

2017 PORTFOLIO REVIEW



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THE IMPETUS
FOR
OUR NEW
STRATEGIC
FRAMEWORK



THE IMPETUS FOR OUR NEW STRATEGIC FRAMEWORK

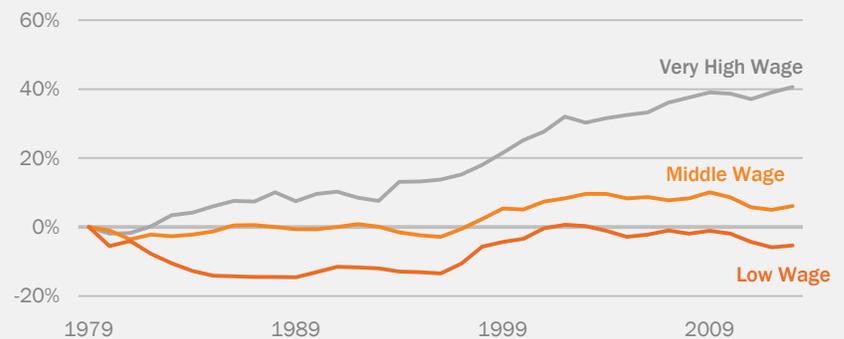
The American Dream has been eroding for decades

At the start of 2016, we set out in a new strategic direction that brought greater focus to our mission of advancing opportunity for the people of California. The impetus for this new direction came from our assessment of the state of opportunity in America and California.

We see two big gaps in opportunity: economic and political. On the economic dimension, wages for middle- and lower-income Americans have been flat or declining for decades. Also, participation in the labor force has been declining since about 2000, particularly among men.

CUMULATIVE CHANGE IN REAL HOURLY WAGES OF ALL WORKERS, BY WAGE PERCENTILE*, 1979-2013

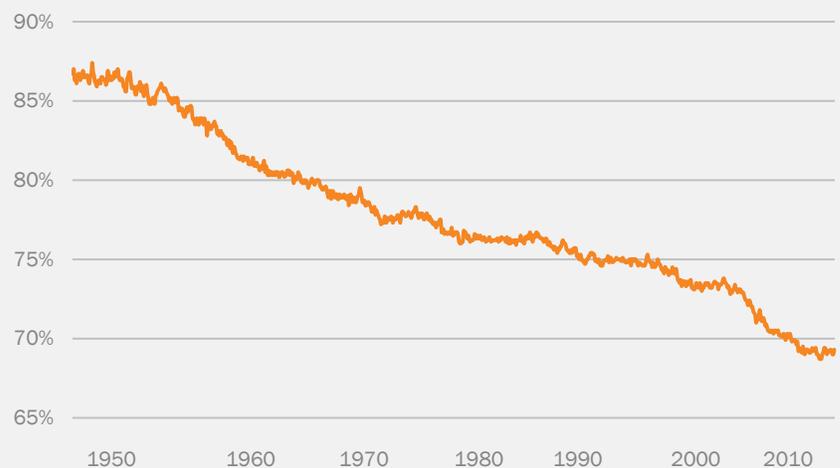
Middle-class wages are stagnant. Middle-wage workers' hourly wage is up 6% since 1979, low-wage workers' wages are down 5%, while those with very high wages saw a 41% increase



*Low wage is 10th percentile, middle wage is 50th percentile, very high wage is 95th percentile.

SOURCE: Economic Policy Institute analysis of Current Population Survey Outgoing Rotation Group microdata, 6 Jan. 2015, www.epi.org/publication/charting-wage-stagnation/.

UNITED STATES LABOR FORCE PARTICIPATION RATE: MEN

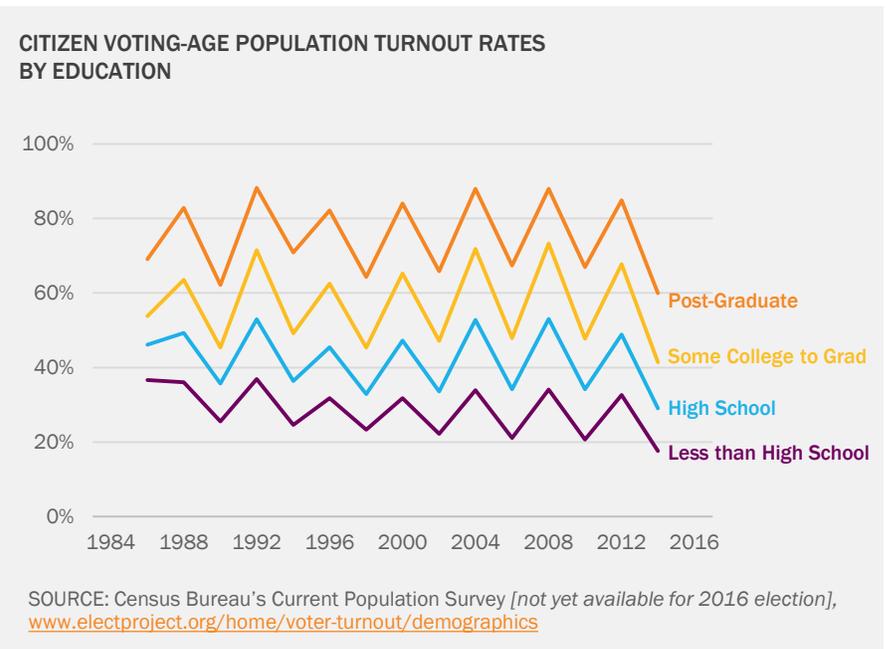
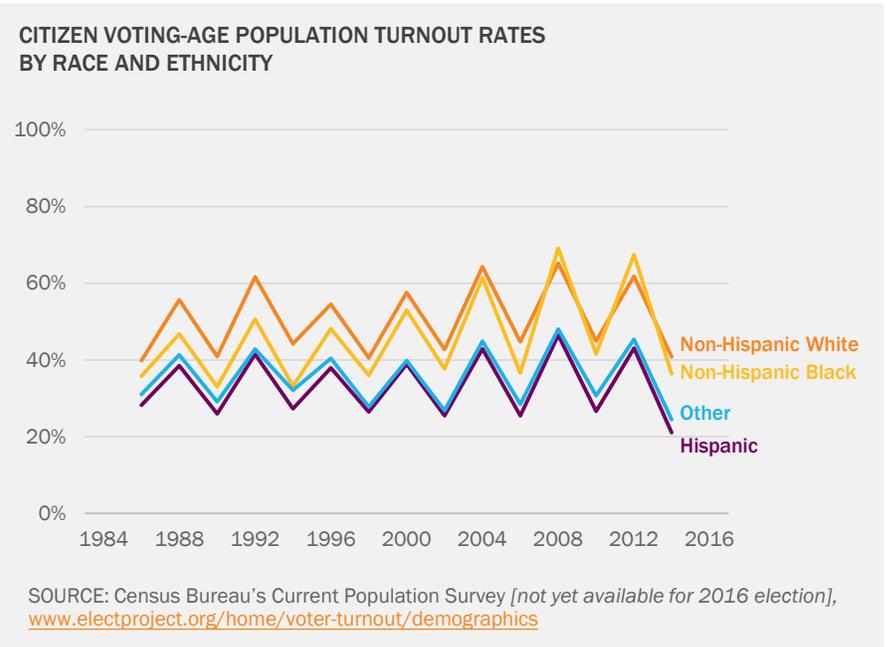


SOURCE: US Bureau of Labor Statistics, 3 Feb. 2017, <https://fred.stlouisfed.org/series/LNS11300001>.

THE IMPETUS FOR OUR NEW STRATEGIC FRAMEWORK

The American Dream has been eroding for decades (cont'd)

Public policies govern how the economy operates. In the political debate, we see a voting population that doesn't equitably include the voices of all Americans. This is true when looking at race/ethnicity, education, and age.



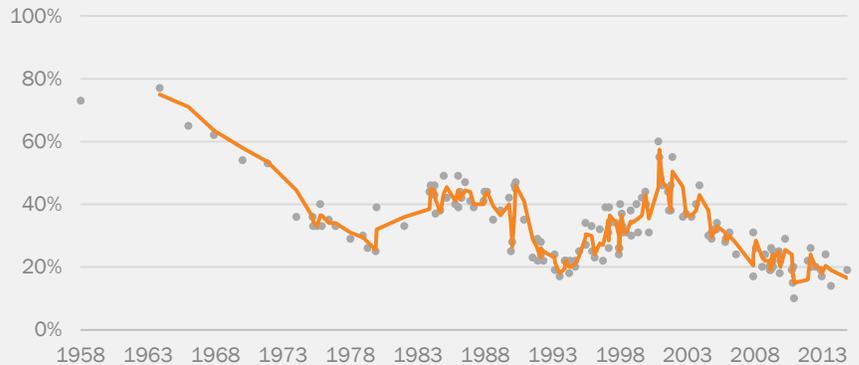
THE IMPETUS FOR OUR NEW STRATEGIC FRAMEWORK

The American Dream has been eroding for decades (cont'd)

One reason experts point to is decline in the trust Americans have in government.

PUBLIC TRUST IN GOVERNMENT: 1958-2015

Trust the federal government to do what is right just about always/most of the time...



(Pew hasn't asked this poll question since 2015)

SOURCE: Pew Research Center, 23 Nov. 2015, www.people-press.org/2015/11/23/1-trust-in-government-1958-2015/

“Over the 36-month period from January 2009 to December 2011, 31.6 percent of the U.S. population was in poverty for at least 2 months”

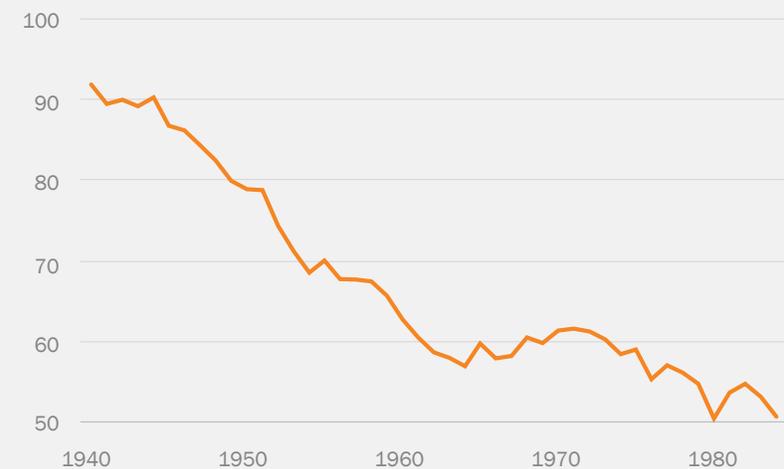
SOURCE: Ashley N. Edwards, U.S. Census Bureau, *Dynamics of Economic Well-Being: Poverty, 2009-2011*, Jan. 2014, www.census.gov/prod/2014pubs/p70-137.pdf

We see a very real risk of a permanent underclass of families and young adults who are working but cycling in and out of poverty.

Recent research from economists, led by Raj Chetty at Stanford, has now documented that the American Dream — as defined by “*earning more than your parents did*” — is no longer the norm for most young Americans.

THE FADING AMERICAN DREAM

Percent of children earning more than their parents by year of birth

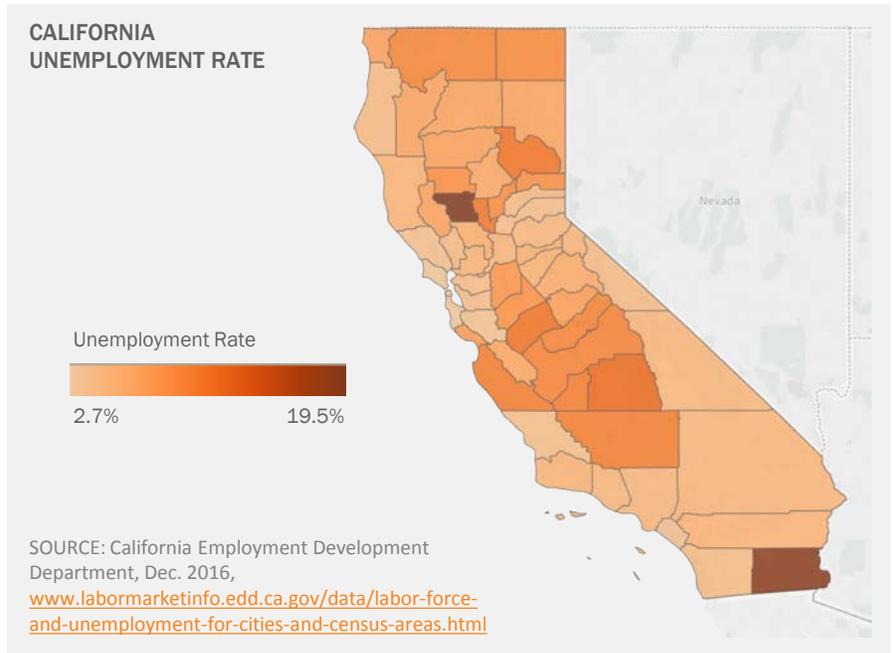


SOURCE: Raj Chetty, *The Fading American Dream*, Dec. 2016

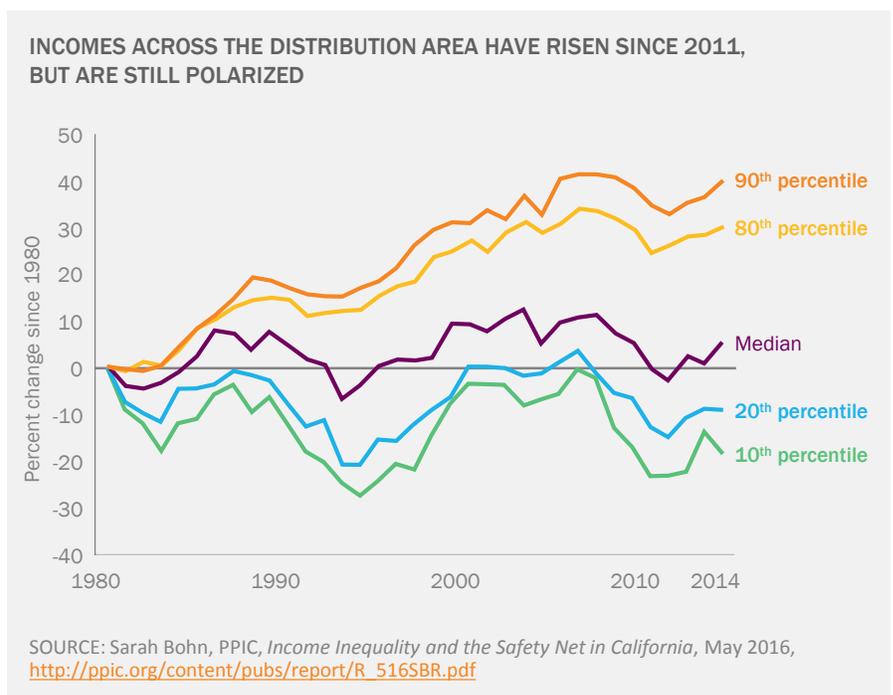
THE IMPETUS FOR OUR NEW STRATEGIC FRAMEWORK

California epitomizes these disparities

Here in California, we epitomize these trends. Disparities in income and employment are acute. Income inequality has grown wider and, despite economic growth in coastal cities, the interior of the state continues to see high levels of unemployment.



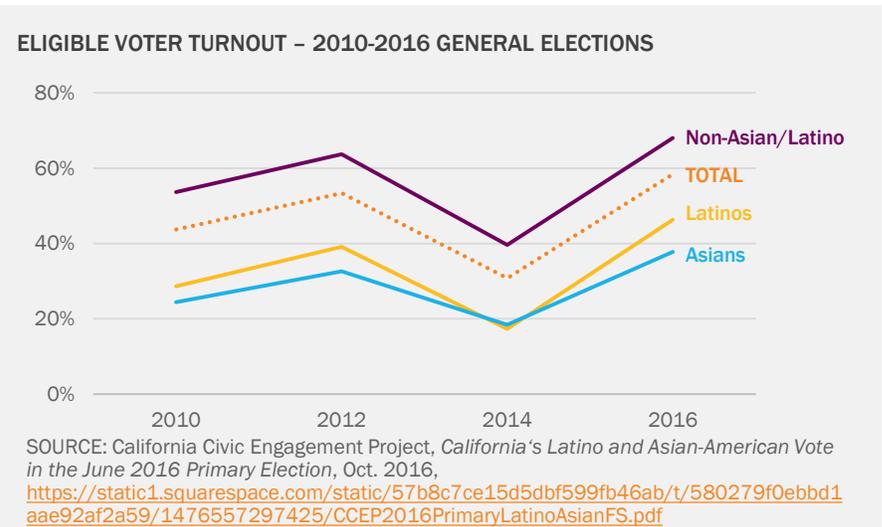
California has the highest poverty rate (based on the US supplemental poverty index) of any state, and several of the poorest Congressional districts in America are in Central California (specifically in Fresno and Bakersfield).



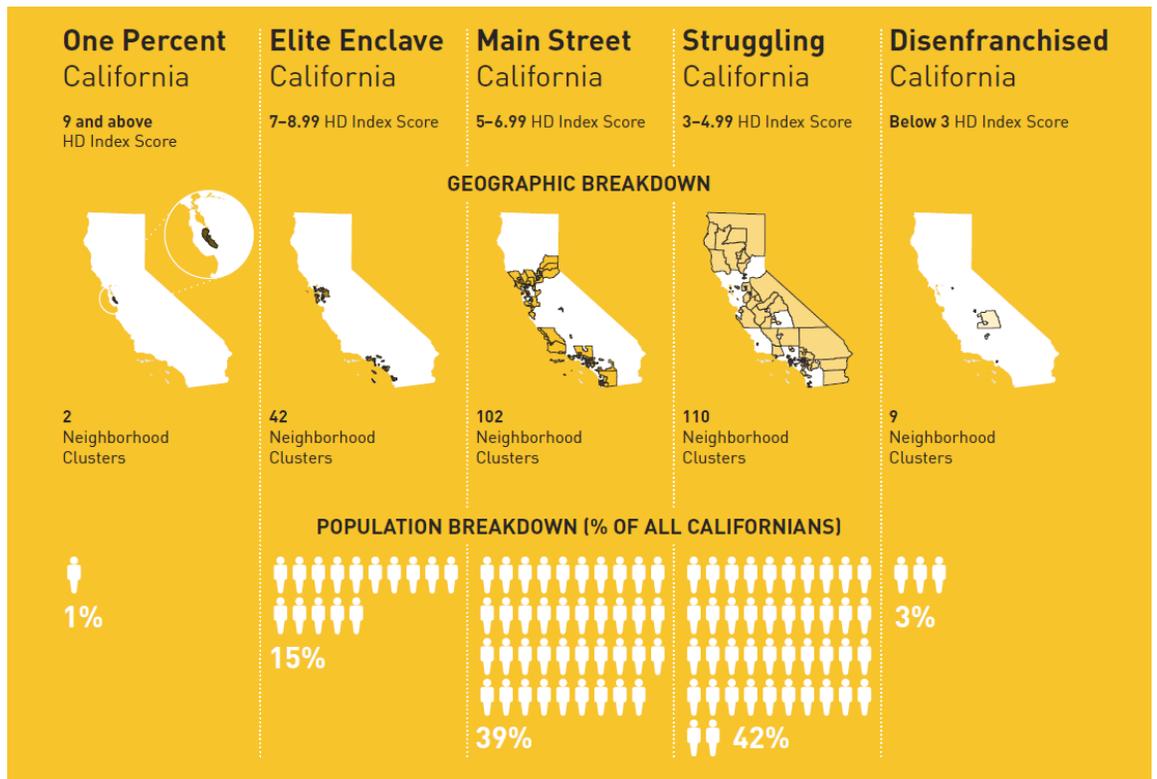
THE IMPETUS FOR OUR NEW STRATEGIC FRAMEWORK

California epitomizes these disparities (continued)

Looking at the most recent election (2016), while there were hopeful increases in voter turnout across racial and ethnic categories, we see an even starker inequity in participation, specifically for Latinos and Asian Americans.



Looking across economic, political, and social factors, California is perhaps best described as a tale of five different states.



SOURCE: *A Portrait of California 2014-2015*, Measure of America, Social Science Research Council, 2014, <https://irvine.box.com/s/z5xbogt1n29t1nxtlu4dueqdp447kgqo> and <https://irvine.box.com/s/mhl4pw33g8va9t93znt4b86iksiv4hje>

The Human Development Index is a composite statistic of life expectancy, education, and per capita income indicators.

THE IMPETUS FOR OUR NEW STRATEGIC FRAMEWORK

Over the last year, there have been both hopeful and worrisome developments:

- Real wages have ticked up nationally and in California.
- There was increased voter registration and turnout, especially Latino, in the 2016 election cycle.
- The election campaign and outcome placed a greater spotlight on economic and political disparities.
- Less broadly recognized has been a wealth of new research-driven insights on the extent and causes of declining economic mobility.

Yet, the rhetoric of the election and the new federal administration is sowing division and distrust. And, the new federal administration has promised to roll back policies that underpin economic and political opportunity (health care, immigrant integration, environmental/climate protection, and others).

Looking ahead, California seems to be heading in a different direction and, perhaps, will find opportunity in the face of a different national agenda:

- Leaders from across the business, government, nonprofit, education, and faith communities may come together to defend California's policies around immigration, climate change, and health care.
- California is uniquely positioned, for a host of reasons, to deliver a more inclusive economy and cohesive political system than other states.
- The California model (better defined, understood, and embraced) could become an alternative that other states seek to emulate.

As a result, we may feel the wind at our back in some regards:

- New alliances, new energy, and additional resources may flow to the causes that are central to our mission.
- We may see greater receptivity and opportunity to reimagining a California Dream, one focused on inclusion and economic mobility.

WHERE WE
ARE TODAY



WHERE WE ARE TODAY

Our Goals and Target Populations

In January 2016, The James Irvine Foundation announced a new strategic direction to fulfill its mission of “expanding opportunity for the people of California.” We have chosen to invest our grantmaking and other resources in expanding economic and political opportunity for families and young adults in California who are working but struggling with poverty. Specifically, we aim to:

- Expand **economic opportunity** so that more of California’s poor working families and young adults are able to cover basic needs in a state with an increasingly high cost of living.
- Expand **political opportunity** so that more low-wage Californians are engaged and have influence in the decisions that impact their jobs, communities, and lives.

This focus emerged after meetings with hundreds of diverse community and political leaders across the state – and hearing the stories of far too many people who are living proof that too many barriers stand in the way of economic and political opportunity for millions of hard-working Californians.

In reflecting on what we’ve learned from our past grantees and their greatest impact, it became clear to us that economic opportunity and political opportunity go hand-in-hand and reinforce each other. California workers who live in poverty are less likely to engage in political and civic activities, but without a stronger political voice, low-income Californians won’t have the opportunities to participate in the inclusive economy that they deserve.

A Natural Evolution for Irvine

Expanding economic and political opportunity is not new for Irvine, and this work is a natural next step that takes advantage of the Foundation’s experience, skills, connections, and grantmaking resources. The goal is not to simply do something new but rather build on what’s working and find new ways to have a greater impact.

That includes increasing how and how much we listen to, and truly hear from, grantees, community leaders and community residents – and what we do with the input and insights. This can influence not only which organizations or issues we fund but also how we provide support. For example, conversations with our grantees have led us to increase the size of our grants and the flexibility of how those dollars are used.

APPROACH TO OUR WORK



APPROACH TO OUR WORK

Grantmaking via Initiatives in a Portfolio

Importantly, Irvine also made a shift in 2016 from a program structure to grantmaking through a portfolio of initiatives. We define a “portfolio” as a collection of initiatives that individually and collectively advance our goals. In outcomes-based, time-bounded initiatives moving to a portfolio approach, our goal was to move away from program staff and dollars existing in silos to a model that leverages our talent, expertise, and resources across the organization and its various efforts.

Each initiative will have a specific focus and plan (goals, timeline, resources, target outcomes, budget envelope, etc.), but will share staff, knowledge, and, at times, grantees as well. Each initiative will have an anticipated end date, and initiatives with similar grants and complementary themes are managed by Irvine’s Portfolio Directors and their teams.

Why did we organize our grantmaking into a portfolio of initiatives?

1) To Maximize Impact

- By creating rigor at the individual initiative level
- By supporting the intersection and integration of initiatives, as the whole is greater than the sum of its parts, which can achieve a multiplier effect
- Through portfolio diversification, providing the ability to work on multiple dimensions of an issue simultaneously and placing multiple bets

2) To Optimize Operational Efficiency

- Allows us to effectively manage available grant resources with grant commitments (revenues and expenses)

3) To Enhance Adaptability in a Changing Environment

- Builds in natural flexibility and ability to add and subtract from the portfolio over time, given the changing social conditions in CA and changing financial conditions

4) To Amplify the Overall Work of the Initiatives through Cross-Cutting Investments

- Accelerate the impact of individual initiatives by creating the external environment necessary to accomplish initiative work
- Benefits and amplifies multiple initiatives across the portfolio

PORTFOLIO GOALS



PORTFOLIO- LEVEL GOALS



OVERVIEW

To deliver on our mission to expand opportunity for the people of California, the Irvine board and staff in 2015 developed the following overarching portfolio-level goals to guide our new strategic framework:

- Expand economic opportunity, by helping Californians achieve an income that can sustain a family.
- Expand political opportunity, by helping Californians participate in an effective democracy.

ANALYSIS

We chose these two portfolio-level goals because:

- There is compelling research that makes it clear we are experiencing significant economic and political disparities in California.
- Economic and political opportunities are closely related and reinforcing, and we believe we can increase the effectiveness of our grantmaking by aligning our work in these two related arenas.
- Leaders across the state have continually expressed to us the need to expand economic and political opportunity.
- Expanding economic and political opportunity builds from our current expertise and capabilities.

PORTFOLIO- LEVEL GOALS

INDICATORS OF SUCCESS

We measure our success relative to accomplishing the following outcomes at the Foundation level (assuming approximately a 10-year horizon):



PEOPLE

More California families and young people have work that can provide a family-sustaining wage

More low-wage Californians are engaged, and have influence, in the political process

New evidence-based models for expanding economic and political opportunity are developed



COMMUNITIES

Local and regional models help to create more inclusive economies and political systems



STATE

Increased policymaker awareness of low-wage California families' and young people's:

- Assets and opportunities
- Innovative approaches to reducing their barriers
- Unique importance for California's future

Better public policies, and increased private and public resources, that support greater economic and political opportunity for California's low-wage families and young people

Greater public confidence and increased engagement in the political system by Californians working but struggling with poverty

PORTFOLIO FRAMEWORK



PORTFOLIO FRAMEWORK

This graphic illustrates the progression of an idea, grounded in one or more of our research-based drivers, as it moves through the portfolio framework to potentially become a full initiative. At each stage of the framework, ideas are winnowed down based on the potential for impact towards achieving our twin goals of expanded economic and political opportunity.

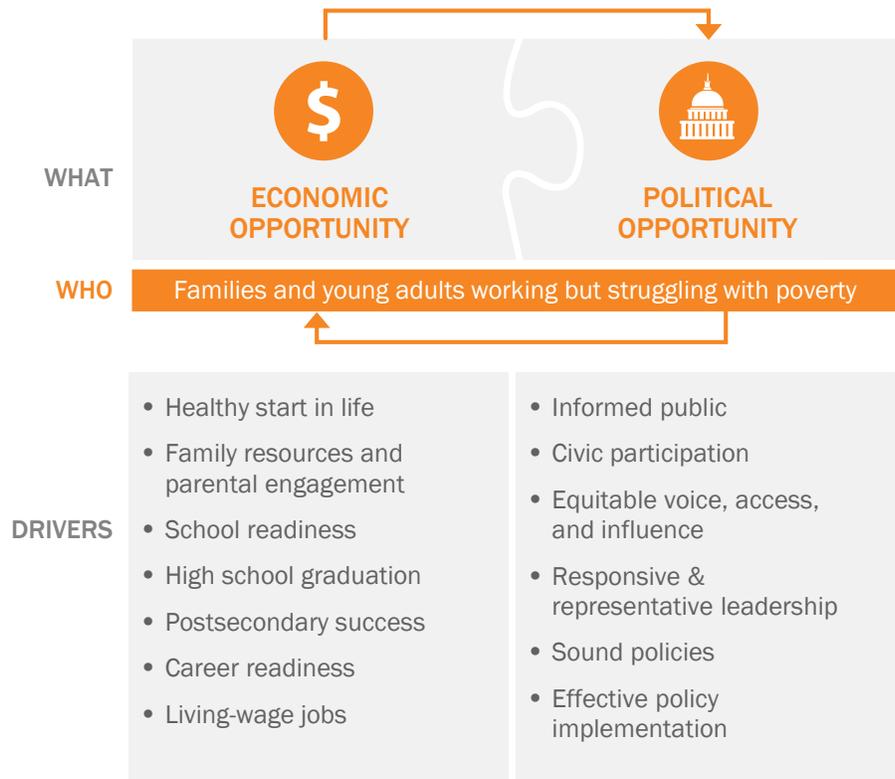


RESEARCH-BASED DRIVERS



OVERVIEW

As we research and develop new initiatives, we focus on research-based drivers of economic and political opportunity. We define a driver as a precursor or predictor, based on high-quality research that can advance one of our twin impact goals of expanding economic and political opportunity for Californians working but struggling with poverty. These drivers are included in the matrix below.



RESEARCH AND DEVELOPMENT (R&D)



OVERVIEW

Research and Development helps Irvine explore ideas, issues, approaches, and/or organizations that could align to future initiatives.

ANALYSIS

In 2016, several Research and Development grants helped inform the development of two of our current New Initiatives in Development: Career Readiness and Living-Wage Work, and Worker Voice and Influence. Moving forward, we expect the number of research themes to increase as we continue to explore new ideas based on our research-based drivers. Staff also expects some themes that emerged from the Community Listening Sessions (see page 30) may become formal R&D ideas.

NEW INITIATIVES IN DEVELOPMENT



NEW INITIATIVES IN DEVELOPMENT PHASES



OVERVIEW

New Initiatives in Development (NID) are ideas that have gone through the R&D process and have been approved by the board for a deeper level of exploration as to its alignment and impact on Irvine’s twin impact goals of expanding economic and political opportunity. In this phase, deep experimentation and learning occurs to help the Foundation determine if the proposed approaches merit future investment as Full Initiatives. We currently have three NIDs: Career Readiness and Living-Wage Work, Worker Voice and Influence, and Postsecondary Success. All of them are in the piloting phase and we expect to have multiyear initiative plans for the board to review in the coming months.

NEW INITIATIVES IN DEVELOPMENT

Career Readiness and Living-Wage Work

The [Career Readiness and Living-Wage Work initiative](#) in development seeks to ensure that low-income, working Californians can secure and succeed in jobs that can sustain a family. We have refined our focus to two categories of investments: preparing and advancing workers on pathways to family-sustaining careers, and fostering and connecting workers to new family-sustaining jobs.

Worker Voice and Influence

The [Worker Voice and Influence initiative](#) in development seeks to increase the ability of low-wage workers to influence the economic and political decisions that affect their lives and communities, and to foster cross-sector partnerships that can lead to tangible gains for workers. We have refined our focus to two categories of investments: engaging the voices of low-wage workers, and turning worker voice into policy action and protecting gains.

NEW INITIATIVES IN DEVELOPMENT



NEW INITIATIVES IN DEVELOPMENT (Cont'd)

Postsecondary Success

The [Postsecondary Success initiative](#) in development is focused on increasing the number of young people earning bachelor's degrees in the state, with a specific focus on the transition from high school to postsecondary. Our current investment categories are improving how colleges support students, supporting students to succeed in college, and strengthening regional pipelines to college.

CURRENT INITIATIVES



OVERVIEW

Current Initiatives have a clear set of board-approved outcomes, budget, and time duration/end date. Moving forward, initiatives included in the Current Initiatives stage will have gone through the Research and Development and New Initiatives In Development processes. Presently, initiatives in the Current Initiative stage include culminating and ongoing initiatives:

Culminating: These are initiatives developed under our previous program areas that will end in the next few years, with Irvine fully committed to their successful conclusions or transitions. Examples: Arts Engagement, Linked Learning, and California Pay for Success.

Ongoing: This includes grantmaking efforts that have no particular end date, because they complement other initiatives or otherwise support Foundation goals.

CURRENT INITIATIVES



Leadership Awards

Goal: To recognize and support individuals who are advancing innovative and effective solutions to significant state issues.

Priority Regions

Goal: To strengthen nonprofit capacity and leadership in Inland Southern California and the San Joaquin Valley.

Arts Engagement

Goal: To promote engagement in the arts for all Californians.

California Pay for Success

Goal: To catalyze innovative approaches to paying for improved social services throughout the state.

Elections Policies and Practices

Goal: To achieve a California electorate more representative of the state's population and help election systems statewide operate effectively and based on best practices.

Immigrant Integration

Goal: To achieve full access for immigrants and their families to educational, economic, and civic participation opportunities.

Linked Learning

Goal: To prepare students to graduate from high school ready for college, and with skills needed to thrive in the workplace.

Voter and Civic Engagement

Goal: To achieve a California electorate more representative of the state's population, and enable public decision-making informed by a broad cross-section of Californians.

PORTFOLIO BY THE NUMBERS



GRANTMAKING BY REGION OF CALIFORNIA



	2016 Grantmaking		Active Portfolio (as of 1/3/2017)		California Population (2013)	California Poverty Rate (2014)*
PRIORITY REGIONS						
San Joaquin Valley	\$6,905,151	8.4%	\$23,449,935	17.9%	11%	20%
Riverside and San Bernardino	\$5,357,290	6.5%	\$15,200,299	11.6%	11%	19%
REMAINING CA REGIONS						
North Coast and North State	\$193,440	0.2%	\$903,440	0.7%	1%	20%
Sierra	\$100,000	0.1%	\$150,000	0.1%	1%	14%
Bay Area	\$19,400,761	23.5%	\$32,637,663	24.9%	19%	17%
Central Coast	\$2,381,440	2.9%	\$4,687,480	3.6%	4%	23%
North Valley	\$255,440	0.3%	\$1,118,440	0.9%	2%	17%
Sacramento Metro	\$275,761	0.3%	\$1,460,250	1.1%	6%	17%
Los Angeles Metro	\$14,408,010	17.5%	\$40,329,099	30.8%	36%	24%
San Diego and Imperial	\$1,952,820	2.4%	\$10,984,691	8.4%	9%	20%
STATEWIDE	\$31,255,167	38%	\$90,902,204	42%		21%
Total Regional and Statewide	\$82,485,280		\$221,823,501			

*Source: PPIC calculations from the 2014 California Poverty Measure research, as of January 2017

GRANTMAKING BY REGION OF CALIFORNIA – NEW VS. CURRENT INITIATIVES



NEW INITIATIVES IN DEVELOPMENT

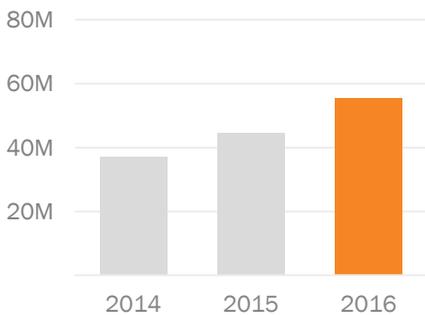
	2016 Grantmaking	
PRIORITY REGIONS		
Riverside and San Bernardino	\$400,000	2%
San Joaquin Valley	\$420,000	2%
REMAINING CA REGIONS		
North Coast and North State	\$0	0%
Sierra	\$0	0%
Bay Area	\$7,490,000	36%
Central Coast	\$1,070,000	5%
North Valley	\$0	0%
Sacramento Metro	\$0	0%
Los Angeles Metro	\$4,044,000	19%
Orange County	\$720,000	3%
San Diego and Imperial	\$620,000	3%
STATEWIDE	\$6,305,600	30%
TOTAL GRANTMAKING	\$21,069,600	100%

CURRENT INITIATIVES

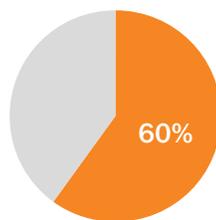
	2016 Grantmaking	
PRIORITY REGIONS		
Riverside and San Bernardino	\$4,957,290	8%
San Joaquin Valley	\$6,485,151	11%
REMAINING CA REGIONS		
North Coast and North State	\$193,440	0%
Sierra	\$100,000	0%
Bay Area	\$11,910,761	19%
Central Coast	\$1,311,440	2%
North Valley	\$255,440	0%
Sacramento Metro	\$275,761	0%
Los Angeles Metro	\$7,127,570	12%
Orange County	\$2,516,440	4%
San Diego and Imperial	\$1,332,820	2%
STATEWIDE	\$24,949,566	41%
TOTAL GRANTMAKING	\$61,415,679	100%

GRANTMAKING FOCUSED EXCLUSIVELY ON LOW-INCOME COMMUNITIES

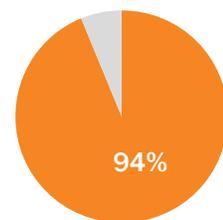
Grantmaking Focused Exclusively on Low-Income Communities



2016 Current Initiatives Targeting Low-Income Communities (by grant \$)

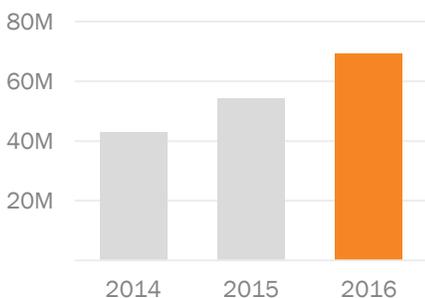


2016 New Initiatives in Development Targeting Low-Income Communities (by grant \$)

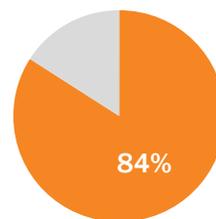


GRANTMAKING FOCUSED EXCLUSIVELY ON COMMUNITIES OF COLOR 2014-2016

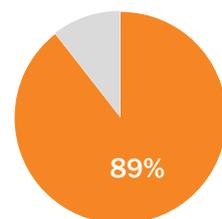
Grantmaking Focused Exclusively on Communities of Color



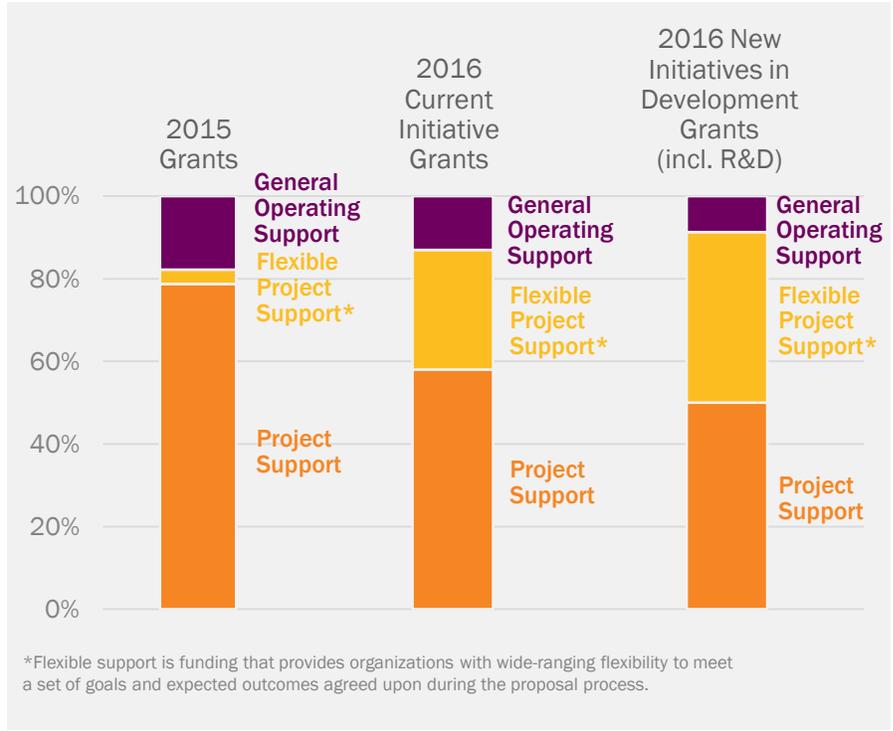
2016 Current Initiatives Targeting Communities of Color (by grant \$)



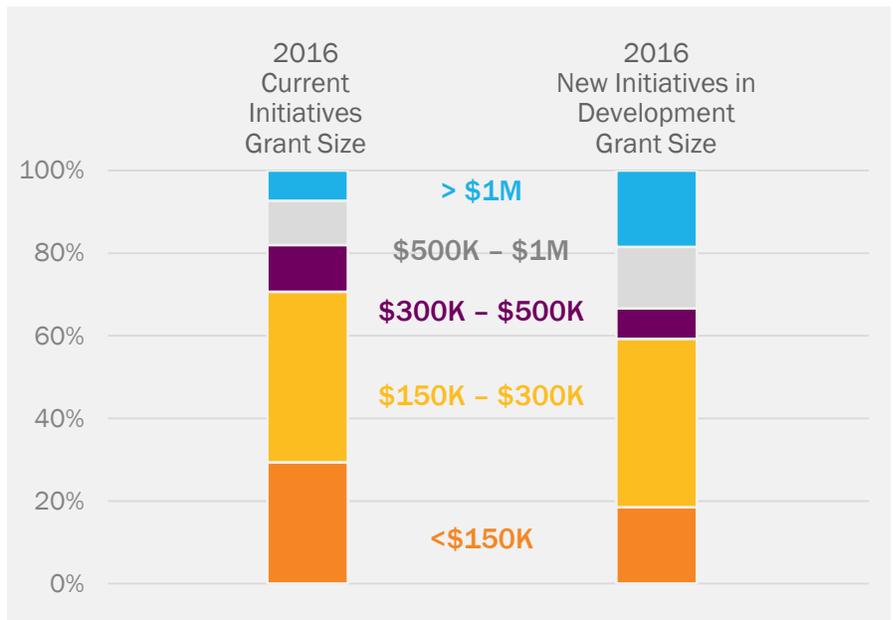
2016 New Initiatives in Development Targeting Communities of Color (by grant \$)



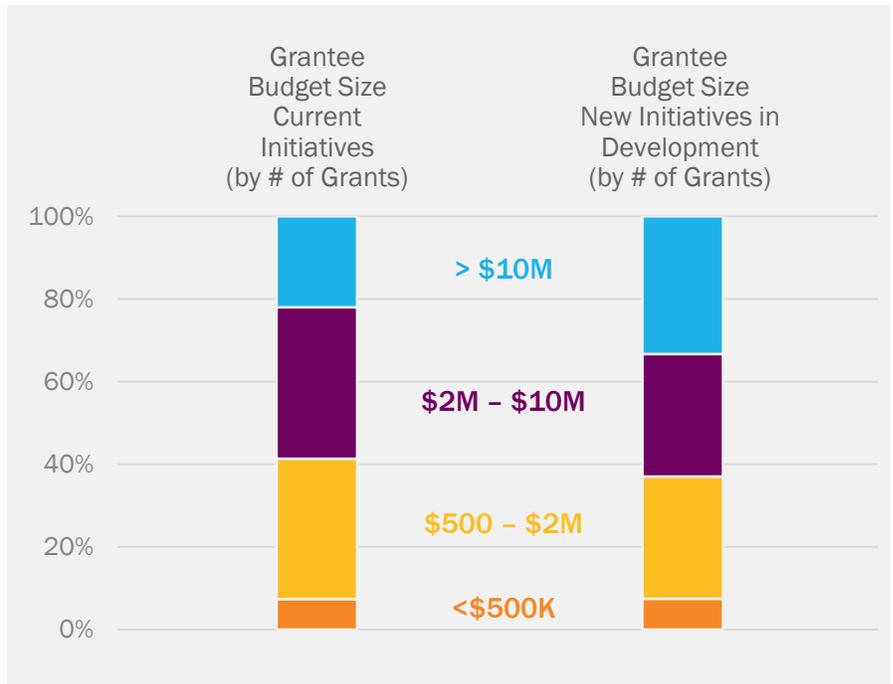
TYPES OF GRANT SUPPORT



GRANT SIZE



OPERATING BUDGET SIZE OF 2016 GRANTEES



FEEDBACK FROM THE FIELD



FEEDBACK FROM THE FIELD

We have a long-standing commitment to gather, reflect, and use feedback from others outside of the Foundation. Irvine is part of a growing movement of foundations prioritizing beneficiary engagement and feedback. During 2016, this has taken place with our grantees and other key stakeholders as well as the Californians our grantees aim to serve – young adults and families who are working but struggling with poverty.

LISTENING TO THE COMMUNITY

In the fall, we engaged in listening to more than 400 individuals throughout California. We held community listening sessions, conducted in-depth interviews, and used a mobile application to gain a greater understanding of the day-to-day experiences, opinions, and aspirations of Californians who are working but struggling with poverty. We also asked what role creativity and creative practices plays in their lives. Across these forums, we heard five common themes (see box below). A full description of our listening efforts, including our approach and more in-depth information on the findings, are summarized on a [website](#) dedicated to findings from the sessions.



FEEDBACK FROM THE FIELD

COMMUNITY LISTENING THEMES

I want to live without making extreme tradeoffs

- I take one step forward and two steps back
- I don't have time to focus on having my voice heard
- College feels more like my ball and chain than my wings
- I need quality childcare to get ahead
- I can't afford to get sick or hurt

I want to live without fear and anxiety

- I'm so stressed
- I'm one crisis away from losing everything
- I don't feel safe
- There will be consequences if I speak up

I want to be treated with dignity

- Those in power don't see me as a person
- I feel expendable on the job
- My past sometimes prevents me from making progress
- The system pits us against each other

I want to be connected to a strong network

- Finding a job depends on who I know
- It really does take a village
- Together, our voices are amplified
- I want ways to make my community stronger

I want the opportunity to make my situation better

- I'm doing all the right things, but I can't get ahead
- I want a stable place to live
- I can't get to better opportunities
- The system is often difficult to navigate

FEEDBACK FROM THE FIELD

Now that we have listened, we are taking the next critical step to apply what we learned to inform our foundation strategy, grantmaking, learning, and future investments. In addition to sharing what we heard with those who participated in the listening sessions, we are sharing what we heard publically with our grantees, philanthropic networks, and others more broadly. We hope this will contribute to a greater collective understanding of who faces barriers to economic and political opportunity, and how we can work together to eliminate those barriers. We are committed to robust beneficiary engagement as part of our portfolio framework.

While overall the findings confirm the importance of our new initiatives' focus, they also point to areas we can go deeper within these initiatives, foci for research and development, and ways to use this information for portfolio amplification (e.g., to increase public empathy and facilitate a more informed public).

On a smaller scale, we are learning from Californians through some of our grantees. For instance:

- The Family Independence Initiative asks participating families to complete online journals; this provides rich data and insights to facilitate their economic and social mobility.
- The Center for Employment Opportunities collects input from its customers, formerly incarcerated adults, through ongoing feedback loops; this allows them to improve their services and support, which in turn positively impact the lives of their beneficiaries.



FEEDBACK FROM THE FIELD

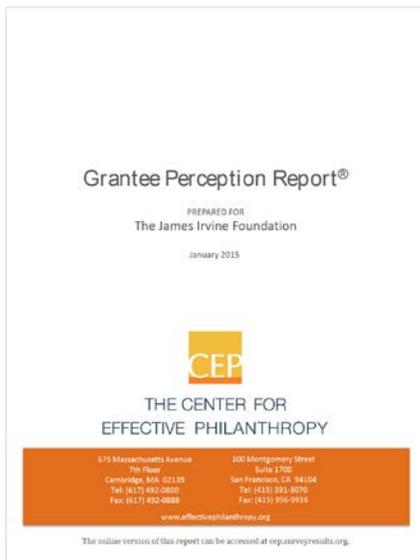
LISTENING TO OUR GRANTEES AND OTHER KEY STAKEHOLDERS

As part of our regular practices, we also ask grantees and key stakeholders for input to guide our work. For example:

- We held two convenings with Linked Learning field leaders to assess progress against 2016 milestones and to help the Foundation shape 2017 funding priorities.
- We launched the first of a series of learning sessions with Career Readiness and Living-Wage Work grantees to obtain their input and reflections on the learning agenda for the pilot phase of the Initiative.

We also continue to strengthen our grantmaking practices in response to what we heard from grantees from our most recent [Center for Effective Philanthropy-commissioned Grantee Perception Report](#). This includes:

- Providing a greater amount of core support to allow grantees flexibility to adapt to opportunities, challenges, and changing context;
- Working with grantees to better ensure that grants cover the full costs associated with the outcomes they seek to advance;
- Extending flexibility to grantees to discuss changes in grant timeframes and objectives as circumstances evolve; and
- Continuing to deepen our engagement in inland regions with a specific focus on our priority regions — the San Joaquin Valley and Riverside and San Bernardino counties.



THE PEOPLE AND CULTURE OF IRVINE



THE PEOPLE AND CULTURE OF IRVINE

Diversity, Equity, and Inclusion (DEI)

We are keenly interested in maintaining a diverse board and staff given the diversity of California and the communities in which we work. In 2016, Irvine began a deep, nine-month collaboration with Inclusion Ventures to create a more diverse, inclusive, and equitable culture at the Foundation, and to apply that knowledge in service to Irvine's evolving focus and external work. After conducting a survey and in-depth cultural interviews with staff, Inclusion Ventures designed and delivered an interactive, informative, and engaging one-day all staff retreat. In addition, Inclusion Ventures facilitated a two-hour session for the Leadership Team, coached a Diversity, Equity, and Inclusion Planning Committee, and implemented Inclusion Ventures' DiaLabs® program, which offers staff a place to come together and dialogue on DEI. These DiaLabs® are facilitated by Irvine staff trained by Inclusion Ventures in facilitating challenging conversations on identity and community.

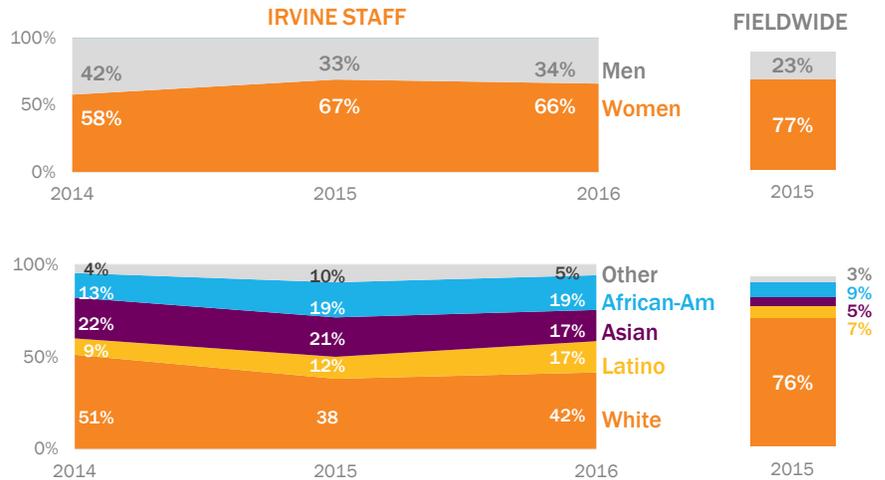
“The Foundation is approaching this work with an incredible humility in what and how to learn. Executives on the DEI Planning Committee name and navigate power dynamics in ways I have never witnessed within an organization. People are rolling up their sleeves and engaging in the hard work. The staff know that even though they have made progress as individuals and as a group, there are still challenges to overcome.”

– Amy Lazarus, Inclusion Ventures

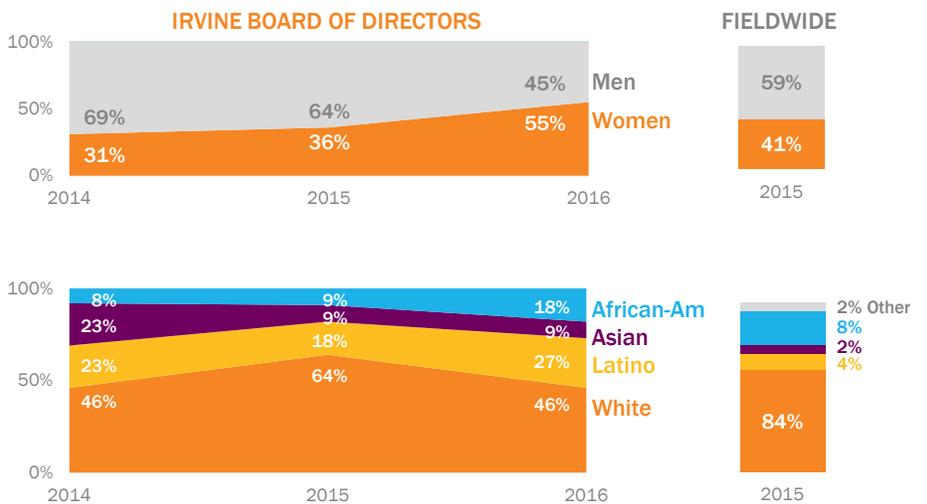
THE PEOPLE AND CULTURE OF IRVINE

Staff and Board Demographics

In the tables below, we provide demographic data on Irvine’s board and staff. We continue to benchmark our demographics against our peers, which show that our diversity continues to distinguish the Foundation from the broader field of private foundations. The data shows that Irvine staff and board are more diverse than our peers in philanthropy (based on the latest data available), though we do not fully represent the diversity of California.



Note: Fieldwide data comes from the Council on Foundations, 2016 Grantmakers Salary & Benefits Report. Some columns may not add up to 100 % due to rounding.

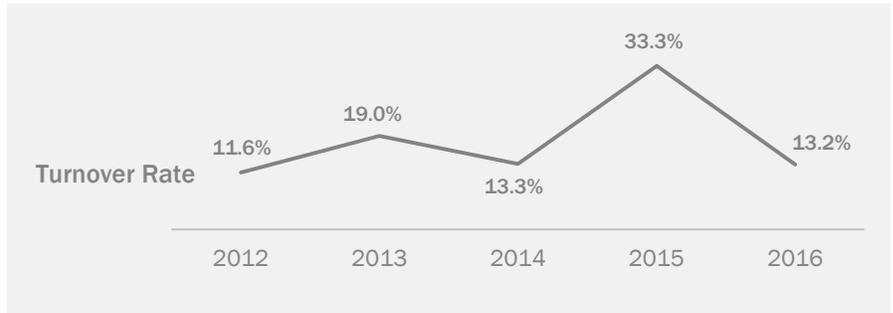


Note: Preliminary fieldwide data comes from the Council on Foundations, 2016 Grantmakers Salary & Benefit Report. Excludes President and CEO, who is an ex-officio board member. Some columns may not add up to 100 % due to rounding.

THE PEOPLE AND CULTURE OF IRVINE

Staff Retention and Turnover

The charts below illustrate Irvine’s evolution to a new strategic framework and associated staff transitions in 2015 and 2016.



We successfully recruited 19 new staff members in 2016 as we increased our overall workforce, which has resulted in increased capacity to successfully culminate existing initiatives and develop new work. Currently, **10 staff are located in our Los Angeles office, with the remaining 43 in San Francisco.**



THE PEOPLE AND CULTURE OF IRVINE

Talent Advancement

In 2016, Irvine fully implemented a new talent advancement program geared to direct alignment between compensation, talent management, and Irvine’s new approaches to grantmaking. Staff have been classified into one of three progressive competency tiers within their existing positions. Working with advisors and supervisors, individuals create a development plan that maps out advancement to the next tier, which in turn is rewarded with meaningful compensation growth upon advancement.

This program streamlines performance management, and focuses specifically on professional development and the resulting impact to the organization. It is intended to support a culture of continual learning and opportunity for our staff and ultimately the foundation as a whole.

