Excellerator Fund

An initiative of Latinos Progresando & Greater Auburn Gresham Development Corporation

EVALUATION INSIGHTS & RECOMMENDATIONS REPORT

The "Great Equalizer":

THE EXCELLERATOR FUND'S ROLE IN MITIGATING INEQUITY IN CHICAGOLAND'S NONPROFITS

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Executive Summary

While a clear set of aims guided the initial design and implementation of the Excellerator Fund Evaluation, the findings surfaced a critical story that was not immediately apparent at the outset. Indeed, the evaluation's aims focused on (1) Fund application and reporting efficacy or ease and (2) overall organizational or programmatic impact. However, the rich data produced from both quantitative and qualitative evaluation instruments tell a much more complex story that includes critiques of traditional philanthropy, the merits of community-driven grantmaking, and both the challenges as well as workarounds facing smaller and lesser-known nonprofits.

In this manner, this study is not only about the real material impact of the Fund on its grantees, but also its social capital impact. The Excellerator Fund brought together a diverse group of nonprofits and community-based organizations with little to no staff and small operating budgets. Despite their vital work, these groups were excluded from most competitive and/or traditional funding opportunities. This story is about the "forgotten ones" or the underdogs—organizations and individuals who have painstakingly invested in their communities, doing the work day in and day out, without much fanfare or public acknowledgement. But, as several grantees pointed out, they are filling critical social service gaps and performing the role that, many argue, is the role of the city. The findings in this evaluation chronicle:

- A case study of community-driven grantmaking and *why* it's so practical and essential in this current political-economic moment (that coincides with federal rollbacks)
- The workarounds and innovations generated by small nonprofits with limited resources
- Critical areas for funders, policy makers, and city leaders to lean in and address
- How an interracial grantmaking body can educate its grantees about the structural similarities that all historically excluded communities and communities of color face
- How even small, incremental cash infusions make a significant impact in nonprofit programming, staffing, persons or communities served–for some, the difference between having the Excellerator Fund grant and not having it was between surviving or shuttering

Background & Introduction

The program evaluation took place over 8-9 months, with some delays due to personnel and/or partnership shifts. IRJ managed the project from start to finish, relying on its staff and consultants, including research and evaluation experts and skilled project managers. IRJ also worked closely with staff from Latinos Progresando and the Greater Auburn Gresham Development Corporation (GAGDC). We solicited feedback from the staff every step of the way, from evaluation design, timeline, instrument questions, and participant incentives. In this way, we conducted the evaluation in the spirit of Participatory Action Research (PAR), regularly leveraging the rich knowledge and insights of the client to maximize relevance, validity, and ultimately impact of the evaluation's findings.

Evaluation Aims

Aim #1: To evaluate the efficacy and ease of the Excellerator Fund's grantmaking processes.

Aim #2: To evaluate the impact of the Excellerator Fund vis-à-vis its grantees' accomplishments and challenges.

Methods

In partnership with the Excellerator Fund staff, we decided to create both a survey and a focus group instrument. We disseminated the survey among all 86 grantees in advance to elicit insights that we would later use to develop the focus group questions. The project evaluation team also leveraged findings that emerged from the annual convening's "TableTop Discussion Questions" to identify preliminary themes and refine the focus group instrument.

Regarding incentives, in consultation with IRJ/Loyola's project team, the Excellerator Fund staff offered the following incentives:
- $50 Visa gift cards (electronic) for five raffle winners (grantees who completed the survey were entered into the raffle)
- $50 Visa gift cards (electronic) for all focus group participants

To further incentivize grantees to sign up for focus group slots, IRJ donated three 30-minute consultation sessions (on a topic of grantee choice) with Associate Director of Research & Evaluation Dr. Faith R. Kares (she/her). After making this email announcement, we saw a spike in individuals signing up for focus group slots.

1. ***Grantee Survey*** to assess grantmaking experiences, challenges, successes, and overall Fund impact. Findings informed the focus group questions; survey findings pointed the evaluation team in the general direction of "the what" to examine, whereas the focus group guide allowed us to delve deeper to understand "the how" and "the why" [to "the what"]. Survey questions broadly focused on:
   a. Organization Information
   b. Fund Process and Experience
   c. Fund Impact
   d. Future Support Needs

2. ***Convening TableTop Discussions*** to garner preliminary insights for the Excellerator Fund staff and inform the development of the focus group instrument. Questions covered the following topics:
   a. Key philanthropy distinctions
   b. Funding snowball impact of the Excellerator Fund
   c. Fundraising
   d. Data gathering, analysis, and usage (e.g., impact reporting)
   e. Marketing and communications
   f. Board development

3. ***Grantee Focus Groups*** to (1) capture experiences in applying for, receiving, and managing grant funds and (2) gauge overall impact of the Fund. Focus groups took place remotely (via Zoom) and during times that grantees indicated greatest availability. Focus group sessions ranged from 40 to 70 minutes, and we had 4 to 7 participants on average in each group. We conducted a total of four focus groups. The focus group guide was organized in the following manner:

Methodological Challenges
- ➢ **FOCUS GROUP RECRUITMENT**
  - ○ Recruiting focus group participants: despite offering incentives and sessions during days/times that grantees themselves identified as most ideal, we still came up short. We aimed for eight focus groups but ended up with enough participants for only four. As a result, we have a smaller sample than anticipated for our qualitative data gathering and analysis.

Methodological Successes
- ➢ **SURVEY RECRUITMENT**
  - ○ We had an overwhelmingly fantastic survey response rate: 60/86 potential participants, or *at a rate of nearly 70%*. Best practices indicate ~30% is a reasonable response rate, and 50% is deemed excellent. What is especially surprising regarding such a high response is that we did not guarantee incentives for everyone; given a limited budget, the Excellerator Fund staff was able to offer only five $50 Visa gift cards.

Analysis

As previously mentioned, IRJ deployed a mixed methods design to ensure the rigor of the evaluation. By joining quantitative data (surveys) with qualitative data (focus groups), we were able to produce a rich body of data and triangulate these results for a more nuanced analysis. Our evaluation followed a sequential explanatory design, starting with surveys and leveraging the findings to design the focus group instrument.

IRJ's quantitative graduate student researcher developed the survey in consultation with the Associate Director of Research & Evaluation, as well as a postdoctoral researcher with quantitative expertise. The graduate student researcher and postdoctoral researcher analyzed the data using Qualtrics, and the team provided another layer of review by leveraging AI as well as the feedback from the Associate Director of Research & Evaluation.

Quantitative findings were then used to develop the set of focus group questions. They [survey findings] were analyzed before focus group findings and then later in conjunction (triangulating data) with focus group findings. We employed a grounded theory analysis or inductive approach, wherein we captured the emergent themes–both similarities across individuals and focus groups but also divergent themes. Given the small sample, we manually coded all focus groups, sharing emergent findings with the Excellerator Fund team and IRJ staff (beyond the project team). An IRJ student research associate then provided an additional layer of review to capture any critical focus group themes we may have missed, leveraging AI. At each level analysis, the IRJ team met with the Excellerator Fund team to provide updates (usually biweekly).

Prominent Themes

Survey data yielded areas for organizational growth. Organizations identified the following as topics in which they needed additional support (in order from most emphasized to least emphasized):

1. Evaluation, data analysis, usage, and impact reporting
2. Fund development (which included grant writing, as well as individual fundraising strategies)
3. Marketing and communications
4. Board development

While focus groups surfaced the same topics as areas for further growth or development, they also offered more details regarding the impact of the Excellerator Fund on nonprofit capacity and programming.

The sections below reflect an analysis of both the quantitative and qualitative data, and address the following large or broad sections:
1. Fund Impact
2. Community-Driven Philanthropy and Insights
3. Traditional Philanthropy Insights
4. Nonprofit Insights

Funding Begets Funding

The vast majority of organizations that received financial support from the Excellerator Fund indicated that, *as a result of the Fund,* they were able to secure additional funds, opportunities, and/resources (e.g., an introduction to someone who connected them to someone to shore up materials or affordable rental space). One person stated matter-of-factly, "[I]t allowed us to start getting more funding, which was obviously very, very helpful." Another nonprofit leader shared,

> *I had gotten grants in the beginning, but they were relatively small, probably like $1,000, no more than $3,000 at a time. And so to get the Excellerator Fund grant in the amount that it was given, it gave my foundation the boost that was needed. And it also allowed my foundation to be recognized even more, because I received even more grants after that.*

Another person spoke about trust as central to the Excellerator Fund's community-driven grantmaking approach, "I feel like that kind of, in a certain way, trust of funding us without so much of that prior documented [...] experience was key for also helping us [...] break that [...] fundraising cycle of needing to, in order to be able to access more funding, in order to be able to be trusted by other funders."

This trust enabled others to not only offer up financial resources but invest in countless other ways. A grantee reflected how the Fund "helped in ways other than

monetary help, which the monetary help of course is super important and very helpful. But they've been able to connect me with other organizations, whether they're funders or just somebody that they think that we should connect with. And part of that was we got connected with X agency."

Meanwhile, other grantees articulated how, in many ways, the Fund legitimized their work in the eyes of other prospective funders and collaborators, enabling them to better advocate for themselves and their organization's work. One organizational leader communicated how, by being awarded the Excellerator Fund, they were able to convince their board to reconsider adjustments to the organization's mission and vision:

> *The Excellerator Grant was one of, I think, one of two grants that I was able to lift up to my board of directors when they were considering, two years ago, expanding our mission statement to be welcoming of all and just not... the Latino community or the... That was a really tough year because that was a big, huge decision. And the board said, 'Well, no one's going to fund us just because we're serving Latinos.' I said, 'Actually, that's not true.'"So I'll skip the whole story just to say they kept the mission focused on just the Latino community, and I'm glad for it [...] But yeah, the fact that the intentionality of who you want to help helps carry the weight and influence to other decision makers of organizations who are considering moving away from that.*

Our survey data support these qualitative assessments: the majority of grantees agreed that the Fund strongly aligned with their mission and community goals.

On the whole, the trust that the Excellerator Fund demonstrated in awarding smaller, lesser-known organizations funding is critical here.

Organizational Stage of Excellerator Fund Grantees
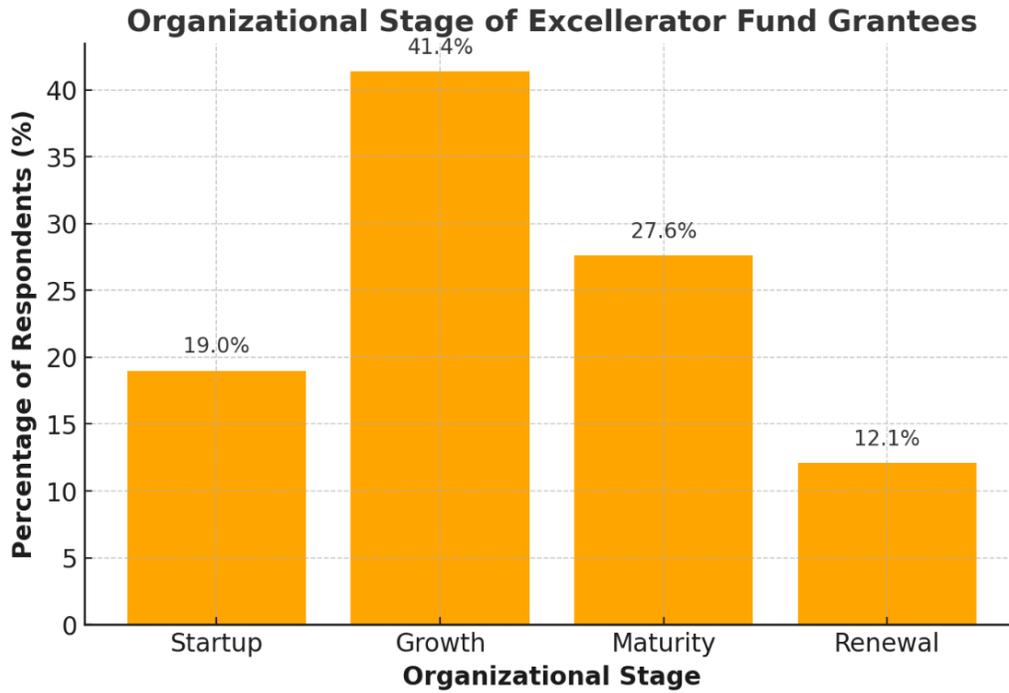
N=66

The Fund's investment in the grantees sparked a domino effect, generating interest, visibility, and the willingness of other funders or collaborators to invest (either time or energy) subsequently. "[I]t gave us a little bit of sense of relief and validation that the work that we're doing is going in the right direction and that we deserve to have some lines." It is important to note here, however, that while grantees leveraged the Excellerator Fund to secure additional opportunities, 52.8% of grantees still described their fundraising capacity as "Limited" and only 11.3% reported having "Strong" capacity. Thus, while the Fund opened doors, fundraising challenges persist.

Fundraising Capacity of Excellerator Fund Grantees
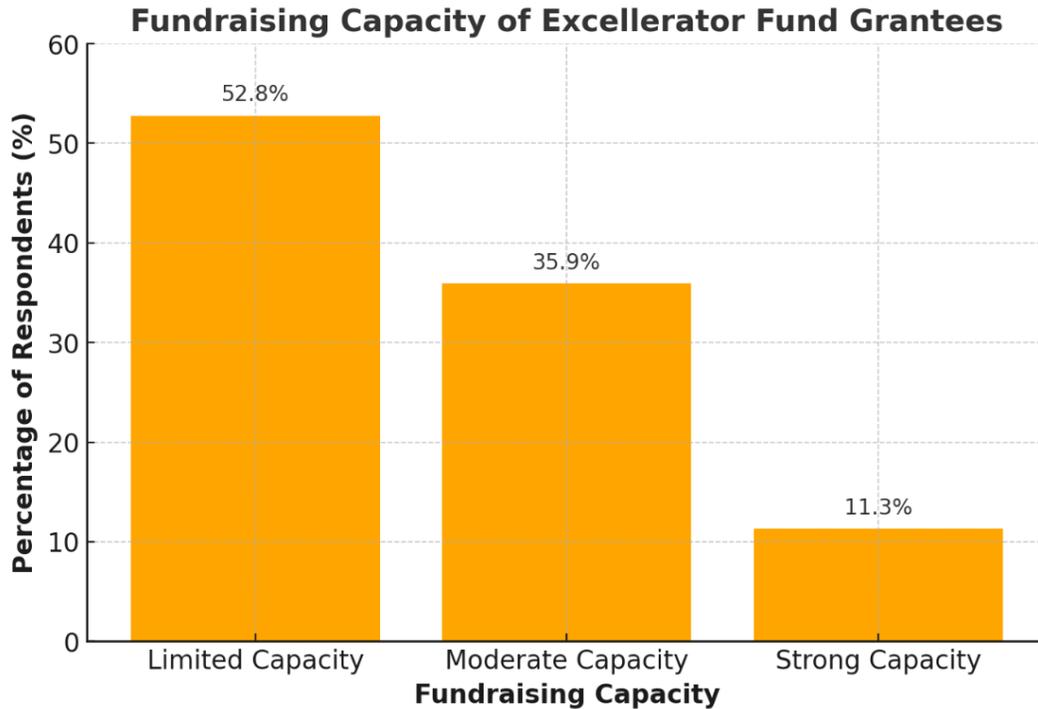
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Unrestricted Funds Filled Critical Gaps

While the funds themselves were necessary, it was how grantees received them that transformed their work. The unrestricted funds were critical for two reasons: (1) they reinforced how the Excellerator Fund *trusted* their grantees, affording grantees in decision-making as it comes to their organization; and (2) they allowed grantees to finance fundamental aspects of their organization, which are frequently restricted by traditional philanthropy. Organizations were able to purchase software, invest in operational resources and support, and, in general, pay for the not-so-glamorous administrative costs associated with running a nonprofit (e.g., insurance, rental fees). One person mentioned, "Typically general operating grants have the flexibility to be used for those boring things that nobody wants to fund, like insurance, some of the overhead, things like that. But for us, this grant came as a surprise." Another grantee reflected, "[T]hat unrestricted fund really helped us because, you all may know that getting funds from the city is very detailed, very restrictive. You have to use it for [...] specific things."

Not having to shoehorn or retrofit, as some grantees described in focus groups, funding was also a significant anxiety or stress relief: "For us, it was definitely a stress reliever simply because we were able to use the money in the way that we desire according to the information that we submitted." Survey data reinforced the sentiment that the

Excellerator Fund aligned with grantees' mission and goals, which meant they did not have to do as much retrofitting or shoehorning of their organization or programs with the Fund; indeed, the unrestricted dollars from the Fund reinforced or enhanced organizational priorities rather than distracting from them.
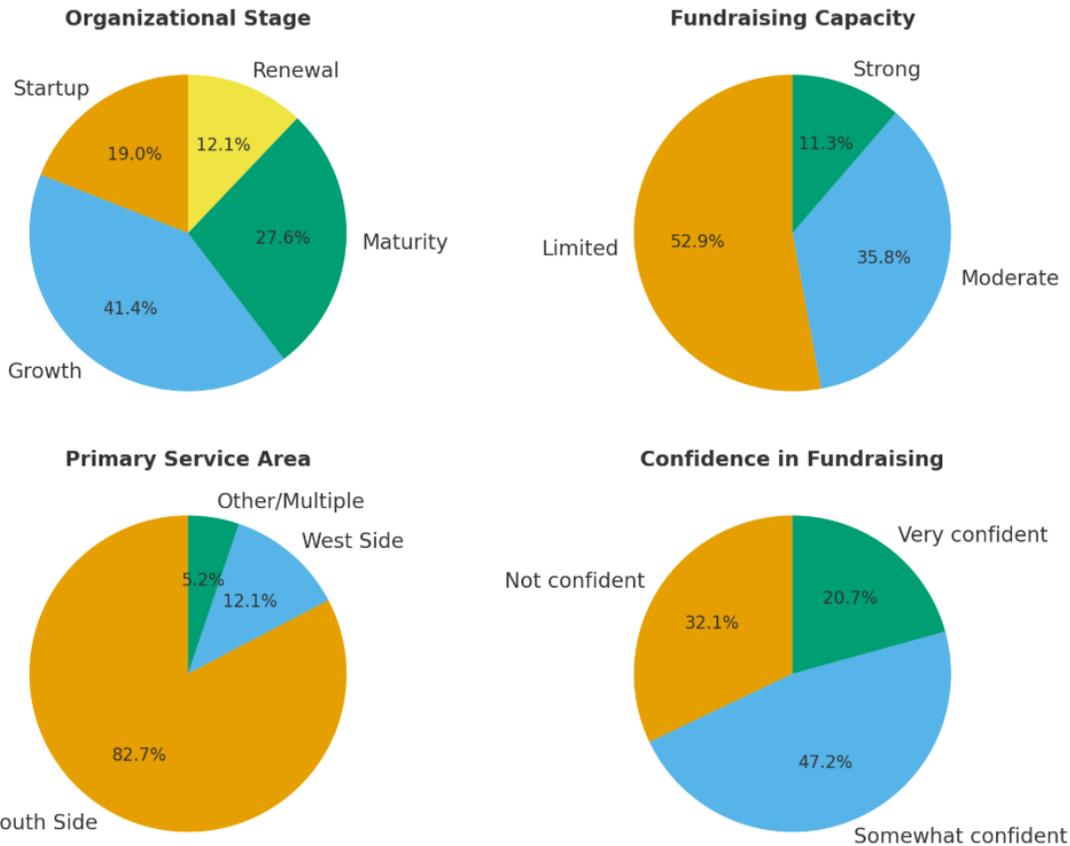
In addition to having the autonomy to use funds for lesser-known activities or materials like operations or software, organizations recognized how the Fund's unrestricted funding opened up their ability to expand populations served and/or how they served them. For example, one leader noted that they were able to develop *both* the youth they served and the experiences they offer young people as a result of unrestricted dollars.

> *[W]e were able to reach more youth in our organization simply because some of the restrictions of other grants and other fundings doesn't allow us to do certain things, expose kids to certain things such as maybe transportation or maybe leaving the state because there's a lot of college or other events that's happening out of the state limits or boundaries that doesn't allow us to use those funds for. And I believe exposure helps reduce some of the violence and also exposes kids to opportunities outside of the state of Illinois.*

Another nonprofit leader spoke about how their organization was able to expand the population it served, meeting the needs of undocumented migrants. The leader explained that the majority of funding that supports their organization comes with rules that delineate not only services provided but also persons or communities served. The Excellerator Fund allowed the organization to meet a need that they knew existed but were unable to address, given funding constraints.

Finally, the Fund enabled some organizations to strengthen or expand their personnel support. Survey results echo this improvement; respondents noted gains in operations, staffing, and leadership development as a result of the Fund. In this way, the link between *unrestricted* financial support and measurable capacity building is stark.

Excellerator Fund Survey Results (Selected Indicators)

Organizational Stage

Renewal 12.1%
Startup 19.0%
Maturity 27.6%
Growth 41.4%

Fundraising Capacity

Strong 11.3%
Limited 52.9%
Moderate 35.8%

Primary Service Area

Other/Multiple 5.2%
West Side 12.1%
South Side 82.7%

Confidence in Fundraising

Very confident 20.7%
Not confident 32.1%
Somewhat confident 47.2%

N=66 (per pie chart)

For many, the grant helped build administrative capacity in particular. For instance, several leaders hired part-time accounting support or bookkeepers. All in all, as a result of the Fund's unrestricted funding, it both developed and strengthened the trust of its grantees *and* also helped maximize the impact grantees had on communities served.

Strategic Planning & Step Away Time or Reflection

Grantees described how multiyear funding was central in planning and being more strategic in program development and personnel/capacity management. Organizations working with young people in particular described how the ability to plan ahead was critical, because they were able to be consistent in working with the youth. As one organizational leader put it, "It really helped me to really go back and evaluate even my X Project [...] So to know that I was able to really think strategically about other goals and

other plans that I needed to put in place, it really worked out well." Indeed, survey results show that two-thirds of respondents reported having a current or recently updated strategic plan. This finding supports qualitative reflections–that the Fund created opportunity for organizations to step back and plan, not just survive.

In addition to being able to plan ahead and think more strategically, the Excellerator Fund's multiyear funding approach alleviated significant stress or anxiety on the part of the organizations' leadership. One person reflected,

> *[E]ven though it would appear not to be a large amount, for me, it's been everything that's been able to keep us going and moving forward to that next year. Every time I've gotten it [...] it's been like relief, being able to breathe and know that you could continue whatever it is you're doing.*

Another grantee pointed out, "[I]t gave us that sense of security that we're probably going to see that funding the following year, and so it allowed us to prep for that. So yeah, it definitely... I think in our experience, probably one of the only grants that are multi-year." In this manner, it was not simply the amount of funding allocated to organizations but also how it was disbursed; that organizations knew they would receive a certain amount each year for five years enabled them to focus on planning and implementation, versus solely on fund development.

Program Maintenance and/or Expansion

The Excellerator Fund grant was crucial for some organizations in simply being able to survive. As one person put it, their organization would not have survived without the Fund, or they would have had to cut services or programming severely. Other organizations talked about how they developed new initiatives. For instance, one mentioned, "[W]e launched a [program] that didn't exist before, and the Excellerator Fund allowed us to do that. I mean, it allowed us really to expand on the work we're doing and the mission." Another talked about how their organization was able to diversify its course and workshop offerings as a result of the fund. Survey results mirror this pattern: most respondents reported making programmatic changes during the grant period. In this vein, program growth was not simply anecdotal but rather widespread.

### *Expansion of Communities or People Served*

For many organizations, the ability to expand offerings was also tied to the expansion of neighborhoods, individuals, and/or communities served. For some

organizations, the expansion of programming led to an increase in the number of young people served or participating. Another organization was able to increase the number of youth scholarships it offered. In another case, a person explained, "[W]e fed more people. It was really basically that." Similarly, a different grantee identified how the Fund supported their organization's ability to provide more food. They articulated,

> *Food is kind of central to our program, which can be expensive. And so it's a great stress reliever when we know that we can pull kids in off of our waiting list, and just from an ED position, but also as a human being position, knowing that the students are going to be fed when they're with us.*

For the most part, it appears that Black, Indigenous, Latino, People of Color (BILPOC) youth and/or youth from working-class backgrounds and undocumented immigrants (both deemed vulnerable or historically excluded groups) benefited a great deal from the expansion of services and programming as a result of the Excellerator Fund. This reflects or is consistent with survey data that highlight "Youth and Education" as *the top focus area* (at 32.8%) among grantees.

Primary Focus Areas of Grantee Organizations
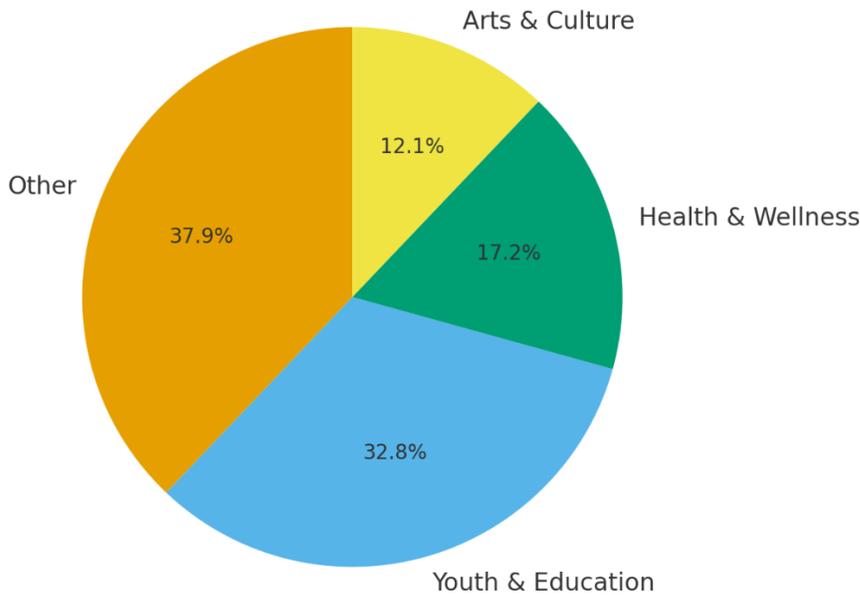
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See also *Unrestricted Funds Filled Critical Gaps.*

Board Development

Survey data indicated that Board development was among the top issue areas or concerns facing the nonprofits. They had limited time, resources, and/or expertise to adequately train, prepare, and/or manage their Board effectively. As a result, they were/are unable to activate the Board to fully realize its potential as a source of support for the organization. One leader mentioned,

> *[W]e wanted to increase our capacity for our board and our marketing. So with the Excellerator Fund, we were able to basically host small get togethers to really have our board meet other potential board members as well and community folks as well, being able to evaluate and bring on different new board members as well. So we were able to afford some capacity development for our four existing board members and also bring in three different board members as well...*

Another organization used the grant money to help Board members unlearn and learn certain practices, and to orient them to how they [the organization] approach their work: "So in terms of capacity development, we did a lot of learning and unlearning around how do we specifically ask support from our community to raise funding for our specific programs."

How the Fund supported Board development is also tied more broadly to how the Fund enabled professional development opportunities that otherwise would not have been available or fully realized. For instance, one person talked about how they paid $100 for an online certification, and another discussed receiving 1:1 coaching support. The difficulty, however, in professional development opportunities was not simply about access to funding; it was the ability for personnel to take time away from work. A grantee pointed out,

> *Do we have the capacity to invest in leadership development? We've talked about it. We are not there yet. And so what I mean by that is we're well aware of opportunities, fellowship programs, and conferences, but the resources aren't there. And then if somebody leaves during the busy period, for us, what does that mean for our organization?*

Survey responses confirmed this pressing issue; while Board development was top of mind for many organizational leaders, they [leaders] were unable to invest significant money or energy toward this area. Any organizational attempts to offer and take advantage of professional development opportunities must understand that it's not solely about

financial cost but also about accounting for time away from one's daily responsibilities or work obligations.

Inter-Racial Coalition Building and Awareness

Grantees discussed how meaningful it was to have an entity like the Excellerator Fund staff organize or convene gatherings that joined organizations and groups from different parts of the city. "I really, really am grateful for the Excellerator Fund. I love that it's Black and Mexican-led. You don't see that." Another person reflected on how much it meant to them that the Excellerator Fund aims to join Black- and Mexican-serving nonprofit organizations.

> *A lot of our problems are similar. A lot of our values are very similar. African-Americans and Latinos notoriously have strong family ties, a lot of family loyalties. And we also feel excluded or ostracized from the political process, from the civic participation in the city politics.*

In this manner, the Excellerator Fund has played a role in revealing the structures that constrain nonprofits and community-based work, regardless of race or ethnic group. In fact, the Fund's impact was concentrated in historically underserved areas. Several Grantees mentioned that nonprofits tend to have a culture of competition and hoarding resources and contacts, but the Fund acted as a "great equalizer," as one person put it.

Primary Service Area of Grantee Organizations
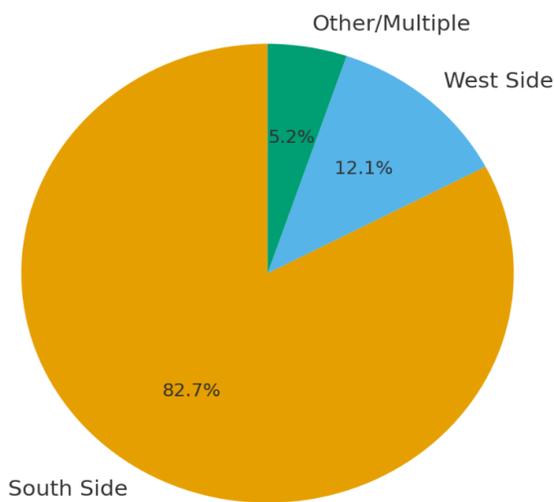
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In contrast to grantees' more commonplace experiences with philanthropy, the Fund offered a different culture–one of sharing resources and nurturing coalition-building toward the shared interest of driving equity and advancing justice in the Chicagoland area. The Fund therefore served as a model of coalition-building (one that was both cultural and operational), which several grantees took to heart and developed new or stronger partnerships with schools, organizations, and city agencies.

Application & Reporting Ease and Simplicity Allow Organizations to Amplify Impact

The Excellerator Fund is an exemplar of community-driven grantmaking in that it centers on the needs of the applicants or grantees. It seeks to mitigate applicant requirements and grantee reporting guidelines. A grantee said, "I [...] want to acknowledge that they are also working within a system where they're trying to make it easier for us." For many grantees, the Excellerator Fund was their first experience or encounter with community-driven philanthropy, and it stood in significant contrast to more traditional grantmaking efforts. Grantees described both the application and reporting process as "easy," which meant they were able to focus on their organization and programming. A grantee conveyed, "Having the Excellerator Fund has been so helpful, and having their support, I guess to filling out that application, it makes it easier, it's more accessible." Similarly, another nonprofit leader remarked,

> *I just want to say, I really appreciated the Excellerator Fund. I appreciate how seamless the application was, the reporting was. I hate to see it go away, obviously, but it definitely provided, I feel like a lot of impact and a lot of return on the dollars that were used. And I just hope that other people or philanthropy in general just adopts a lot of the model that was here and I really, really appreciate it.*

Survey testimonials reinforce these sentiments. Over half of open-ended responses praised the clarity and transparency of the Excellerator Fund grantmaking process. Hence, positive perceptions of accessibility were widespread.

For many organizational leaders, their reflection on the merits of the Excellerator Fund's community-driven grantmaking process was tied to their critique of traditional philanthropy.

> *I really appreciated the simplified process. This model is excellent. I think this is something [name of a prominent national philanthropic agency] should definitely learn from. Despite having a portal they believe makes it easy for you, they haven't. There are other foundations that are a part of larger foundations. And so I know that they... I don't*

know. Under retreats when they think about how they can make it possible so that organizations with smaller budgets can qualify for funding, so they start these other smaller foundations, that's great, but I have never been invited to a room to talk about how they can serve us. And it's them talking to us. It's not a two-way conversation.

In contrast, traditional philanthropy was/is complicated and time-consuming, such that it has deterred organizations from pursuing funding.

It's really exhausting having to prove that you qualify for funding, that you meet their criteria. But not only that, I think what's even more exhausting is adapting to the language that foundations use over and over again. So you're basically redefining what you're doing, even though you know that the work you do is something that they should support. It's like jumping through hoops and hurdles and over and over again. That's exhausting.

Grantees cited that stipulations associated with traditional grantmaking are frequently untenable, and that it's a laborious process to even obtain the funds after being awarded the grant.

Let me say, too, about even with the grant situation. You can be qualified for everything that they say on that grant. I have all unique identifying numbers. I got everything there is. If there were a federal, state, or city grant, you would need to be eligible for it. But when they tell you that this $250,000 grant or $400,000 or a million dollar grant that you had to be able to finance this grant yourself until the money comes in and you have only a $10,000 budget, there's no way that you're going to be able to fully staff, fully get any operational thing going if you have to wait on this money. So you don't apply for grants because they have a stipulation. You might not get this money until six months later [...] So that right there just kind of kicks you totally out of the thing.

Nonprofit leaders also mentioned how the Excellerator Fund money was easily and quickly disbursed. They expressed gratitude that they did not have to jump through multiple hoops to "prove" that they were doing the work after they received funding. These sentiments tie back to the core elements of trust in community-driven grantmaking.

Data Challenges or Constraints

The vast majority of grantees are gathering data, but either don't know what to do with it or cannot manage it and leverage it to amplify their impact. Organizations recognized the value of gathering data and using it to secure additional funding (e.g., grant

proposals) or demonstrate impact, but vocalized the need for assistance in this area. As one leader noted, by the time their organization gets around to using the data, the data are already outdated. "[W]e gather data for some of the foundation reports, the grant reports, and so it's a lot of work. We had never done an impact report. There had been about maybe three, four years that we went without a report." Another organizational leader explained,

> I'm a data queen, I'm just going to say. But the problem sometimes is we have the data, we have the technology for it, but sometimes trying to output it so that it can be shared with everybody. That's the thing that I continue to struggle with. The annual reports, things like the time. I'm in the weeds of helping families and communities and going out in my car and dropping off stuff. How much time do I have in my 11 jobs to actually also do the data so we can get more grants? And that's been a big struggle for me. If anybody can help me with that, that would be great. But I've been struggling with that a lot. I have the data, I've been writing it down, but then trying to get it translated and moved in is challenging.

What's fascinating, then, is not necessarily that organizations do not value data or are not gathering it. Indeed, they have ample information. Instead, the obstacles are personnel as well as expertise in translating findings into impact and/or grant reports, marketing and communications content, etc. 85% of grantees reported collecting data, but only about half had a formal evaluation partner. These findings underscore the significant divide between data collection and data usage. One grantee conceded, "[W]e simply don't have the necessary tools to create a data analytics perspective of our work." Another person mused,

> I think something is missing. And I think that something could be the partnering with a university that can help us look at the questions, look at the survey, and maybe also help us analyze it because it's not going to do us any good if we can't analyze it better when we get, I guess, those surveys answered.

Organizations recognized that leveraging the data they collect and actually doing something with it is integral to making an impact, but they have limited resources.

Biggest Need Remains Additional Staff

Survey data yielded the prominent functional roles or areas that leaders tended to struggle with in their organizations. These areas included evaluation/data management and impact reporting, marketing and communications, and fund development, including

grant writing. Many grantees explained that they lacked the skills in these areas and developed workarounds, such as asking someone's grandchild to help with social media or a friend to help with impact reporting. A grantee said they wear "multiple hats, but also, I know I appear young, but I'm a grandpa when it comes to social media and marketing [...] so I'm basically forbidden to have social media. " Another ED was matter-of-fact, "I think what I'm suffering from is someone with more advanced skills or expertise in bringing all of our programming holistically and telling the story, something as simple but as impactful as an annual report, which we don't have." Also, leaders expressed that they tended to prioritize their programming, so these functions tended to fall to the wayside. One person lamented,

> [S]ometimes the obstacle is you wear many hats and you can do many things, but you just can't do everything. So some of the things that need to be done are things that may not be in my wheelhouse, or I kind of go into a fetal position when I see this particular topic or situation coming up that I know that needs to be done, but I just don't do it.

Survey findings further support the qualitative narrative that leadership is spread too thinly to effectively execute (or execute at all) on critical functions like grant writing, impact reporting, or even fundraising. Over half of survey respondents (52.8%) described their organization's fundraising capacity as "Limited" citing lack of skills and frequent burnout.

Very few organizations had lines or roles dedicated (either full- or part-time) to marketing/communications, fund development, and/or program evaluation. A person commented, "I have a part-time assistant that specializes in grants. She does the research for me. She specializes in federal and state grants, but she knows how to look for different areas. She works maybe 20 hours a month." In this way, leadership has to be discerning in terms of which grants are even worth pursuing. And that is if they are lucky enough to have additional funds to pay for a contractor or part-time staff. The scarce or limited personnel and resources result in a type of stop-and-start, or inconsistent activities that compromise the impact of their messaging or work. A nonprofit leader connected data analysis to effective marketing and communication; they were well aware that the two functional areas are deeply intertwined, and yet still had limited resources to implement either fully.

> [T]he other gap with the marketing is just the documentation of our work. Because we also have been in a lot of instances like the main facilitators of a lot of things, it's like we also don't have the capacity to document while we're facilitating and doing other things, but we've been noticing that gap in the last couple years quickly, just kind of like, "Oh,

*everyone's like, where's the documentation of this?" I'm like, "I don't know, we were busy."
But just how important it is to really document what has been going on. So it's literally
been maybe like a year that we've been finally finding some people that we just kind of
on contract hired to do, like document maybe one event or one type of activity, and then
they'll produce something for us that we can then share, which has been helpful. It's
super helpful to have that, but ideally it would be great to have somebody on staff that
could just be able to handle and manage consistently all of that. But as of now, just kind
of out contracting, outsourcing, and when there's funding, when there's something that's
worth it and whatever I can do on the side to keep that rolling. But....*

Volunteers (if untrained or ill-prepared) create more labor for the organization than assistance.

Commonplace in the nonprofit industry, the grantees of the Excellerator Fund
leveraged students and adult volunteers to fill critical labor or knowledge gaps (e.g.,
marketing, communications, and social media). Several organizations are all volunteer-
based. Several Excellerator Fund nonprofits had no paid staff and relied heavily on their
volunteers. While organizations mentioned some positive experiences with long-term
volunteers, the vast majority mentioned significant challenges, such as high turnover or
working with volunteers who were ill-trained or unprepared. One organizational leader
remembered, "The Gen Z are so scared of phone work. Even phones, they're terrified [...]
We had to work with the university instructors [...] and try to figure out how we can help
them help us." Another leader talked about working with a student volunteer who was
supposed to assist them with marketing and communications, yet they had little to no
practical experience. As they explained,

> *[W]hat we found out is that oftentimes students don't have the skillset, for lack of better
> words. They're kind of lacking. Literally, we had an intern who had a Master's in digital
> advertising and had never created a digital ad [...] It's a big disconnect between what
> they're learning in school and the skills that will [transfer].*

Volunteers thus tended to create more labor for the organizations (at worst) and, at best,
served as a quick fix or short-term solution for minimal staffing. Survey findings that
indicate 41.1% of grantees remain in the "Growth" phase, and 19.0% in the "Start Up" phase
may help explain overreliance on volunteers and skills mismatch: given their growth or
start up phases, many organizations continue to lack stable staffing structures.

Recommendations

The recommendations offered here surface from Excellerator Fund grantees (in either surveys and focus groups) as well as reflect IRJ subject matter expertise, familiarity with the philanthropic landscape, and nonprofit administration and culture. We offer two tiers of recommendation types: (1) Short-term of "quick hits" and (2) Long-term and/or deeper investments. Short-term or "quick hit" recommendations refer to recommendations for implementation with minimal financial and/or personnel investments. Such recommendations can be implemented within 3-6 months, indeed within a year. Meanwhile, long-term recommendations require ample time and may necessitate deeper financial investments or personnel time/labor.

SHORT-TERM

Workshops/Trainings

Many grantees wanted to know what's next after the Excellerator Fund money runs out. This evaluation produces critical findings that staff can use to create the next phase of the Fund, which is skills and capacity building. In partnership with local experts and organizations, the Fund may provide workshops/trainings on:

a. How to analyze data and translate findings (e.g., impact reporting)
b. Aspects of fund development, including practical approaches to individual fundraising as well as grant-seeking and writing
c. Social media strategies to enhance marketing and communications

We recommend *remote* trainings to mitigate travel time. As several organizational leaders pointed out, to step away for a retreat or training is "a lot of commitment." A more long-term approach to trainings may include a series of trainings on a particular issue or topic wherein grantees have the opportunity to produce a delivery (e.g., a 6-month or year-long training on grant-writing wherein grantees must produce 2-3 major grant proposals). In this way, the training is hands-on, and leaders' involvement in workshops does not detract from their daily work stream or take away from their responsibilities but, instead, augments them. This recommendation is premised on "best practices" and the concept of the "spacing effect," which argues that individuals are more likely to retain information when it is layered over time or scaffolded, as educators refer to the process/practice. Ample research has been conducted on the efficacy of the spacing effect in skills-based learning among adults and deliberate practice (Kang et al., 2014). Indeed, one of IRJ's

partners, Digital Promise, has published on "distributed practice," which is often used interchangeably with the spacing effect.

Moreover, several grantees referenced AI as offering "great opportunities to do more with less," but they need additional training (e.g., how to leverage AI in data analysis). In that vein, any workshop or training on the topics above (grant writing, etc.) also embeds both the merits and shortcomings of AI.

Face-Time with Funders

Create an opportunity for grantees to meet directly and face-to-face with funders to: (1) learn more about traditional and community-driven philanthropic models; (2) orient themselves to the local Chicagoland philanthropic landscape, and (3) share their stories and pitch their programs. This opportunity may take the shape of a day-long expo comprising a series of panel presentations, roundtable discussions and dialogues, as well as workshops and hands-on trainings. The exchange would be bidirectional, wherein funders learn more about the issues facing nonprofits serving Black and Mexican communities in Chicagoland, and Excellerator Fund grantees gain insight regarding local philanthropic practices, culture, and upcoming RFPs or opportunities.

LONG-TERM

Ongoing/Continued Internal Networking Opportunities

Grantees mentioned on several occasions, both in focus groups and at the Spring '26 Fund convening, that they value gathering with one another. These gatherings serve as critical venues for resource-sharing, new collaborations, and emotional support as organizations navigate unprecedented national political-economic shifts and climate. The Fund may desire to coordinate or convene a small steering committee comprising 3-5 leaders of grantee organizations, whose role is to convene grantees every 3-6 months or annually. More long-term investments may look like each organization contributing to a collective pot of money or fund that covers the salary of a part-time manager or project coordinator, whose role is to convene grantee gatherings, publish a biweekly or monthly newsletter that shares local trainings and upcoming fund development opportunities, etc. Such a project manager or coordinator may also connect organizations to collaborate on a major grant proposal or share resources (e.g., sharing a bookkeeper or social media consultant).

Community-University Partnerships

Many organizations were open to partnership with local universities, but did not know where to start. As one person put it, it's about who you know to get your foot in the door, to partner with a university. The Excellerator Fund could leverage its preexisting university partnerships to generate a pipeline or streamlined system wherein grantees can reach out to local college or university faculty, units/departments, and/or research centers. Similar to offering a convening that gives grantees "face time" with local funders, the Excellerator Fund could facilitate a networking or "matchmaking" event in collaboration with local university partners.