

2018
GRANTMAKING
PORTFOLIO
REVIEW



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THE RELEVANCE OF OUR STRATEGY



THE RELEVANCE OF OUR STRATEGY

In 2016, we set out in a new strategic direction. We bring a greater focus to our mission – expanding opportunity for the people of California – by investing our resources to expand economic and political opportunity for working families and young adults in California who are struggling with poverty. Specifically, we aim to:

- Expand **economic opportunity** so more working Californians can earn a family-sustaining wage and advance their careers
- Expand **political opportunity** so more low-wage Californians are engaged and have influence in the decisions that impact their jobs, communities, and futures

We focus on working families and young adults who are struggling because of the large – and growing – disparities in their incomes and rates of civic participation. Our goals are mutually reinforcing: we believe that workers who earn a living wage can be more engaged in their communities and, conversely, corporate and public policies will better reflect worker needs when low-wage workers are politically engaged.

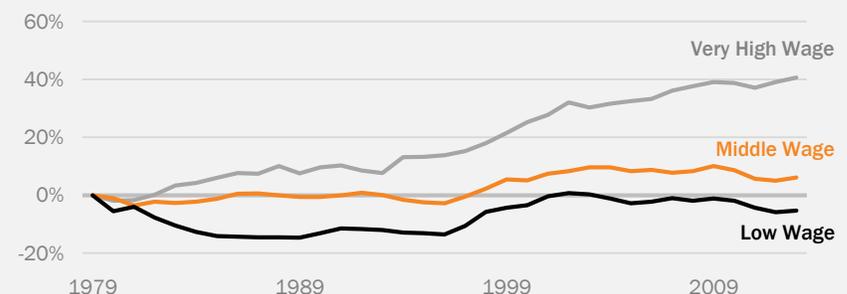
ECONOMIC AND POLITICAL DISPARITIES ARE NATIONAL PROBLEMS

As a nation, we are at risk of creating a permanent underclass of families and young adults who are working but cycling in and out of poverty.

Middle- and lower-income Americans have experienced flat or declining wages for decades, though there has been a slight uptick in the last few years. At the same time, many workers (especially men) have been exiting the labor market. According to the Bureau of Labor Statistics, the labor force participation rate for men dropped from 75 percent in 2000 to 69 percent in 2016.

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

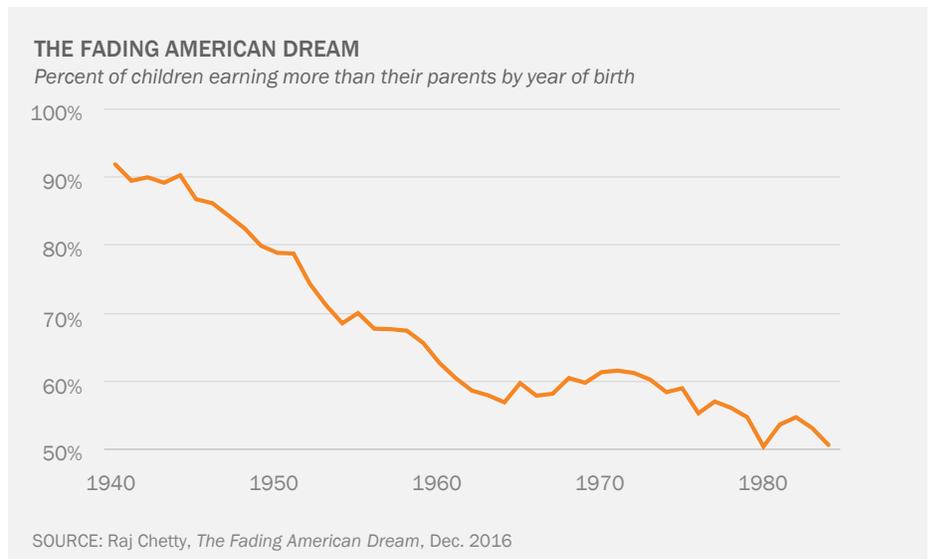


*Low wage is 10th percentile, middle wage is 50th percentile, very high wage is 95th percentile.
SOURCE: Economic Policy Institute analysis of Current Population Survey Outgoing Rotation Group microdata, 6 Jan. 2015, www.epi.org/publication/charting-wage-stagnation/.

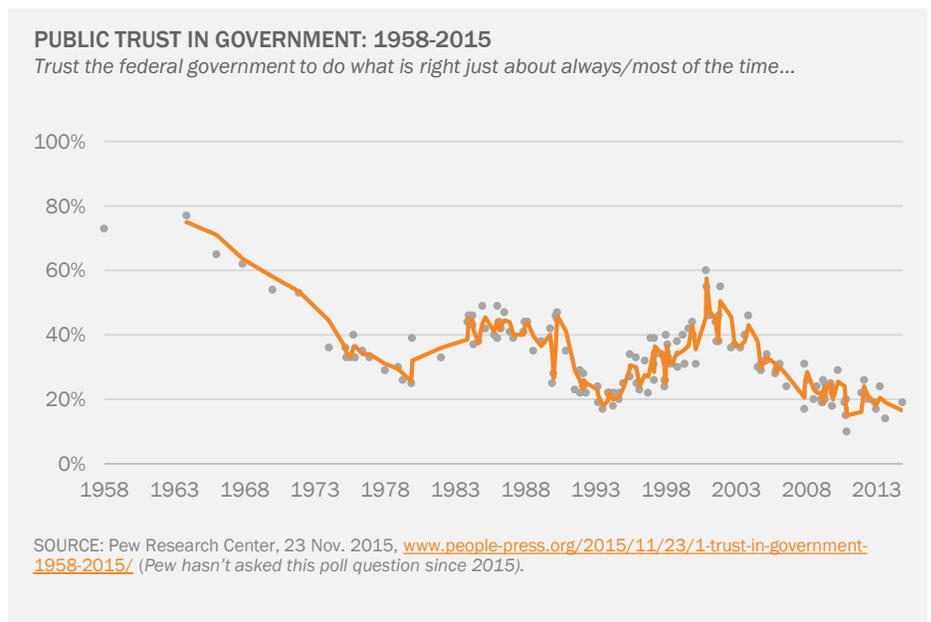
THE RELEVANCE OF OUR STRATEGY

ECONOMIC AND POLITICAL DISPARITIES ARE NATIONAL PROBLEMS (cont'd)

Economists, including Raj Chetty at Stanford, have documented that the American Dream – “earning more than your parents did” – is no longer the norm for most young Americans (or Californians, whose prospects track similarly with the below graph).



Meanwhile, trust in government is sharply declining, affecting rates of civic participation – from 60 percent in the early 2000s to 20 percent in 2015.

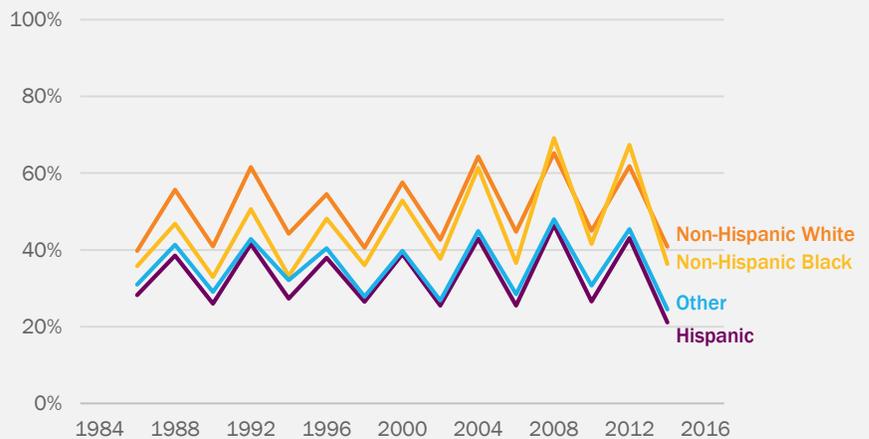


THE RELEVANCE OF OUR STRATEGY

ECONOMIC AND POLITICAL DISPARITIES ARE NATIONAL PROBLEMS (cont'd)

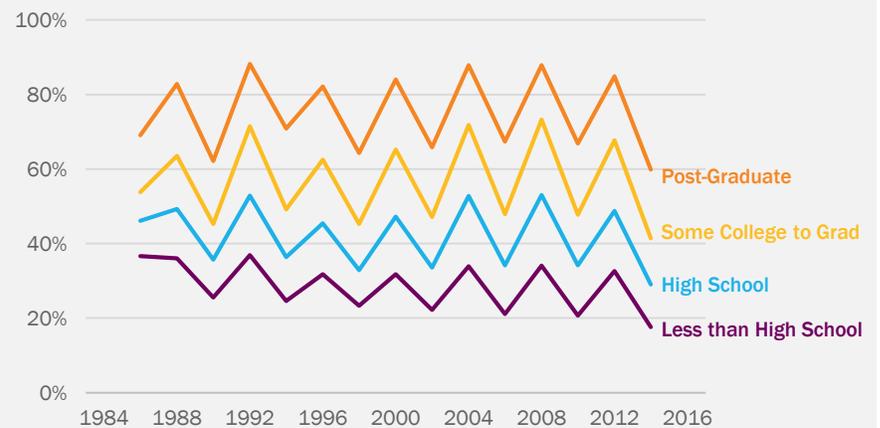
A lack of trust in government translates to low turnout rates nationwide at the ballot box, especially among people of color and voters with less education.

CITIZEN VOTING-AGE POPULATION TURNOUT RATES BY RACE AND ETHNICITY



SOURCE: Census Bureau's Current Population Survey [not yet available for 2016 election], www.electproject.org/home/voter-turnout/demographics

CITIZEN VOTING-AGE POPULATION TURNOUT RATES BY EDUCATION

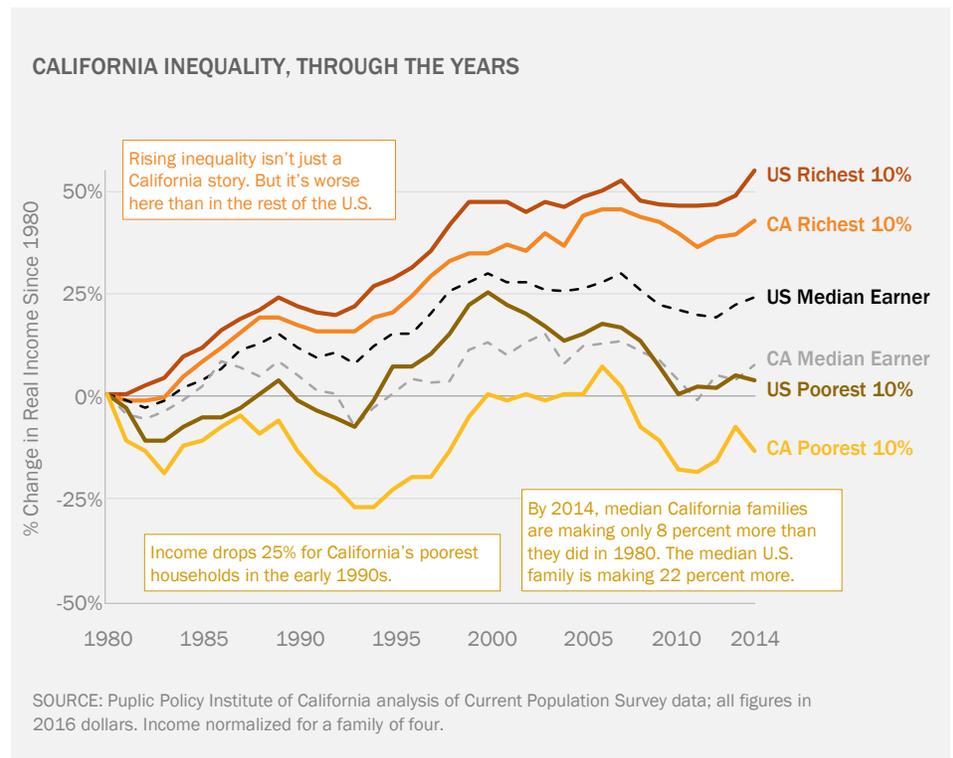


SOURCE: Census Bureau's Current Population Survey [not yet available for 2016 election], www.electproject.org/home/voter-turnout/demographics

THE RELEVANCE OF OUR STRATEGY

CALIFORNIA EPITOMIZES THESE PROBLEMS – AND THE OPPORTUNITY FOR CHANGE

In California, disparities in income and civic participation are acute. Economically, median family incomes grew faster nationally over the last three decades than in California, and the gap in California's middle and upper class is higher than most states. Income gains since the economic recovery have primarily benefitted upper-income workers and coastal cities.

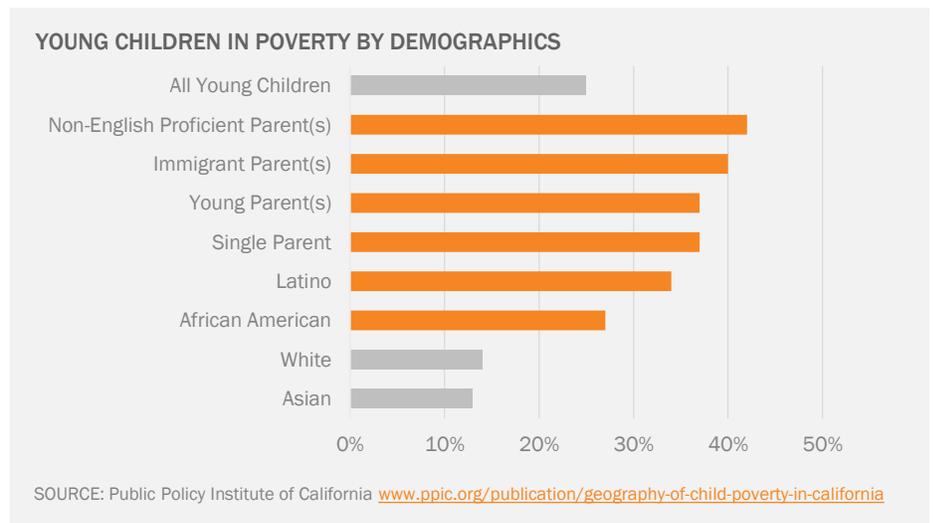


The failure of incomes to keep up with the cost of living threatens the California Dream. Less than half of children born in California in 1980 make more at age 30 than their parents earned at that age. Not since the 1940s has that measurement dipped below 50 percent. Not surprisingly, a USC Dornsife/Los Angeles Times [poll](#) found that only 17 percent of Californians believe the current generation fares better than previous generations (with more than half believing younger Californians are doing worse).

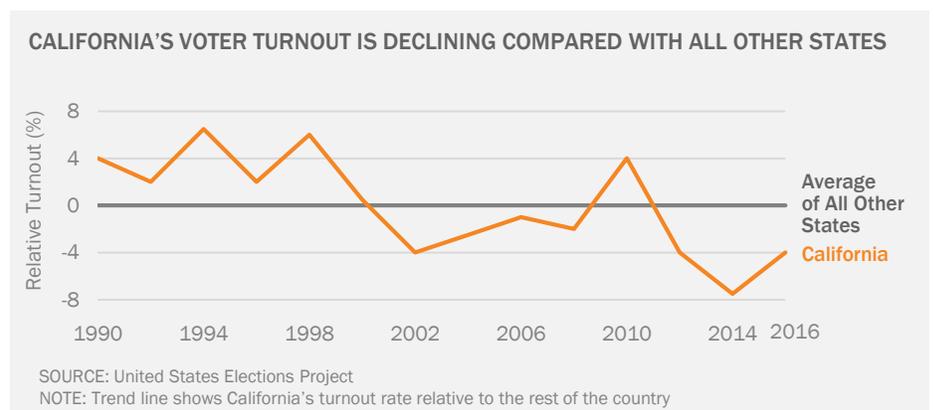
THE RELEVANCE OF OUR STRATEGY

CALIFORNIA EPITOMIZES THESE PROBLEMS – AND THE OPPORTUNITY FOR CHANGE (cont'd)

And there is reason for concern: California now has the highest poverty rate of any state when you factor in the cost of living. Four in 10 Californians live in or on the brink of poverty, and 25 percent of Californians in poverty are children age 5 or younger – with even higher rates for children of color.



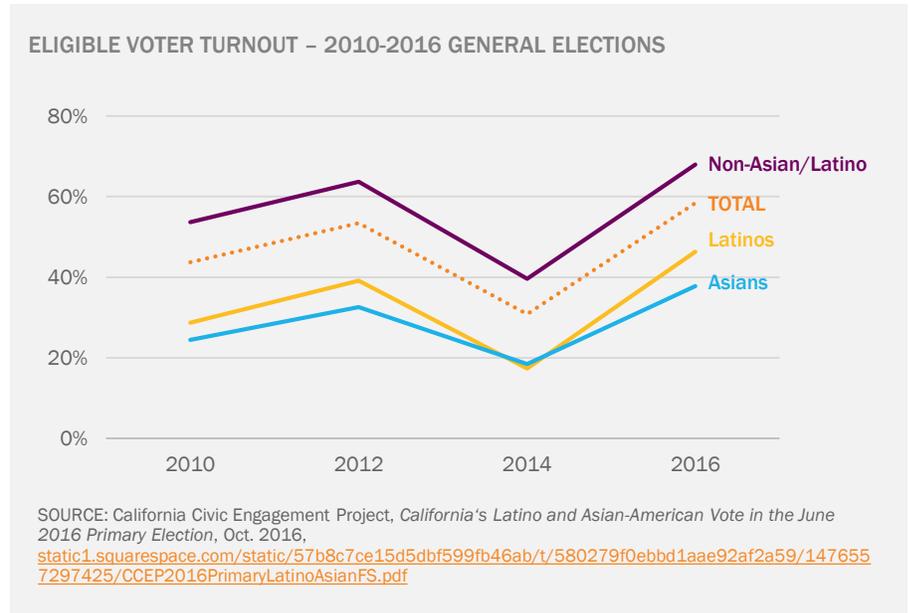
Additionally, not all California voices are heard. California voter participation was above the national average in the 1990s, but dipped below the national average in 2012, 2014, and 2016.



THE RELEVANCE OF OUR STRATEGY

CALIFORNIA EPITOMIZES THESE PROBLEMS – AND THE OPPORTUNITY FOR CHANGE (cont'd)

There are stark inequities in participation, specifically for Latinos and Asian Americans. Voting in California is also skewed heavily by income and education levels. On a positive note, the 2016 election saw increases in voter turnout across all demographics.



RESPONDING TO THREATS

Since our last Portfolio Review, we have monitored – and responded to – developments affecting disparities in California.

- Divisive rhetoric and changing national immigration policies threaten California’s immigrants and their communities. Federal action to end Deferred Action for Childhood Arrivals (DACA) and to step up raids and deportations conflict with our state’s values and threaten the important progress we have made to integrate immigrants into our communities and economy. Irvine is playing a leadership role with other philanthropic institutions to speak out in support of immigrants and their rights. And in 2017 we provided ~\$10 million in grants to organizations working to protect, inform, and support our immigrant neighbors.
- With the rising prominence of white nationalism, we are supporting a series of community events, hosted by public radio stations in Los Angeles and Bay Area counties, focused on combatting the rise in hate groups and hate speech.
- The role of community colleges in California is critical for jobseekers looking to find better careers and for employers in need of skilled workers. However, the cost of community college is often a barrier to students. We provided a grant to WestEd to take a closer look at how the state can benefit from the California College Promise, a nonpartisan effort exploring the potential for free community college for Californians.
- There are concerning signals that the 2020 decennial U.S. Census will be undermined by a lack of federal funding and added survey questions that would discourage immigrant participation. The Census results affect so much, from funding of services to how congressional districts are drawn. To ensure there is a full, accurate count of California residents, in 2017 Irvine provided an \$800,000 grant to support a network of organizations working to ensure a fair Census – and plans to provide more funding in the coming years before the 2020 count.
- Wild fires destroyed homes and livelihoods for thousands of our fellow residents. We joined other funders in contributing to rebuilding efforts in Northern California (with Irvine specifically committing \$1 million for two funds focused on helping low-income families).

HOW WE APPROACH OUR WORK



HOW WE APPROACH OUR WORK

A PORTFOLIO OF COMPLEMENTARY GRANTMAKING

We feel more resolute than ever in our focus on expanding economic and political opportunity for working Californians who struggle with poverty. We are pursuing this focus through a portfolio of mutually-reinforcing grantmaking initiatives.

We define our portfolio as a collection of outcomes-based, time-bounded initiatives that individually and collectively advance our goals. The portfolio also includes smaller areas of targeted, ongoing grantmaking that complement our initiatives and advance goals we have for a more equitable California. Each initiative has a specific focus and plan (goals, timeline with end date, resources, target outcomes, budget envelope, etc.), and they share staff, knowledge, and, at times, grantees.

We organize our grantmaking as a portfolio in order to be thoughtful, decisive, and nimble in making an impact. And our portfolio is anchored by a simple promise: All Californians – no matter who they are or where they live – should be able to create a better life for themselves and their families. This is the promise of California.

We help make that promise a reality by investing in leaders, organizations, and solutions that expand economic and political opportunity for young adults and families in California who are working but struggling with poverty. This includes:

- Executing multiyear grantmaking initiatives to help low-income families and young adult workers:
 - Develop the skills to succeed in careers that can sustain a family (Better Careers)
 - Receive the wages, benefits, and protections they deserve (Fair Work)
- Strengthening communities in regions with fewer resources through civic engagement, leadership development, and support for grassroots organizations
- Responsibly culminating our previous work
- Working with leaders to assess and adapt our priorities and approach as we learn what works best

HOW WE APPROACH OUR WORK



HOW WE APPROACH OUR WORK

A FOCUS ON CORE GRANTEES IN OUR INITIATIVES

At the heart of each initiative we plan to make long-term, flexible investments to a select number of organizations that provide direct service or critical supports to achieve the initiatives' target outcomes. We will work with these grantees to identify other supportive areas of research, strategic communication, and innovation that could help grantees – and the field writ large.

Many of these grantees were part of our pilot grantmaking in 2016 and 2017 – our learning process to develop new initiatives alongside the leaders and organizations on the front lines of the work. We learned a tremendous amount from engaging with these grantees. Their insights directly informed the two initiatives that we announced in December 2017.

OUR NEW INITIATIVES

The Irvine board approved up to \$200 million, combined, over six years for two new initiatives, which are:

BETTER CAREERS

As California's economy has grown in recent years, so too has the number of middle-skill jobs – positions that offer higher wages for high school graduates who have had additional training. Approximately 1.4 million middle-skill jobs are unfilled in California, and yet these jobs are just out of reach for many low-wage workers. Through our grantmaking and partnerships, the Better Careers initiative seeks to:

- Help 25,000 low-income jobseekers secure employment that pays at least \$18 per hour
- Improve training opportunities that lead to quality jobs and advancement
- Identify successful models of matching employers with middle-skilled workers
- Build and grow a diversified pool of talented workers

HOW WE APPROACH OUR WORK

FAIR WORK

An estimated 5 million working Californians make less than \$12.50 per hour. While low-wage workers are critical to California's economy, they often have limited voice or influence on the economic conditions that affect their families and communities – and even their pay.

Low-wage workers do not always receive a fair day's pay for a fair day's work. In fact, roughly 600,000 Californians eligible for minimum wage lose an average of \$3,400 each to wage theft every year – at a cost of \$2 billion annually.

The Fair Work initiative recognizes the dignity of all work and seeks to ensure that fairness and opportunity are afforded to all workers. Specifically, we support:

- Partnerships among community-based organizations, employers, and public agencies to ensure workers get the wages they deserve, while leveling the playing field for employers
- Organizations to enlist, educate, and empower low-wage workers to advocate for their rights and legal protections, helping advance public policies that recognize their vital role in California's economic future
- Effective partnerships that improve skills and advancement opportunities, benefiting workers and employers alike

A NEW APPROACH TO PRIORITY REGIONS

In the fall of 2017, the Irvine board also approved the pilot of a new approach to our [Priority Regions](#) grantmaking. We will continue to partner with leaders and organizations in regions of California that have fewer resources while we also pilot new approaches in Fresno and Salinas over an 18-month period.

This new approach will allow us to leverage the expertise of local funders to regrant Irvine dollars to smaller and earlier-stage organizations in these communities. We will work with regranteeing partners in two investment areas: improving civic engagement and developing new leaders (young people and grassroots organizations). Irvine, separately, will also look to support increasing access to quality information.

HOW WE APPROACH OUR WORK

THOUGHTFUL CULMINATION OF PREVIOUS WORK

When we shifted our strategy and structure in 2016, we chose to culminate most of our previous grantmaking programs. To do so responsibly, we created multiyear plans, in communication with those grantees, to wind down or transition these investments.

In 2017 we made our final grants for three of those efforts: Elections Policies and Practices, Pay for Success, and Immigrant Integration (though the latter was merged into an area of ongoing grantmaking we call Protecting Immigrant Rights). Funds extend into future years for these grantees, and Irvine will similarly make our final, multiyear grants to Arts Engagement grantees in 2018 and to the Linked Learning field in 2019.

Our goal is to support these grantees in ways that position them for ongoing success, and we also are conducting reflection and learning processes to share lessons internally and with our peers about those efforts.

OUR PRIMARY GOALS IN 2018

We have two overarching goals in 2018. We want to strengthen our organizational culture and focus on implementing our strategy (and operating model) with rigor and clarity.

Since 2016, the Foundation has been immersed in strategy development and aligning policies and practices with our new strategy. We are now poised to implement our plans – for the new initiatives and beyond – and strive for focus in those efforts. This requires the Foundation to prioritize its core work and not take on too much. We have clear goals – ambitious but realistic – and will focus intently on achieving them.

HOW WE WILL LEARN AND ASSESS IMPACT

We continue our commitment to continual learning. This past year we developed an [impact assessment and learning framework](#) to enhance our understanding and to inform our grantmaking going forward. This includes holding ourselves accountable to assess our progress and impact against our initiative and foundation level goals.

As part this process, we collect quantitative and qualitative information through grant monitoring, grantee/funder conferences, evaluation, and more. We regularly synthesize the information we collect and reflect on how learnings can inform – and adjust – our work for greater impact.

INITIATIVES AT A GLANCE

NEW INITIATIVES

Better Careers

Goal: To connect low-income Californians to good jobs with family-sustaining wages and advancement opportunities.

Fair Work

Goal: To engage low-wage workers to secure their wages, rights, and protections.

NEW INITIATIVES IN DEVELOPMENT

Postsecondary Success

Goal: To strengthen low-income students' transitions to – and through – postsecondary institutions.

ONGOING COMMITMENTS

Leadership Awards

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

Media and Content Creator Grants

Goal: To inform and engage specific audiences about the challenges facing and opportunities for low-income, working Californians.

Priority Regions

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

Protecting Immigrant Rights

Goal: To address immediate and mid-term issues related to protecting undocumented Californians and their families who may be at risk for deportation.

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.

CULMINATING INITIATIVES

Arts Engagement

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

Linked Learning

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

2017
GRANTMAKING
PORTFOLIO BY
THE NUMBERS



2017 GRANTMAKING BY REGION OF CALIFORNIA

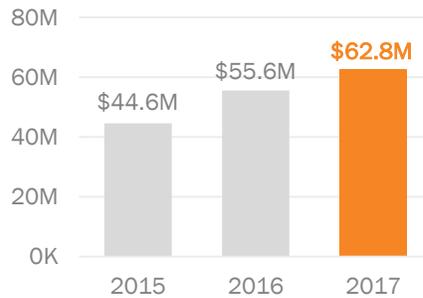


	2017 Grantmaking	% of Total Regional Grantmaking	California Population (2015)
PRIORITY REGIONS			
Riverside and San Bernardino	\$4,482,735	13%	11%
San Joaquin Valley	\$6,599,615	19%	11%
REMAINING CA REGIONS			
Bay Area	\$8,337,660	24%	20%
Central Coast	\$1,989,428	6%	4%
Los Angeles Metro	\$7,476,340	21%	28%
North Coast and North State	\$448,085	1%	1%
North Valley	\$65,585	0%	2%
Orange County	\$1,410,585	4%	8%
Sacramento Metro	\$340,000	1%	6%
San Diego and Imperial	\$4,108,490	12%	9%
Sierra	\$0	0%	1%
TOTAL REGIONAL GRANTMAKING	\$35,258,523		
STATEWIDE <i>(% based on total grantmaking)</i>	\$54,375,223	61%	
TOTAL REGIONAL AND STATEWIDE	\$89,633,746		

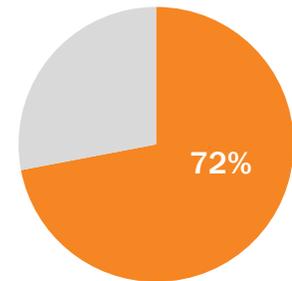
2017 GRANTMAKING FOCUSED EXCLUSIVELY ON LOW-INCOME COMMUNITIES

We expect our focus on low-income communities to continue to increase as more of our grantmaking resources are focused on the new initiatives.

Grantmaking Focused Exclusively on Low-Income Communities



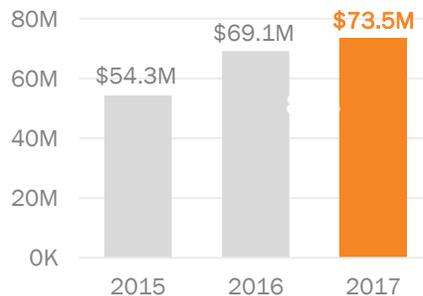
Total Grantmaking Targeting Low-Income Communities (by grant \$)



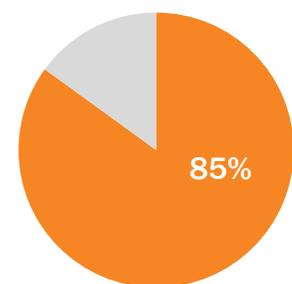
2017 GRANTMAKING FOCUSED EXCLUSIVELY ON COMMUNITIES OF COLOR

We expect our focus on communities of color to continue to increase as more of our grantmaking resources are focused on the new initiatives.

Grantmaking Focused Exclusively on Communities of Color



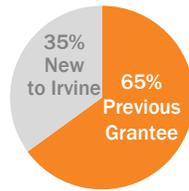
Total Grantmaking Targeting Communities of Color (by grant \$)



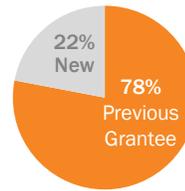
PREVIOUS VS. NEW ORGANIZATIONS TO IRVINE

A significant percentage of our grantmaking in 2017 supported organizations with a previous relationship to Irvine, as we continued with our ongoing commitments and the culmination of prior work. As we embark on new bodies of work, we anticipate an increase in new organizations to Irvine over time.

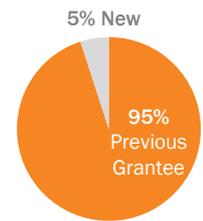
New Initiatives in Development*
(by # of grants)



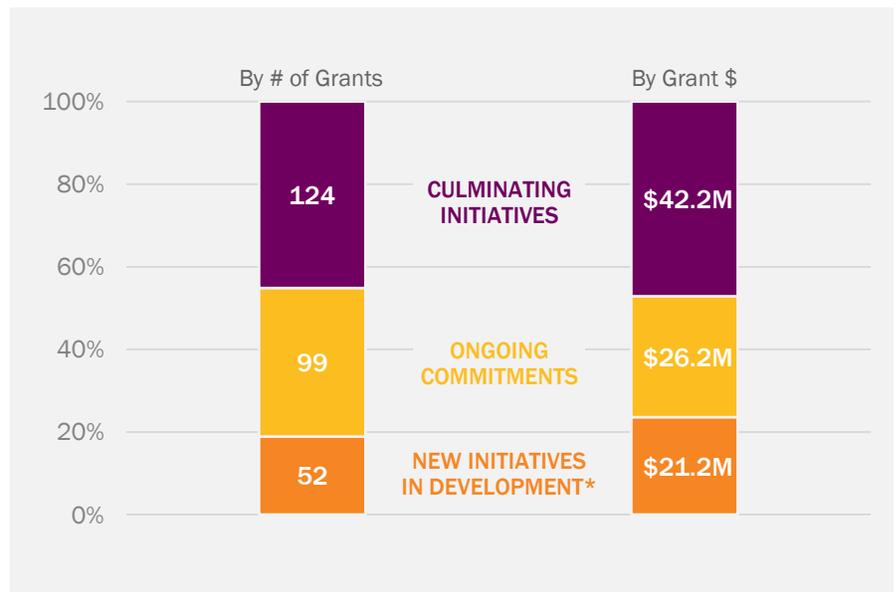
Ongoing Commitments
(by # of grants)



Culminating Initiatives
(by # of grants)



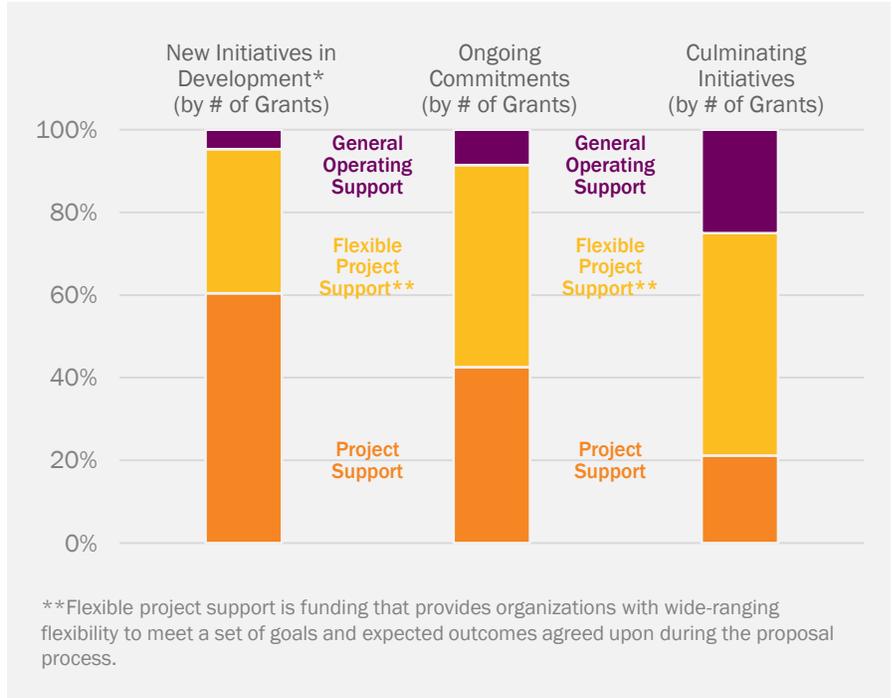
2017 GRANTMAKING BY INITIATIVE TYPE



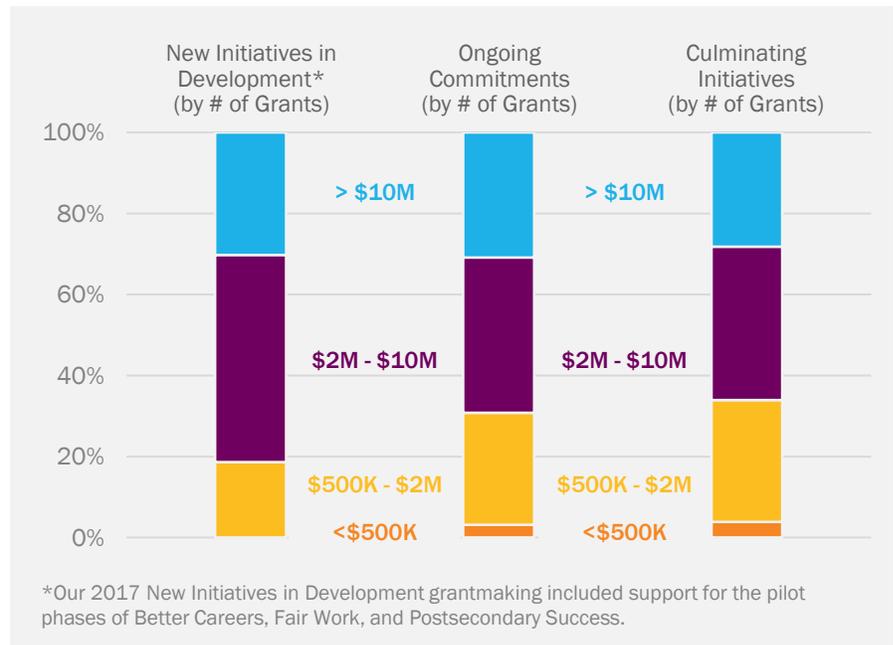
*Our 2017 New Initiatives in Development grantmaking included support for the pilot phases of Better Careers, Fair Work, and Postsecondary Success.

TYPES OF GRANT SUPPORT IN 2017

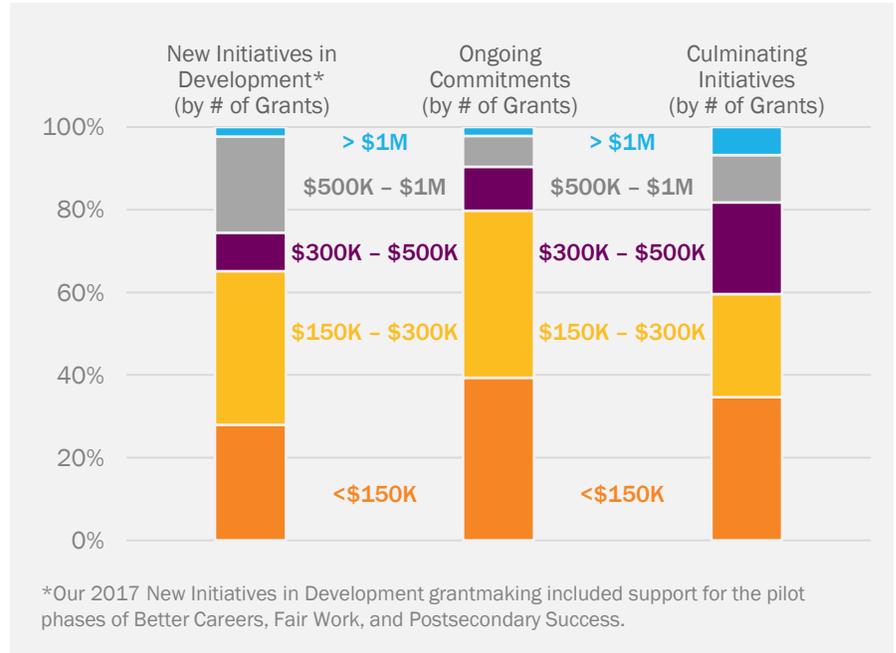
The following charts represent our grantmaking in 2017. As we launch our new initiative grantmaking in 2018, we strive to provide more flexible funds to organizations that align with our goals.



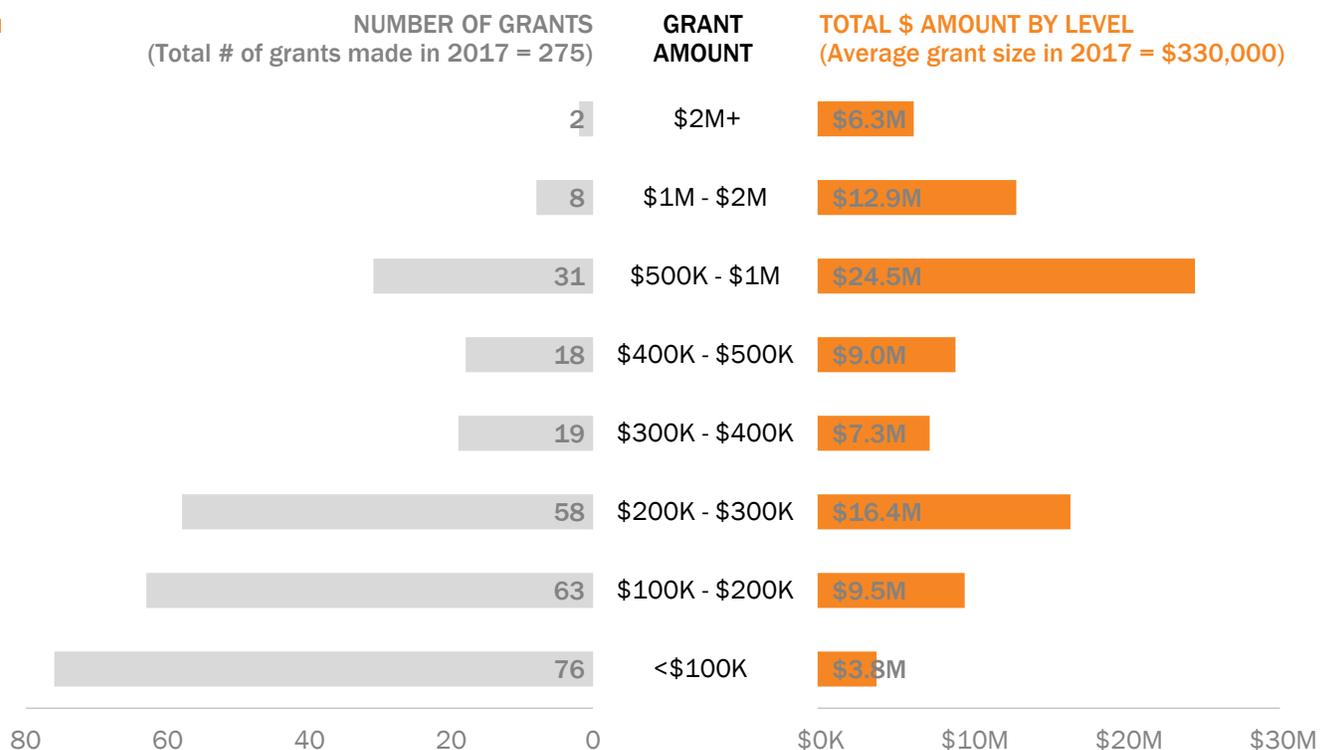
OPERATING BUDGET SIZE OF 2017 GRANTEES



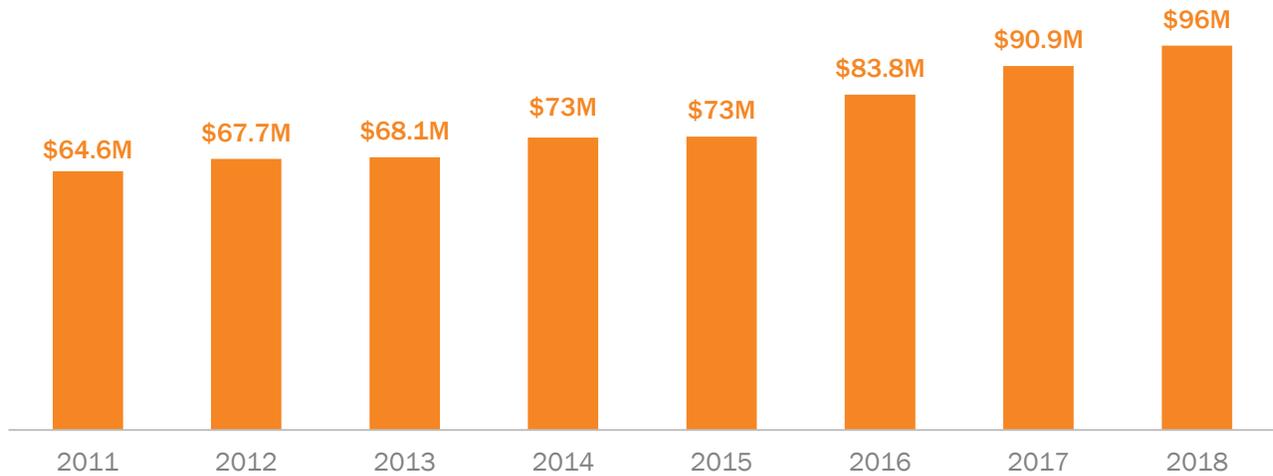
GRANT SIZE IN 2017 BY INITIATIVE TYPE



TOTAL GRANTMAKING IN 2017 BY GRANT AMOUNT



GRANTMAKING BUDGET 2011-2018



2017 GRANTMAKING BUDGET

	<u>2017 ACTUAL</u>
NEW INITIATIVES	
Better Careers	\$8,052,292
Fair Work	\$6,376,222
NEW INITIATIVES IN DEVELOPMENT	
Postsecondary Success	\$6,615,000
ONGOING COMMITMENTS	
Leadership Awards	\$2,140,000
Media and Content Creator Grants	\$2,010,000
Priority Regions	\$2,755,000
Protecting Immigrant Rights	\$6,571,000
Voter and Civic Engagement	\$12,064,501
CULMINATING INITIATIVES	
Arts Engagement	\$2,637,374
California Pay for Success	\$1,383,086
Elections Policies and Practices	\$6,500,000
Immigrant Integration	\$3,400,000
Linked Learning	\$15,912,000
RESEARCH AND DEVELOPMENT	\$3,065,500
ADDITIONAL GRANTMAKING	
Institutional Relationship Grantmaking	\$3,349,000
Opportunistic Grantmaking	\$6,215,000
Flex Fund	\$644,000
Membership/Sponsorship	\$491,500
Board/Staff Discretionary Grants	\$818,525
TOTAL \$91,000,000	

RECIPIENTS OF
THE MOST
IRVINE GRANT
DOLLARS IN
OUR ACTIVE
GRANTMAKING
PORTFOLIO



RECIPIENTS OF THE MOST IRVINE GRANT DOLLARS IN OUR ACTIVE GRANTMAKING PORTFOLIO

Irvine's active grantmaking portfolio is a snapshot taken on February 2018 comprised of grants made in 2017 and multiyear grants made in previous years. It includes:

- 258 organizations
- 395 grants
- \$182.5 million in total support
- A range of grant support per organization from \$25,000 to \$8.5 million

On the following page is a list of the organizations that currently receive the most grant dollars from Irvine. Please note:

- Out of the total of 258 organizations, the top 20 percent (the 52 organizations listed below) received 60 percent of Irvine's active grant dollars.
- Within that 20 percent, there are nine fiscal sponsors. Fiscal sponsors allow Irvine to make grants to smaller organizations or projects that are well-positioned to do work aligned with our goals.
- The following list represents a point of transition for Irvine's grantmaking portfolio, specifically from our culminating initiatives to our new initiatives, including:
 - *Large, multiyear grants to organizations as part of the initiatives' culminating plans (e.g., Arts Engagement and Linked Learning)*
 - *Large, multiyear grants to grantees beginning a longer-term relationship through our Better Careers and Fair Work initiatives*

(Continued...)

RECIPIENTS OF THE MOST IRVINE GRANT DOLLARS IN OUR ACTIVE GRANTMAKING PORTFOLIO

- The most common reasons for an organization to have multiple grants are:
 - *The organization works on multiple issues that align with more than one of Irvine’s grantmaking initiatives*
 - *The organization is receiving resources for an issue that aligns with Irvine’s grantmaking initiative and is also receiving a grant for technical assistance or an unforeseen need or opportunity*

Organization	Initiatives (Year Grants Made)	Total Amount of Active Irvine Support	Number of Active Grants
Jobs for the Future, Inc.	Better Careers (2017) Linked Learning (2015, 2016, 2017)	\$ 8,525,970	4
Linked Learning Alliance	Linked Learning (2016, 2017)	\$ 7,375,000	3
Nonprofit Finance Fund	Pay for Success (2014, 2017)	\$ 3,800,000	3
National Domestic Workers Alliance	Fair Work (2017)	\$ 3,750,000	1
Community Partners*	Elections Policies & Practices (2015, 2016, 2017) Leadership Awards (2018) Postsecondary Success (2017) Voter and Civic Engagement (2016, 2017)	\$ 3,520,000	9
Rockefeller Philanthropy Advisors, Inc.*	Additional Grantmaking - ArtPlace (2017) Additional Grantmaking - Fund for Shared Insight (2017)	\$ 3,520,000	3
National Employment Law Project	Fair Work (2016)	\$ 3,400,000	1
Year Up, Inc.	Better Careers (2016)	\$ 3,300,000	1
California Calls Education Fund	Leadership Awards (2018) Protecting Immigrant Rights (2017) Voter and Civic Engagement (2015, 2017)	\$ 3,220,000	4
Partnership for Working Families	Fair Work (2016) Protecting Immigrant Rights (2017)	\$ 3,050,000	2
Center for Powerful Public Schools	Linked Learning (2015, 2017)	\$ 2,997,500	3
Pacific Symphony	Arts Engagement (2013, 2014, 2016, 2017)	\$ 2,885,000	4
Foundation for California Community Colleges*	Linked Learning (2017) Postsecondary Success (2017) Protecting Immigrant Rights (2017)	\$ 2,737,000	5
PICO National Network	Additional Grantmaking (2016) Voter and Civic Engagement (2017)	\$ 2,400,000	3
Equal Measure	Linked Learning (2015)	\$ 2,100,500	2
ConnectEd	Linked Learning (2017)	\$ 2,000,000	1
JVS	Better Careers (2016)	\$ 2,000,000	1
National Academy Foundation	Linked Learning (2017)	\$ 2,000,000	1
Oakland Museum of California	Arts Engagement (2016, 2017)	\$ 1,950,000	2
McLeod Grant Advisors LLC	Priority Regions (2014, 2016)	\$ 1,942,000	2
Regents of the University of California	Elections Policies and Practices (2017) Linked Learning (2015, 2017) Postsecondary Success (2016) Priority Regions (2017) Research and Development (2017) Voter and Civic Engagement (2017)	\$ 1,820,000	8

*Provides fiscal sponsorship for Irvine-supported projects and organizations. See Appendix at the end of this section for further details.

RECIPIENTS OF THE MOST IRVINE GRANT DOLLARS IN OUR ACTIVE GRANTMAKING PORTFOLIO (CONT'D)

Organization	Initiatives (Year Grants Made)	Total Amount of Active Irvine Support	Number of Active Grants
California State University Foundation	Linked Learning (2017) Postsecondary Success (2017)	\$ 1,780,000	2
Old Globe Theatre	Arts Engagement (2015, 2017)	\$ 1,775,000	2
Advancement Project	Additional Grantmaking – Census (2017) Voter and Civic Engagement (2017)	\$ 1,700,000	2
Mexican American Legal Defense and Educational Fund*	Elections Policies and Practices (2016) Immigrant Integration (2016, 2017) Protecting Immigrant Rights (2017)	\$ 1,675,000	5
Stanford University	Arts Engagement (2017) Linked Learning (2016, 2017) Research and Development (2016)	\$ 1,624,500	4
Public Policy Institute of California	Additional Grantmaking – Gen Op Support (2017) Postsecondary Success (2016)	\$ 1,614,000	2
La Jolla Playhouse	Arts Engagement (2015, 2017)	\$ 1,600,000	2
Chinese Progressive Association*	Fair Work (2017) Research and Development (2017) Voter and Civic Engagement (2016)	\$ 1,500,000	3
Pivot Learning Partners	Linked Learning (2016)	\$ 1,500,000	1
California State University, Fresno Foundation	Additional Grantmaking - CA Partnership for the San Joaquin Valley (2015) Fair Work (2017) Linked Learning (2011) Priority Regions (2017)	\$ 1,475,000	4
ICA Fund Good Jobs	Better Careers (2016)	\$ 1,400,000	2
Restaurant Opportunities Centers	Fair Work (2016)	\$ 1,400,000	1
National Day Laborer Organizing Network	Immigrant Integration (2016) Protecting Immigrant Rights (2017)	\$ 1,300,000	3
Asian Americans Advancing Justice Los Angeles*	Elections Policies and Practices (2017) Immigrant Integration (2016) Protecting Immigrant Rights (2017) Voter and Civic Engagement (2016)	\$ 1,255,000	4
PowerPAC Foundation*	Voter and Civic Engagement (2016)	\$ 1,250,000	1
The Music Center	Arts Engagement (2016, 2017)	\$ 1,250,000	2
Yerba Buena Center for the Arts	Arts Engagement (2016, 2017)	\$ 1,250,000	2
Central Valley Community Foundation*	Priority Regions (2016, 2017)	\$ 1,210,000	3
Common Cause Education Fund	Elections Policies and Practices (2017)	\$ 1,200,000	1
Movement Strategy Center*	Elections Policies and Practices (2017) Fair Work (2017) Research and Development (2017) Voter and Civic Engagement (2016, 2017)	\$ 1,200,000	7
National Immigration Forum	Immigrant Integration (2017)	\$ 1,200,000	2
Santa Cruz Museum of Art and History	Arts Engagement (2016, 2017)	\$ 1,138,500	2
California Shakespeare Theater	Arts Engagement (2016, 2017)	\$ 1,075,000	2
LeadersUp	Better Careers (2016, 2017)	\$ 1,075,000	2
Latino Community Foundation	Additional Grantmaking – Northern CA Fire Relief; General Operating Support (2017)	\$ 1,050,000	2
San Diego Workforce Partnership	Better Careers (2017)	\$ 1,050,000	2
Alliance for California Traditional Arts	Arts Engagement (2016, 2017)	\$ 1,025,000	2
Center for Employment Opportunities	Better Careers (2016)	\$ 1,000,000	1
Chaffey College Foundation	Better Careers (2017)	\$ 1,000,000	1
Family Independence Initiative	Research and Development (2016)	\$ 1,000,000	1
Fresno Community Development Financial Institution	Better Careers (2017)	\$ 1,000,000	1

*Provides fiscal sponsorship for Irvine-supported projects and organizations. See Appendix at the end of this section for further details.

APPENDIX: FISCALLY SPONSORED PROJECTS

The following is a list of projects that Irvine supports through grants to fiscal sponsors included on the previous chart. In addition to funding specific projects through fiscal sponsors, the Foundation may also support the fiscal sponsor directly for its own core work.

Asian Americans Advancing Justice Los Angeles:

California Immigrant Policy Center

Central Valley Community Foundation:

Fresno Cradle to Career Partnership

Chinese Progressive Association:

Asian American and Pacific Islanders for Civic Empowerment
SF Rising

Community Partners:

African American Board Leadership Institute
California Competes
Future of California Elections
Inland Empowerment
Southern California College Access Network
Teens Exploring Technology

Foundation for California Community Colleges:

California Acceleration Project
California College Guidance Initiative
California Community Colleges Dreamers Project
California Guided Pathways Project
Career Ladders Project

Mexican American Legal Defense and Educational Fund:

California Immigrant Youth Justice Alliance

Movement Strategy Center:

Bay Rising
National Black Worker Center Project
Oakland Rising

PowerPAC Foundation:

American Majority Project Research Institute

Rockefeller Philanthropy Advisors, Inc.:

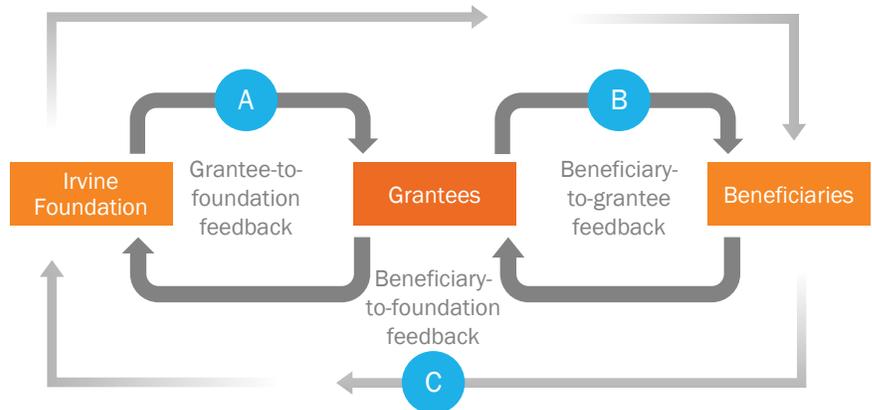
ArtPlace America
Fund for Shared Insight
Fund for Shared Insight: Listen for Good program

FEEDBACK FROM THE FIELD



FEEDBACK FROM THE FIELD

We regularly gather, reflect, and use feedback from others. We have elevated our commitment to feedback practices as described in our newly adopted [Impact Assessment and Learning Framework](#). As shown below, this includes greater use of feedback loops with Irvine grantees, key stakeholders, and those we seek to serve: working Californians who are struggling with poverty.



LISTENING TO THOSE WE SEEK TO SERVE

In fall of 2016, we partnered with community organizations to hold 14 Community Listening Sessions in six regions across California. We listened to more than 400 Californians who are struggling with poverty to better understand their hopes, fears, challenges, and dreams. This past year, we continued to use [what we learned](#) to inform our thinking, approach, and decisions about our new initiatives, research and development, communications, and impact assessment and learning. We also regularly shared our experience with other funders to inform their grantmaking, as well as those who are interested in replicating this listening process.

We also began to support grantees to enhance their own feedback practices. Six existing grantees received a supplemental grant to participate in the [Fund for Shared Insight](#)'s Listen for Good initiative, where they learn how to strengthen their collection and use of client feedback to improve their services and impact. As a core funder in Shared Insight, we also benefit from learning about the latest feedback practice innovations, impacts, and research.

FEEDBACK FROM THE FIELD

LISTENING TO OUR GRANTEES AND OTHER KEY STAKEHOLDERS

We engaged grantees in an iterative process to obtain their feedback as we developed our two new initiatives, Fair Work and Better Careers. This input informed initiative strategy development, grantmaking approaches, and impact goals.

For **Fair Work**, this process included an initial gathering of pilot grantees followed by a larger convening with dozens of individuals and organizations to learn about their perspectives on a range of issues: wage theft and worker protections, immigration, worker organizing, capacity building, and emerging narratives related to low-wage work. The process culminated in a follow-up survey, which asked grantees to prioritize topics that were identified as central to the proposed initiative’s emerging strategy.

For **Better Careers**, pilot grantees were involved in a series of convenings that were collaboratively designed with foundation staff to maximize shared learning, their expertise and knowledge in areas related to the workforce and employment landscape. Conversations allowed for deeper exploration of identified topics, including understanding potential solutions and important regional considerations in middle-wage training and job opportunities, effective employer engagement, and how to think about recruitment and hiring practices. This listening and learning work resulted in our initiative strategy as well as a final grantee-generated list of “big ideas” that will shape the initiative’s research and innovation agenda.



FEEDBACK FROM THE FIELD

We also continue to obtain feedback from grantees and other key stakeholders to inform other Foundation work. This includes ongoing efforts, those in development, and initiatives that are culminating. Some illustrative examples are described briefly below.

Pay for Success: Grantee and key stakeholder feedback was used to shape an unexpected infusion of resources for the last phase of Pay for Success. This influenced what types of funding and assistance to provide, which projects to fund, and final knowledge products to produce for funders and the field.

Postsecondary Success: Grantees and community listening session participants voiced concerns about college affordability and limited student awareness of available financial aid. This resulted in a grant to Get Schooled, a nonprofit partnering with the California Student Aid Commission, to directly engage low-income students of color with needed financial aid resources using an interactive digital media platform.

Elections Policies and Practices: To craft exit grants thoughtfully, we asked grantees and election administrators where our resources could be most helpful. The resulting focus was implementation of the Voters' Choice Act, which allows California counties to pilot changes to the way people vote. Funds are now being used to develop a strategy centered on public education and outreach, sharing resources and research, and coordination among key stakeholders.



THE PEOPLE AND CULTURE OF IRVINE



THE PEOPLE AND CULTURE OF IRVINE

Diversity, Equity, and Inclusion (DEI)

DEI STAFF ADVISORY COMMITTEE

In 2016, Irvine began a journey to create a more diverse, inclusive, and equitable culture at the Foundation and to grow our cultural competency in service of our work. In 2017, the Leadership Team empowered a Diversity, Equity, and Inclusion (DEI) Staff Advisory Committee to take responsibility and make recommendations for DEI-related activities. Among the goals of the committee are to operationalize DEI and to create accountability for implementing the DEI activities we agree to do.

The inaugural DEI Staff Advisory Committee launched in February 2017 with 10 staff members and three Leadership Team advisors. The committee adopted a working group operating structure, with four current working groups:

- **DiaLab*** – Plans up to three DiaLabs per year and curates a variety of staff engagement opportunities to dialogue and celebrate our differences
- **Governance** – Oversees and documents committee operating structure, recruitment, and membership
- **Impact Tracking** – Tracks and reports organizational progress and feedback on DEI activities and impact, and documents Irvine’s DEI journey to share with the broader philanthropy field
- **Values + Culture** – Will develop and operationalize Irvine’s values with a diversity, equity, and inclusion lens, serving as the project manager for Irvine’s 2018 Organizational Values Project

**DiaLab = A dialogue group co-facilitated by two staff members trained as inclusive facilitators, where a safe circle of 6-12 Irvine staff can share and listen to stories, ideas, and concerns about issues related to diversity, equity, and inclusion in our lives, our work, and our world.*

THE PEOPLE AND CULTURE OF IRVINE (cont'd)

Diversity, Equity, and Inclusion (DEI)

2017 ACCOMPLISHMENTS

The DEI Committee Working Groups have helped advance Irvine's progress on issues around diversity, equity, and inclusion, with the following milestones to note:

DEI Focus	2017 Achievements
DiaLab	<ul style="list-style-type: none">• Held DiaLabs in Spring and Fall 2017 with seven and six participants, respectively.• Apprenticed an inclusive facilitator-in-training program.• Brought the total number of staff who have participated in or co-facilitated a DiaLab to 28.
Values + Culture	<ul style="list-style-type: none">• Spoke with outside organizations and researched best practices in values and cultural characteristics creation, resulting in a broadening of the working group's original scope and a proposal to the Leadership Team to conduct an inclusive and organization-wide values refresh.• Received Leadership Team approval to launch a 2018 Organizational Values effort.• Established an extended working group independent of the DEI Staff Advisory Committee, with representation from across the Foundation, co-chaired by a Leadership Team member and a Senior Program Officer.

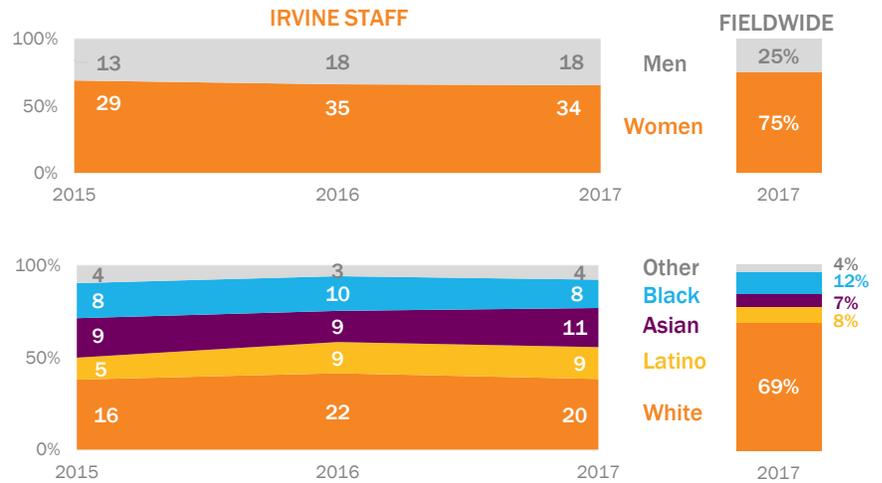
"DiaLab taught me that uncomfortable conversations often lead to positive change, and as such that it's important to not shy away from 'brave space' conversations."

- Irvine DiaLab participant

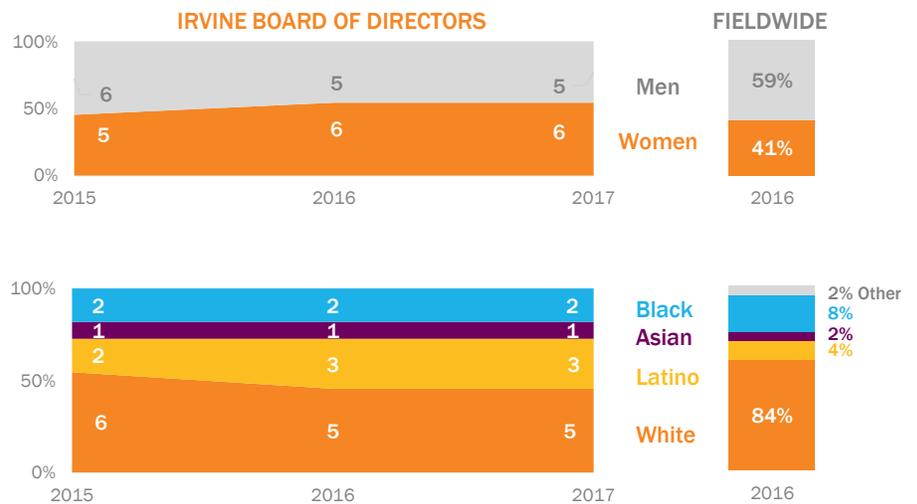
THE PEOPLE AND CULTURE OF IRVINE (cont'd)

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, 2017 Grantmakers Salary & Benefits Report.

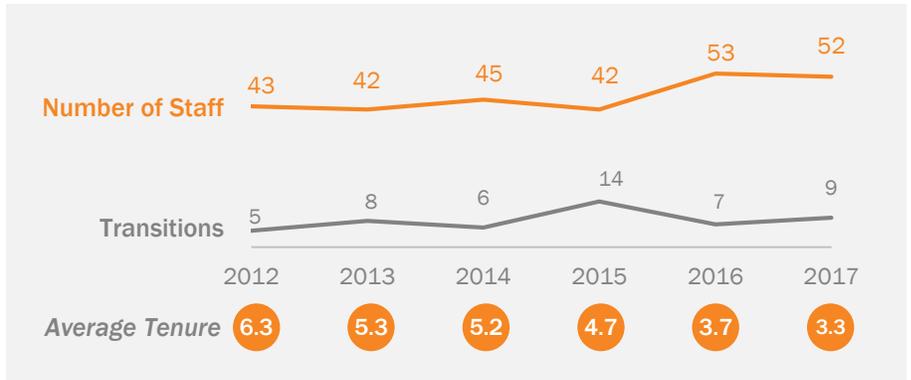


Note: Fieldwide data comes from the Council on Foundations, 2016 Grantmakers Salary & Benefit Report. Excludes President and CEO, who is an ex-officio board member.

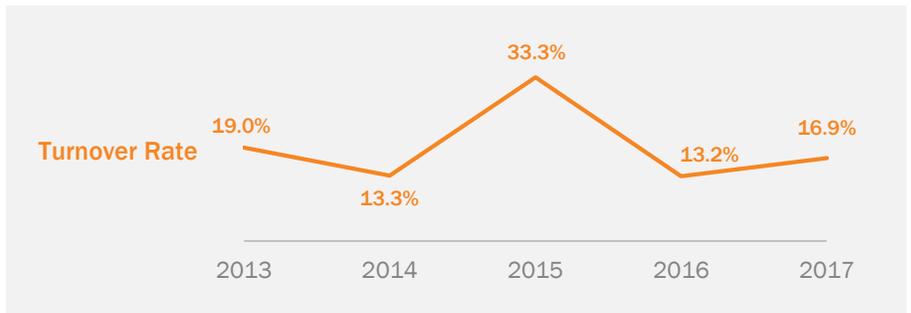
THE PEOPLE AND CULTURE OF IRVINE (cont'd)

Staff Headcount and Turnover

The table below shows that we have maintained our staffing levels from 2016, when we saw overall growth from previous years.



The chart below shows that our 16.9 percent staff turnover rate in 2017 is within our normal historical range.



We successfully recruited nine new staff members in 2017. As of December 2017, **10 staff** were located in our Los Angeles office, with the remaining 42 in San Francisco.

