



# LISTENING TO OUR GRANTEES:

*OUR 2023 GRANTEE PERCEPTION REPORT*



## INTRODUCTION AND KEY CONTEXT

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



Based on feedback from Irvine's last GPR in 2020, we took important actions that continue to influence our grantmaking today which included:

- Increased communication with grantees through initiative-specific newsletters, better targeting on social media, using existing touchpoints as part of our grant processes, and creating and updating tools for staff for more consistent messaging
- Publicly communicated our racial equity commitments as part of a blog series about our perspectives on and work related to diversity, equity, and inclusion
- Leaned further into indirect costs by supporting staff knowledge and understanding on full-cost funding and overall grantee financial health

This year's GPR findings reflect data collected in May-June 2023. It is the second survey under our singular goal: a California where all low-income workers have the power to advance economically. Of the 293 active Irvine grants, **169 responded for a 58% response rate.**

All grantees with active grants between February 2022 and January 2023 were invited to participate in the survey; the exceptions were membership and sponsorship grants, and discretionary grants made by individual staff and board members.

In this document, we highlight key findings from the 2023 survey, including perceptions of:

- The impact of our support on their fields, communities, and organizations ([pg. 4](#))
- Our commitment to diversity, equity, and inclusion, especially racial equity ([pg. 6](#))
- Our communication with grantees ([pg. 9](#))
- Irvine interactions with grantees ([pg. 11](#))
- Grant and evaluation processes ([pg. 14](#))

We conclude with our action steps to address grantees' constructive feedback ([pg. 18](#)). Full survey results can be viewed [here](#).

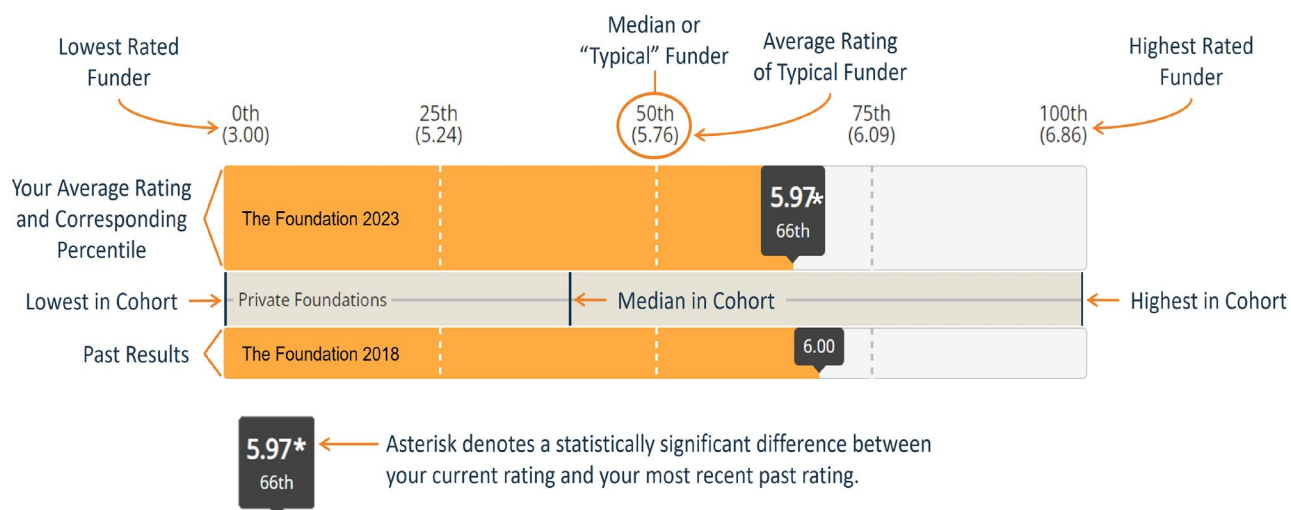
## KEY 2023 HIGHLIGHTS

- **Grantees reported improvements on the Foundation’s impact on their fields, local communities, and organizations.** This included enhancing the capacity of individuals, networks, and systems as well as leveraging Irvine’s connections and influence for greater impact.
- **Grantees reported improvements in our grant processes,** including less time spent on selection, reporting, and evaluation; more dollars per process hour (compared to previous years and our funder peers); and less pressure to modify their priorities to receive funding.
- Even with hybrid work (with Foundation staff working more remotely now), **grantees provided more positive ratings than in 2020 across measures pertaining to their relationships with Irvine.** This was exemplified by their increased comfort approaching staff if an issue arises, Irvine’s perceived openness to their ideas, and a greater sense of trust, compassion, and responsiveness for those impacted by their work.
- **Grantees reported significant improvements in the clarity of Irvine’s communications** about its’ goals and strategies and what diversity, equity, and inclusion means for our work.

## INTERPRETING THE RESULTS

This summary focuses on results from active 2023 grantees. Our “custom cohort” consists of a comparison group of peer funders who are similar on factors such as assets, grantmaking budget, staff size, and/or content focus.<sup>1</sup> Important things to note:

- The top of each chart shows the range of scores among funders, with the lowest average score on the left and the highest on the right.
- The orange bars show Irvine’s overall scores in 2023 as compared to 2020, where available.
- The gray bar between the two orange bars indicates the highest and lowest scores in our custom cohort, along with a vertical notch that indicates the median.
- An asterisk (\*) denotes a statistically significant difference between the 2023 and 2020 ratings.



<sup>1</sup> The “custom cohort” includes the Bill & Melinda Gates Foundation, Chan Zuckerberg Initiative, Evelyn and Walter Haas, Jr. Fund, Ewing Marion Kauffman Foundation, Ford Foundation, Surdna Foundation, 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, and Weingart Foundation.



## IMPACT ON GRANTEES' FIELDS, COMMUNITIES, AND ORGANIZATIONS

Seven years into our focus on low-income workers, grantees rate Irvine as having positive impacts on their respective fields and communities, with significantly higher scores as compared to our 2020 results as well as higher than the median of our custom cohort of peer foundations (Figures 1-2). Grantees perceive Irvine as being a key player and partner in the broader field. Key themes from open-ended comments include grantees' appreciation for Irvine's focus and how it leverages its' connections and influence to amplify grantees' efforts, and its support for capacity building and learning exchanges that is strengthening the worker ecosystem and movement.

“The investment in the portfolio as a whole is the most significant way in which the Foundation includes the ecosystem. The additional funds and capacity the Foundation provides to all of the organizations in the portfolio, all of whom do great work, is what leads to broad impact. Everyone is able to do more/higher quality work as a result and that adds up across such a large number of grantees. Also having a specific strategy around economic mobility and worker power creates a sense of connection across the work and the grantees.”

“The Foundation has played a great role in amplifying worker needs and has a depth of knowledge on economic growth, workforce, and labor issues. The Foundation is influencing the field by prioritizing the role of local community in an issue area largely dominated by sector leaders. We are now more exposed to the landscape and growing in knowledge and capacity to be better advocates.”

Figure 1: Overall, how would you rate the Foundation's impact on your field?

1 = No impact, 7 = Significant positive impact

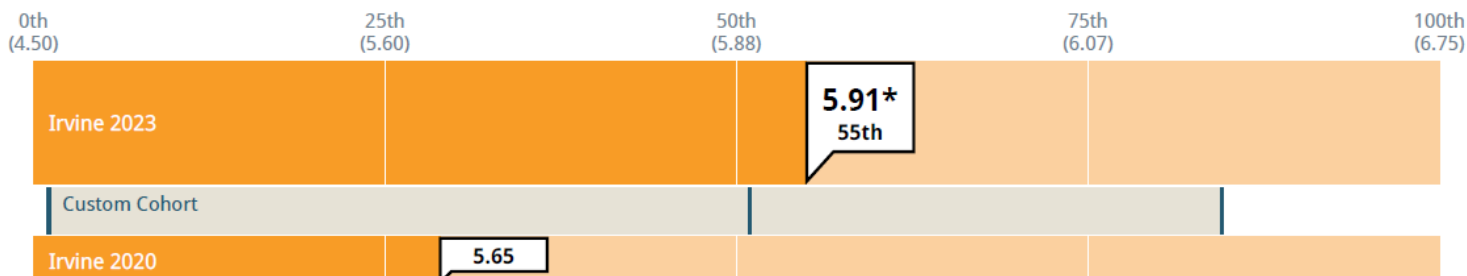
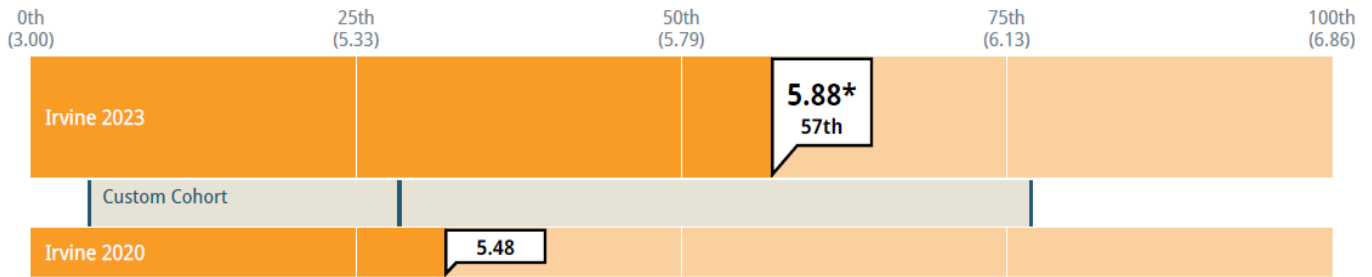


Figure 2: Overall, how would you rate the Foundation’s impact on your community?

1 = No impact, 7 = Significant positive impact



*The Foundation is advancing greater fairness and opportunities for low-wage workers and families by providing support for infrastructure, capacity building, learning, exchanges, and growth of the worker movement ecosystem. Entire regional and statewide partnerships/coalitions have formed that have allowed organizations and worker centers to do cross-collaboration for advancing worker power, ensure greater fairness to low-wage workers, and address systemic issues with local and state levels.”*

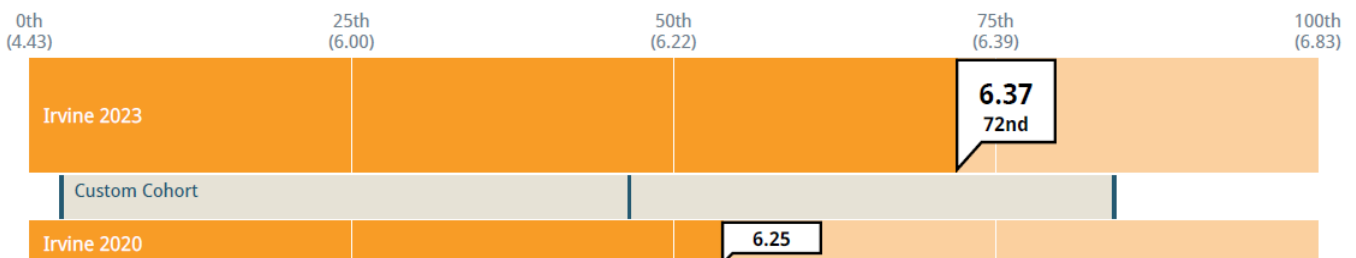


*The Foundation is well-informed and has been very thoughtful about developing strategies that meet the needs of the community currently...When the Foundation takes on a challenging area, it is so well-informed that other practitioners in the field take note and consider focusing there as well, if they aren't already doing so.”*

Grantees rated Irvine as having a strong positive impact on their organizations (Figure 3), with higher scores as compared to 2020 and the mean of the peer custom cohort. Grantees shared that Irvine’s investment and partnership have been critical to strengthening their organizational capacity, resulting in greater organizational impact and ability to help strengthen the broader ecosystem.

Figure 3: Overall, how would you rate the Foundation’s impact on your organization?

1 = No impact, 7 = Significant positive impact



*The Foundation continues to be one of the biggest funding partners that organizations like ours continue to have. We have been able to support our worker rights department through this funding, grow our team, and get additional support from consultants to help us deal with our growing pains. Irvine is one of the few funding partners that understands the importance of organization and leadership development in our community.”*



*Grantee convenings and work groups (quality jobs and data projects) [supported by Irvine] have been helpful to broaden learnings and reach of any individual organization. Through those spaces, connections are made that seed collaborations that benefit the communities we serve.”*



## COMMITMENT TO DIVERSITY, EQUITY, AND INCLUSION, INCLUDING RACIAL EQUITY

The overwhelming majority of Irvine’s grants are primarily meant to benefit historically disadvantaged groups (Figure 4), particularly communities and individuals who are Black, Indigenous, and/or people of color as well as women (Table 1).

Figure 4: Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?

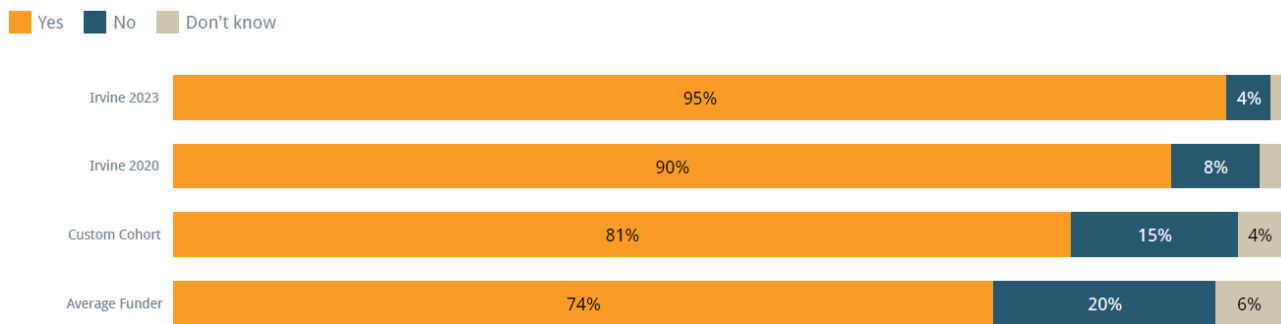


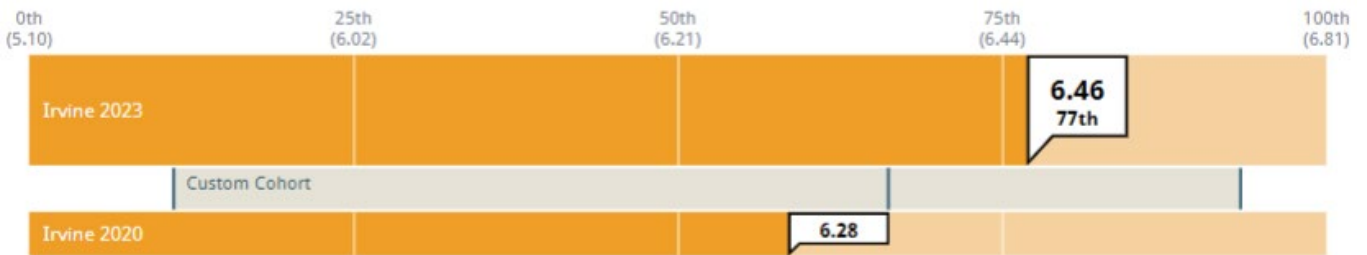
Table 1: Breakdown of historically disadvantaged populations, benefiting from initiatives funded by grant efforts.

POPULATIONS AND PERCENTAGE	
Latina, Latino, Latinx, or Hispanic individuals or communities (87%)	American Indian, Alaska Native, or Indigenous individuals or communities (57%)
African American or Black individuals or communities (80%)	Pacific Islander or Native Hawaiian individuals or communities (49%)
Multiracial and/or Multi-ethnic individuals or communities (71%)	Members of the LGBTQ+ (Lesbian, Gay, Bisexual, Transgender, and Queer) community (44%)
Women (71%)	Middle Eastern or North African individuals or communities (39%)
Asian or Asian American individuals or communities (71%)	None of the above (1%)

**Diversity, Equity, and Inclusion (DEI).** Overall, grantees see Irvine staff as embodying a strong commitment to DEI (Figure 5). Grantees rate Irvine higher in 2023 than 2020 in explicitly demonstrating a commitment to DEI and communicating what DEI means for the Foundation’s work, although these scores are lower than the median in our comparison custom cohort (Figures 6-7). The grantee rating of our commitment to combatting racism remains unchanged (Figure 8).

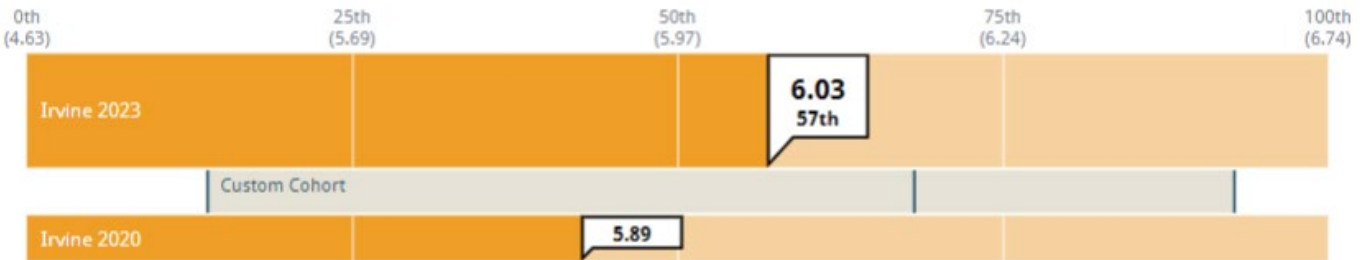
**Figure 5: Overall, most staff I have interacted with at the Foundation embody a strong commitment to diversity, equity, and inclusion.**

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



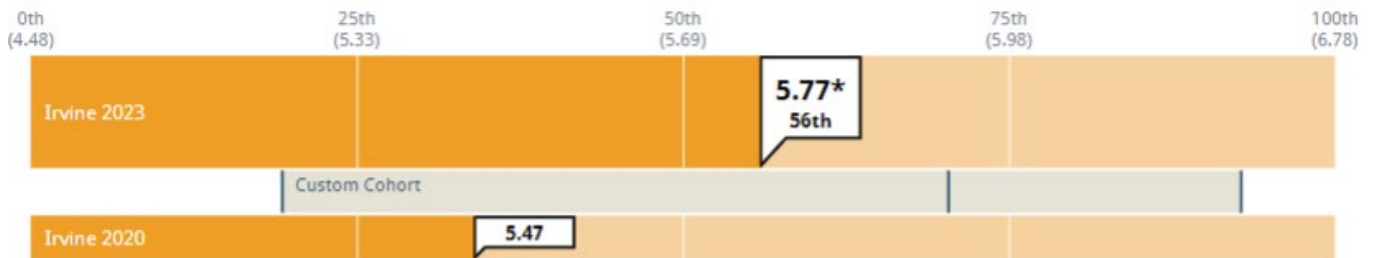
**Figure 6: Overall, the Foundation demonstrates an explicit commitment to diversity, equity, and inclusion in its work.**

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



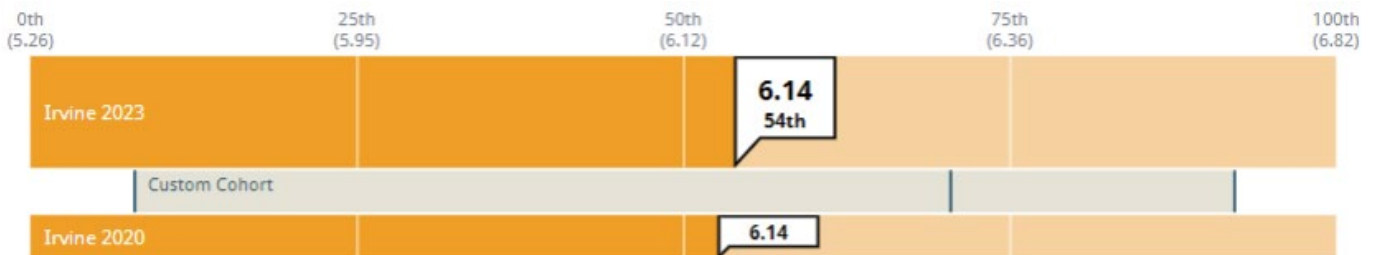
**Figure 7: Irvine has clearly communicated what diversity, equity, and inclusion means for its work.**

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



**Figure 8: I believe that the Foundation is committed to combatting racism.**

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



**Racial Equity.** Grantees were asked, for the first time, a set of custom questions pertaining to Irvine’s racial equity efforts. Grantees rated Irvine highly on their comfort with discussing racial equity with their program officer as well as the Foundation’s support of efforts to serve communities of color and for transformative economic justice work by workers, leaders, and allies of color (Figure 9).

**Figure 9: 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



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

**Gender differences.** The Center for Effective Philanthropy conducted additional analysis on differences of grantee experience by grant type and grantee characteristics (e.g., gender identity and people of color). In 2020, women provided significantly lower ratings than men across multiple measures. In 2023, only one significant difference remained: Women still rate Irvine’s explicit commitment to DEI and combatting racism as significantly lower compared to men (Table 2).

**Table 2: Comparison of gender differences across measures identified in 2020 and 2023.**

GENDER DIFFERENCES ACROSS MEASURES		
Measures	Significant difference observed in 2020	Significant difference observed in 2023
Explicit commitment to DEI and to combatting racism	✓	✓
Impact on and understanding of grantees’ organizations and contexts	✓	
Strength of relationships, including approachability and responsiveness	✓	
Clarity of communications about goals and DEI	✓	
Overall transparency and candor	✓	





## COMMUNICATION

Overall, grantees are pleased with Irvine’s communications to and with them. Scores have improved in the consistency and clarity of information shared, even amid significant change for the Foundation (Figures 10-11). This is especially notable for communications on Irvine’s broader goals and strategy, and grantees’ understanding of how their work connects to the Foundation’s broader efforts (which place Irvine in the top quarter of the dataset) (Figure 12).

Figure 10: 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

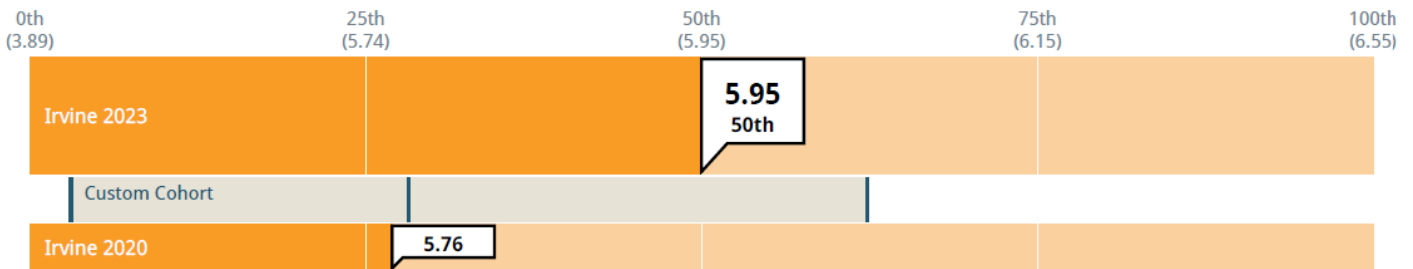


Figure 11: How clearly has the Foundation communicated its goals and strategy to you?

1 = Not at all clearly, 7 = Extremely clearly

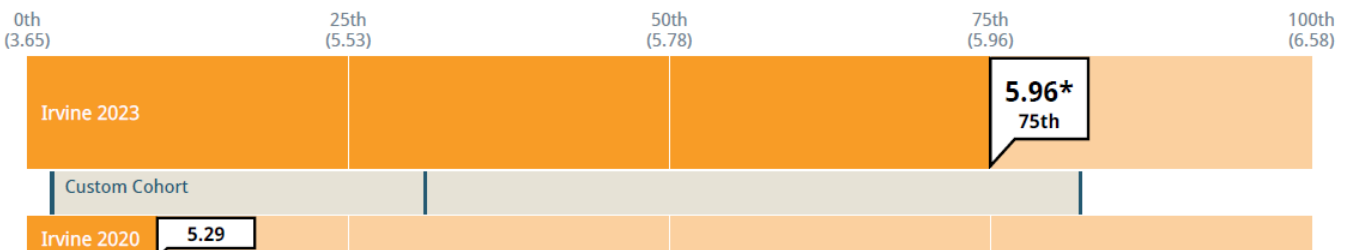
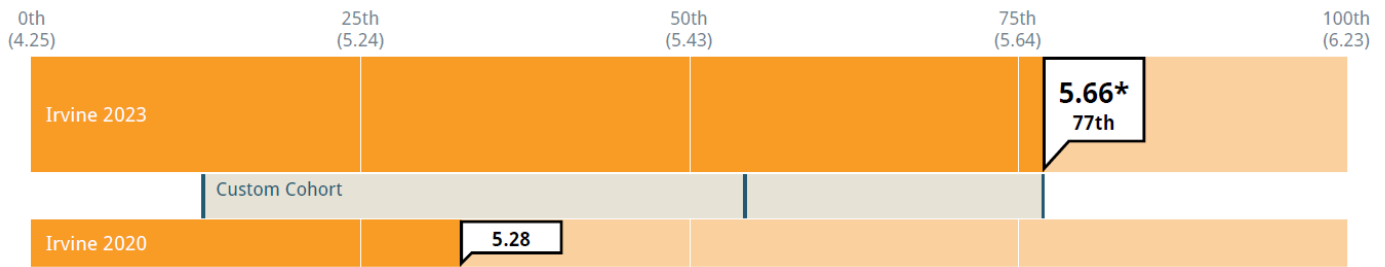




Figure 12: How well do you understand the way in which the work funded by this grant fits into the Foundation's broader efforts?

1 = Limited understanding 7 = Thorough understanding



“There was a change in [program] officer during the relationship building process and, looking back now, it was a very well thought out process... I have seen the shift within the Foundation in centering community power and leadership, which has opened the door to be more explicit around what is actually needed to make the changes we’d like to see. Interactions have been great, and communication never feels burdensome; on the contrary, it feels incredibly supportive.”

“The Foundation is so responsive, respectful, and communicative, [yet] it feels to me there are opportunities to harness strong lines of communication with grantees ...more than has been done to date...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.”



## FUNDER-GRANTEE INTERACTIONS

Overall, grantees consistently report positive interactions with Irvine staff, including with our new model of hybrid work (partly remotely). As compared to 2020, ratings for all funder-grantee interactions improved, with significant improvements for grantees feeling comfortable approaching the Foundation when a problem arises and the Foundation’s openness to grantee ideas about strategy (Figures 13-17).

“ I have found Irvine to be grantee- and community-centered. Their processes are often collaborative and informed by grantee feedback and community priorities. Irvine is always accessible... I do not experience extra or unnecessary 'hoops' when engaging with Irvine as a funder.”

“ The Foundation's process was by far one of the best I've experienced in submitting proposals and collaborating with philanthropy. Our program officers have been clear, responsive, and supportive throughout the process. We've been so pleased with our interactions and knowing that we will receive timely responses to any questions.”

Figure 13: Overall, how responsive was Foundation staff?  
1 = Not at all responsive, 7 = Extremely responsive

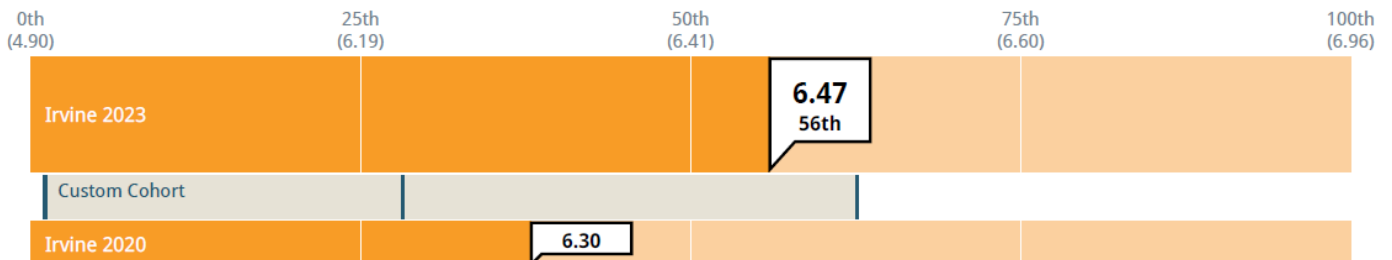


Figure 14: To what extent did the Foundation exhibit trust in your organization's staff during this grant??  
 1 = Not at all, 7 = To a great extent

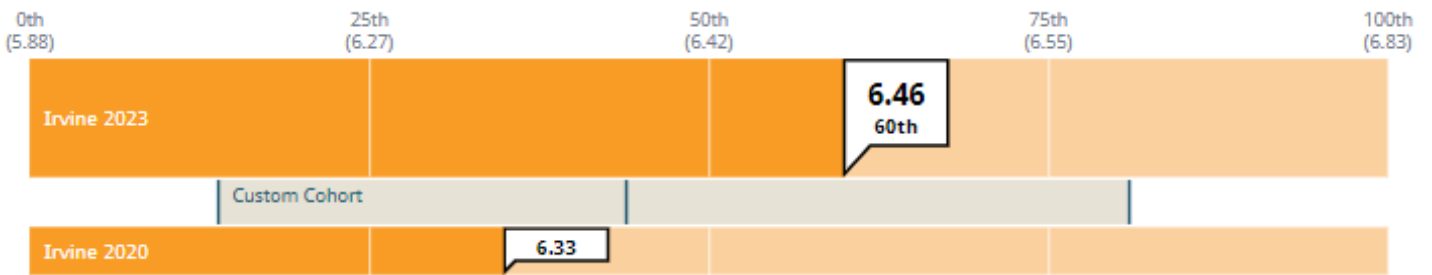


Figure 15: To what extent did the Foundation exhibit compassion for those affected by your work during this grant?  
 1 = Not at all, 7 = To a great extent

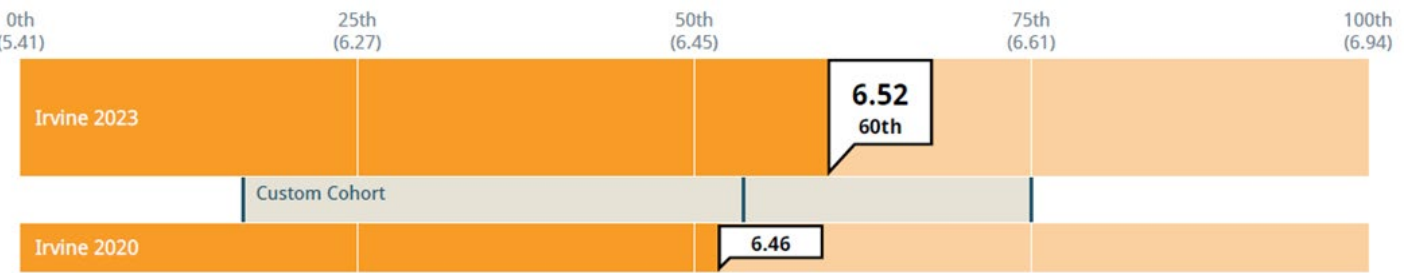


Figure 16: How comfortable do you feel approaching the Foundation if a problem exists?  
 1 = Not at all comfortable, 7 = Extremely comfortable

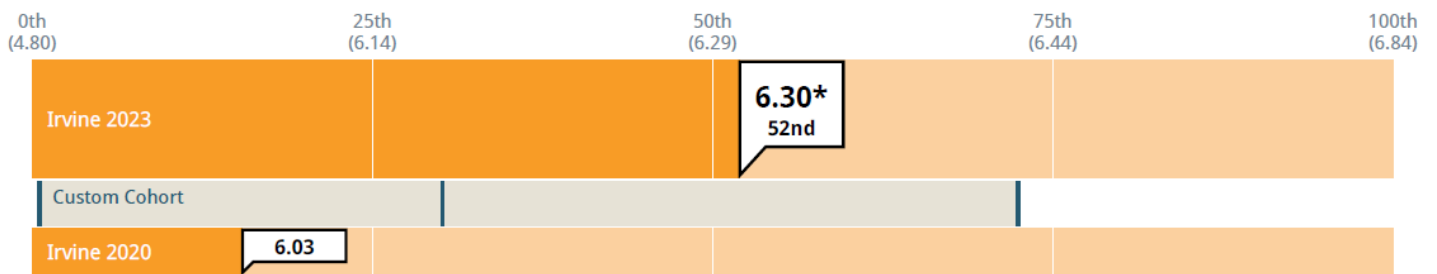
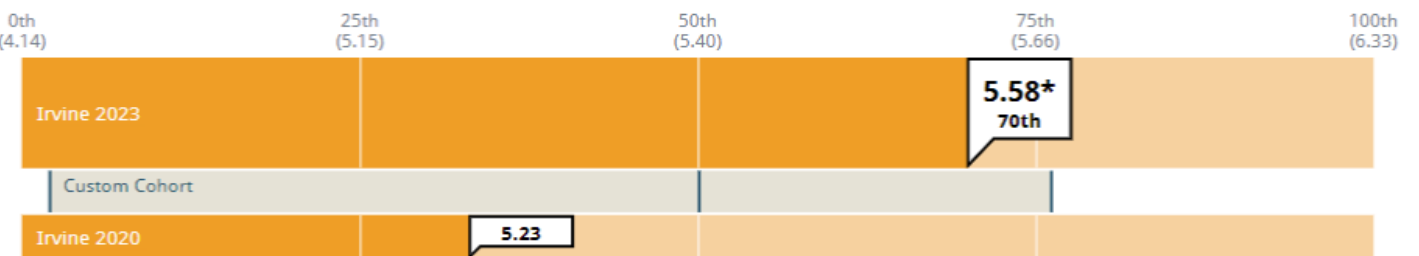


Figure 17: To what extent is the Foundation open to ideas from grantees about its strategy?  
 1 = Not at all, 7 = To a great extent

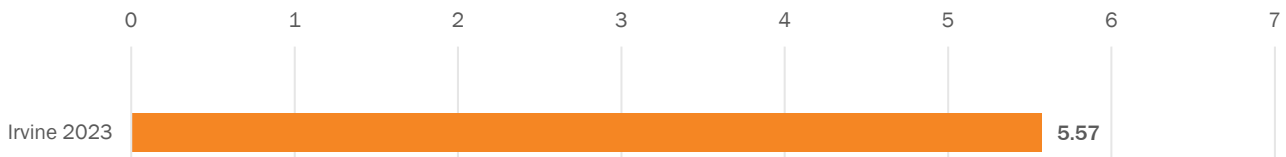


**Hybrid Working Model.** Grantees rated Irvine’s new hybrid approach (with staff working part of their time in-person and part remotely) as having a positive impact on the quality of their relationship with Irvine staff (Figure 18). They rated Irvine staff as highly accessible and appreciated staff flexibility in using grantees’ preferred mode of engagement (Figure 19).

Note: Trend data for the below is not available because these questions did not appear in Irvine’s Grantee Perception Report in prior years.

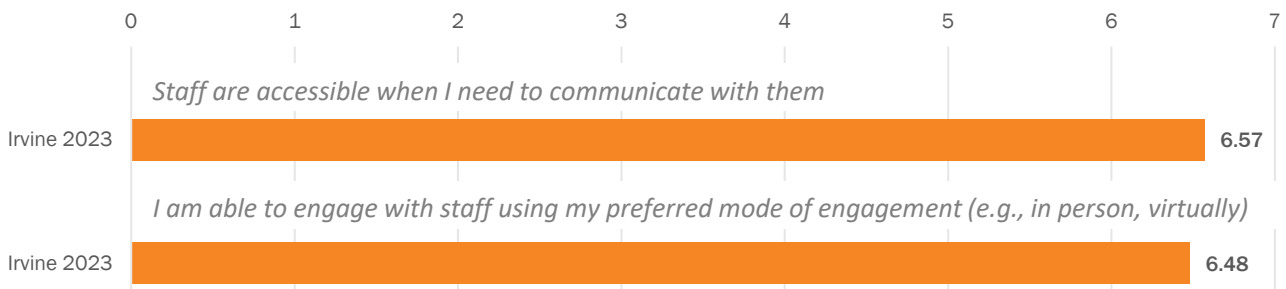
**Figure 18: Overall, how would you rate the impact of Irvine staff working in a hybrid approach on the quality of your relationship with them in 2023?**

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



**Figure 19: 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*



“Being able to meet with program officers in person and virtually has provided the opportunity for us to spend more time together. It has created the opportunity for more in-depth engagement than is often possible.”

“I appreciate the opportunity to connect with Irvine staff in person. I feel it builds our understanding of each other, allows us to exchange more and deeper information related to our areas, and creates unexpected connections...”



## GRANT AND EVALUATION PROCESSES

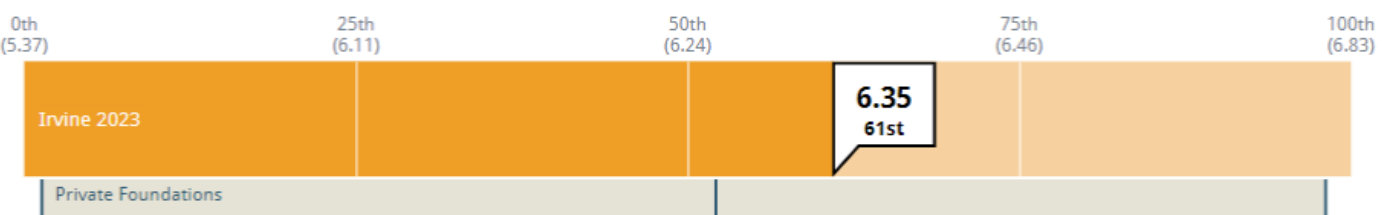
Irvine’s grant processes have become more streamlined since our last GPR in 2020. Overall, grantees perceive our processes to be helpful and minimally burdensome, yielding a high dollar return. Additionally, a majority of grantees receiving project-based grants report their full costs being covered.

“The process of developing the grant was through a series of conversations that were helpful to our organization in sharpening our thinking about our work... The reporting process was also an opportunity to reflect on progress and what has been learned...”

“All Irvine staff interactions have been a pleasure -- courteous, prompt, thorough and honest. Very professional, helpful, and kind at every stage of this grant and other grants we've been fortunate to receive from the Foundation. Real partners in our work.”

**Selection Process.** Grantees report that the Foundation’s selection process was clear and transparent (Figure 20) and helped to strengthen the organization/program funded by the grant (Figure 21). As compared to 2020, grantees also report significantly lower pressure to change organizational priorities in their grant proposal to increase their funding opportunity (Figure 22).

Figure 20: 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



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

Figure 21: To what extent was the Foundation's selection process a helpful opportunity to strengthen the efforts funded by the grant?

1 = Not at all helpful, 7 = Extremely helpful

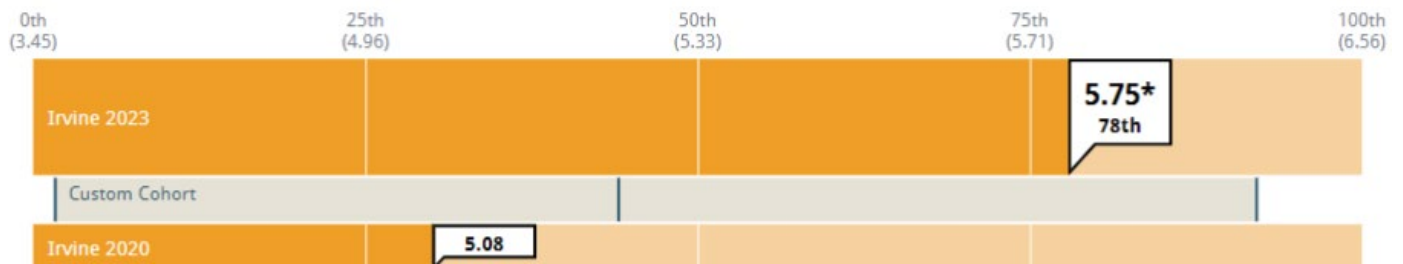
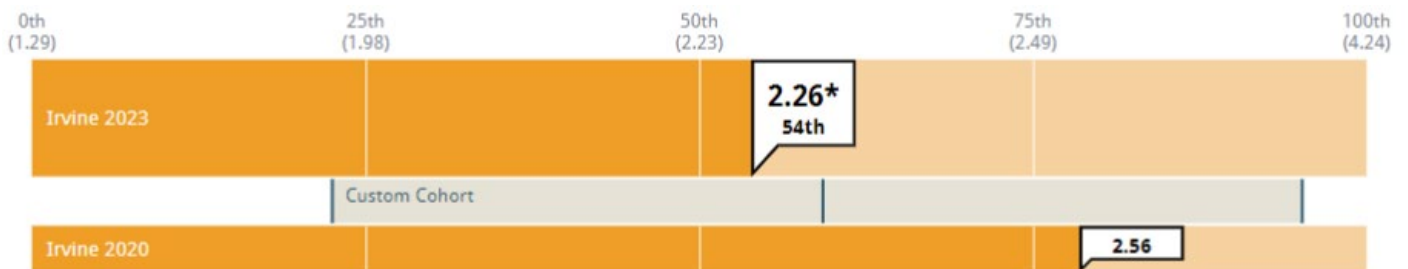


Figure 22: As you developed your grant proposal, how much pressure did you feel to modify your organization's priorities in order to create a grant proposal that was likely to receive funding?

1 = No pressure, 7 = Significant pressure



Grantees report spending 20 hours on the proposal and selection process in 2023, which was the same in 2020 and the median for our foundation peers (not shown). However, Irvine's grant dollar amount, relative to the hours expended on grant requirements, is high and an increase since 2020 (Figure 23). This positions us in the top 2% of our foundation peers. Grantees also thought that the effort involved in the selection process was appropriate for the amount of funding received (Figure 24).

Figure 23: Median Dollars Awarded Per Process Hour Required

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

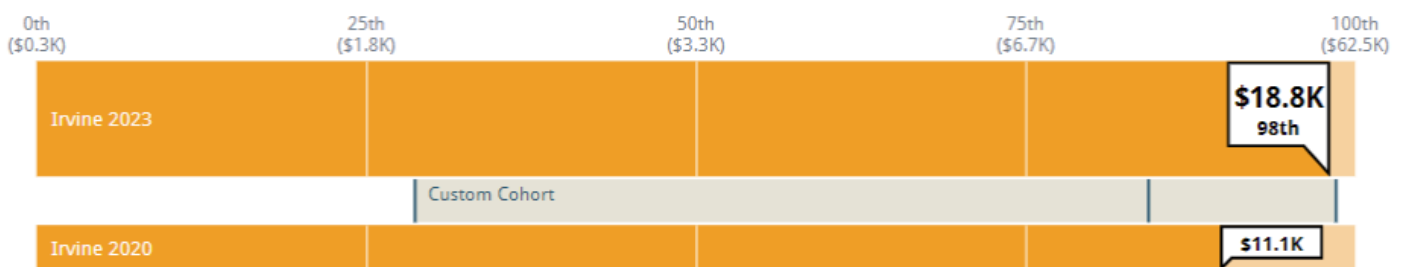
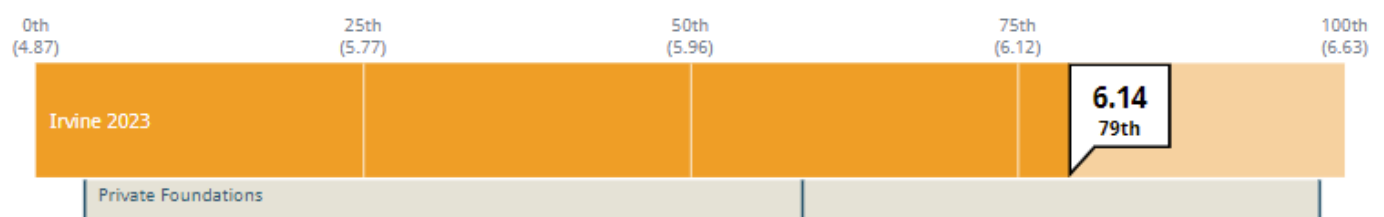


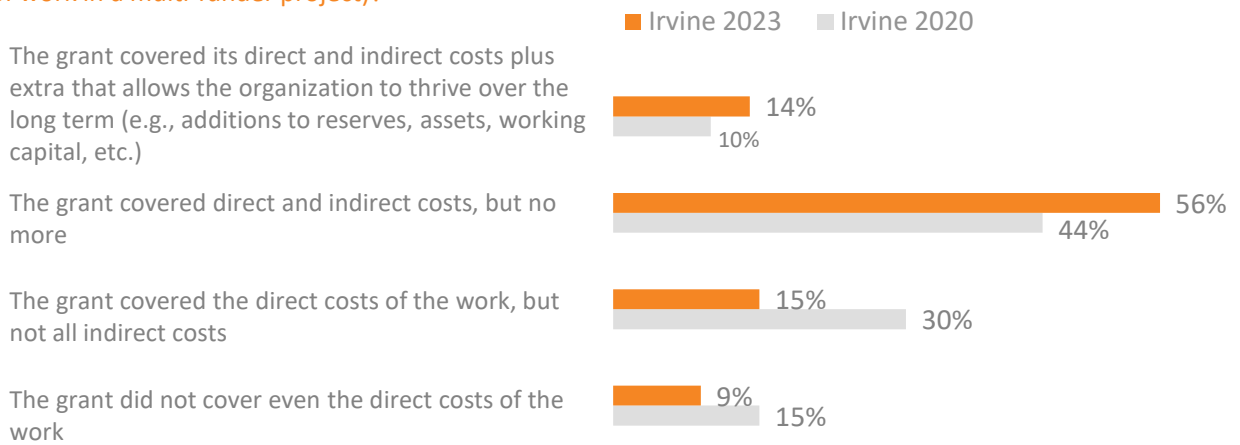
Figure 24: To what extent was the Foundation's selection process an appropriate level of effort given the amount of funding received?

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



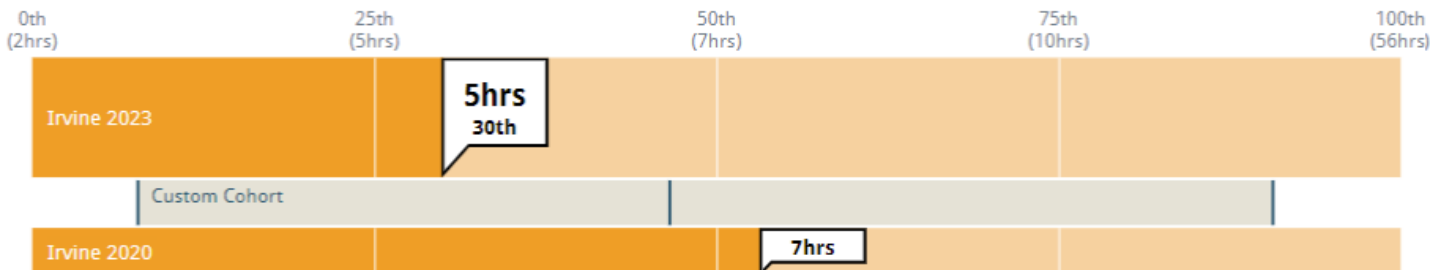
**Indirect Costs.** Based on grantee feedback in Irvine’s 2014 GPR, the Foundation increased its allowance for indirect costs in project-based grants that receive restricted funding. Support for indirect costs (overhead beyond direct project costs) can be included in project support grant budgets and is discussed as part of the proposal process. Building on 2020 grantee feedback, Irvine offered trainings and resources to build staff knowledge on full-cost funding and overall financial health. In 2023, 70% of grantees receiving restricted, project-based grants report that their grant covered both direct and indirect costs, compared to 54% in 2020 (Figure 25).

Figure 25: 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)?



**Grantee reporting and evaluation.** Results show a reduction in the burden of reporting and evaluation on grantees, with grantees spending a median of five hours annually on grantee reports and evaluation as compared to seven hours in 2020 (Figure 26) and 13 hours in 2014 (not shown).

Figure 26: Median Hours Spent on Monitoring, Reporting, and Evaluation Process Per Year



In 2023, grantees found Irvine’s reporting process to be more relevant, with questions and measures pertinent to the work funded (Figures 27). Additionally, they found the reporting process to be significantly more adaptable to fit their circumstance as needed and a helpful opportunity for reflection and learning (Figures 28-29). However, as compared to 2020, grantees reported lower scores for their perception that the evaluation design incorporated input from their organizations (Figure 30) and less use of evaluation results to make changes to their work (Figure 31).

Figure 27: 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

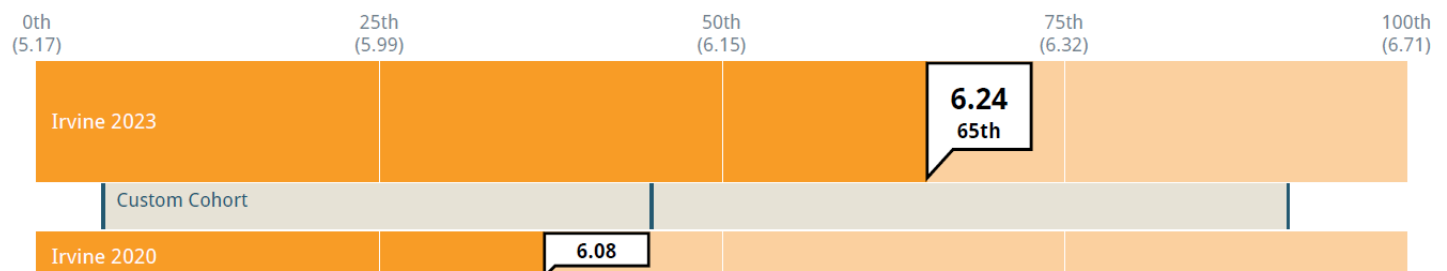




Figure 28: To what extent was the Foundation's reporting process adaptable, if necessary, to fit your circumstances?  
 1 = Not at all, 7 = To a great extent

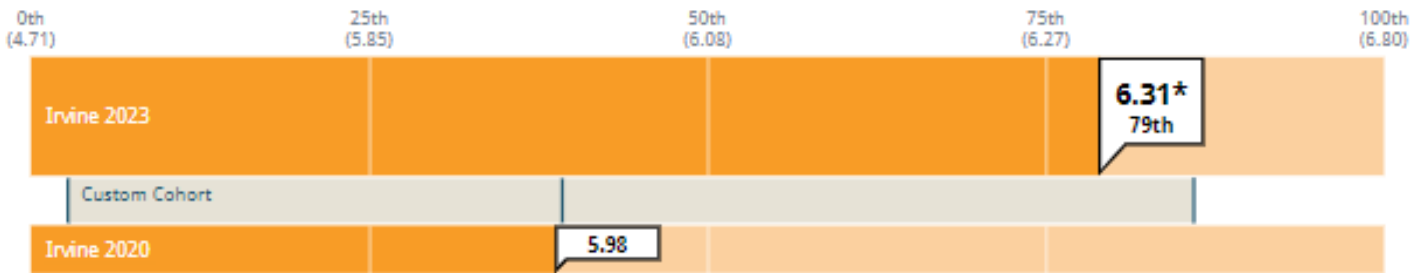


Figure 29: To what extent was the Foundation's reporting process a helpful opportunity for you to reflect and learn?  
 1 = Not at all, 7 = To a great extent

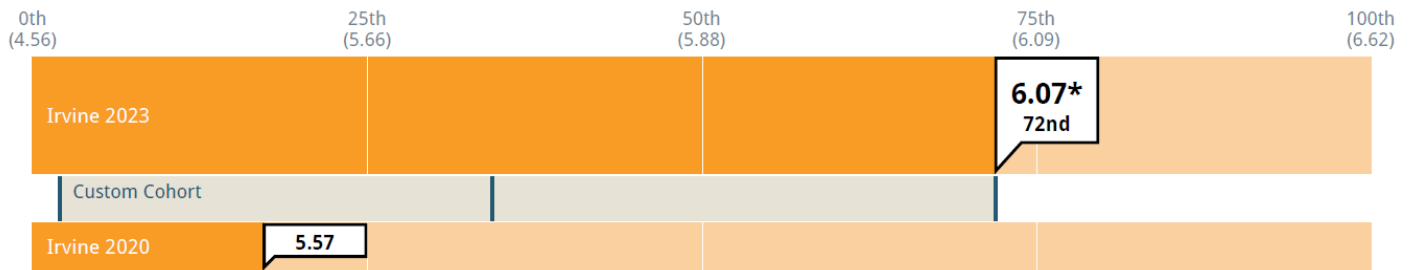


Figure 30: To what extent did the evaluation incorporate input from your organization in the design of the evaluation?  
 1 = Not at all, 7 = To a great extent

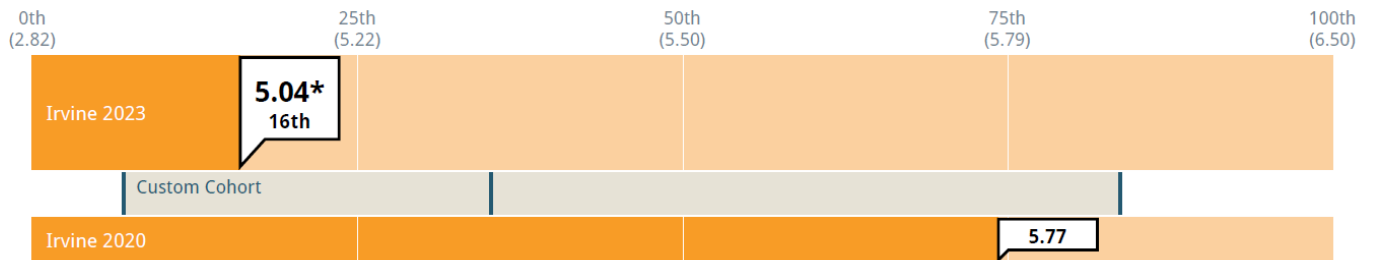
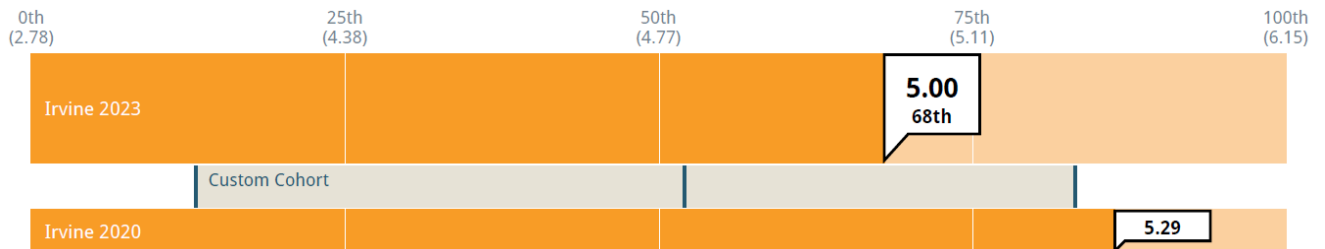
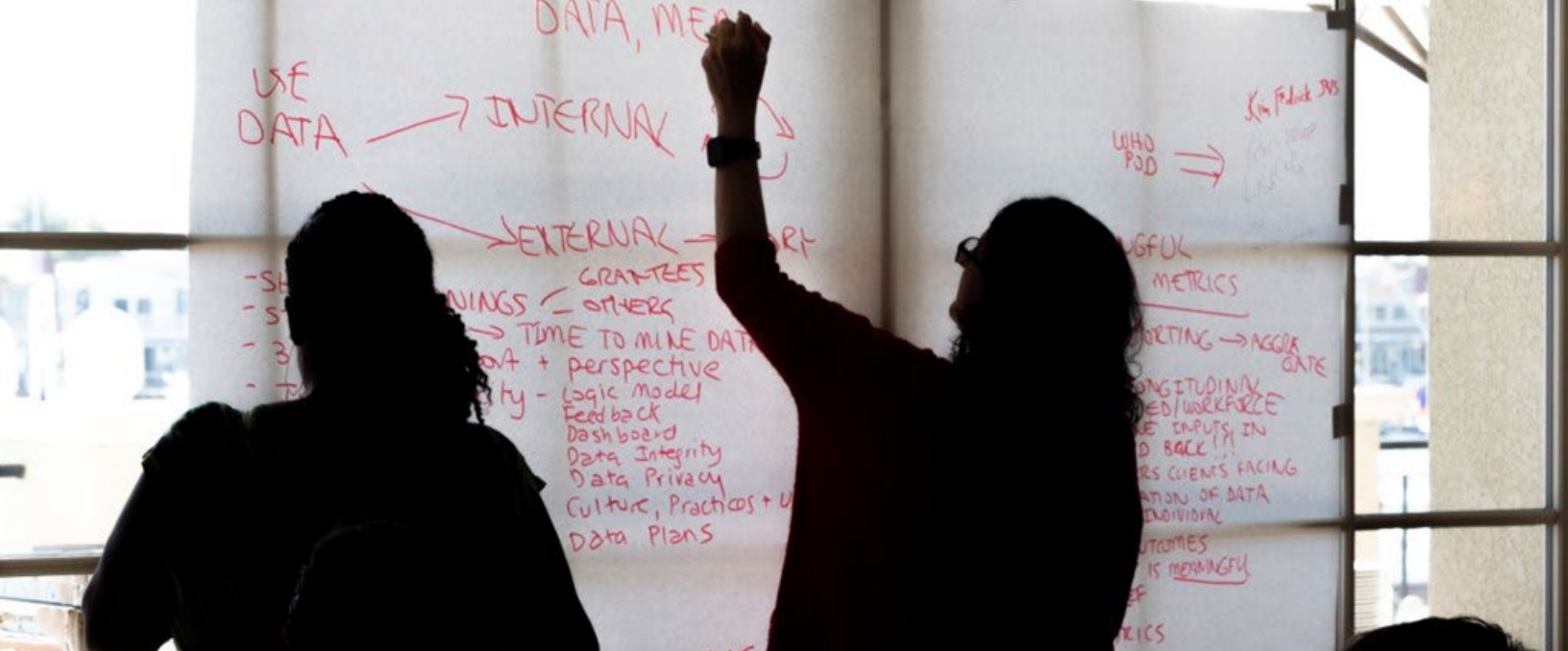


Figure 31: To what extent did the evaluation result in your organization making changes to the work that was evaluated?  
 1 = Not at all, 7 = To a great extent





## IRVINE'S ACTION STEPS

We are grateful for the valuable insights we received from our grantees and appreciate their time and reflection on our strengths and areas for improvement.

We were heartened to receive improved ratings across key themes in our 2023 survey, including areas identified and addressed through our action steps based on feedback from the 2020 survey.

Moving forward, we are committed to continue to strengthen the way that we support and partner with grantees. This involves advancing and sharing updates about our DEI and racial equity efforts, staying aware of and monitoring gender differences in grantee experiences, ongoing focus on our communications, and ensuring full-cost coverage for project funding.

### Diversity, Equity, and Inclusion, particularly Racial Equity

Grantees continue to want Irvine to be more explicit about its commitment to diversity, equity, and inclusion and what it means for their work with Irvine. This includes being clearer about how racial equity is being embedded and addressed throughout different elements of our work, including our strategy, grantmaking, evaluation, and communications.

Releasing Irvine’s racial equity statement was an important step in this direction. As we move forward with our racial equity efforts, we will:

- Continue to publicly communicate our commitment and progress related to DEI, and racial equity efforts specifically
- Share with grantees and others, as relevant, what these efforts mean for them
- Continue to obtain input from grantees and others to guide our racial equity efforts

### Gender Differences

We are glad that there are almost no significant differences in ratings between respondents identifying as women and men in 2023. The exception is grantees identifying as women who still rate Irvine as having a lower explicit commitment to diversity, equity, and inclusion and to combatting racism, compared to men.

We hope to address and eliminate this difference in responses through our racial equity statement and ongoing racial equity efforts — and communications about this work. We will monitor progress in future survey cycles.

## Communication

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

- Communicate regularly to grantees with updates about the initiative they are funded by as well as news about other initiatives and the Foundation more broadly, using various mediums (e.g., initiative newsletters, blog posts, videos, and articles)
- Support greater consistency in communications Foundation-wide through regularly using, and updating as relevant, messaging and other tools for staff
- Use existing grantee touchpoints (e.g., grant agreements and grant report reminders) to reinforce key information about requirements, timelines, changes, and improvements in our grantmaking processes

## Indirect Costs

Due to Irvine's efforts, 70% of grantees with restricted, project-based support reported receiving funding that covered the full cost of their projects, up from 54% in 2020. To sustain this positive trend, especially with new program staff since 2020, we will:

- Update our indirect cost policy to ensure a larger number of grantees have their full costs met
- Regularly remind all grantmaking staff to discuss full-cost options as part of the proposal process for project grants
- Provide a refresher training and reminder of tools for grantmaking staff on engaging grantees in conversations about indirect costs as needed (and potentially training and tools for grantees on determining their full costs)

## Evaluation

We are committed to using evaluation to advance equity and impact. In line with the guiding principles described in [our IA&L Framework](#), we are involving our grantees to a greater degree in all aspects of Foundation-supported evaluations. This includes:

- Using participatory experiences with grantees to design the evaluation at the start of initiatives and after an initiative strategy refresh
- Ensuring that assessment and learning processes inform grantees' work more directly in addition to how the Foundation supports grantees and other partners