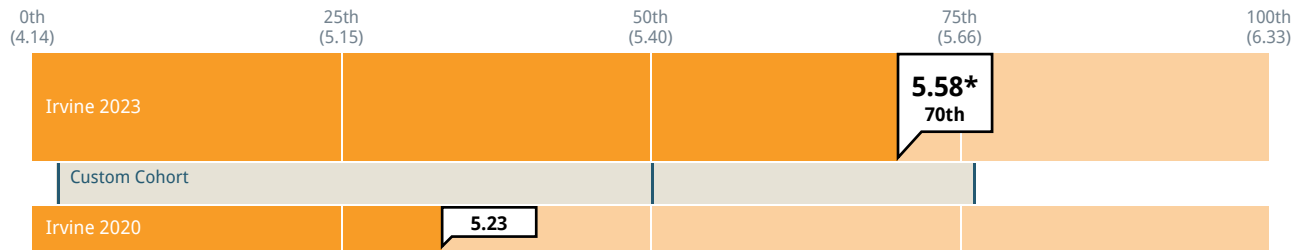
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

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

1 = Not at all 7 = To a great extent

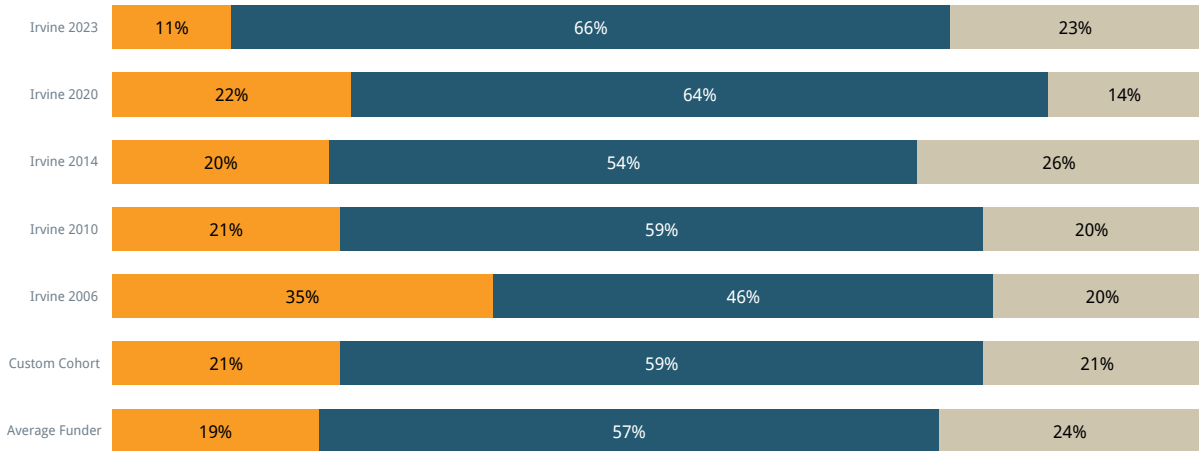


Cohort: Custom Cohort Past results: on Subgroup: None

Interaction Patterns

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

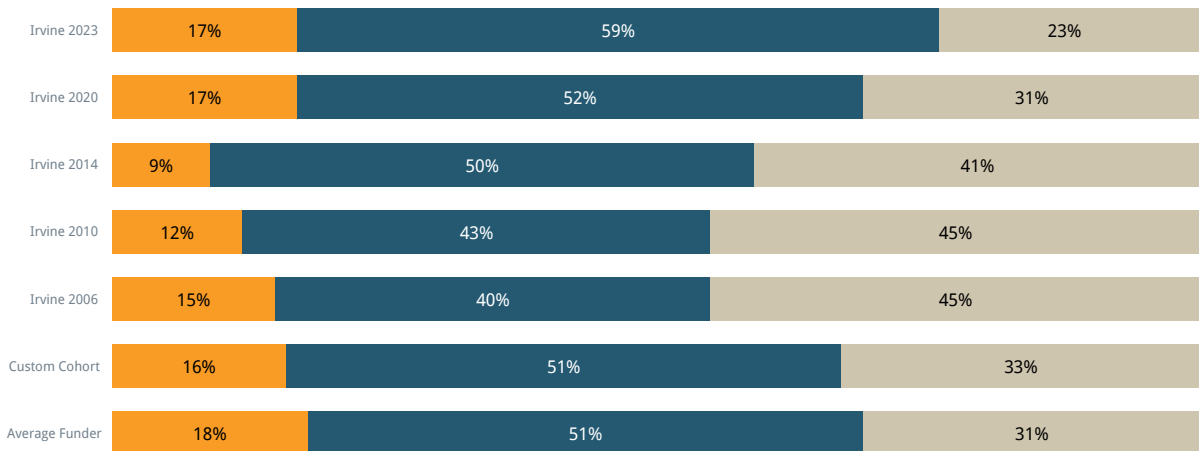
Yearly or less often Once every few months Monthly or more often



Cohort: Custom Cohort Past results: on

Who most frequently initiated the contact you had with your program officer during this grant?

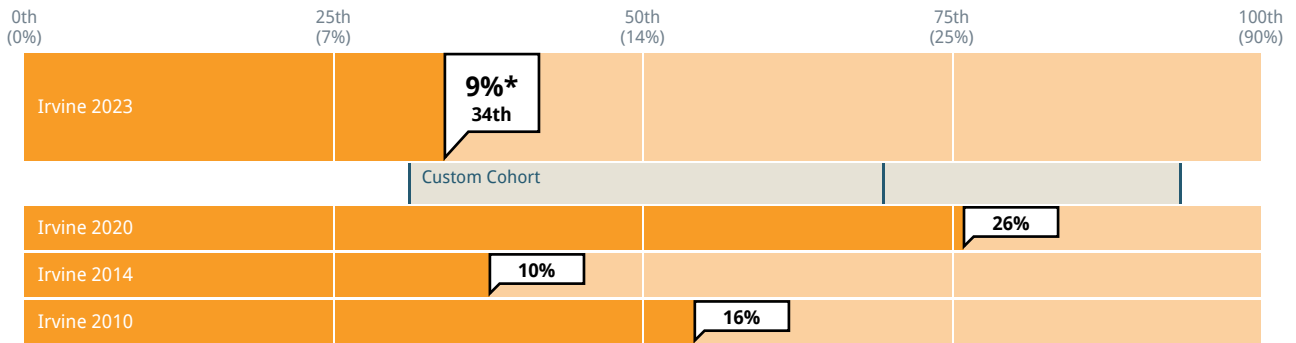
Program Officer Both of equal frequency Grantee



Cohort: Custom Cohort Past results: on

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

Proportion of grantees responding 'Yes'



Cohort: Custom Cohort Past results: on Subgroup: None

Please note that CEP recently modified the following question. The prior question was: "At any point during this grant, including the selection process, did the Foundation staff visit your offices or programs?" The question anchors have not been modified.

At any point during this grant, including the selection process, did Foundation staff conduct a site visit?

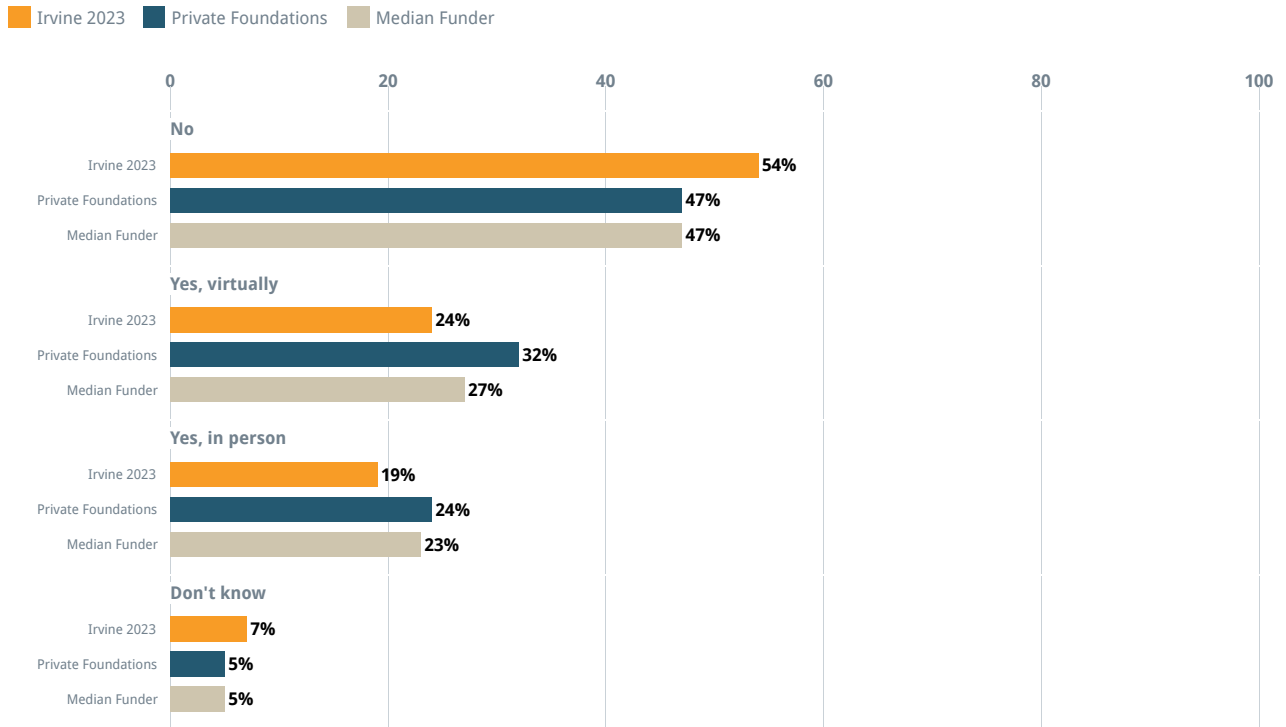
Yes, in person and/or virtual No Don't know



Cohort: Private Foundations Past results: on

In the survey, respondents were asked the site visit question in a check-all-that-apply format. Therefore, the following charts provide greater detail on the previous site visit question.

At any point during this grant, including the selection process, did Foundation staff conduct a site visit?

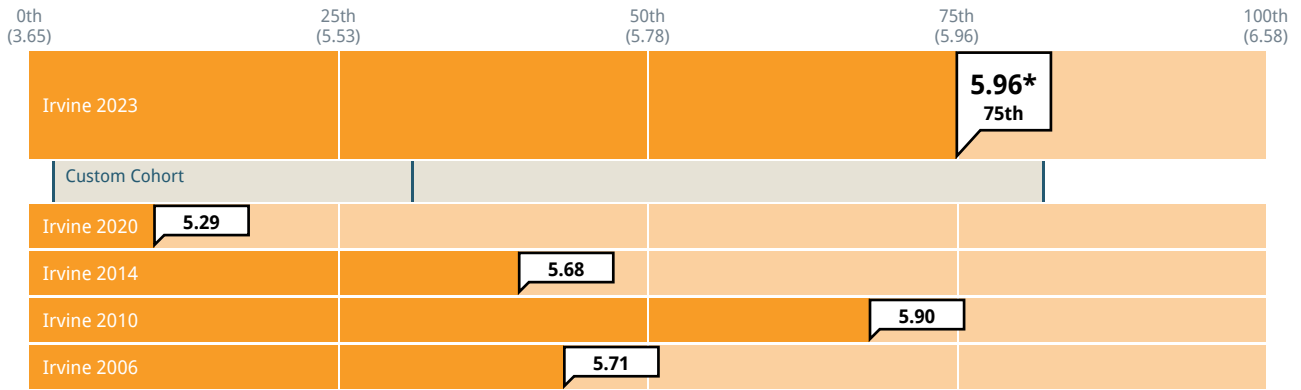


Cohort: Private Foundations Past results: on

Communication

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

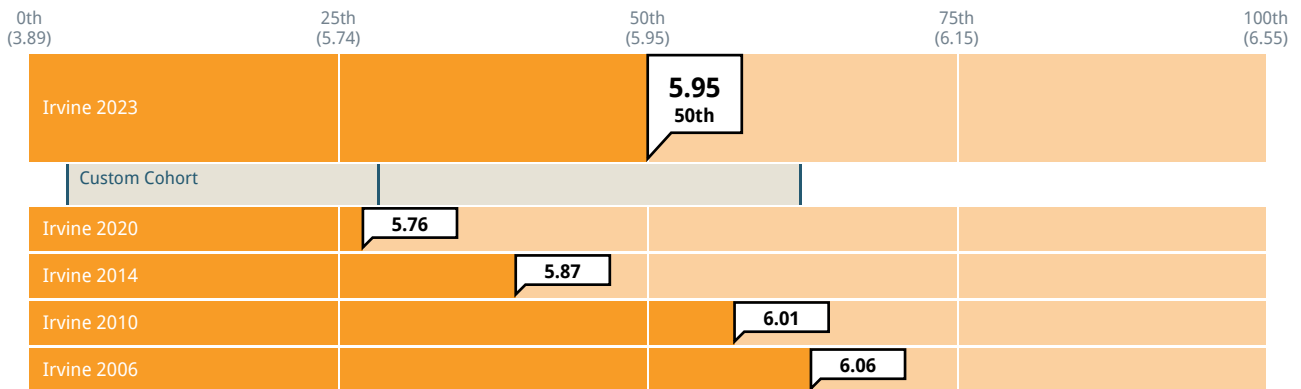
1 = Not at all clearly 7 = Extremely clearly



Cohort: Custom Cohort Past results: on Subgroup: None

How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Foundation?

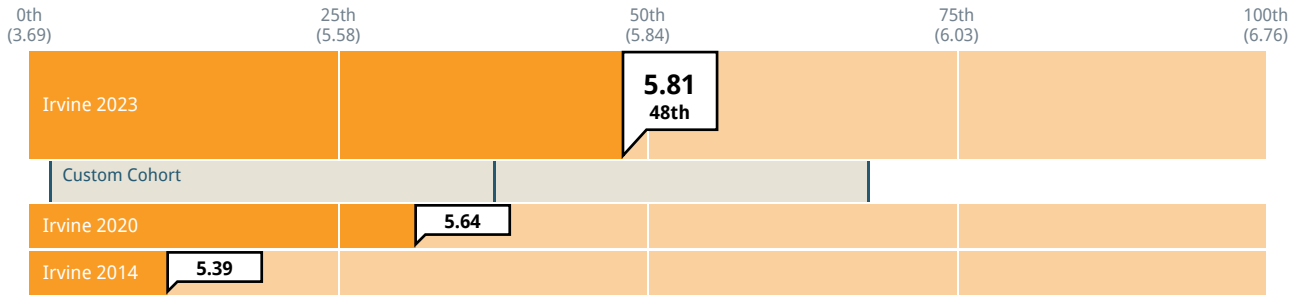
1 = Not at all consistent 7 = Completely consistent



Cohort: Custom Cohort Past results: on Subgroup: None

Overall, how transparent is the Foundation with your organization?

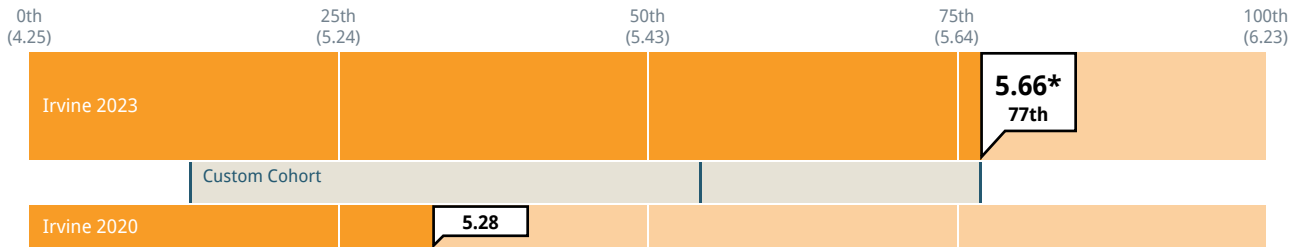
1 = Not at all transparent 7 = Extremely transparent



Cohort: Custom Cohort Past results: on Subgroup: None

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

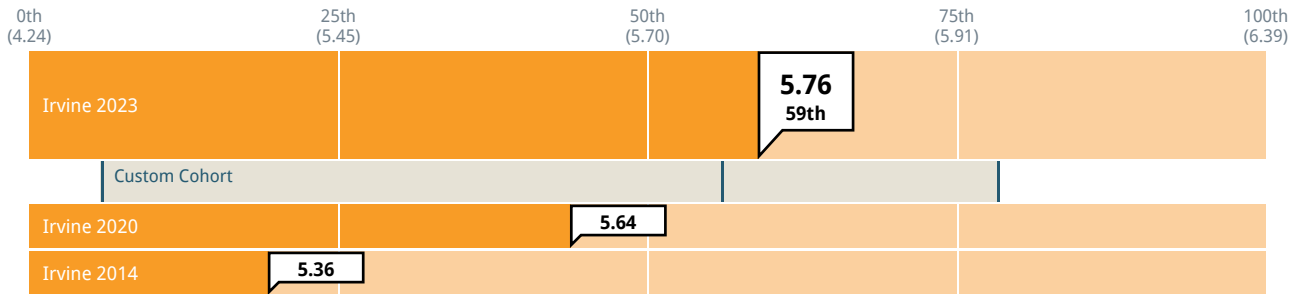


Cohort: Custom Cohort Past results: on Subgroup: None

Contextual Understanding

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

1 = Limited understanding 7 = Thorough understanding

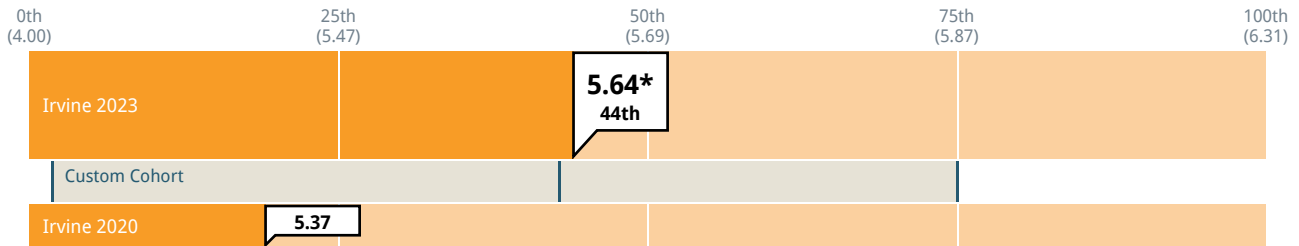


Cohort: Custom Cohort Past results: on Subgroup: None

In the following questions, we use the phrase "the people and communities that you serve" to refer to those your organization seeks to serve through the services and/or programs it provides.

How well does the Foundation understand the needs of the people and communities that you serve?

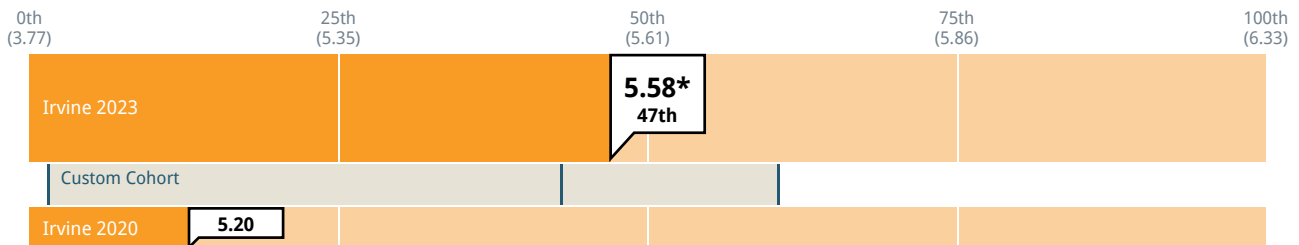
1 = Limited understanding 7 = Thorough understanding



Cohort: Custom Cohort Past results: on Subgroup: None

To what extent do the Foundation's funding priorities reflect a deep understanding of the needs of the people and communities that you serve?

1 = Not at all 7 = To a great extent



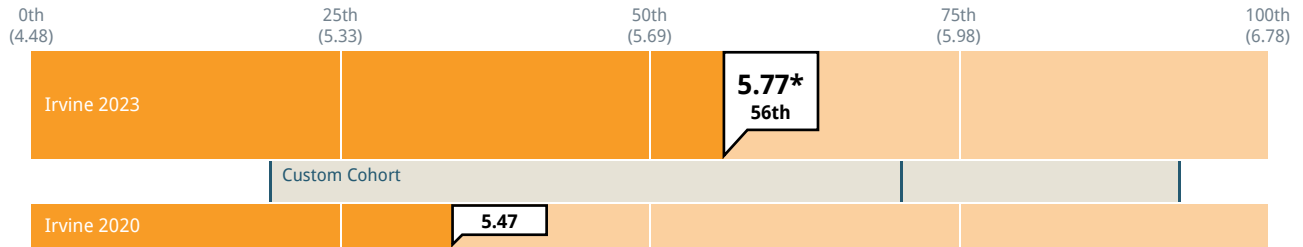
Cohort: Custom Cohort Past results: on Subgroup: None

Diversity, Equity, and Inclusion

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

Irvine has clearly communicated what diversity, equity, and inclusion means for its work

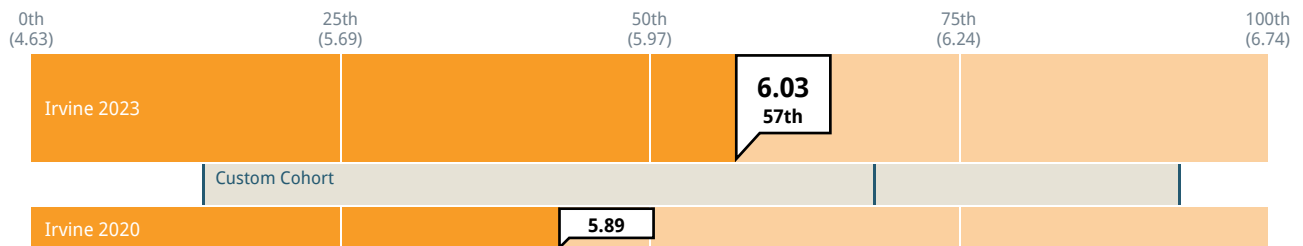
1 = Strongly disagree 4 = Neither agree nor disagree 7 = Strongly agree



Cohort: Custom Cohort Past results: on Subgroup: None

Overall, the Foundation demonstrates an explicit commitment to diversity, equity, and inclusion in its work

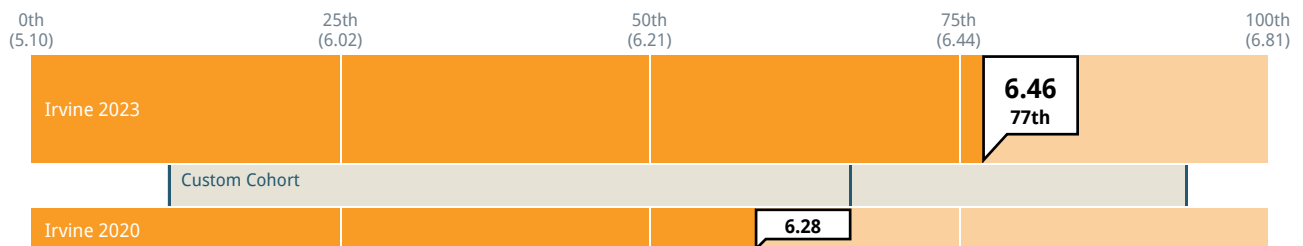
1 = Strongly disagree 4 = Neither agree nor disagree 7 = Strongly agree



Cohort: Custom Cohort Past results: on Subgroup: None

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

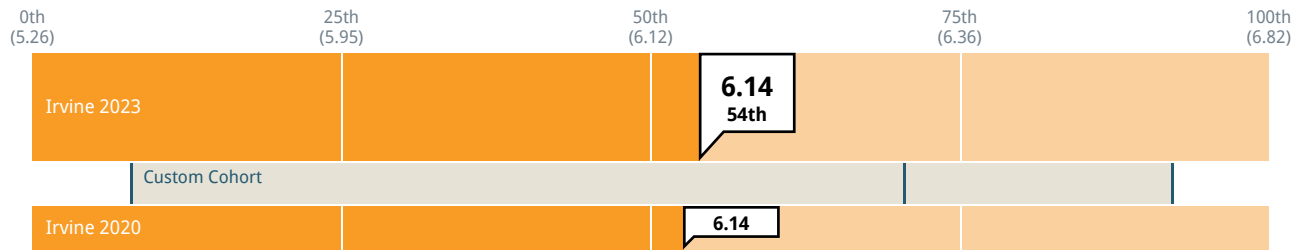
1 = Strongly disagree 4 = Neither agree nor disagree 7 = Strongly agree



Cohort: Custom Cohort Past results: on Subgroup: None

I believe that the Foundation is committed to combatting racism

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

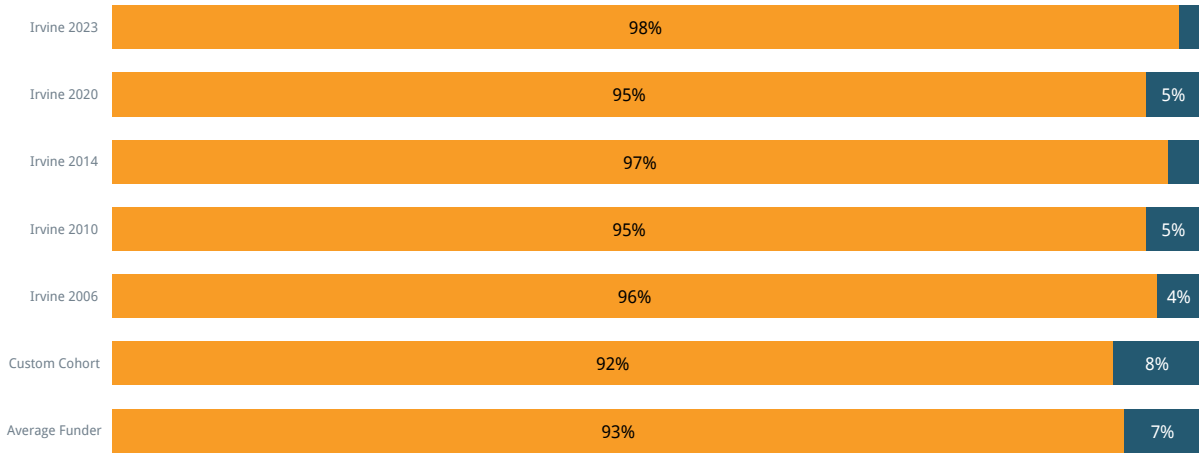


Cohort: Custom Cohort Past results: on Subgroup: None

Grant Processes

Did you submit a proposal to the Foundation for this grant?

Submitted a proposal Did not submit a proposal



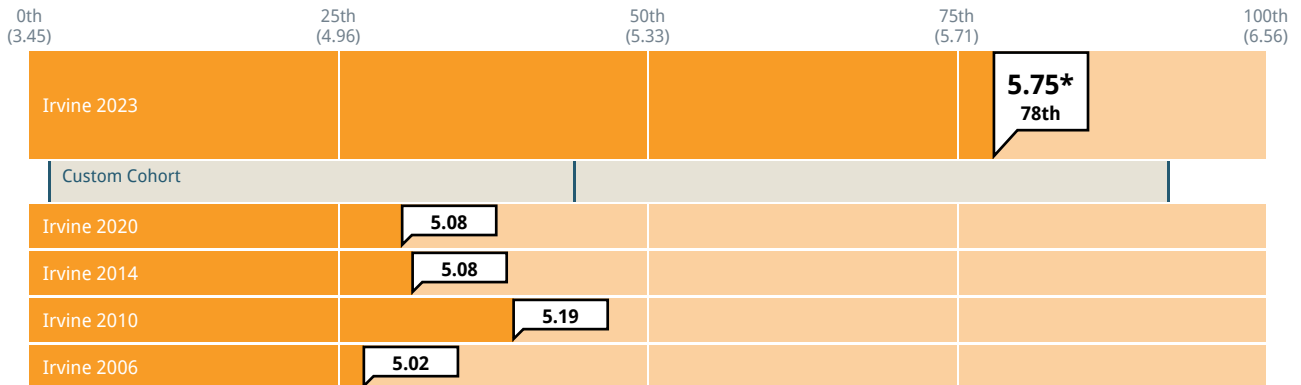
Cohort: Custom Cohort Past results: on

Selection Process

Please note that CEP modified the following question in 2022. The prior question text was: "How helpful was participating in the Foundation's selection process in strengthening the organization/program funded by the grant?" The corresponding anchors were "not at all helpful" and "extremely helpful."

To what extent was the Foundation's selection process a helpful opportunity to strengthen the efforts funded by the grant?

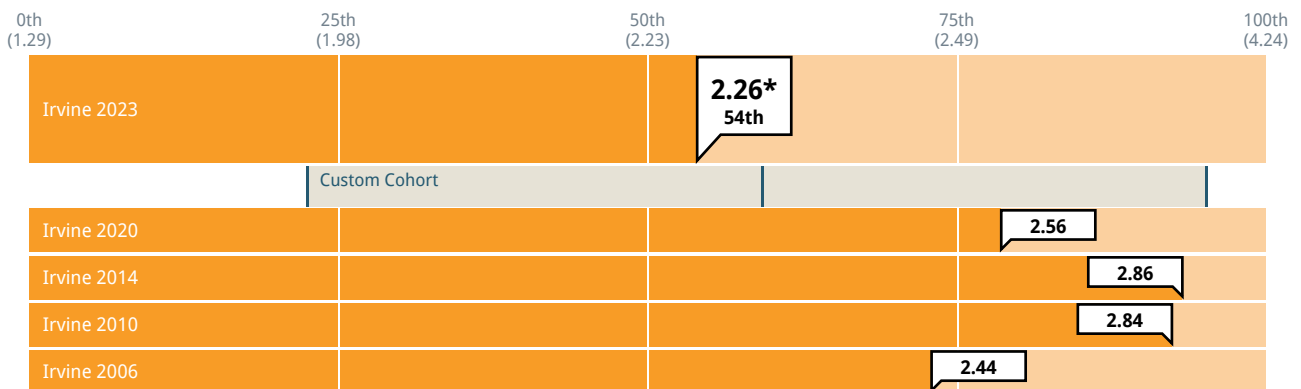
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

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?

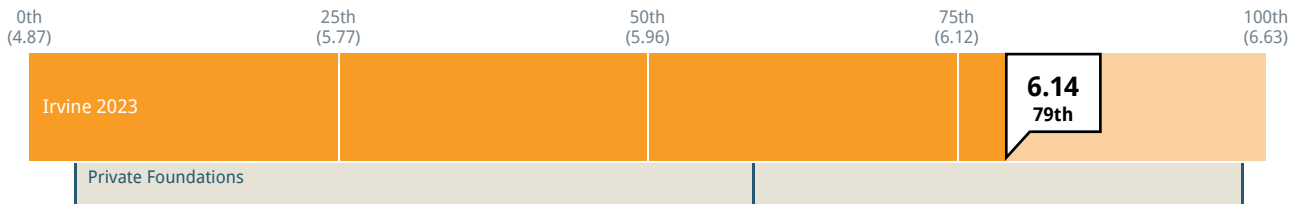
1 = No pressure 7 = Significant pressure



Cohort: Custom Cohort Past results: on Subgroup: None

To what extent was the Foundation's selection process an appropriate level of effort given the amount of funding received?

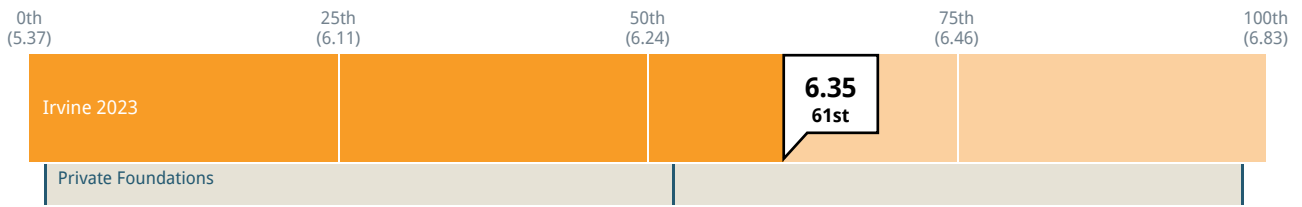
1 = Not at all 7 = To a great extent



Cohort: Private Foundations Past results: on Subgroup: None

To what extent was the Foundation clear and transparent about the selection process requirements and timelines?

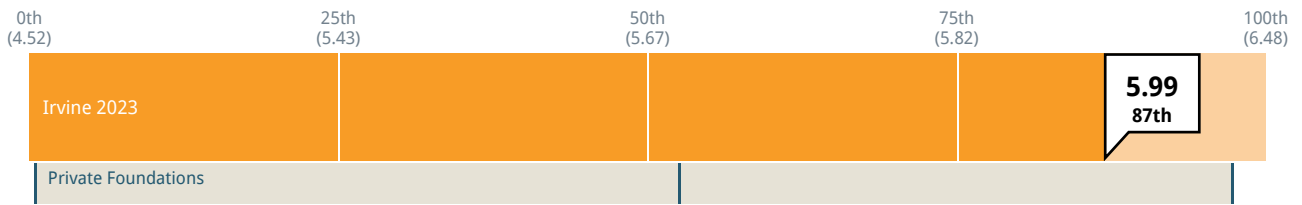
1 = Not at all 7 = To a great extent



Cohort: Private Foundations Past results: on Subgroup: None

To what extent was the Foundation clear and transparent about the criteria the Foundation uses to decide whether a proposal would be funded or declined?

1 = Not at all 7 = To a great extent



Cohort: Private Foundations Past results: on Subgroup: None

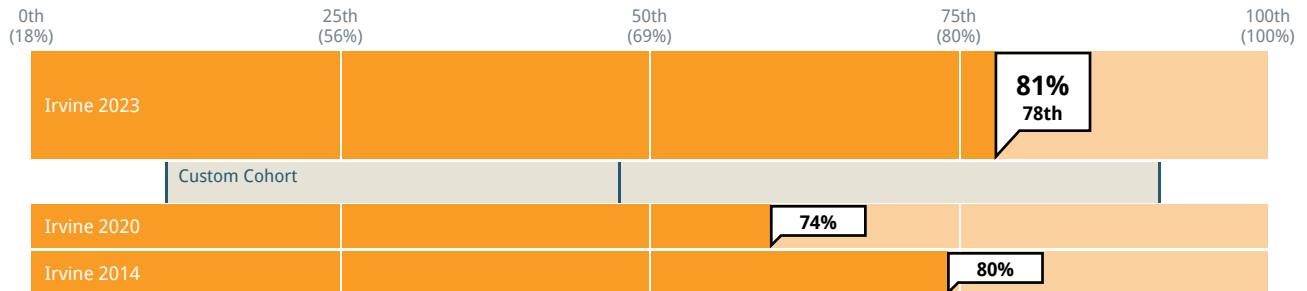
Reporting and Evaluation Process

Definition of Reporting and Evaluation

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

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

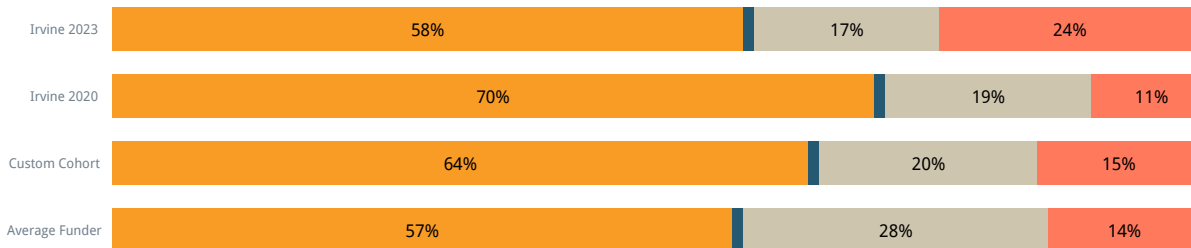
Proportion of grantees responding 'Yes'



Cohort: Custom Cohort Past results: on Subgroup: None

Participation in Reporting and/or Evaluation Processes

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



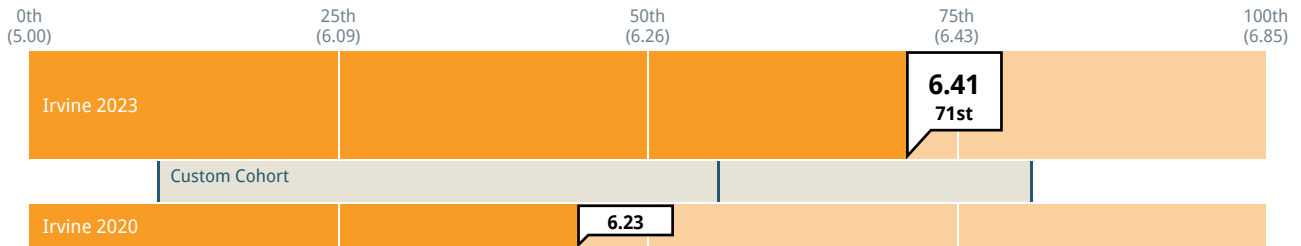
Cohort: Custom Cohort Past results: on

Reporting Process

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

To what extent was the Foundation's reporting process straightforward?

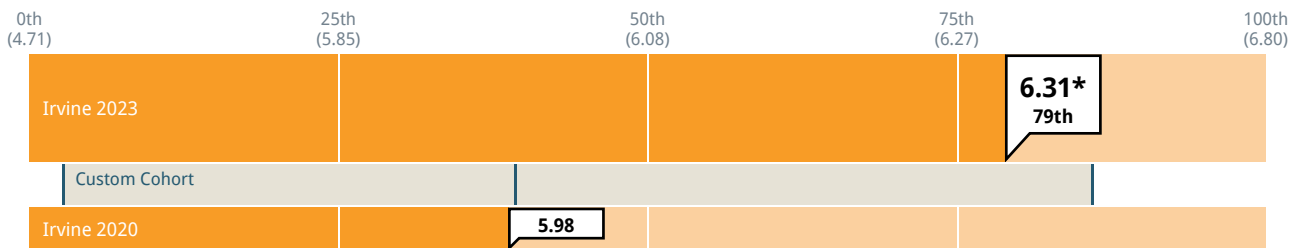
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

To what extent was the Foundation's reporting process adaptable, if necessary, to fit your circumstances?

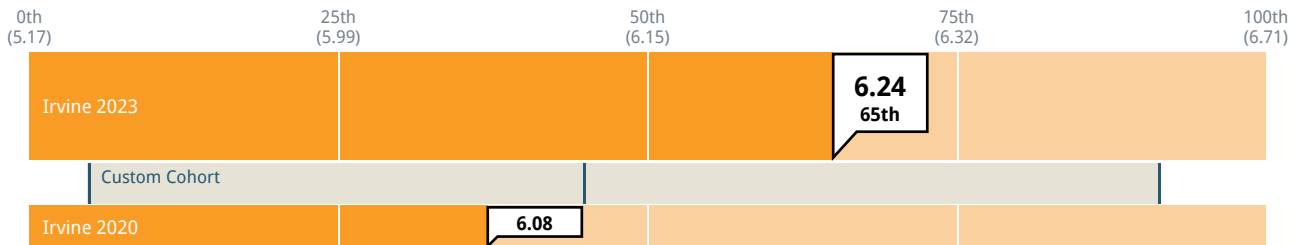
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

To what extent was the Foundation's reporting process relevant, with questions and measures pertinent to the work funded by this grant?

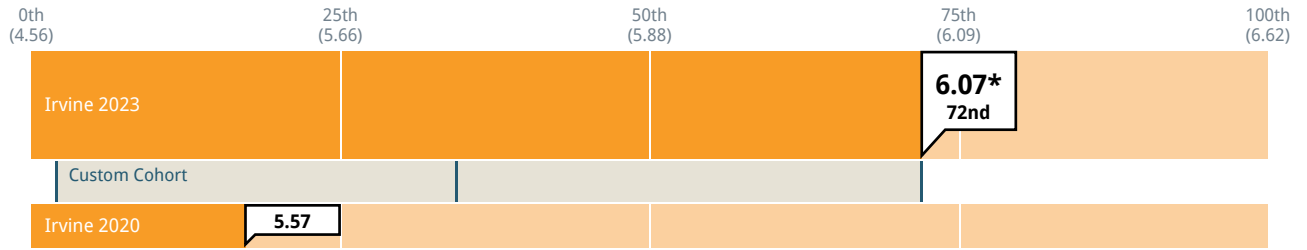
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

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



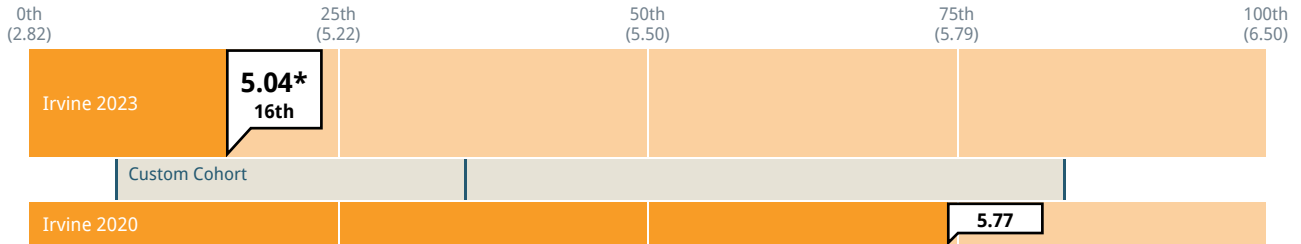
Cohort: Custom Cohort Past results: on Subgroup: None

Evaluation Process

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

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

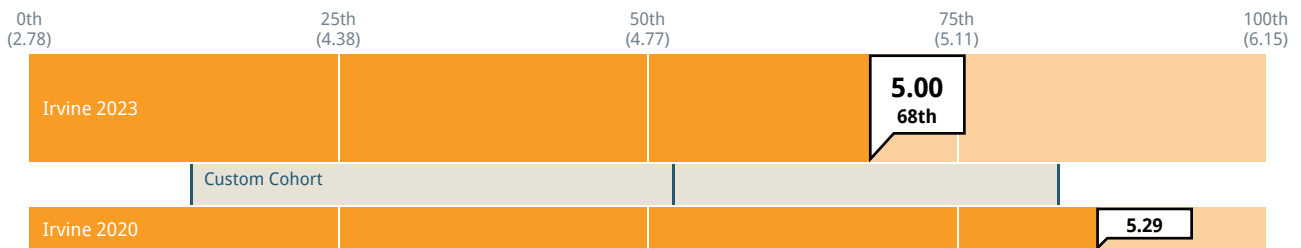
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

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

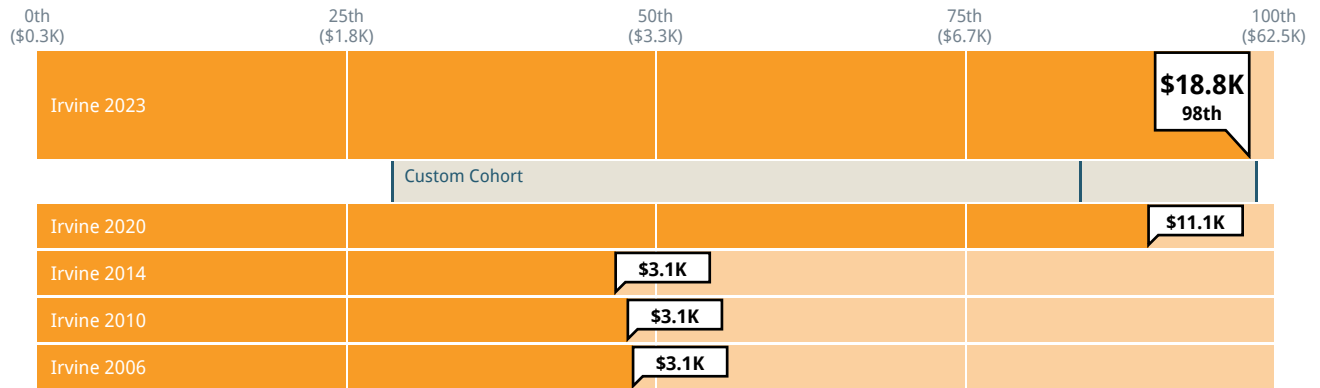


Cohort: Custom Cohort Past results: on Subgroup: None

Dollar Return and Time Spent on Processes

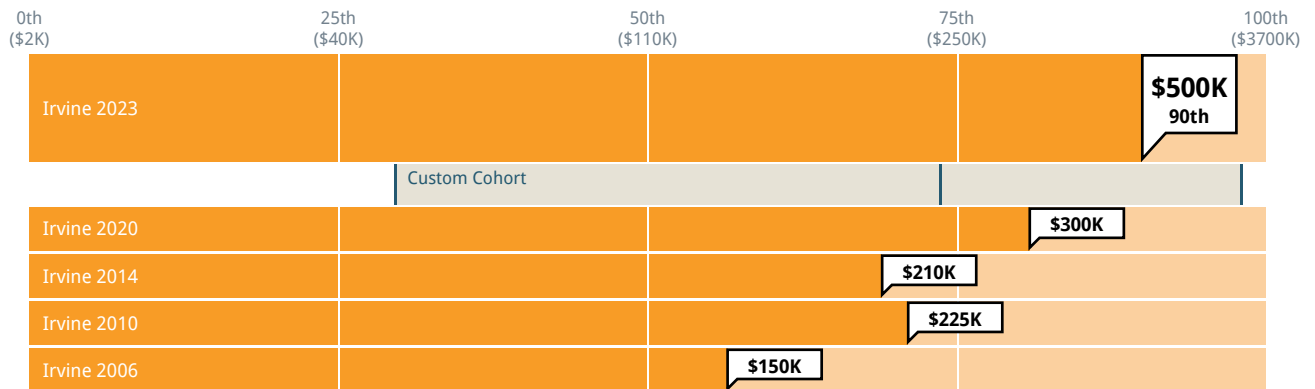
Dollar Return: Median grant dollars awarded per process hour required

Includes total grant dollars awarded and total time necessary to fulfill the requirements over the lifetime of the grant



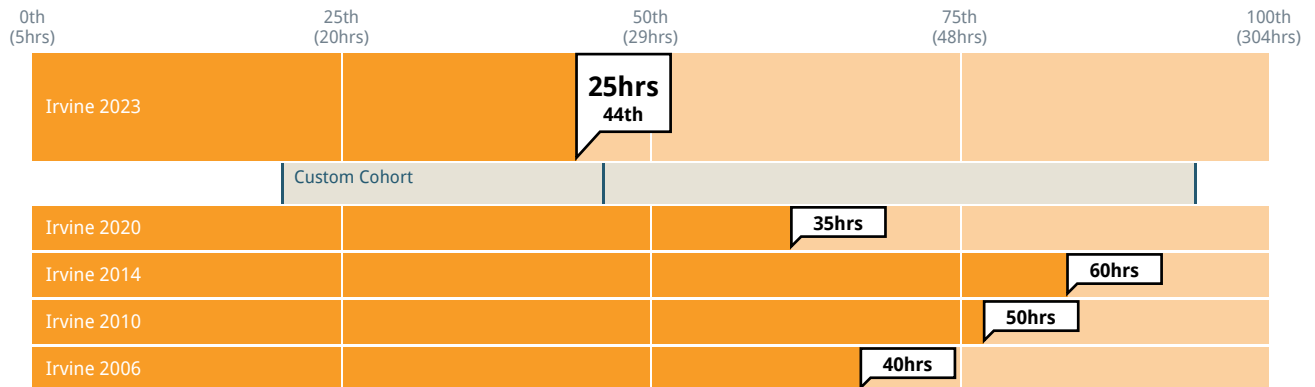
Cohort: Custom Cohort Past results: on Subgroup: None

Median Grant Size



Cohort: Custom Cohort Past results: on Subgroup: None

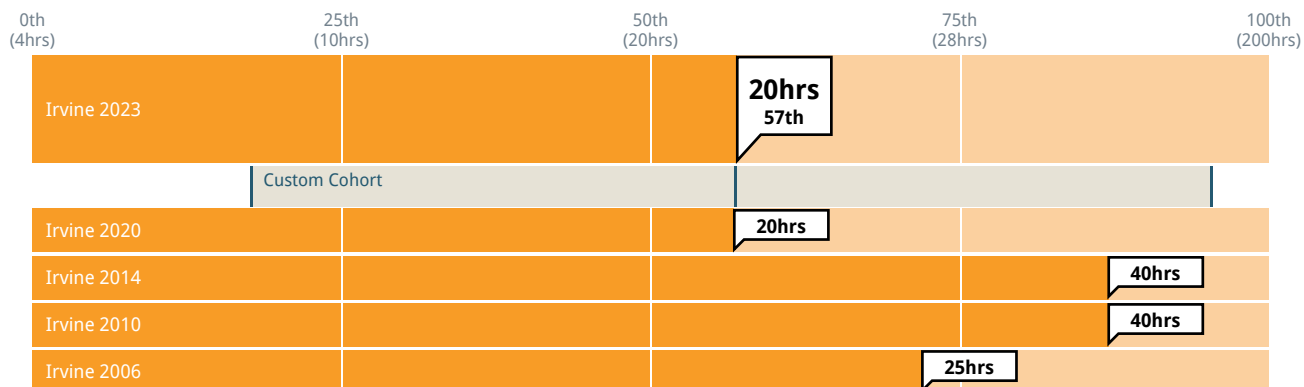
Median hours spent by grantees on funder requirements over grant lifetime



Cohort: Custom Cohort Past results: on Subgroup: None

Time Spent on Selection Process

Median Hours Spent on Proposal and Selection Process



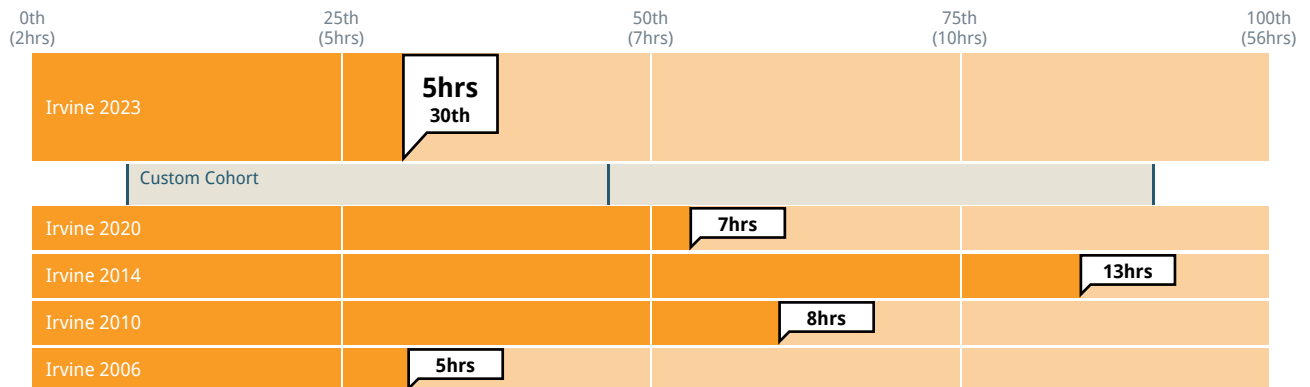
Cohort: Custom Cohort Past results: on Subgroup: None

Time Spent On Proposal and Selection Process								
	1 to 9 hours	10 to 19 hours	20 to 29 hours	30 to 39 hours	40 to 49 hours	50 to 99 hours	100 to 199 hours	200+ hours
Irvine 2023	20%	26%	26%	6%	10%	7%	4%	0%
Irvine 2020	17%	27%	21%	8%	12%	11%	3%	1%
Irvine 2014	5%	13%	22%	9%	20%	18%	8%	4%
Irvine 2010	8%	17%	18%	6%	19%	16%	11%	4%
Irvine 2006	10%	21%	23%	6%	25%	8%	7%	1%
Average Funder	26%	22%	16%	7%	11%	10%	5%	3%
Custom Cohort	25%	24%	18%	7%	10%	10%	4%	2%

Selected Subgroup: None
Time Spent On Proposal and Selection Process (By Subgroup)
1 to 9 hours
10 to 19 hours
20 to 29 hours
30 to 39 hours
40 to 49 hours
50 to 99 hours
100 to 199 hours
200+ hours

Time Spent on Reporting and Evaluation Process

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



Cohort: Custom Cohort Past results: on Subgroup: None

Selected Cohort: Custom Cohort							
Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized)							
	1 to 9 hours	10 to 19 hours	20 to 29 hours	30 to 39 hours	40 to 49 hours	50 to 99 hours	100+ hours
Irvine 2023	67%	20%	8%	1%	2%	2%	2%
Irvine 2020	59%	22%	13%	2%	2%	2%	1%
Irvine 2014	37%	29%	14%	4%	3%	8%	6%
Irvine 2010	55%	25%	8%	4%	2%	4%	2%
Irvine 2006	64%	22%	7%	0%	4%	2%	1%
Average Funder	57%	19%	9%	3%	3%	4%	4%
Custom Cohort	59%	20%	10%	3%	3%	3%	3%

Selected Subgroup: None
Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (By Subgroup)
1 to 9 hours
10 to 19 hours
20 to 29 hours
30 to 39 hours
40 to 49 hours
50 to 99 hours
100+ hours

Customized Questions

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

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

Irvine 2023 Irvine 2020



Cohort: None Past results: on

Please rate the extent to which you agree or disagree with the following statements about the Foundation and racial equity:

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

Irvine 2023



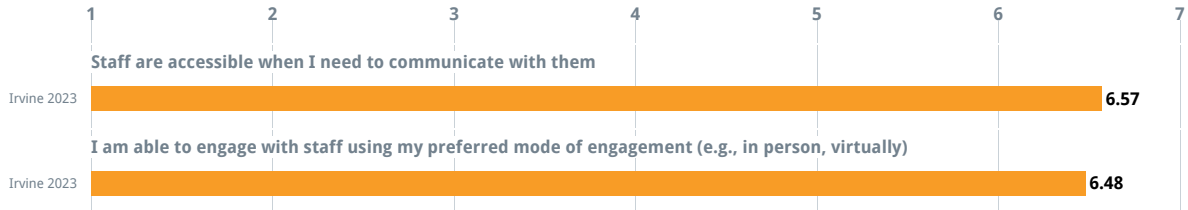
Cohort: None Past results: on

Hybrid Approach

Please rate the extent to which you agree or disagree with the following statements based on your recent experience working with the Foundation in 2023:

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

Irvine 2023



Cohort: None Past results: on

Overall, how would you rate the impact of Irvine staff working in a hybrid approach on the quality of your relationship with them in 2023?

1 = Significant negative impact 4 = Neutral (no noticeable impact) 7 = Significant positive impact

Irvine 2023



Cohort: None Past results: on

Costs of Project

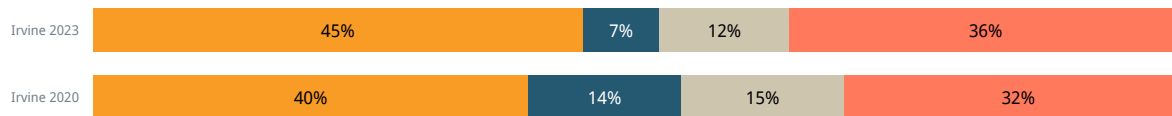
The following questions were only asked of grantees who indicated receiving restricted funding from Irvine.

In the survey, CEP provided descriptions of the types of costs asked in the questions below:

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

Which best describes the process used to set an indirect cost rate for this project?

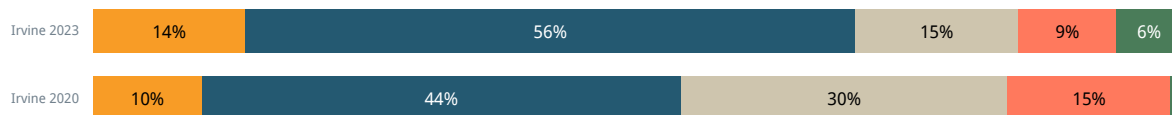
- We provided an indirect rate, which the Foundation accepted
- The Foundation provided an indirect rate, without opportunity for discussion
- We settled on an indirect rate in discussion with Foundation staff
- In determining grant amount, we did not specifically address indirect costs



Cohort: None Past results: on

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)?

- The grant covered its direct and indirect costs plus extra that allows the organization to thrive over the long term
- The grant covered direct and indirect costs, but no more
- The grant covered the direct costs of the work, but not all indirect costs
- This grant did not cover even the direct costs of the work
- Not applicable



Cohort: None Past results: on

Grantees' Written Comments

In the Foundation's Grantee Perception Report survey, CEP asks four written questions:

1. "Please comment on the quality of the Foundation's processes, interactions, and communications."
2. "Thinking beyond the grant you received, please comment on how the Foundation influences your field, community, or organization."
3. "What specific improvements would you suggest that would make the Foundation a better funder?"
4. "Do you have any comments or feedback that would be important for Irvine to understand about how you rated the impact of hybrid work on the quality of your relationship with Irvine?"

To download the full set of grantee comments and suggestions, please refer to the "[Report Overview](#)" page of your report. Please note that some comments may be redacted or removed to protect the confidentiality of respondents.

CEP's Qualitative Analysis

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

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

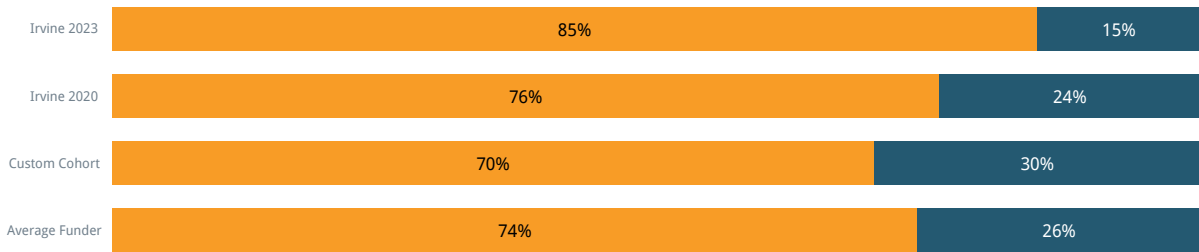
Quality of Processes, Interactions and Communications

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

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

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

Positive comment Comment with at least one constructive theme



Cohort: Custom Cohort Past results: on

Suggestion Topics

Grantees were asked to provide any suggestions for how the Foundation could improve. The 169 grantees that responded to the survey provided 82 constructive suggestions. These suggestions were thematically categorized by CEP and grouped into the topics below.

Proportion of Grantee Suggestions by Topic

Topic of Suggestion	Proportion
Non-Monetary Assistance	22%
Funder-Grantee Relationships	17%
Grantmaking Characteristics	16%
The Foundation's Focus	15%
Interactions with Grantees	11%
Communication	7%
Grant Processes	7%
Diversity, Equity, and Inclusion	5%

Suggestions

Grantees were asked to provide any suggestions for how the Foundation could improve. The 169 grantees that responded to the survey provided a total of 82 distinct suggestions. These suggestions were thematically categorized by CEP and grouped into the topics below.

Non-Monetary Assistance (22% N=18)

- Grantee convenings (N = 8)
 - "Convene non-public, in-person if possible, discussions about strategy with smaller groups of grantees and Foundation staff. Smaller groups not to exclude some organizations but because it allows for deeper discussions: multiple smaller discussions."
 - "Encouraging collaboration and knowledge sharing among grantees can yield significant benefits. The Foundation could facilitate networking opportunities, workshops, or conferences where grantees can connect, exchange ideas, and learn from each other. Promoting an environment of collaboration and shared learning can spark new collaborations, amplify the impact of individual projects, and foster a sense of community within the Foundation's grantee network."
 - "I would love the opportunity to meet with fellow grantees more often -- perhaps at the Foundation's office or at stakeholder offices!"
 - "I've always thought that convenings of grantees would be a boon for the Foundation."
 - "I'd suggest an increased focus in cultivating opportunities for grantees to collaborate. Of course, that work is clearly underway and there's always a risk of grantees feeling as if collaboration is being forced, but we've enjoyed such programming thus far."
 - "Perhaps since the annual in-person convenings stopped, there might be an opportunity for connection across grantees, linking themes and work. Same with connection across portfolio/priority areas."
 - "We would also be interested in learning from other grantees in intentional ways through in-person convenings."
 - "Continue to do the great work of coordinating grantee gatherings.... This helps our nonprofit to improve our networking opportunities."
- Capacity-building for grantees (N = 4)
 - "It would be helpful to get support on better understanding the changing landscape in philanthropy and how we can better diversity our internal approach in that changing landscape so that we are able to maintain a resilient and sustainable movement ecosystem."
 - "Consider doing more to elevate grantees in different forums, convenings, exchanges, philanthropy circles, etc. to help promote and amplify the work being done."
 - "I strongly believe that capacity assistance for areas such as seeking funds for servicing the population we serve in terms of employment and training is exceedingly important."
 - "Continue to do the great work of offering capacity building opportunities.... This helps our nonprofit to improve our internal capacity."
- Collaboration among stakeholders (N = 3)
 - "Continue to do the great work of connecting nonprofits with other funders.... This helps our nonprofit to improve our networking opportunities."
 - "Additional expertise and support to identify other funders also committed to our organization's scope of work."
 - "Consider seeking opportunities for collaborative partnerships with other funders, philanthropic organizations, and stakeholders -- helping to amplify impact on the nonprofit sector more effectively."
- Other (N = 3)
 - "Commitment to annual in-person convening with other relevant grantees across the state; Inventory of best practices / models in the spaces that the Foundation is funding, for easy reference on what models should be emulated or learned from (our community partners ask for this all of the time); Talent board -- shared list of executive talent (directors, VPs, COO, Chief of Staff) that apply to work with grantees all over the state. It can be difficult to recruit sometimes in our region."
 - "Reports of how we're doing compared to other workforce boards (impact we're making, degree of innovation) that we can bring back to our Workforce Development Board/Policy Board."
 - "Maybe a deeper dive and cataloguing of the challenges that organizations face -- you can never know enough about these challenges."

Funder-Grantee Relationships (17% N=14)

- Trust-based practices (N = 6)
 - "Continue moving in the direction of trust-based philanthropy with the partners and organizations that you believe in. Systems change does not happen in a grant cycle, and there is great advantage to investing in organizations or leaders who are showing signs of progress, learning and adaptation."
 - "More listening to grantees and continue to engage around trust-based philanthropy."
 - "I think the Foundation could let go of some control over the work and allow for more experimentation. There seems to be a lot at stake and this has made the process very time consuming and sometimes feels that there is not enough confidence in staff to determine the best course of action based on shared values."
 - "Practice trust-based philanthropy and directly fund organizations instead of empowering intermediaries that hoard wealth and resources."
 - "Moving even further along the trust based philanthropy spectrum."
 - "The Foundation is making great strides in addressing some of the traditional challenges within philanthropy. It is important to continuously evaluate how decisions are made and who is at the table."
- Candid conversations with grantees (N = 5)
 - "Because the Foundation is so responsive, respectful, and communicative, it feels to me there are opportunities to harness strong lines of communication with grantees for probably more than has been done to date. In our own case, I would very much appreciate opportunities to engage in

broader conversation with Irvine about our work, and various non-monetary ways in which they could help us continue to strengthen our work and impact."

- "We hope we'll get a clear sense of what department we will be partnering with in the future. We've heard that we'll be handled by another division in future but not yet clear who/what."
- "I have the impression that they were candid, but of course I can't know if they chose to be gentle on some issues."
- "We'd like to have feedback from the Foundation on how they perceive our work's impact on the Foundation's overall vision. In other words, how valuable is our work to the Foundation's overall goals?"
- "The Foundation staff also try to hold the line on some things but then they don't -- kind of interesting. Just stand firm if you really want X outcome or effort to move forward, and don't want to invest in Y. Sometimes the staff could be less extractive with their conversations -- it seems as if they are triangulating what people are saying and without admitting that, it can be awkward."

- Strategy engagement with grantees (N = 3)

- "Continue to take lead from the people on the ground in regards to the needs of the community."
- "We suggest that the CEO and directors of the Foundation have more of a presence in communicating with the grantees, once a year at least. Understanding our community is more than just getting reports back, it is also about the presence that it shows beyond the program managers."
- "Allow for more community input in grantmaking decisions (maybe a community-informed, small grants program)."

Grantmaking Characteristics (16% N=13)

- General operating support (N = 4)

- "The Foundation should consider general operating and organizational development support."
- "Offer as much unrestricted funding as possible."
- "General operating support grants."
- "To embrace not only program specific funding but general operating funds for grantees. Grantees also need the latitude to address and spend on organizational needs that complement the programs for which they are funded."

- Larger grants (N = 3)

- "Awarding larger grants."
- "Max out the amount of consistent, multi-year, general operating funding awarded."
- "The Foundation might also consider increasing its annual payout to provide more immediate support to organizations and initiatives tackling pressing challenges."

- Multi-year grants (N = 3)

- "It would be great if the Foundation could transition to more multiyear funding and would be more open to funding research."
- "Consider multi-year funding over several years."
- "Multi-year grants are ENORMOUSLY helpful -- 3-5 years, for example. Grants for 1-2 years simply don't provide the time needed to create, implement, and sustain new ideas or aspects of organizational development."

- Types of grantees (N = 2)

- "Like most Foundations, a more grassroots level of engagement could benefit local economic uplift. In addition to the CBOs that are included, organized labor should be more directly involved."
- "Increasingly consider the less conventional organizations/approaches to solving social problems... those are typically the most innovative and least supported."

- Other (N = 1)

- "Option of choosing TA funding support or pre-selected vendors; Flexibility to include % of the grant that can be added to reserves (i.e., doesn't have to be spent down during grant period)"

The Foundation's Focus (15% N=12)

- Funding strategies and priorities (N = 7)

- "Continue to fund training for pre-apprenticeship for under-served communities to help them prepare to enter available apprenticeships."
- "We would value more effort to educate the broader funder community about the importance of funding journalism on economic inequality in CA."
- "Continue to develop the Just Prosperity program and increase specific investment in the integrated voter engagement ecosystem."
- "To continue to evaluate and review the realistic trends taking place in our communities that center around workforce development, housing, underserved and unhoused youth."
- "Continue the award program and possibly expand it."
- "Continue to support organizing and systems change work."
- "We hope that the Foundation will make local news and information a formal and enduring philanthropic priority, recognizing this as a direct service that is critical to civic engagement and strengthening democracy."

- Understanding of local communities (N = 3)

- "More engagement with those least served and underrepresented within the BIPOC community."
- "I think the Foundation spends a lot of time seeing through its own lens and could benefit by being open to seeing through others' lenses without the filter of its priorities. I think the Foundation cares about the region, the issues, the people, but lacks at times the nuanced skills and experiences to shepherd those along in ways that build more community and connection. At times the behavior of the Foundation is divisive and that doesn't have to be the case, if all the strategies are valid."

- "More time spent by Foundation staff in the community and interacting with stakeholders."
- Other (N = 2)
 - "A funder of the size and influence of Irvine may be more open than smaller funders around transparency. I think consideration of their influence in the field as a trend setter should be taken very seriously."
 - "In engaging with the field, the Foundation can continue to strive to be open to supporting approaches that have a record of success but may not always fit neatly into the defined priorities."

Interactions with Grantees (11% N=9)

- Frequent touchpoints (N = 8)
 - "Monthly/quarterly engagement meetings and connectivity to other grantees."
 - "We would welcome regular face-to-face meetings to discuss our work and outcomes.... These don't need to be highly structured, time-intensive or in-person meetings."
 - "Perhaps engage with grantees more throughout the grant term. Not necessarily about providing in kind support but just to learn together about shared goals and how grantees and funder can work together to have long term impact and systems change. Perhaps be more proactive about attending local events, etc."
 - "More frequent conversations to discuss specific project investments and new needs as they arise."
 - "Perhaps an informal check-in. On a 2 year award, we've had no one reach out in 18+ months. The autonomy is appreciated, and an email/call that didn't necessarily require an involved response would have been nice."
 - "Maybe a few more regular check ins."
 - "It would be helpful to receive replies to inquiries more promptly."
 - "More scheduled check-ins with grantee partners."
- Other (N = 1)
 - "Consider doing a site visit with all grantees."

Communication (7% N=6)

- Clarity and transparency of communication (N = 6)
 - "I perceive the strategy development process to be opaque, and I wonder which organizations and what other input is truly influencing the direction. As a nonprofit leader, I understand very well the delicate balance of listening to stakeholders and gauging the extent to which we reflect back and incorporate input. I think Irvine does a good job here, but I would also like to better understand how final decisions are arrived at."
 - "I suggest the Foundation explore ways they can be more intentionally transparent to increase effectiveness in the flow of private capital to public private partnership initiatives for enhanced and more efficient ecosystem building."
 - "A greater understanding of the overall priorities for the Foundation would be helpful."
 - "More communication about the amazing work you are doing! Maybe we are not receiving a newsletter but I feel like we don't know much about the broad work, strategies, efforts, etc. that Irvine is doing beyond supporting us with our grant."
 - "The Foundation is sure to explain the priorities it has for the area they fund our organization. They do not necessarily go into depth about other areas that do not pertain to the funding they provide to us."
 - "Visibility on policy advocacy that the Foundation is pursuing / that may impact local work undertaken by community partners; Clarity on intermediary strategy (how many is ideal per region, and why)"

Grant Processes (7% N=6)

- Clarity of grant requirements and timelines (N = 3)
 - "The timing of Foundation updates and invitations does not always align with a non profit fiscal cycle and budgeting process."
 - "More written detail of Foundation priorities prior to proposal submission would be helpful."
 - "The process for our renewal was significantly delayed and led to anxieties amongst our program staff about continuity of funding/ensuring the work. It would be great if the Foundation could backdate their grant letters, as some other funders do."
- Streamlining processes (N = 3)
 - "I encourage the Foundation to connect with other foundations that have a simpler application form. They asked for a lot of information that they may not realize created more work for us and that didn't seem relevant to making a grant decision."
 - "The reporting templates are not friendly for the telling the story and impact of our work or the large scale of our work. While short, we spend a lot time just trying to figure out how to tell our story and fit it in the fields presented. Would love to see a revised reporting template in the future if possible. Appreciate the Foundation wants to keep it shorter but suggest more relevant questions and intuitive sequencing of questions and more room to tell the story if desired. We believe this would help the Foundation tell its own story better also -- their great work being funded -- and decisions about renewals."
 - "The grant portal itself is onerous to navigate."

Diversity, Equity, and Inclusion (5% N=4)

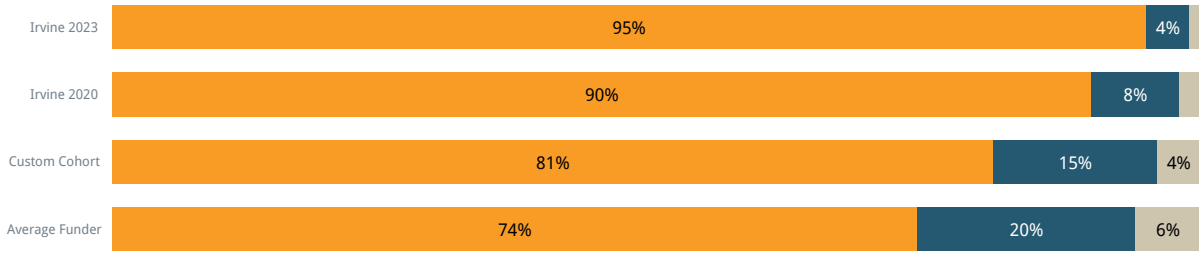
- Commitments to DEI and racial equity (N = 3)
 - "Irvine needs to integrate a racial justice lens in grantmaking in a more explicit way. The low wage worker frame is a good baseline and starting point but in order to address specific racial disparities, there needs to be a clearer commitment to support organizations doing racial justice work, which could be new organizations or additional resources to current grantees."
 - "The Foundation should be open to a variety of strategies and perspectives to achieve our common goals, including combatting racism -- which affects

- several communities in California."
- "Willingness to take risks and be bold -- the scale of structural transformations needed to address the needs of everyday working people in CA is huge. Organize the rest of philanthropy to go bold and be willing to tackle the root causes of the inequities we see and feel."
- Other (N = 1)
 - "I believe the current leadership and staff demonstrate a strong commitment to racial equity and diversity but the Foundation, as a whole, could be clearer in communicating the same commitment to racial equity."

Respondents and Communities Served

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

Yes No Don't know

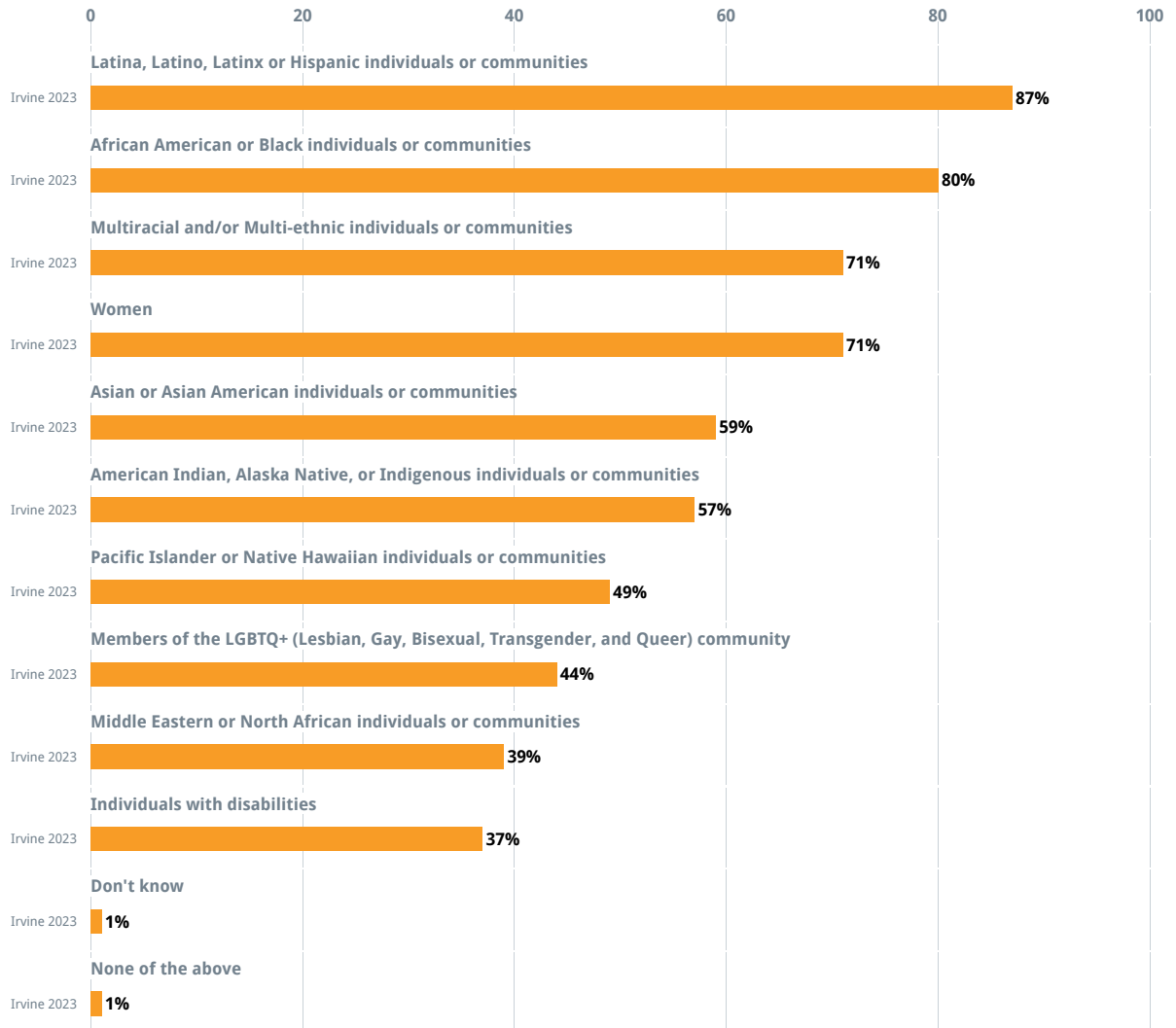


Cohort: Custom Cohort Past results: on

The following question is asked only of grantees who answered "yes" to the question, "Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?"

Specifically, are any of the following populations the primary intended people and/or communities served by the efforts funded by this grant?

Irvine 2023



Cohort: None Past results: on

Respondent Demographics

Note: Demographic questions related to grantees' POC and racial/ethnic identity are only asked of respondents in the United States.

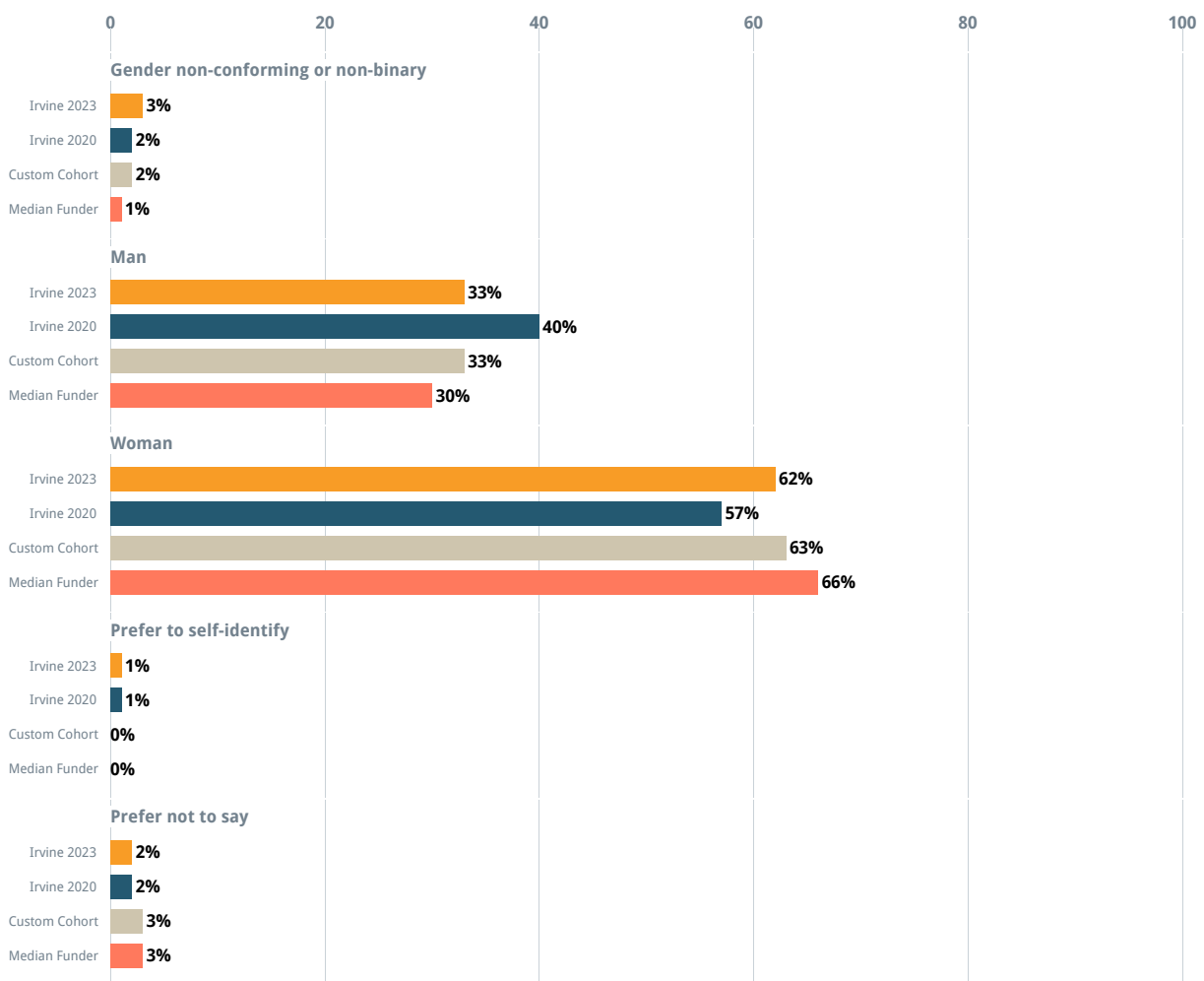
Survey language and response options for questions about race and ethnicity are guided by best practices shared by [National Institutes of Health](#), [Pew Research Center](#), [Psi Chi Journal of Psychological Research](#), and the [US Census Bureau](#).

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

Survey respondents are asked to share their gender identities in a check-all-that-apply question. Each chart has the option of showing the average ratings of respondents who selected only "man," only "woman," multiple gender identities, "gender non-conforming or non-binary," "prefer to self-identify," and "prefer not to say" - as long as that response option had at least 10 respondents.

Please select the option that represents how you describe yourself:

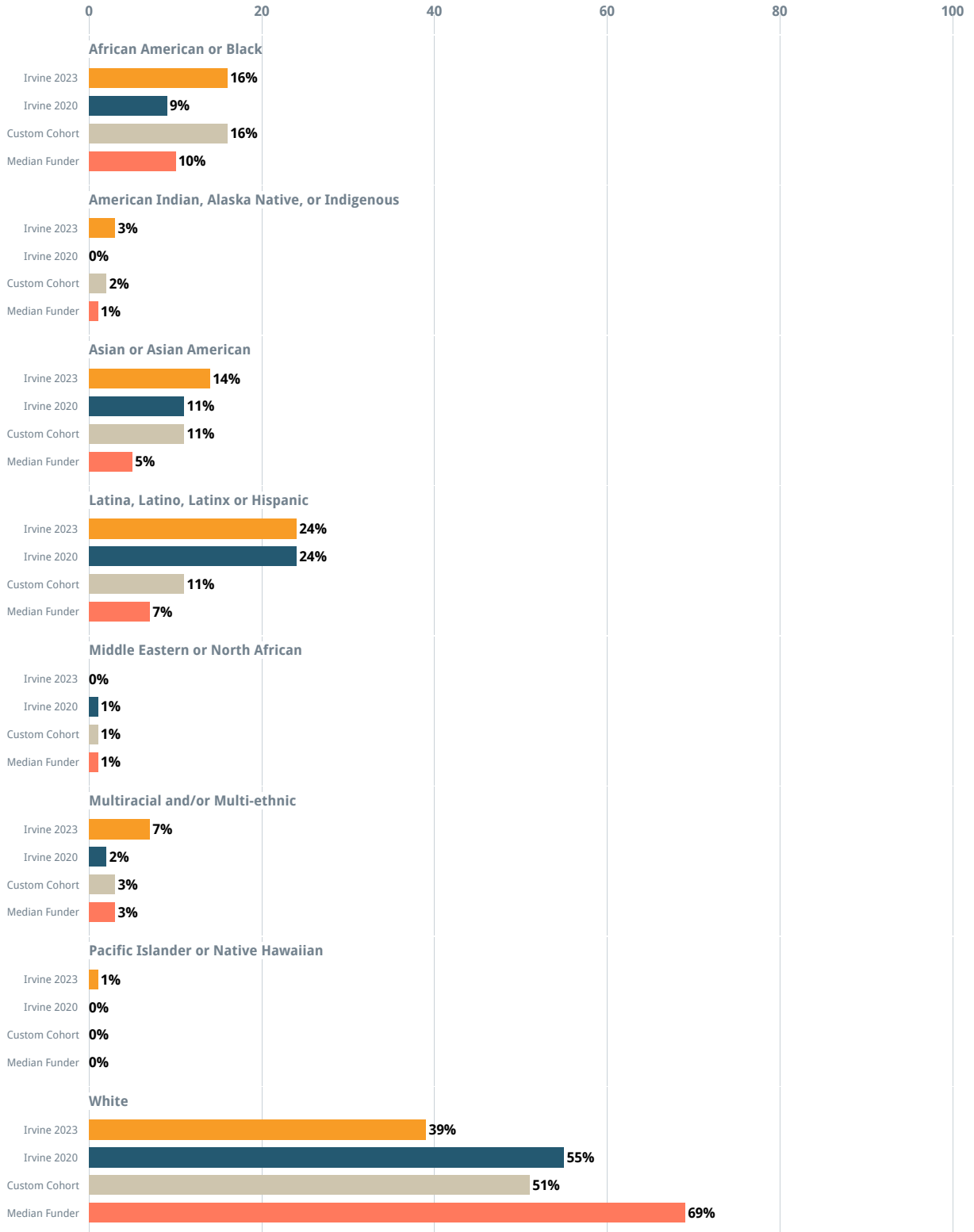
Irvine 2023 Irvine 2020 Custom Cohort Median Funder



Cohort: Custom Cohort Past results: on

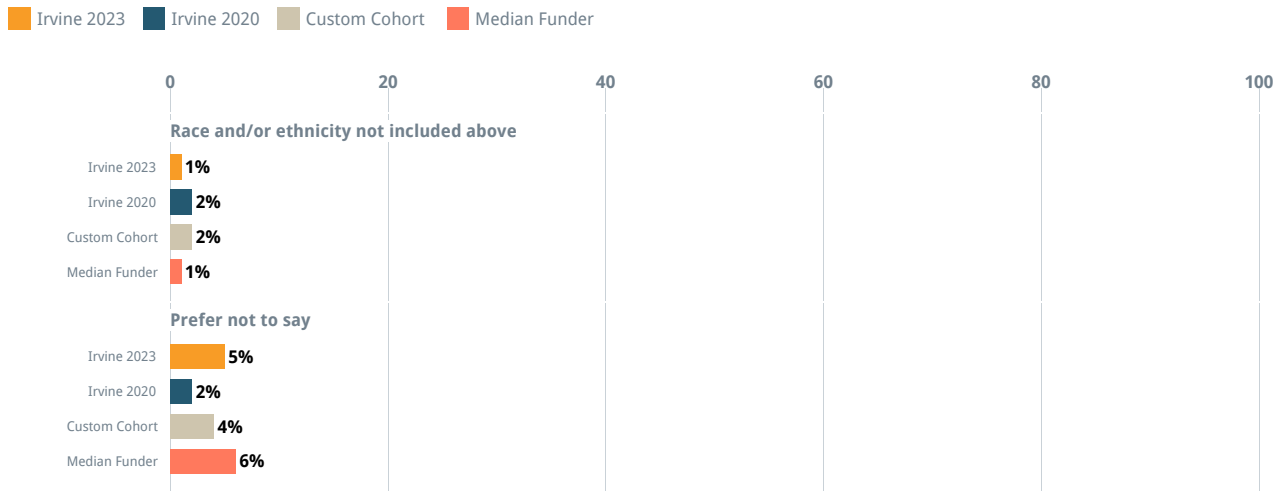
How would you describe your race and/or ethnicity?

Irvine 2023 Irvine 2020 Custom Cohort Median Funder



Cohort: Custom Cohort Past results: on

How would you describe your race and/or ethnicity? (cont.)



Cohort: Custom Cohort Past results: on

Selected Cohort: Custom Cohort				
Do you identify as a person of color?	Irvine 2023	Irvine 2020	Average Funder	Custom Cohort
Yes	57%	44%	24%	41%
No	38%	55%	70%	55%
Prefer not to say	5%	2%	6%	4%

Selected Cohort: Custom Cohort			
Are you transgender?	Irvine 2023	Average Funder	Custom Cohort
Yes	1%	1%	1%
No	97%	96%	97%
Prefer not to say	2%	4%	3%

Selected Cohort: Custom Cohort			
Do you identify as a member of the LGBTQ+ (Lesbian, Gay, Bisexual, Transgender, and Queer) community?	Irvine 2023	Average Funder	Custom Cohort
Yes	11%	11%	12%
No	84%	84%	83%
Prefer not to say	5%	5%	4%

Selected Cohort: Custom Cohort			
Do you have a disability?	Irvine 2023	Average Funder	Custom Cohort
Yes	9%	6%	7%
No	86%	89%	89%
Prefer not to say	5%	5%	4%

Grantee Organizations' Demographics

In its standard survey, CEP no longer asks respondents to report the person of color identity of their organization's CEO/Executive Director. To maintain the most accurate comparison over time, Irvine added a custom question to its 2023 survey to collect this information from respondents who are not the CEO/ED at their organizations.

The following table incorporates 2023 responses from CEO/EDs who self-identify **and** from respondents who answered about their CEO/EDs' person of color identity to reflect the proportion of Irvine grantee organizations led by a person of color.

Selected Cohort: None		
Does the CEO/Executive Director of your organization identify as a person of color?	Irvine 2023	Irvine 2020
Yes	60%	48%
No	38%	51%
Don't know	2%	1%
Prefer not to say	0%	1%

Selected Cohort: None	
Do 50 percent or more of the individuals on your organization's board identify as a person of color?	Irvine 2023
Yes	65%
No	30%
Don't know	4%
Prefer not to say	1%

Selected Cohort: None	
Do 50 percent or more of staff at your organization identify as a person of color?	Irvine 2023
Yes	77%
No	15%
Don't know	6%
Prefer not to say	2%

Respondent Job Title

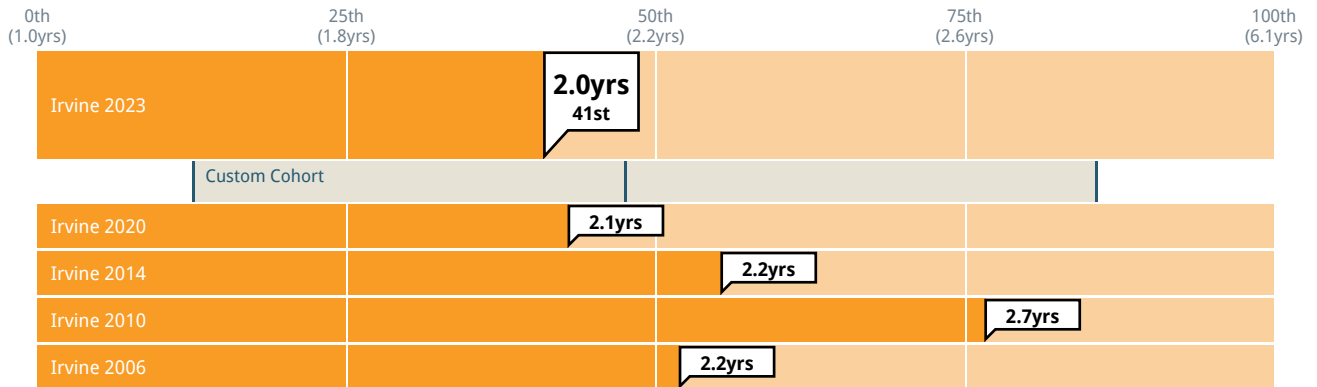
Selected Cohort: Custom Cohort						
Job Title of Respondents						
	Executive Director/CEO	Other Senior Team (i.e., reporting to Executive Director/CEO)	Project Director	Development Staff	Volunteer	Other
Irvine 2023	48%	25%	8%	18%	0%	1%
Irvine 2020	54%	21%	6%	16%	0%	3%
Irvine 2014	62%	13%	7%	14%	0%	4%
Irvine 2010	62%	11%	7%	13%	0%	7%
Irvine 2006	51%	11%	11%	17%	0%	9%
Average Funder	47%	19%	12%	16%	1%	5%
Custom Cohort	48%	21%	11%	17%	0%	3%

Contextual Data

Please note that all information below is based on self-reported data from grantees.

Grantmaking Characteristics

Average Grant Length



Cohort: Custom Cohort Past results: on Subgroup: None

Selected Cohort: Custom Cohort	
	Length of Grant Awarded
	Average grant length
Irvine 2023	2 years
Irvine 2020	2.1 years
Irvine 2014	2.2 years
Irvine 2010	2.7 years
Irvine 2006	2.2 years
Median Funder	2.2 years
Custom Cohort	2.1 years

Selected Cohort: Custom Cohort					
Length of Grant Awarded					
	0 - 1.99 years	2 - 2.99 years	3 - 3.99 years	4 - 4.99 years	5 - 50 years
Irvine 2023	27%	54%	15%	3%	1%
Irvine 2020	33%	48%	14%	2%	4%
Irvine 2014	23%	45%	28%	1%	3%
Irvine 2010	12%	35%	47%	3%	4%
Irvine 2006	25%	43%	28%	1%	3%
Average Funder	47%	22%	19%	3%	8%
Custom Cohort	38%	34%	20%	3%	5%

Selected Cohort: Custom Cohort				
Proportion of Unrestricted Funding	Irvine 2023	Irvine 2020	Average Funder	Custom Cohort
No, this funding was not restricted to a specific use (i.e., general operating, core support)	36%	40%	28%	38%
Yes, this funding was restricted to a specific use (e.g., supported a specific program, project, capital need, etc.)	64%	60%	72%	62%

Grantmaking Characteristics - By Subgroup

Selected Subgroup: None	
Length of Grant Awarded (By Subgroup)	
Average grant length	

Selected Subgroup: None
Length of Grant Awarded (By Subgroup)
0 - 1.99 years
2 - 2.99 years
3 - 3.99 years
4 - 4.99 years
5 - 50 years

Selected Subgroup: None
Proportion of Unrestricted Funding (By Subgroup)
No, this funding was not restricted to a specific use (i.e., general operating, core support)
Yes, this funding was restricted to a specific use (e.g., supported a specific program, project, capital need, etc.)

Grant Size

Selected Cohort: Custom Cohort	
	Grant Amount Awarded
	Median grant size
Irvine 2023	\$500K
Irvine 2020	\$300K
Irvine 2014	\$210K
Irvine 2010	\$225K
Irvine 2006	\$150K
Median Funder	\$110.2K
Custom Cohort	\$237.5K

Selected Cohort: Custom Cohort									
Grant Amount Awarded									
	Less than \$10K	\$10K - \$24K	\$25K - \$49K	\$50K - \$99K	\$100K - \$149K	\$150K - \$299K	\$300K - \$499K	\$500K - \$999K	\$1MM and above
Irvine 2023	1%	1%	1%	2%	5%	17%	19%	24%	29%
Irvine 2020	1%	1%	5%	3%	5%	25%	23%	23%	16%
Irvine 2014	1%	3%	7%	10%	14%	27%	14%	14%	11%
Irvine 2010	0%	4%	10%	16%	6%	23%	24%	9%	7%
Irvine 2006	1%	15%	16%	14%	4%	12%	21%	11%	7%
Average Funder	8%	11%	12%	14%	10%	17%	10%	9%	10%
Custom Cohort	2%	3%	6%	12%	11%	24%	14%	12%	15%

Selected Cohort: Custom Cohort	
Median Percent of Budget Funded by Grant (Annualized)	
Size of grant relative to size of grantee budget	
Irvine 2023	5%
Irvine 2020	6%
Irvine 2014	6%
Irvine 2010	6%
Irvine 2006	5%
Median Funder	4%
Custom Cohort	5%

Grant Size - By Subgroup

Selected Subgroup: None
Grant Amount Awarded (By Subgroup)
Median grant size

Selected Subgroup: None
Grant Amount Awarded (By Subgroup)
Less than \$10K
\$10K - \$24K
\$25K - \$49K
\$50K - \$99K
\$100K - \$149K
\$150K - \$299K
\$300K - \$499K
\$500K - \$999K
\$1MM and above

Selected Subgroup: None
Median Percent of Budget Funded by Grant (Annualized) (By Subgroup)
Size of grant relative to size of grantee budget

Grantee Characteristics

Selected Cohort: Custom Cohort	
Operating Budget of Grantee Organization	
Median Budget	
Irvine 2023	\$5M
Irvine 2020	\$3.1M
Irvine 2014	\$1.6M
Irvine 2010	\$1.3M
Irvine 2006	\$1.2M
Median Funder	\$1.7M
Custom Cohort	\$2.7M

Selected Cohort: Custom Cohort						
Operating Budget of Grantee Organization						
	<\$100K	\$100K - \$499K	\$500K - \$999K	\$1MM - \$4.9MM	\$5MM - \$24MM	>=\$25MM
Irvine 2023	1%	4%	10%	35%	36%	14%
Irvine 2020	1%	7%	12%	42%	26%	12%
Irvine 2014	1%	18%	14%	40%	17%	8%
Irvine 2010	1%	20%	19%	40%	15%	5%
Irvine 2006	0%	29%	15%	32%	15%	10%
Average Funder	8%	18%	13%	30%	19%	12%
Custom Cohort	2%	11%	11%	38%	25%	13%

Grantee Characteristics - By Subgroup

Selected Subgroup: None
Operating Budget of Grantee Organization (By Subgroup)
Median Budget

Selected Subgroup: None
Operating Budget of Grantee Organization (By Subgroup)
<\$100K
\$100K - \$499K
\$500K - \$999K
\$1MM - \$4.9MM
\$5MM - \$24MM
>=\$25MM

Funding Relationship

Selected Cohort: Custom Cohort	
Funding Status	
Percent of grantees currently receiving funding from the Foundation	
Irvine 2023	93%
Irvine 2020	79%
Irvine 2014	86%
Irvine 2010	94%
Irvine 2006	83%
Median Funder	82%
Custom Cohort	84%

Selected Cohort: Custom Cohort						
Pattern of Grantees' Funding Relationship with the Foundation	Irvine 2023	Irvine 2020	Irvine 2014	Irvine 2010	Average Funder	Custom Cohort
First grant received from the Foundation	34%	26%	22%	33%	29%	27%
Consistent funding in the past	48%	49%	55%	45%	54%	52%
Inconsistent funding in the past	18%	24%	24%	23%	18%	20%

Funding Relationship - by Subgroup

Selected Subgroup: None
Funding Status (By Subgroup)
Percent of grantees currently receiving funding from the Foundation

Selected Subgroup: None
Pattern of Grantees' Funding Relationship with the Foundation (By Subgroup)
First grant received from the Foundation
Consistent funding in the past
Inconsistent funding in the past

Funder Characteristics

Selected Cohort: Custom Cohort		
Financial Information		
	Total assets	Total giving
Irvine 2023	\$3200M	\$187M
Irvine 2020	\$2607M	\$100.8M
Irvine 2014	\$1675.3M	\$72.7M
Irvine 2010	\$1433.8M	\$67M
Irvine 2006	\$1610.5M	\$73.1M
Median Funder	\$286.3M	\$20.1M
Custom Cohort	\$3200M	\$145.5M

Selected Cohort: Custom Cohort		
Funder Staffing		
	Total staff (FTEs)	Percent of staff who are program staff
Irvine 2023	86	51%
Irvine 2020	56	46%
Irvine 2014	43	35%
Irvine 2010	42	38%
Irvine 2006	36	44%
Median Funder	18	44%
Custom Cohort	100	42%

Selected Cohort: Custom Cohort						
Grantmaking Processes	Irvine 2023	Irvine 2020	Irvine 2014	Irvine 2010	Median Funder	Custom Cohort
Proportion of grants that are invitation-only	100%	94%	98%	90%	50%	92%
Proportion of grantmaking dollars that are invitation-only	100%	97%	98%	95%	68%	95%

Additional Survey Information

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

As a result, there are some measures where only a subset of responses is included in the reported results. The table below shows the number of responses included on each of these measures. The total number of respondents to Irvine's grantee survey was 169.

Question Text	Number of Responses
Overall, how would you rate the Foundation's impact on your field?	149
How well does the Foundation understand the field in which you work?	157
To what extent has the Foundation advanced the state of knowledge in your field?	136
To what extent has the Foundation affected public policy in your field?	110
Overall, how would you rate the Foundation's impact on your local community?	136
How well does the Foundation understand the local community in which you work?	139
How well does the Foundation understand your organization's strategy and goals?	162
Please rate the extent to which you agree with the following statements about the non-monetary support you received from the Foundation:	
The non-monetary support I received met an important need for my organization and/or program	89
The non-monetary support I received strengthened my organization and/or program	89
The Foundation's non-monetary support was a worthwhile use of the time required of us	89
I felt the Foundation would be open to feedback about the non-monetary support it provided	87
Who most frequently initiated the contact you had with your program officer during this grant?	166
Has your main contact at the Foundation changed in the past six months?	164
At any point during this grant, including the selection process, did Foundation staff conduct a site visit?	169
How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Foundation?	153
How well do you understand the way in which the work funded by this grant fits into the Foundation's broader efforts?	163
How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?	162
How well does the Foundation understand the needs of the people and communities that you serve?	154
To what extent do the Foundation's funding priorities reflect a deep understanding of the needs of the people and communities that you serve?	157
Please rate the extent to which you agree or disagree with the following statements about diversity, equity, and inclusion:	
The Foundation has clearly communicated what diversity, equity, and inclusion means for its work	155
Overall, the Foundation demonstrates an explicit commitment to diversity, equity, and inclusion in its work	153
Overall, most staff I have interacted with at the Foundation embody a strong commitment to diversity, equity, and inclusion	159
I believe that the Foundation is committed to combatting racism	153
Did you submit a proposal to the Foundation for this grant?	167
To what extent was the Foundation's selection process a helpful opportunity to strengthen the efforts funded by the grant?	155
To what extent was the Foundation's selection process an appropriate level of effort given the amount of funding received?	159
To what extent was the Foundation clear and transparent about the selection process requirements and timelines?	161
To what extent was the Foundation clear and transparent about the criteria the Foundation uses to decide whether a proposal would be funded or declined?	155
Have you participated in a reporting or evaluation process?	163
At any point during the proposal or the grant period, did the Foundation and your organization exchange ideas regarding how your organization would assess the results of the work funded by this grant?	150
To what extent was the Foundation's reporting process straightforward?	119

Question Text	Number of Responses
To what extent was the Foundation's reporting process adaptable, if necessary, to fit your circumstances?	111
To what extent was the Foundation's reporting process relevant, with questions and measures pertinent to the work funded by this grant?	119
To what extent was the Foundation's reporting process a helpful opportunity for you to reflect and learn?	118
To what extent did the evaluation incorporate your input in the design of the evaluation?	26
To what extent did the evaluation result in you making changes to the work that was evaluated?	26
Are you currently receiving funding from the Foundation?	165
Which of the following best describes the pattern of your organization's funding relationship with the Foundation?	166
Primary Intended People and/or Communities	
Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?	167
Specifically, are any of the following the primary intended people and/or communities served by the efforts funded by this grant?	154
Customized Questions	
Grantee input and expertise informs how the Foundation does its work	133
Foundation-sponsored gatherings provide meaningful opportunities to connect with and learn from grantee peers	107
The Foundation partners with grantees to adapt to changes in context and resulting challenges and opportunities	140
The Foundation is visible on issues of importance to its mission and programs, even in the face of potential criticism	130
The Foundation is willing to take risks when there is opportunity to have greater impact	121
Irvine's grantmaking programs, approaches, and partnerships effectively serve communities of color in California	141
Irvine's grantmaking programs, approaches, and partnerships support my organization's effort to effectively serve communities of color in California	155
Irvine robustly supports transformative economic justice efforts that are led by workers, leaders, and allies of color	140
I feel comfortable discussing the Foundation's commitments to racial equity with my program officer	152
Staff are accessible when I need to communicate with them	165
I am able to engage with staff using my preferred mode of engagement (e.g., in person, virtually)	161
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)?	101

About CEP and Contact Information

Mission

CEP provides data, feedback, programs, and insights to help individual and institutional donors improve their effectiveness. We do this work because we believe effective donors, working collaboratively and thoughtfully, can profoundly contribute to creating a better and more just world.

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.

Additional CEP Resources

Assessment Tools

Donor Perception Report (DPR): The Donor Perception Report provides community foundations with comparative data on their donors' perceptions, preferences for engagement, and giving patterns. Based on research and guidance from a group of community foundation leaders, the DPR is the only survey process that provides comparative data for community foundations.

Staff Perception Report (SPR): The Staff Perception Report explores foundation staff members' perceptions of foundation effectiveness and job satisfaction on a comparative basis. The SPR is based on a survey specific to foundations that includes questions related to employees' impressions of their role in philanthropy, satisfaction with their jobs, their foundation's impact, and opportunities for foundation improvement.

YouthTruth Student Survey: YouthTruth supports school systems in gathering and acting on student and stakeholder feedback, helping schools, districts, and education funders think through the ins-and-outs of actionable insights to drive improvement. Learn more at youthtruthsurvey.org.

Advisory Services

CEP's data-driven, customized advising leverages CEP's knowledge and experience to help funders answer pressing questions about their work, address existing challenges, hear from valued constituents, and learn and share with peers. Learn more at cep.org/advisoryservices.

Research

CEP's research projects delve into issues that are central to funder effectiveness, examining common practice and challenging conventional wisdom. Our research is informed by rigorous quantitative and qualitative analysis of large-scale data sets, in-depth qualitative interviews with philanthropic leaders, as well as by profiles of high-performing organizations and staff.

CEP's resource library offers resources for grantmakers, individual donors, and more. Explore the full range of resources available in CEP's resource library at cep.org/resources.

Contact Information

Alice Mei
Manager, Assessment and Advisory Services
alicem@cep.org

Joyce Cheng
Analyst, Assessment and Advisory Services
joycec@cep.org