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the James Irvine foundation

2007 ANNUAL PERFORMANCE REPORT

FEBRUARY 2008



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## INTRODUCTION

In December 2005, the Board of Directors approved a Performance Assessment Framework to clarify Irvine's approach to foundation-wide assessment and our reporting on the Foundation's performance. This Annual Performance Report is based on that framework and reports on Irvine's activities in 2007. The report includes selective and targeted information, based on the guidelines provided by the framework.

The Framework established two broad domains: program impact and institutional effectiveness. In each domain, we developed the following sections and key questions to address:

### PROGRAM IMPACT

**Grantmaking:** Where are our grants going?

**Outcomes:** Are we achieving what we set out to achieve?

**Learning and Refinement:** How do lessons from our program work improve our approach?

### INSTITUTIONAL EFFECTIVENESS

**Leadership:** How is the Foundation exercising leadership?

**Constituent Feedback:** How do key stakeholders perceive us, and how do their perceptions inform our work?

**Finance and Organization:** How are we performing along measures of financial health and organization effectiveness?

In response to feedback on the 2006 report, we added a section this year called **Program Context**. In this section we have compiled selected statistics used by program staff to analyze the larger context within which our programs operate. These are not measures that we expect to affect directly but they are important for us to track and understand for planning purposes. We have placed them in a separate section to make this distinction clear.

Several assumptions inform Irvine's Performance Assessment Framework. As mentioned above, we have been targeted in our measurement. We also expect this to be an iterative process and look forward to receiving feedback from the board to improve this report in future years. The report will also evolve as our strategies and goals change so that we are holding ourselves accountable to relevant outcomes. Finally, we hope this report provokes candid discussions when results do not go as planned, as well as insights about how to build on the successes indicated herein.



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PROGRAM IMPACT



## GRANTMAKING

This section analyzes grantmaking by program area, priority area and initiatives, and regional distribution in California. While there are no benchmarks or quotas for grant distribution, we track and report on who benefits from our grant dollars based on location.

### TOTAL GRANTMAKING BY PROGRAM AREA

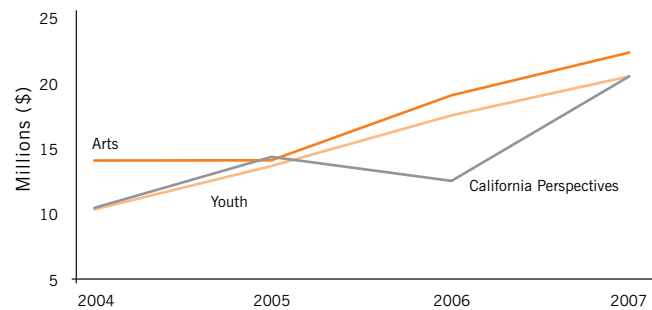
Program Area	2007 Grant Dollars	
Arts	\$22,580,265	30.2%
California Perspectives	20,656,724	27.6%
Youth	22,156,759	29.6%
Special Opportunities	5,900,000	7.9%
Cross-Program	2,277,759	3.0%
Board & Staff Discretionary Grants	827,000	1.1%
Memberships/Sponsorships	459,975	0.6%
<b>Total Grantmaking</b>	<b>\$74,858,482</b>	<b>100.0%</b>

Irvine's grantmaking in 2007 reached a new high of \$74.9 million and each of our core programs distributed more than \$20 million in its respective area.

### TOTAL GRANTMAKING FOR CORE PROGRAMS, 2004-07 (Dollars in millions)

	2004		2005		2006		2007	
Arts	\$14.15	26%	\$14.21	23%	\$19.23	28%	\$22.58	30%
California Perspectives	10.47	19%	14.43	23%	12.62	18%	20.66	28%
Youth	20.13	37%	20.79	34%	24.01	35%	22.16	30%
Other	9.23	17%	12.29	20%	13.46	19%	9.46	13%
<b>Total Grantmaking</b>	<b>\$53.98</b>	<b>100%</b>	<b>\$61.72</b>	<b>100%</b>	<b>\$69.33</b>	<b>100%</b>	<b>\$74.86</b>	<b>100%</b>

### GRANTMAKING BY CORE PROGRAM\*



\*Excludes grants in CORAL initiative

This graph provides trend data for our grantmaking over four years across our three core programs. The Youth program data excludes the CORAL Initiative so that we could focus on a comparison across programs as we ramped up our grantmaking under new directions established in 2004. We distributed dollars in essentially the same ranges of \$10–14 million in the earlier years. More recently, grantmaking in our Arts and Youth programs has steadily and consistently increased.

Variation in the California Perspectives program is explained by increased grantmaking in years when we launched or renewed initiatives. In 2005, we renewed seven-figure grants to prominent partners in the portfolio, such as PPIC and the New America Foundation. The California Votes Initiative was launched in 2005 and renewed in 2007.

## GRANTMAKING BY PRIORITY AREA

The tables below provide the distribution of dollars and the number of grants awarded by grantmaking priority and initiative within each program. In making decisions about allocation of resources within each program, the program directors are considering the goals for each priority and initiative, what we seek to accomplish in each area, our potential for leverage or impact, and the size of investment required relative to the scale of impact.

A note about “Special Projects”: A portion of each program area’s grants budget is set aside to allow the respective program teams to respond to special situations and opportunities; to participate in relevant collaborative projects with peer funders; and/or to support particularly innovative ideas, usually at an early stage of testing or development. These special projects advance the broader goals of the portfolio but do not necessarily align with the specific program grantmaking priorities.

### ARTS

#### GRANTMAKING BY PRIORITY AND INITIATIVE, 2007

Priority	Number of grants	Amount (Millions)	
Arts Leadership (Total)	23	\$9.19	41%
Arts Regional Initiative	16	4.78	
Artistic Innovation Fund	7	4.42	
Artistic Creativity	13	4.02	18%
Cultural Participation	19	3.95	17%
Communities Advancing the Arts	2	0.63	3%
New Connections Fund	64	2.23	10%
Special Projects	23	2.56	11%
Total	144	\$22.58	100%

The Arts grantmaking table shows that the Arts Regional Initiative, which focused on the San Joaquin Valley in 2007, comprised the largest portion of that portfolio. Together, the two Arts Leadership initiatives accounted for 41 percent of the Arts portfolio. Also, the New Connections Fund represented a larger portion of grantmaking

in the Arts compared to other programs. Special projects grants in Arts include the California Cultural Data Project and grants to service organizations in various artistic disciplines.

### CALIFORNIA PERSPECTIVES

#### GRANTMAKING BY PRIORITY AND INITIATIVE, 2007

Priority	Number of grants	Amount (Millions)	
Infusing New Ideas & Perspectives	4	\$6.50	31%
Informing Californians	7	1.29	6%
Mobilizing Californians (Total)	33	10.3	50%
California Votes Initiative	10	2.68	
Leadership Awards Program	16	1.75	8%
New Connections Fund	14	0.68	3%
Special Projects	4	0.14	1%
Total	78	\$20.66	100%

The table above shows that the Mobilizing Californians priority represented half of the grantmaking in California Perspectives. Our \$6 million grant to California Forward represented the majority of our investment in the Infusing New Ideas and Perspectives priority.

### YOUTH

#### GRANTMAKING BY PRIORITY AND INITIATIVE, 2007

Priority	Number of grants	Amount (Millions)	
Multiple Pathways: CTE	24	\$15.37	70%
Instruction and Support Services	9	2.68	12%
CORAL	4	1.5	7%
New Connections Fund	13	0.56	3%
Special Projects	12	2.05	9%
Total	62	\$22.16	100%

The distribution of grantmaking in the Youth program, detailed in the table above, clearly demonstrates our focused commitment to Multiple Pathways. A major grant in this priority area was a \$4.4 million investment in dual-enrollment strategies. This year marks the conclusion of CORAL, which in past years has been a significant proportion of this portfolio.

## REGIONAL DISTRIBUTION OF GRANTMAKING

As our grantmaking budget has grown in the past four years, we have been able to maintain a consistent level of grantmaking towards regionally focused work while expanding the proportion for statewide efforts. This year we have invested in major initiatives to address statewide issues and systems reforms, including grants to fund California Forward and Strengthening Organizations to Mobilize Californians in the California Perspectives program; curriculum development and the dual-enrollment initiative in the Youth program; and the California Cultural Data Project in the Arts program. This resulted in our highest level of statewide grantmaking in 2007.

### REGIONALLY-FOCUSED GRANTMAKING

(All dollars in millions)

	2004		2005		2006		2007	
Regional Grants	\$36.9	73%	\$40.9	72%	\$42.9	63%	\$42.1	58%
Statewide Grants	13.5	27%	16.1	28%	25.2	37%	31.1	42%
<b>Total Grantmaking</b>	<b>\$50.4</b>	<b>100%</b>	<b>\$57.0</b>	<b>100%</b>	<b>\$68.1</b>	<b>100%</b>	<b>\$73.3</b>	<b>100%</b>

Note: Excludes memberships, sponsorships and discretionary grants

Irvine has a particular commitment to serving regions of the state that have been underserved by philanthropy, are home to a disproportionate number of low-income Californians, and are experiencing rapid population growth. There are no quotas for regional grantmaking, but we compare our grantmaking distribution to population distribution as a benchmark. The active portfolio (all current, open grants, regardless of year of approval) shows a better alignment with population compared to the one-year snapshot of grants approved in 2007.

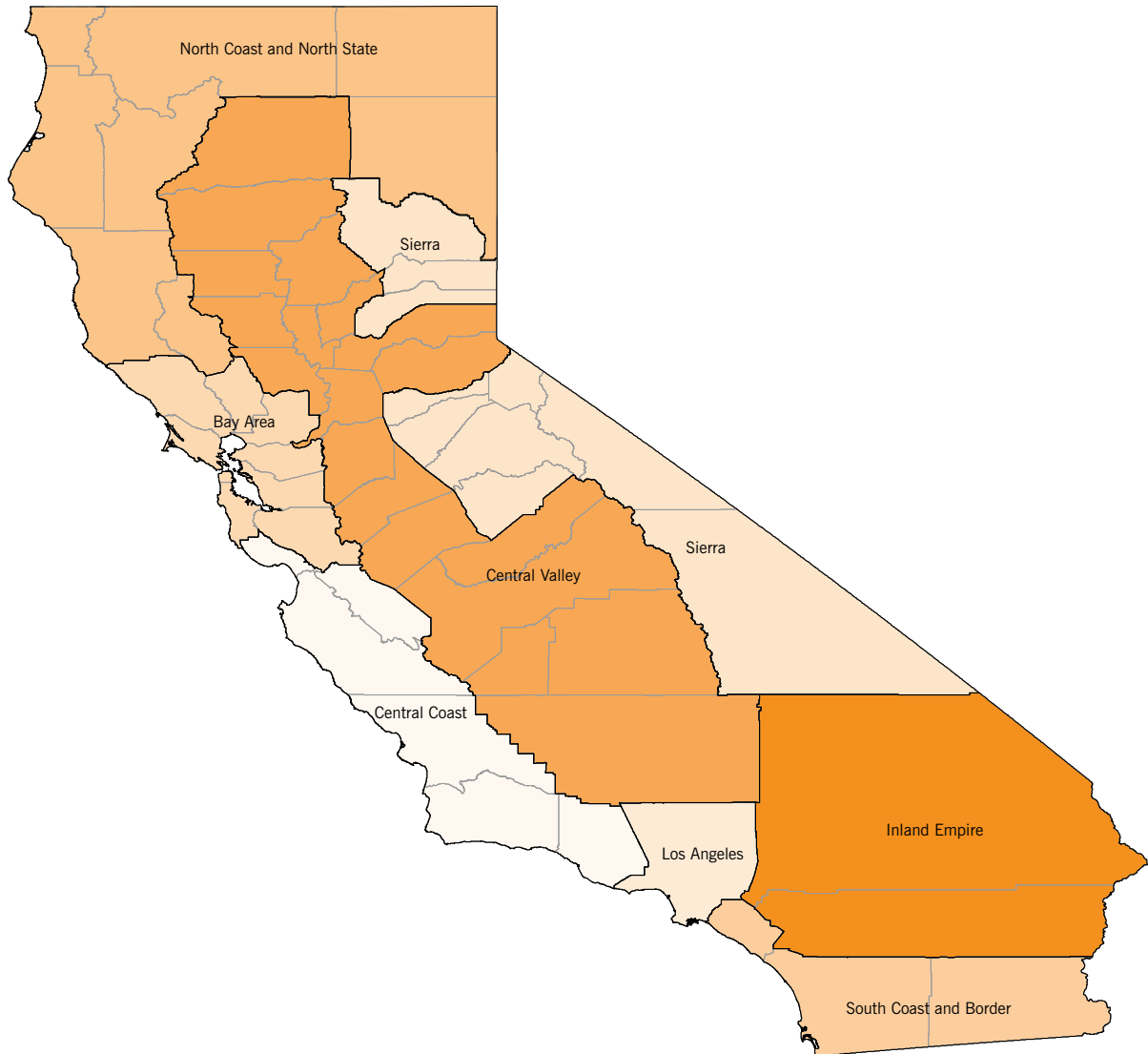
### GRANTMAKING BY REGION

Primary Region Served	2007 Grantmaking		Active Portfolio (as of 01/01/08)		Population (2007)
North Coast and North State	\$75,000	<1%	\$1,075,000	1%	1%
Sierra	325,000	1%	388,000	<1%	1%
Bay Area	7,558,000	18%	23,603,500	21%	19%
Central Coast	880,000	2%	2,900,000	3%	6%
Central Valley	12,536,500	30%	22,360,250	20%	18%
Los Angeles	13,910,500	33%	36,603,000	33%	27%
Inland Empire	595,000	1%	6,911,500	6%	11%
South Coast and Border	6,259,000	15%	17,244,000	16%	17%
<b>Total Regional Grants</b>	<b>\$42,139,000</b>	<b>100%</b>	<b>\$111,085,250</b>	<b>100%</b>	<b>100%</b>

Note: Excludes statewide grants, and memberships, sponsorships and discretionary grants



REGIONAL VIEW OF CALIFORNIA



We have maintained a consistent level of grantmaking to the Foundation's priority regions of the Central Valley, Los Angeles and the Inland Empire over the years (between 60 to 65 percent of regional grants awarded) although grantmaking to each of the respective regions has varied year-to-year. We have allocated about one-third of our grantmaking budget over the last three years to Los Angeles County, which represents 27 percent of the state's population. This disproportionate level of grantmaking reflects our extensive networks and history in Los Angeles.

Over the years, we have also dedicated a significant portion of grant dollars to the Central Valley when compared with population share, largely due to several grantmaking initiatives that target the region. Our grantmaking in the Central Valley increased notably in 2007 because of several multiyear grants for program initiatives such as the Arts Regional Initiative and CORAL.

#### REGIONAL GRANTMAKING, 2004-07

Primary Region Served	2004	2005	2006	2007	Population (2007)
North Coast and North State	1%	1%	1%	0%	1%
Sierras	0%	0%	0%	1%	1%
Bay Area	20%	25%	22%	18%	19%
Central Coast	3%	3%	1%	2%	6%
Central Valley	23%	26%	16%	30%	18%
Los Angeles County	28%	33%	36%	33%	27%
Inland Empire	9%	6%	11%	1%	11%
South Coast and Border	14%	5%	13%	15%	17%
<b>Total Regional Grants</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Note: Excludes statewide grants, and memberships, sponsorships and discretionary grants

## OUTCOMES

Outcomes for our work are primarily assessed through evaluations of major program initiatives. Evaluation supports our efforts to identify and sustain promising approaches, effective solutions and strong organizations. Irvine's evaluation activities have four main purposes:

1. To document and assess the impact and effectiveness of our grantmaking and related program activity
2. To inform our own funding priorities, grantmaking strategies and program decision making
3. To increase the capacity of our grantees to develop and implement quality and effective programs
4. To offer practical information, results and lessons that might be adopted by programs elsewhere in California or across the country

Our approach is to monitor individual grants comprehensively and evaluate program initiatives selectively. Our formal evaluations focus on program initiatives, clusters of grants with common strategies and outcomes. This approach presents an opportunity to learn from other organizations doing similar work and facing similar challenges. Often, for Irvine and the participating grantees, such evaluations can suggest effective changes in program strategy, how resources could be more effectively allocated, or new ways of achieving the program goals. Many of our evaluations include midpoint reports and formative elements to create opportunities for midcourse corrections. Irvine typically contracts external professional evaluators trained in a range of research methodologies, though in some cases staff have gathered data where specialized research skills are not needed.

Evaluation demands a significant amount of “ramp up” activity — identifying and hiring an external evaluator; specifying clear, measurable goals; and developing an evaluation plan and means of measurement. Only after this time-intensive preliminary work can the evaluation begin collecting information, interpreting the results and sharing and reflecting on those results. Hence, 2007 represented the first year in which we were able to gather data about initiatives launched under our new program directions established in 2004. This year we report on four midterm evaluations of ongoing initiatives and the final evaluation for CORAL.

Each evaluation summary in this section of the report provides the initiative goal, time frame, budget with evaluation costs, grantees, key findings, dissemination, and next steps for the initiative. Additional details about our evaluations are available through our Web site at <http://www.irvine.org/evaluation>. The following section, “Learning and Refinement,” provides analysis and synthesis of the evaluation findings.

## CALIFORNIA VOTES INITIATIVE

### GOAL:

Increase electoral participation among infrequent voters, particularly those in low-income, ethnic communities. Recognizing that our funding for voter mobilization can only reach a portion of California's infrequent voters, this evaluation is focused on demonstrating to policymakers, funders and other civic organizations the best strategies for mobilizing these voters.

### TIMEFRAME:

2006 to 2009

### BUDGET:

Initiative: \$7.4 million

Evaluation: \$785,000 (11% of budget)

### GRANTEES:

Nine community organizations in the San Joaquin Valley and Los Angeles, Orange, Riverside and San Bernardino counties.

### KEY FINDINGS:

In the first phase of this initiative (2006-07), grantee organizations reached 82,000 voters through direct methods such as door-to-door outreach and phone calls. An additional 100,000 voters were contacted through less-direct methods such as voter forums and messages to congregations.

The effectiveness of voter outreach across grantees varied. The more effective campaigns generally raised turnout by about 7 to 9 percentage points among those contacted. On the high end, a Riverside organization demonstrated an increase of 33 percentage points in voter participation by canvassing in a community where its staff and volunteers had a long history of outreach. Indirect methods, such as automated phone calls and mailed materials, did not demonstrate statistically significant differences in voter turnout.

The evaluation also highlighted a number of best practices for voter mobilization:

- Campaigns should ideally use face-to-face canvassing when possible.
- Phone bank calling, the next most effective option, was particularly successful among young voters and people who had voted in a prior election.
- Phone banks can be maximized by using robotic pre-screening calls to screen out non-operating numbers, and then following up with people who expressed an intention to vote.
- Well-prepared canvassers from the local community generally were most effective.
- Information-rich messages, previously thought to be a non-factor, were shown to have an impact on voter turnout in one site. Additional research will explore the implications of this new finding.
- Canvassing more than four weeks before election day can decrease the effectiveness of a campaign.

## CALIFORNIA VOTES INITIATIVE...Continued

## DISSEMINATION:

Our goals in disseminating the evaluation findings were:

1. To inform organizations engaged in voter outreach (and the funders supporting their efforts) of effective ways to allocate resources for maximum impact.
2. To educate policymakers and other opinion leaders of the potential for significant civic participation among communities with traditionally low voting rates.

Evaluation findings were disseminated to target audiences through the following approaches:

- Regional briefings — Irvine staff, members of the evaluation team and grantee representatives discussed the findings and their implications at briefings in Los Angeles, Fresno and Sacramento, and these convenings were attended by policymakers, community leaders and media representatives.
- Media outreach — Media coverage included two *Fresno Bee* articles; television news coverage on Univision in Fresno and KQVR in Sacramento; radio segments on *The California Report* and Southern California's KPCC radio; and a panel discussion with CVI grantees and the California Secretary of State on KQED's *Forum*.
- Conference presentations — Irvine staff and the research team presented the findings at the national conferences of the Funders' Committee for Civic Participation and Independent Sector.
- Report distribution — Irvine distributed 500 reports to policymakers, civic leaders, funders and grantees; an additional 675 copies of the report were downloaded from our Web site.

## NEXT STEPS:

The evaluation team is working with grantees to develop voter outreach plans for the February, June and November 2008 elections, based on the 2006–07 evaluation results. The team is also designing new experiments to test some of the findings indicated in the first round, as well as additional aspects of the voter outreach campaigns. Irvine will publish and disseminate subsequent reports on updated evaluation findings in mid-2008 and early 2009.

## PROMISING PRACTICES IN CAREER AND TECHNICAL EDUCATION (CTE)

### GOAL:

Strengthen, document and replicate innovative and effective career and technical education programs in California high schools that prepare students for success in college and career.

### TIMEFRAME:

2006 to 2008

### BUDGET:

Initiative: \$3.25 million

Evaluation: \$150,000 (5% of budget)

### GRANTEES:

Eight career and technical education (CTE) high schools in the San Joaquin Valley, Inland Empire and Los Angeles regions, regranted through ConnectEd.

### KEY FINDINGS:

- High schools participating in the initiative enrolled higher proportions of Latino and African American students than the average high school in California. The total student body across participating high schools was 50 percent Latino, 21 percent African American and 19 percent White. Statewide, the high school student body is 48 percent Latino, 8 percent African American and 29 percent White.
- In the initiative high schools for which findings are available, preliminary data show lower dropout rates and higher rates of on-time graduation compared to high schools statewide.
- As shown below, students at initiative high schools were more likely to pass the California High School Exit Exam (CAHSEE) than were high school students generally. African American and Latino students had significantly higher pass rates.

#### CALIFORNIA HIGH SCHOOL EXIT EXAM PASS RATES

	English		Math	
	Initiative	Statewide	Initiative	Statewide
Overall	81.5%	77.0%	76.5%	76.0%
Student Race				
African American	77.7%	66.0%	69.5%	58.0%
Asian	75.9%	93.0%	86.2%	87.0%
Hispanic	81.6%	66.0%	74.5%	66.0%
White	92.1%	88.0%	88.2%	89.0%

- Except for ninth-graders, students enrolled in participating high schools equaled or exceeded peers on the California Standards Test in English, Science and History.

### DISSEMINATION:

The dissemination plan is in development.

### NEXT STEPS:

ConnectEd recognizes the opportunity to communicate more strategically and forcefully a new shared vision for CTE and to demonstrate evidence of CTE as an effective model for reform. The evaluation of the Promising Practices initiative sites will serve as important input into this communications and coalition-building effort.

## COMMUNITIES ADVANCING THE ARTS (CAA)

## GOAL:

Increase individual giving to the arts. As a result of Irvine's investments, we anticipate that each participating community foundation will attract substantial new and permanent assets for the arts; increase giving to the arts (both discretionary and donor-advised), exclusive of Irvine dollars; and demonstrate leadership in the arts sector.

## BUDGET:

Initiative: \$4.75 million through 2007  
 Evaluation: \$129,000 (3% of budget)  
 (Additional \$3.75 million in grants recommended for board approval in March 2008.)

## GRANTEES:

13 community foundations, mostly in coastal areas.

## TIMEFRAME:

2005 to 2011 (subject to board approval)

## KEY FINDINGS:

Midterm assessment after three years shows that CAA grantees distributed an additional \$7.8 million to arts organizations in 2007, compared to 2004 giving. This includes their own grantmaking as well as donor-advised giving, and does not include regranteeing dollars from Irvine.

Community foundation assets dedicated to the arts grew by \$59 million from 2004–07. This represents a 48 percent increase in arts assets, compared to overall asset growth of 40 percent during the same period.

Additional results at some sites:

- 181 new funds earmarked for the arts
- Arts assets per capita in regions served by grantees grew to \$6.68 in 2007, compared to \$4.56 in 2004
- A permanently endowed award for individual artists (Sonoma)
- Development of a local cultural plan and restored public funding of the arts council (Monterey)
- Strengthened arts councils in some sites (Marin, Monterey, Orange, Sonoma)

## DISSEMINATION:

To date, most dissemination has focused on internal audiences and reporting progress to the Irvine board and CAA participants. Dissemination to external audiences, such as community foundations in California and nationwide, arts councils, private foundations and other types of arts funders, is in progress. In September 2007, we presented a session titled "Advancing the Arts: New Leadership Possibilities" to community foundation staff from across the country at the Council on Foundation's Community Foundations Conference. In late spring, we will launch a CAA Web site featuring briefs on key lessons learned, case studies of Irvine grantees and a host of resources generated through the initiative. The Web site will be updated with new resources and lessons learned throughout the initiative's extended timeframe of 2008 to 2011.

## NEXT STEPS:

We refined and focused the next phase of the initiative based on the results and lessons from the first phase, as follows:

- Fund efforts that directly link regranteeing dollars with strategies for asset development
- Clarify measures of success by articulating the central goal of the initiative to be raising permanent (e.g., endowed) assets for the arts
- Encourage greater innovation in donor-engagement strategies, including events, giving circles, behind-the-scenes tours and artist/donor receptions
- Develop more deliberate and interactive ways for the cohort members to share lessons with each other, other community foundations and arts funders
- Provide support for raising the profile of the arts within the respective county or region of the community foundation, including reporting on cultural indicators or advocacy for increased public funding of the arts

## COMMUNITY FOUNDATIONS INITIATIVE II

### GOAL:

Accelerate the growth and development of a group of California's smaller community foundations located in parts of the state underserved by philanthropy, helping them become more robust local philanthropic organizations

### TIMEFRAME:

2006 to 2010

### BUDGET:

Initiative: \$10.5 million planned, \$6.5 million to date

Evaluation: \$325,000 to date (5% of budget)

### GRANTEES:

Nine emerging community foundations across California:

- Central Valley: Shasta, Placer, Stanislaus, Fresno and Kern
- Northern and Central Coast: Mendocino and San Luis Obispo
- Bay Area: Napa and Solano

### KEY FINDINGS:

Every community foundation in the cohort has experienced significant growth in assets. Philanthropic funds held by the cohort increased from \$65 million in 2004 to \$109 million in 2006. This 30 percent annual growth rate exceeds the expected growth rate of 23 percent for community foundations of similar size. Individual foundations have grown between 10 and 75 percent.

Grantmaking has increased 71 percent from \$10.1 million to \$17.3 million, not including regrants from Irvine. In addition to engaging new donors, cohort members deepened connections to the regions they serve: 86 percent of their grants were directed to organizations in local communities.

Evidence also shows progress in governance practices, board involvement, clarity of purpose and visibility.

### NEXT STEPS:

The initiative is nearing a planned midcourse adjustment where we will assess each community foundation's progress, recommend grants for renewal support and refine the menu of technical assistance. We will present a cluster of recommendations to the board in June, likely with some attrition in the number of organizations included in the initiative.

### DISSEMINATION:

Focusing on information of value to other emerging community foundations, FSG Social Impact Advisors authored a report titled "Growing Smarter: Achieving Sustainability in Emerging Community Foundations," which offered emerging models, largely culled from the initiative, about community foundation growth and sustainability. The report was released at the Council on Foundation's annual Community Foundations Conference in September 2007 at a session designed by Irvine staff and FSG. Accompanying tools were also released, including a discussion guide and presentation materials, to guide community foundation boards in a robust discussion of growth and sustainability.

To date, the initiative has produced a wealth of tools and information that could be shared with the field. We will conduct market research to identify which pieces will be most valued by our target audiences. We plan to begin releasing results in late 2008 to 2010.



## COMMUNITIES ORGANIZING RESOURCES TO ADVANCE LEARNING (CORAL)

### GOAL:

Improve the basic reading and writing skills of children performing below grade level in the lowest-performing schools in five California cities through after-school programming utilizing balanced literacy and other enrichment strategies.

### BUDGET:

Initiative: \$58 million

Evaluation: \$5,370,000 (9% of budget)

### GRANTEES:

33 after-school programs in Fresno, Long Beach, Pasadena, Sacramento and San Jose.

### TIMEFRAME:

1999 to 2007

### KEY FINDINGS:

- With consistent, high-quality literacy strategies, CORAL participants' reading skills improved by .44 reading levels, which represents nearly half-a-grade level.
- Children who felt a sense of belonging at the CORAL program also had positive attitudes towards reading and attending school.
- Positive effects from CORAL extended to English language learners and children whose reading skills were far below grade level.
- CORAL had higher participation rates than other after-school programs.
- Parents and children rated CORAL programs highly.
- High quality after-school programming like CORAL costs more than current public funding allocations provide. CORAL programming costs slightly under \$20 per child per day. Public funding currently provides between \$7–10 per child per day.

### NEXT STEPS:

Although this final evaluation represents the conclusion of the CORAL initiative, a number of important lessons were learned that inform program design, evaluation, work with intermediaries and dissemination in our other program areas.

### DISSEMINATION:

Given the breadth of lessons and findings generated through CORAL implementation and evaluation, a range of audiences and related goals for each has been identified for dissemination purposes. In general, we seek to inform and promote action by specific target audiences to initiate, expand and improve after-school programming to advance student achievement. A series of five publications were produced in late 2007 and will be released in early 2008. Drawn from the final evaluation, these publications offer focused lessons and practical information to target audiences. Public/Private Ventures (P/PV) will present findings at conferences targeted to after-school funders and practitioners. Irvine and P/PV will distribute the various reports, briefs and a toolkit through their respective Web sites and networks.

## LEARNING AND REFINEMENT

Monitoring and evaluation activities serve as the primary inputs into our efforts to learn and improve and, ultimately, to be more responsible, accountable and effective as a grantmaker. Learning, however, is not just a report or an event but rather a continuous process within an organizational culture that supports the capacity of staff and grantees to reflect on their work and to improve their results.

With the maturation of several program initiatives in 2007, we were able to report and reflect on early results with the board and adapt our strategies and grantmaking activities accordingly. Several themes and lessons emerged from this work in 2007:

- 1. Programs and evaluation work best when anchored in clear goal statements and program theory.** The ability of the Foundation to learn from any evaluation depends in large part on the degree to which we have articulated clear goals and expected outcomes. In 2007, we began to more systematically and clearly articulate measures of success for new program initiatives, such as we did with the dual-enrollment initiative in December 2007. As part of our ongoing program design work, we plan to devote more attention to identifying intermediate steps or milestones that we must reach so we can periodically assess our progress with the board and ensure that we are on the right track. This is particularly important for our systems-change or policy-reform efforts, which are by nature collaborative, complex and long-term. For example, in our major grants to California Forward and ConnectEd, we recognize the need to specify clear short-term outcomes that are aligned with the timeframe and the scale of resources for those respective efforts.
- 2. Evaluation has been most useful when it is geared toward targeted, timely and practical evaluations for our grantees and the fields in which we work.** This entails articulating a learning agenda in advance to guide an evaluation,

based on an understanding of areas of knowledge or practice that would be of interest to other organizations, funders and policymakers. For example, in the evaluation and dissemination work on the CORAL results, we did not have upfront clarity about how policymakers seek information and what information might guide future policy or funding decisions for after-school programs. This information can further frame and guide any products emanating from a program or evaluation effort. This suggests an opportunity for more involvement by our communications office in identifying appropriate audiences and vehicles to formulate learning objectives, to focus the evaluation and, ultimately, to share program lessons and experiences from our grantmaking.

- 3. We are building cost analyses into program design and evaluation.** In past evaluations we have not devoted much attention to the cost effectiveness of programs. Consequently, we have funded, in some cases, high-cost models that might have lower likelihood of being sustained or replicated. In the case of the CORAL evaluation, we reported on the cost per unit-of-service and benchmarked that analysis. We plan to do more of this kind of analysis in future evaluations where appropriate and feasible. In the California Votes Initiative (CVI), we plan to assess the relative cost-effectiveness of various voter-mobilization strategies. For our Community Foundations Initiative (CFI II), foundations are asking what capacity-building interventions are the most cost-effective for small, rural-based community foundations, which we plan to address through our evaluation and communication efforts.

**4. We are creating a culture at Irvine that supports the use of evaluation and learning.** With an understanding that learning is an integral part of our mission and the way in which we work, we are committed to sharing our results and learning publicly so that others may learn from our successes and missteps. We also use evaluation results to inform our ongoing planning and program improvement with the following experiences in 2007 as noteworthy examples:

- CVI grantees are utilizing the findings from the first phase of the evaluation to inform their voter-outreach strategies for the 2008 elections. For example, in 2006, PICO California incorporated a number of strategies that can efficiently reach large numbers of voters (such as mailers and automated phone calls), but that were shown, through the evaluation results, to be less effective in increasing voter turnout. In 2008, PICO will utilize its large membership base to engage in door-to-door outreach, which was shown to increase turnout when carried out by well-prepared, knowledgeable canvassers. Other CVI grantees that have utilized live phone calls as their primary outreach method are planning to make follow-up reminder calls to people who say they plan to vote, a strategy shown to be effective in the evaluation.
- Based on feedback solicited from the 2006 Leadership Award recipients, we instituted several new program elements. For example, we are now providing communications assistance in a more structured and defined manner. In addition, the recipients' expressed interest in meeting with one another led to our convening the 2006 and 2007 recipients recently in a very productive and engaged session, which in turn produced further programmatic ideas.

We are committed to continuing to build a learning culture at the Foundation characterized by staff sharing both good news and ongoing concerns with the board; a willingness by staff to accept critical and constructive feedback from peers and the board; and more systematic action on evaluation findings and feedback.

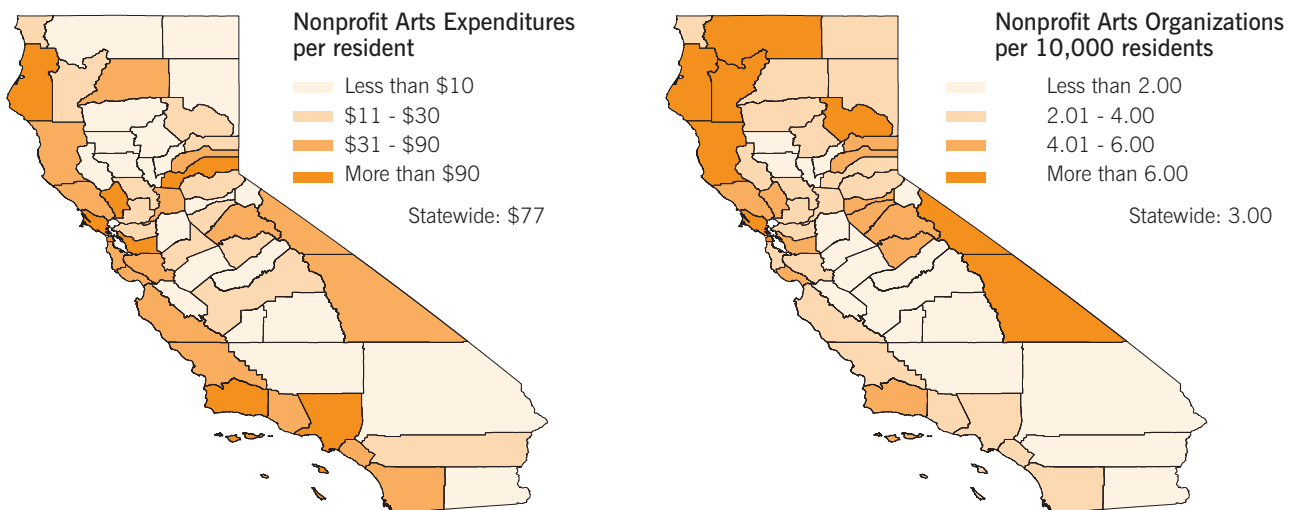
## PROGRAM CONTEXT APPENDIX

The board requested in 2007 that staff identify a handful of statistics related to Irvine's three program areas that might be tracked over time to understand trends in areas in which we are actively funding. The purpose of identifying these statistics was not to suggest that we could alone move these indicators, nor were we attempting to attribute any progress in these areas to Irvine. However, this data provides rich context by describing the general conditions and statewide trends in California related to our three program areas. We selected data that are publicly available and, in several instances, represent proxies for indicators for which data was not available.

### ARTS

These maps provide an indicator of the intensity of nonprofit arts activity and access to the arts by county. Lightly shaded counties in the San Joaquin Valley and Inland Empire illustrate the lack of arts delivery systems and infrastructure and speaks to the importance of Irvine's active engagement and investment in these regions.

#### NONPROFIT ARTS ACTIVITY AND ACCESS



Data: National Center for Charitable Statistics, US Census Bureau

State arts councils help build strong arts organizations, fund arts programs, support leadership development and promote awareness of the value of arts. In 2007, the California state government provided just \$3.95 million to fund the state arts agency. This amounts to \$0.11 per capita, making California the worst state in the nation in a ranking of arts agency revenue nationwide. The table below provides some illustrative figures for other states for comparison purposes.

#### STATE GOVERNMENT FUNDING FOR ARTS AGENCIES

State	State Arts Agency Revenue FY2007	State Arts Agency Revenue Per Capita	Rank
California	\$3,948,000	\$0.11	50
New York	51,888,000	2.69	5
Florida	40,934,727	2.30	8
New Jersey	24,433,650	2.80	4
Illinois	19,836,800	1.58	13
Pennsylvania	15,225,000	1.22	19
Connecticut	15,164,991	4.32	2
Massachusetts	12,193,520	1.91	9
Minnesota	8,843,000	1.72	11
Louisiana	5,100,272	1.13	20
Washington	4,544,913	0.72	37

Source: National Assembly of State Arts Agencies

The chart below shows the total private foundation grantmaking per capita for the eight most populous states in the United States, sorted in order of private grantmaking per capita.

#### PER CAPITA PRIVATE FOUNDATION GRANTMAKING TO ARTS AND CULTURE

Population Rank	State	Private Grantmaking Per Capita, 2005
3	New York	\$29.49
6	Pennsylvania	12.93
8	Michigan	12.52
1	California	10.43
7	Ohio	9.76
5	Illinois	7.36
2	Texas	5.94
4	Florida	2.56

Data: FoundationSearch, US Census Bureau

The Arts field is particularly lacking in reliable data that facilitates indicator tracking of this nature. We expect this to change in the coming years as we collect information through the California Cultural Data Project. In the future we plan to track indicators such as:

- Attendance at arts events
- Annual number of cultural events
- Visits and subscriptions to arts and culture organizations
- Average ticket price
- Economic contribution of the arts

## CALIFORNIA PERSPECTIVES

Irvine's priority regions of Los Angeles, San Joaquin Valley and Inland Empire continue to lag the rest of the state in voter turnout

### VOTER TURNOUT BY RACE, 2004 GENERAL ELECTION

	California	US
White (Non-Hispanic)	70.6%	67.2%
African American	66.2%	60.0%
Asian	44.3%	44.1%
Hispanic	46.9%	47.2%

Data: US Census, Current Population Survey, 2004 Voter Participation Supplement

### VOTER TURNOUT BY REGION OF CALIFORNIA

Region (In descending order of turnout)	2004 General Election	2006 Midterm Election
Sierras	70.5%	55.1%
North State	63.7%	48.7%
Central Coast	63.5%	45.8%
Bay Area	61.8%	44.6%
Sacramento Valley	59.8%	44.3%
South Coast & Border	59.0%	40.2%
<b>Statewide</b>	<b>57.0%</b>	<b>39.3%</b>
Los Angeles	54.5%	35.6%
San Joaquin Valley	49.3%	33.7%
Inland Empire	48.9%	31.2%

Data: CA Secretary of State, Statement of Vote

### CIVIC ENGAGEMENT BY RACE

#### Percent by Race/Ethnicity

	Overall	White	African American	Latino	Asian
Vote regularly	54%	60%	54%	38%	39%
Attend local meetings	39%	37%	44%	43%	34%
Volunteer in organizations	25%	30%	24%	17%	16%
<b>Type of Organization</b>					
Religious	35%	32%	62%	40%	30%
Civic	25%	26%	20%	18%	27%
Children	33%	34%	20%	37%	28%
Health	16%	18%	11%	14%	14%

The data on civic engagement presented to the left, taken from a 2002 report by the Public Policy Institute of California, show significant differences amongst racial groups, with Whites and African Americans appearing more active than Latinos and Asians.

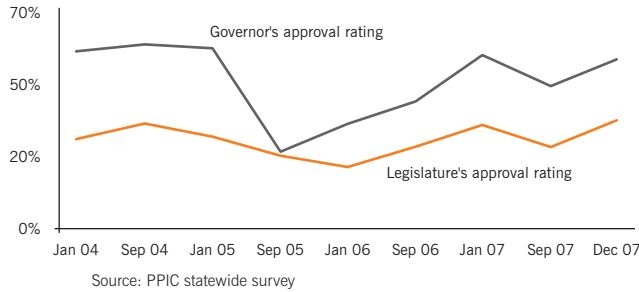
Source: The Ties that Bind: Changing Demographics and Civic Engagement in California, Public Policy Institute of California  
Data: PPIC statewide surveys, Current Population Survey volunteerism supplement

### EFFECTIVE GOVERNANCE RANKING

California's state government was awarded a "C-" by the Government Performance Project in their "Grading the States 2005" initiative, a nonpartisan assessment of the quality of management performance in four categories (money, people, infrastructure and information). Alabama was the only other state to earn such a low grade overall, and California was the only state to receive a grade of "D" on financial management. The highest grades of "A-" were given to Utah and Virginia.

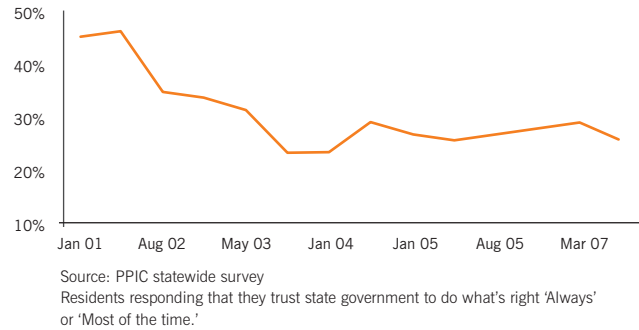
## CALIFORNIA PERSPECTIVES CONTINUED...

### APPROVAL RATINGS FOR ELECTED OFFICIALS



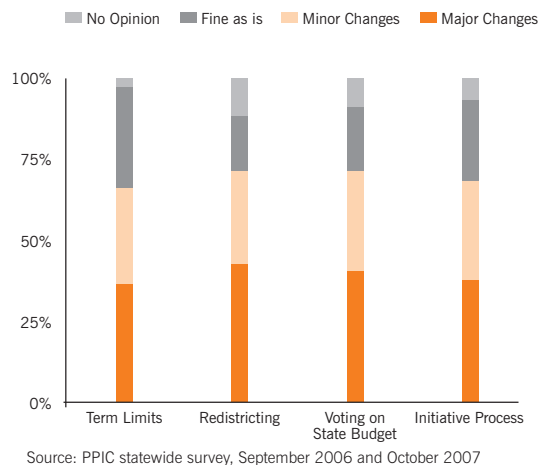
Approval ratings of the governor have been rocky and seem to be influenced more by current events relative to the general measure of confidence in state government. Approval ratings for the state legislature have been consistently lower, only recently breaking 40 percent.

### CONFIDENCE IN STATE GOVERNMENT



The public's confidence in California's state government never fully recovered from the lows of the period around the recall of Gov. Gray Davis in October 2003.

### PUBLIC INTEREST IN REFORM IN STATE GOVERNMENT



There is a moderate appetite for reform amongst Californians polled by PPIC. Term limits are the least-popular reform topic.

### CALIFORNIANS' PRIMARY SOURCE OF NEWS

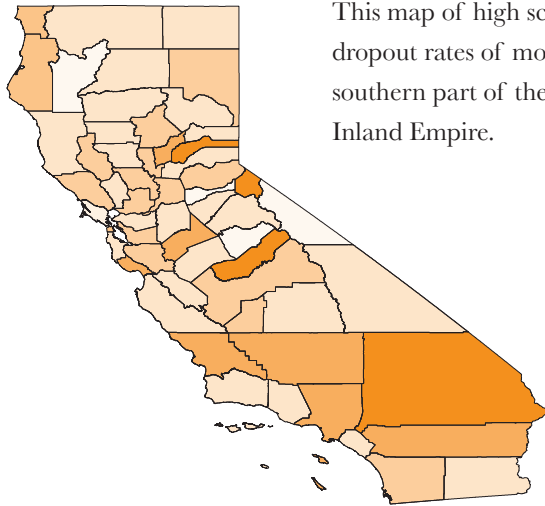
	Survey Date	
	October 2004	Sept 2007
Television	44%	47%
Internet	9%	17%
Newspapers	20%	15%
Radio	12%	12%
Talking to other people	8%	5%
Magazines	2%	2%

Source: PPIC statewide survey, October 2004 and September 2007

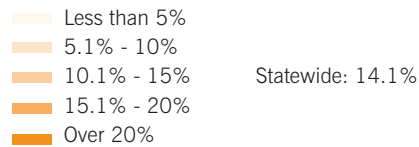
Data on news sources over time shows that the Internet is becoming a much more important source of information for Californians.

## YOUTH

### HIGH SCHOOL DROPOUTS



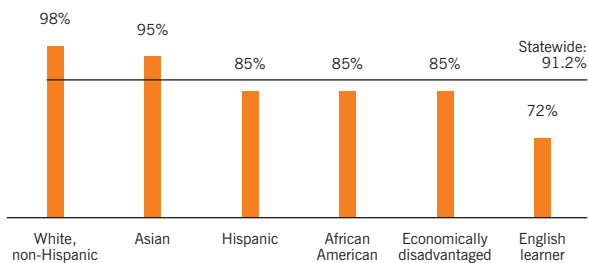
#### High School Drop-out Rates (4-year derived method)



Data: California Department of Education, Educational Demographics Unit

The following charts show how well California's education system is advancing youth ages 16 to 24 through particular benchmarks.

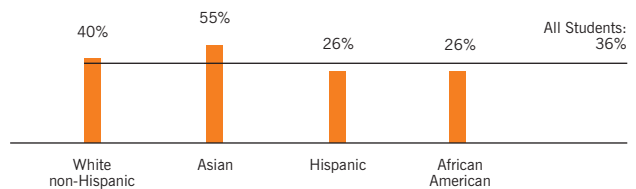
### PASSING RATES ON THE CALIFORNIA HIGH SCHOOL EXIT EXAM



Data: Independent Evaluation of the California High School Exit Examination (CAHSEE): 2007 Evaluation Report (HumPRO)

These charts illustrate the racial achievement gap in California. The proportion of Latino and African American students passing the California High School Exit Exam and completing the "A to G" coursework for entering the UC or CSU system was significantly lower than their White and Asian peers. The pass rate on the high school exit exam is particularly poor for English language learners.

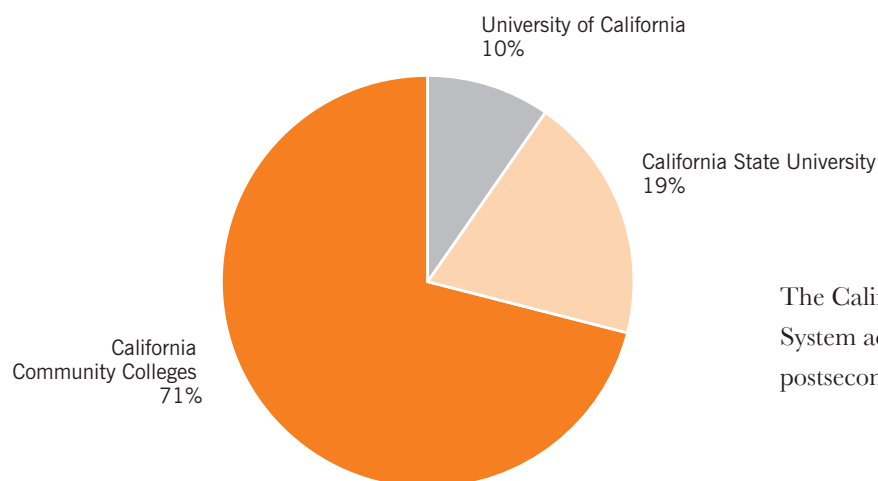
### UC/CSU READINESS



Data: California Department of Education



#### CALIFORNIA PUBLIC POSTSECONDARY ENROLLMENT BY SYSTEM, 2006



The California Community College System accounts for over 70 percent of the postsecondary enrollment in California.

Source: California Postsecondary Education Commission

#### RETENTION AND COMPLETION AMONG DEGREE SEEKERS AT CALIFORNIA COMMUNITY COLLEGES, 2000-2006

Percent of Degree Seekers	
Retention to second term (semester or quarter)	62%
Retention to second year	50%
Completed a certificate	3%
Completed an associate degree	11%
Transferred to a university	18%
Overall completion rate (does not double-count transfers who also completed a degree or certificate)	24%

Source: Beyond the Open Door: Increasing Student Success in the California Community Colleges, Institute for Higher Education Leadership and Policy.

The table at left provides retention and completion figures for degree seekers, defined by the researchers as 17-19 year-old community college students who both indicated and demonstrated their intent to complete a degree, certificate, or transfer to a university. During the six years studied, less than 20 percent transferred to a university. The overall completion rate, which is also very low, does not double-count students who earned a certificate and then transferred.

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## INSTITUTIONAL EFFECTIVENESS



## EXERCISING LEADERSHIP

The Foundation aspires to help frame understanding of key issues facing California, supporting the formation and implementation of solutions to those challenges, and working collaboratively with others to achieve its mission and goals. This aspiration motivates us to go beyond grantmaking when opportunities arise to highlight grantee activities, share accumulated knowledge and utilize our access to valued resources beyond funding. This section reports on key highlights during 2007.

### FRAMING AND DEEPENING UNDERSTANDING OF KEY ISSUES

We fund efforts that change how an issue is presented, discussed and perceived. This work includes redefining a problem or issue, raising awareness of a problem or a solution, increasing understanding and knowledge about an issue, bringing other perspectives to bear, and motivating key decision makers to pay attention to one problem over others.

In 2007, the Youth program deepened the conversation about multiple pathways to college and career and the importance of improving career and technical education (CTE). We acted on an opportunity to facilitate a Governor’s summit on CTE, which was held on March 13 in Torrance, Calif. The all-day summit was the first to bring together a cross-section of education, business and government leaders to discuss CTE and marked an unprecedented opportunity to promote dialogue about the future role of CTE, recast vocational education and promote a new vision for multiple pathways.

Stakeholder interviews suggest that CTE is gaining visibility within the education reform movement and that ConnectEd is playing a prominent role in attracting attention to CTE as an effective model for reform. Through its communications, research and advocacy work, ConnectEd has gained a high level of awareness and favorable opinion across multiple stakeholder groups.

Two key research papers sponsored by Irvine also highlighted CTE and school reform. Researchers at the University of California, Los Angeles, compiled a collection titled “Multiple Perspectives on Multiple Pathways,” a series of 12 papers providing the intellectual underpinnings of a multiple pathways approach. The need for education reform was highlighted in the “Getting Down to Facts” report on school finance. Both reports garnered press coverage and attention from elected officials and are informing ongoing policy discussions about high school reform.

The Foundation continued to promote conversations around the working paper “Critical Issues Facing the Arts” through presentations at statewide and national conferences. We supported the California Cultural Data Project in response to a key issue raised by the working paper about the lack of objective, reliable data available to inform arts and culture policy. In the coming year we will direct attention to exploring two other issues from the working paper: the need for business models for nonprofit arts organizations to promote their viability, and developing the next generation of leadership of arts organizations.

#### SHARING OUR RESULTS AND LEARNING

In 2007, staff made 53 presentations at meetings, conferences and other events to frame issues, highlight best practices and share evaluation results. All of the program teams presented their work at national conferences of grantmakers working in their respective fields (Grantmakers in the Arts, Grantmakers in Education, Funders' Committee for Civic Participation and the Council on Foundation's Community Foundations conference).

Throughout the year, Irvine staff also served as board or committee members of 30 different advisory bodies, councils and associations, including prominent organizations like Independent Sector, Grantmakers for Effective Organizations and the Superintendent of Public Instruction's California P-16 Council.

Irvine participated in various funding partnerships for several important statewide initiatives:

- California Cultural Data Project – more than 30 public and private funders are participating in the project, with funding from the Hewlett Foundation, the Los Angeles County Arts Commission, the Getty Foundation, the Haas Jr. Fund and the California Arts Council
- California Forward – funding from the Hewlett Foundation, the Haas Jr. Fund, the Packard Foundation and the California Endowment
- Strengthening Organizations to Mobilize Californians – funding and grantee participants from the Hewlett Foundation and the Packard Foundation.

The publication of our Midcourse Corrections report about the CORAL initiative was a clear demonstration of our values of accountability and transparency. The report stimulated conversation in a number of venues, starting with a panel at the Council on Foundation's annual conference. Following that, the report was referenced in articles in *The New York Times* and *The Financial Times*. Jim Canales and Hewlett Foundation President Paul Brest authored an op-ed article in *The Chronicle of Philanthropy* about learning from mistakes.

## CONSTITUENT FEEDBACK

Measuring foundation effectiveness is challenging at many levels and particularly in soliciting objective, candid feedback from constituents about their work. At Irvine, we pursue a range of methods to gather input, both formally and informally, in order to understand these perceptions on certain aspects of the Foundation's performance. We describe below formal and informal feedback gathered throughout 2007 and discuss some lessons and actions taken.

### SYSTEMATIC FEEDBACK: GRANTEE PERCEPTION REPORT AND STAKEHOLDER ASSESSMENT REPORT

In fall 2006, Irvine retained the Center for Effective Philanthropy to administer two assessments. The Grantee Perception Report (GPR) surveyed Irvine's grantees about their interactions with the foundation. The Stakeholder Assessment Report was based on interviews with a broad range of peers and leaders in our program fields. In 2007, Irvine received these two reports and reflected on the findings with the board and staff.

Irvine's GPR results and stakeholder feedback were generally quite positive, but the reports also highlighted areas that warranted further examination and possible remedy. These included: quality of staff interactions with grantees; a disparity in responses to New Connections Fund grantees compared to those in our core grants portfolio; and a lack of clarity in communications of our goals and strategy.

In response to these shortcomings, we refined grantmaking processes to improve staff interactions with grantees; redesigned the New Connections Fund; and updated information on our Web site and in other communications vehicles with an aim toward using clear, consistent language in describing our program goals and objectives.

The assessment findings also confirmed our growing sense that we were understaffed. After additional internal analyses of the ratio of active grants per program staff and distribution of high-engagement program efforts, we decided to expand our program staff to help meet our goal of being a more responsive and engaged grantmaker.

### INFORMAL FEEDBACK

In addition to third-party and objective analyses, we also regularly solicit input, guidance and criticism that helps inform our work. This includes: creating learning communities where we can learn with and from our grantees; written and confidential participant evaluations at convenings sponsored or organized by the Foundation; focus groups or interviews facilitated by external consultants to gather input about the Foundation's program and approach; and site visits to grantees and interviews of informed observers of the grantee organization in the same field or community. We use information obtained through these assessment and monitoring processes to develop a better understanding of how we can best support a grantee organization, to develop our own knowledge of how different programs or approaches play out in the field, and, finally, to get feedback about the work of the Foundation.

Most of the input that we receive helps us plan more effective meetings, grantee convenings and other services. Feedback in general about the Foundation tends to focus on an interest in greater clarity in our communication of goals, strategy or processes.

## FINANCE AND ORGANIZATION

### INVESTMENT PERFORMANCE

As shown below, due to strong absolute and relative investment performance, the Foundation's assets have grown steadily over the past four years. Irvine's assets have increased each year even as we have spent well over \$350 million for grants and operating costs during the past five years.

#### OVERVIEW OF ASSETS AND EXPENDITURES, 2003–2007

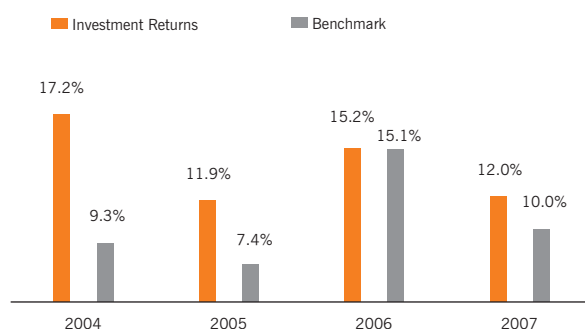
	2003	2004	2005	2006	2007*
Assets	\$1,364,920,952	\$1,542,049,509	\$1,610,480,320	\$1,810,856,518	\$1,889,739,802
Expenditures (Grants, Operating & Investments)	\$63,987,956	\$64,380,792	\$75,394,606	\$80,555,392	\$94,592,072

\*Unaudited figures

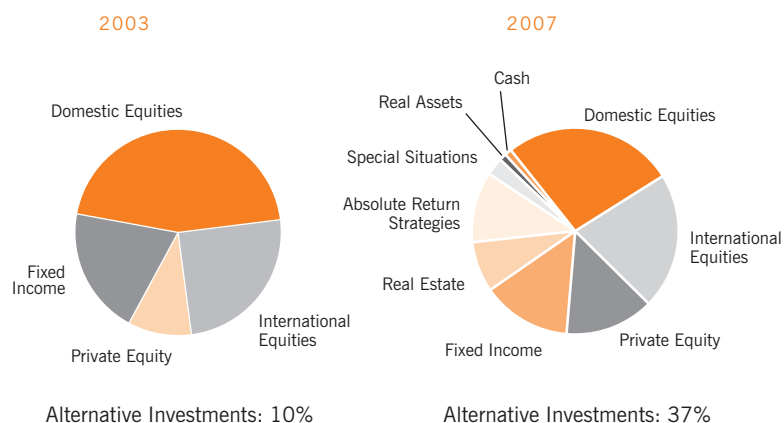
The board receives detailed quarterly statements on investment returns from Callan Associates that analyze Irvine's performance across various time periods, relative to other foundations/endowments, by specific asset classes, and by individual manager, among other dimensions. Since those reports are reviewed each quarter by the board, we have not provided that level of detail in this annual performance report.

The charts below show our investment returns relative to our benchmark for each of the past four years, as well as the continued diversification of the investment portfolio from 2003 to 2007, based on the decision to increase Irvine's allocations to alternative asset classes.

### INVESTMENT PERFORMANCE



### ASSET ALLOCATION

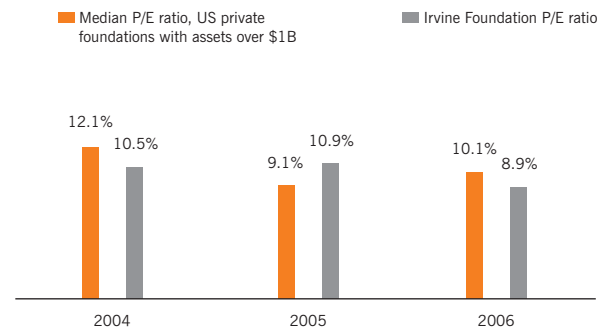


## GRANTMAKING AND EXPENSES

The operating efficiency of private foundations can be measured by the Program Expense ratio (P-E ratio), which is the ratio of total operating expenses allocated to program divided by total grantmaking. We examine this data closely because we have access to similar data from other foundations for comparative purposes. As we have expressed to the board in the past, our target has been to maintain a P-E ratio in the range of 10-12 percent.

In previous years, we have used data from the Council on Foundations (COF), our national membership organization, to benchmark Irvine's P/E ratio. The best data set that COF provides is private foundations with assets over \$250 million. This year, we have drawn from a more robust and comparable data set, compiled by the Foundation Financial Officers Group's (FFOG) administrative costs survey, which provides a benchmark group of 35 private U.S. foundations with assets over \$1 billion.

The chart below shows that Irvine's ratio is comparable to these peers and within the range that we have been comfortable with for Irvine. Going forward, we will rely on the FFOG data, as we believe it's a more precise data set for comparison.



## PERSONNEL

## STAFF AND BOARD DEMOGRAPHICS

Irvine continues to demonstrate its commitment to a diverse board and staff. As the charts below demonstrate, we have made very good progress in the past four years in further diversifying our staff, and we should take pride in that fact. We recognize the particular importance of maintaining a diverse program staff, given their external orientation, and as of December 2007, 56 percent of program staff are people of color.

## STAFF DEMOGRAPHICS

	2004		2005		2006		2007	
Gender:								
Female	25	76%	21	64%	21	60%	22	58%
Male	8	24%	12	36%	14	40%	16	42%
Ethnicity:								
Hispanic	4	12%	4	12%	4	11%	4	11%
Asian	4	12%	7	21%	7	20%	9	24%
African American	3	9%	3	9%	4	11%	5	13%
White	22	67%	19	58%	20	57%	20	53%
Total	33	100%	33	100%	35	100%	38	100%

## STAFF TURNOVER

Because of the nature of the philanthropic field, it is our expectation that we would have annual turnover in the 10–15 percent range (or four to five staff per year). In 2004, the relatively high turnover rate of 38 percent was a result of aligning our staff with new program directions and, hiring new program leadership. Although some of that turnover continued in 2005, we stabilized staffing by 2006, and now have two years of turnover within the expected range.

## BOARD DEMOGRAPHICS

	2004		2005		2006		2007	
Gender								
Female	2	18%	3	27%	4	36%	5	38%
Male	9	82%	8	73%	7	64%	8	62%
Ethnicity								
Hispanic	2	18%	2	18%	2	18%	2	15%
Asian	1	9%	2	18%	2	18%	2	15%
African American	1	9%	1	9%	1	9%	1	8%
White	7	64%	6	55%	6	55%	8	62%
Total	11	100%	11	100%	11	100%	13	100%

Note: Does not include the President and CEO

## STAFF HEADCOUNT AND TURNOVER

	2004	2005	2006	2007
Number of Staff	34	36	36	38
Transitions	13	10	5	4
Turnover rate	38.2%	27.8%	13.9%	10.5%
Average Tenure	4.07 years			



**ABOUT THE JAMES IRVINE FOUNDATION**

THE JAMES IRVINE FOUNDATION IS A PRIVATE, NONPROFIT GRANTMAKING FOUNDATION DEDICATED TO EXPANDING OPPORTUNITY FOR THE PEOPLE OF CALIFORNIA TO PARTICIPATE IN A VIBRANT, SUCCESSFUL AND INCLUSIVE SOCIETY. THE FOUNDATION'S GRANTMAKING IS ORGANIZED AROUND THREE PROGRAM AREAS: ARTS, YOUTH AND CALIFORNIA PERSPECTIVES, WHICH FOCUSES ON IMPROVING DECISION MAKING ON SIGNIFICANT STATE ISSUES. SINCE 1937 THE FOUNDATION HAS PROVIDED OVER \$1 BILLION IN GRANTS TO MORE THAN 3,000 NONPROFIT ORGANIZATIONS THROUGHOUT CALIFORNIA. WITH CURRENT ASSETS OF OVER \$1.8 BILLION, THE FOUNDATION EXPECTS TO MAKE GRANTS OF \$81 MILLION IN 2008 FOR THE PEOPLE OF CALIFORNIA.

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