

# Case Study of the American British Cowdray School of Nursing (ABCSN)

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## **Abstract**

This case study is the last of five looking at the influence of culture on fundraising activities in international non-profits. The American British Cowdray School of Nursing (ABCSN), a nonprofit school affiliated with a local Mexican hospital and university, reflects many of the fundraising practices common to Mexican non-profit organizations, which are in fact few. In Mexico, fundraising and philanthropy have never been widely practiced, a restrictive legal and tax framework inhibits fundraising activity, there is a general mistrust of nonprofits, and there is a general lack of knowledge about or skills with fundraising among nonprofit organizations. This case study examines the organizational structure and fundraising strategies of the ABCSN, and then reflects on the influence the cultural context of the organization has played on shaping them.

## **Cultural Context**

When the town of San Miguel Epejan in the Mexican state of Michoacan needed a new road, former residents who had emigrated to the Chicago suburb of Aurora, Ill., held raffles, sponsored dances and knocked on hundreds of doors asking for donations. In less than two years, their local organization, Club de Michoacan, raised more than \$100,000 to help the Mexican Government complete the road, which opened a few months ago. "In my town in Mexico, you call people your 'uncle' even if they are not related to you," said Gonzolo Arroyo, a native of San Miguel Epejan...."It's like a large family, and you rely on each other for lots of things."<sup>1</sup>

The above anecdote, from a recent *New York Times* article, goes a long way in describing the concept of philanthropy that currently prevails in Mexico – that it should focus first on the needs of family and the local community. Landim and Thompson<sup>2</sup> as well as Ramos<sup>3</sup> have observed that a common characteristic of Latin American countries like Mexico that were colonized by Spain is the strong preference among the populace for giving to needy friends and families or religious organizations instead of to mainstream philanthropies.

The Spanish word *ayuda* (help) is, according to De Mente,<sup>4</sup> a very important, culturally loaded concept in Mexico that goes a long way in explaining this orientation to philanthropy. Evoking the idea of the biblical 'Good Samaritan,' the cultural value of *ayuda* is, De Mente<sup>5</sup> argues, a holdover from the 300-year-long period when the Spanish

colonizers did not provide for social welfare or offer governmental assistance and, in fact, levied extremely burdensome taxes on the general populace. As a consequence, the common people were forced to rely on help from family, friends, and connections with influence. "This need for *ayuda* conditioned Mexicans to regard the practice as the highest form of social morality, and to take great personal satisfaction in helping others."<sup>6</sup> But this social value usually only extends to one's own circle of family, friends, and – in small communities – to one's neighbors. There has not been, through most of Mexican history, any strong sense of obligation to contribute to philanthropic causes to support society in general.

As Royce and Rodriguez note, "the value of personal relationships, or making connections through people you know, and conversely of the web of obligations this entails" all play a critical role in how Mexicans think about giving.<sup>7</sup> Royce and Rodriguez further assert that, for Hispanics in general, "there needs to be an intimacy about giving so that people feel a personal connection to the cause or to the persons soliciting funds. Who is involved is almost as important as what the cause is"<sup>8</sup> – so much so that there is a general suspicion, even distrust, of organizations outside one's personal network. These ideas are echoed by Wagner and Deck,<sup>9</sup> who argue that the values of *familiarismo* (significance of family) and *personalismo* (good character), among other common values, impact how people in Latin America relate to philanthropic efforts.

This is not to say that philanthropy has not played an important role in society in Mexican history. Fundraising undertakings were so prevalent and successful in 16th century Mexico, for example, that historians refer to this period as the 'charitable century.'<sup>10</sup> The point is that there is little tradition for the wide variety of secular nonprofit, philanthropic organizations that are typical across many fields in the U.S. and, accordingly, little understanding as to the practice and logistics of philanthropy. Like other Latin American countries, philanthropy in Mexico tends to be "passive" in form, limited to charitable, clientilistic, or paternalistic practices. "Rarely is philanthropy associated with any structured or sustained effort to relieve poverty, or with institutionalized forms of corporate citizenship. Corporate foundations are a very new phenomenon, and companies traditionally serve their own internal public, that is, their employees or immediate community."<sup>11</sup>

In fact, as noted by Ramos<sup>12</sup> as well as by attendees at a recent workshop on "Strengthening Philanthropy in Latin America" at Harvard University<sup>13</sup>, there is an extraordinary lack of trust in public institutions and in their provisions of services by residents of Latin American countries. This lack of trust carries over into other sectors as well, so that there tends to be a general sense of distrust even towards non-government philanthropic organizations, with most suspected of some level of corruption. Foundations, for example, are often seen as fronts for diverting public funds and donations.<sup>14</sup> This is no truer anywhere in Latin America than in Mexico.

Philanthropy in Mexico, consequently, has a public relations problem that has prevented it from being a major force for change in the culture. This includes (1) the lack of a cultural

tradition of philanthropy; (2) a restrictive legal and tax framework that does little to support and promote philanthropic activity; (3) a general mistrust of nonprofits; and (4) a lack of widespread philanthropic knowledge and skills in nonprofit organizations.

The growth of non-government philanthropic organizations is, in fact, a fairly recent phenomenon in Mexico – the national Mexican Center for Philanthropy (CEMEFI) was only established in 1994, for example – and the value of these organizations for the betterment of society is still not fully embraced by many Mexicans.

It is within this cultural context that the School of Nursing at the nonprofit American British Cowdray (ABC) Medical Center in Mexico City is forced to operate. This case study will overview the ABC School of Nursing, summarize its sources of funding, look at one specific example of fundraising used to support its programs, and discuss its operations within the context of Mexican culture that has been introduced here.

### **Description and Mission**

The ABCSN was founded in 1956 to support the professional training of nurses in Mexico City and specifically for the ABC Medical Center. The ABCSN is affiliated with and its program overseen by the Universidad Nacional Autonoma de Mexico (the National Autonomous University of Mexico), and is considered an important school of nursing in Mexico. The field of nursing in Mexico, however, is under a lot of stress. The basic education for "general" nurses is a middle school education (*secundaria*, which goes through the 9th grade) plus three-years of practical training, although requirements are slowly becoming more stringent. According to Elisa Quintero Ramirez, Director of Nursing at the ABCSN, there is currently a severe shortage of nurses in Mexico. Of the practicing nurses, she estimates that less than 10% have completed a bachelor's degree in nursing and only 2% have a masters degree or above. Many nursing duties, in fact, are performed by "para-nurses" – or nurse auxiliaries – who have had one only year of nursing training after completing the 9th grade. And even these are in short supply. According to Ramirez, this shortage of qualified nurses underscores an immediate and growing crisis in Mexico, and she sees the situation as only getting worse. She cites recent statistics that indicate that while there are 70,000 students currently studying to be medical doctors, there is only a fraction of this number currently studying to be nurses.

Enrollments of new students into the field of nursing became so weak in the 1980s that the ABCSN – a highly regarded school – closed its doors to training general nurses because it was no longer financially sustainable. Again, according to Ms. Ramirez, for every 1,000 students that enroll in nursing school, only 40 graduate; most of the others chose instead to drop out and take other jobs in private institutions or in the service sector. As a consequence, the ABCSN now focuses on providing specialized training to nurses who have received their general degrees elsewhere. For example, one of the programs that the ABCSN offers is the Nursing Diploma of Oncology, which can be earned through a continuing education course taught two days per week for two months.

There are a variety of interrelated reasons that have contributed to this troubling state of affairs for the field of nursing in Mexico. First of all, nursing is stereotypically considered a low prestige profession, best suited for women and not requiring much education. Since women have long been viewed as "second-class" citizens in Mexican culture, nursing – considered a women's profession – is not a highly desirable occupation, certainly by men but even by women. Consequently, salaries for nurses are extremely low; so low in fact that most nurses have to hold down two or more jobs. In 2000, the average annual income for nurses in Mexico was between 75,000 - 110,000 pesos (~US\$8,000 - \$11,500), plus benefits. According to Ramirez, many who are trained in nursing only stay in the field a few years before looking for better paying work. And those who stay in the field for at least ten years are frequently snapped up by higher paying industrial pharmaceutical companies, leaving many hospitals dependent on less experienced, younger nurses. This difficult situation for nurses is compounded by the attitude of many of the doctors with whom they work, which is, Ramirez notes, that nurses are little more than maids.

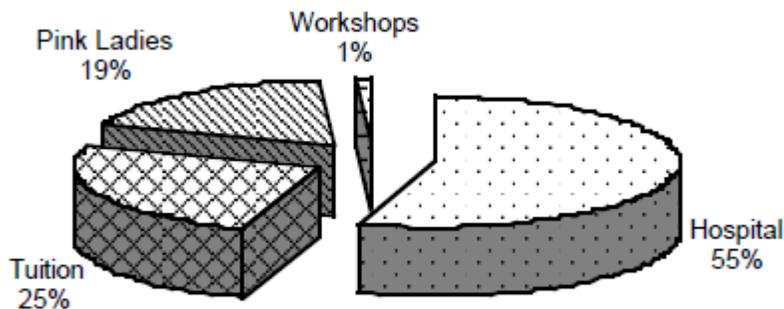
It is no surprise that nursing, as a profession, is very demoralized as a result of its extremely low pay and low prestige. According to Ramirez, few nurses in Mexico belong to a professional organization of any sort or attend professional workshops, conferences, or networking opportunities, primarily because most can afford neither the time nor the expense. Even Ramirez, who is the Director of Nursing at an important hospital in Mexico City, belongs to no national or international nursing organization and none of her colleagues at the hospital does either. In fact, of the approximately 120,000 nurses in Mexico in 1990, only about 800, 0.7%, belonged to the Mexican affiliate of the International Council of Nurses.<sup>15</sup> This compares with memberships of 25,000 to 50,000+ for the German, Finnish, and Japanese ICN affiliates discussed in other articles in this volume, not to mention a membership rate of over 50% of eligible nurses in Japan.

It is in this context that the ABCSN seeks to provide better professional training and a means of networking for nurses in Mexico City. This is primarily done through the offering of "post-basic" nursing and specialization courses (i.e., specialized courses focusing on one area of expertise, such as oncology or cardiology, taken by nurses who have already completed their basic nursing training); internships providing training in intensive care, and courses in health care management. Over the course of a year, the ABCSN reaches approximately 1,500 nurses through its various programs, including many free workshops.

Ramirez, as the Director of the ABCSN, reports directly to the Board of Directors of the ABC Medical Center. This alignment brings with it both advantages and disadvantages. The advantages are that the ABCSN can draw on the resources, expertise, and facilities at the Medical Center, which are some of the best in Mexico City, not to mention in Mexico. The disadvantage is that the Board of Directors is not solely focused on the well being of the School of Nursing, but must focus on balancing its needs with those of other units in the Center.

## Budget Overview

The ABCSN has an annual operating budget of 80,000 pesos (~US\$9,000). However, staff salaries, office space and equipment, and general maintenance are all covered by the Medical Center and do not come directly from their budget. Although the ABCSN is a nonprofit organization, annual reports and budgets were not made available during the interview, primarily because this sort of information is not freely discussed in Mexican culture. Nevertheless, Figure 1 provides an overview of the ABCSN's sources of funding as described by Ramirez. The largest percentage of the ABCSN's operating budget comes directly from the ABC Medical Center and is apportioned by the ABC Board of Directors. This money is generated from a wide variety of sources within the hospital, including income for hospital services, leasing of space for private practice, and research grants.



The second largest source of income for the ABCSN – accounting for 25% of the budget – is tuition for the internships, certificates and diplomas in various specializations that it offers to nurses already practicing in the field. This would include courses and internships in areas such as oncology, obstetrics, and electro cardiology.

A source of funding that is particularly interesting is from an organization called the Pink Ladies, in reference to the pink outfits they wear. This is a volunteer organization, established in 1953, whose mission is to support the ABC Medical Center by helping patients and their relatives as well as by raising funds to help support the hospital. These fundraising activities, while not insignificant, are fairly passive in nature; they do not actively solicit funds. The Pink Ladies rely to a great extent on activities such as garage sales, a used bookstore (literally a large bookshelf in one of the hospital rooms), and a small store on the ground floor of the hospital as the source of their donations. However, membership in the Pink Ladies is seen as socially prestigious, and so many of the volunteers come from the upper social class. Consequently, it is not unusual for the Pink Ladies to receive sizable bequests from estates or even donations from individuals; but these are never directly solicited.

The last source of direct funding the ABCSN taps is the registration fees for the workshops that they sponsor. While many of the workshops they offer are free, the three workshops that they conduct each year requiring registration fees generate approximately 1% of their overall budget.

One significant area of indirect financial support not documented in the budget lines of the ABCSN but critical to its operation is the pro bono service provided by many of the doctors at the hospital. Their cooperation is essential to the success of the ABCSN as a training ground for nurses, as they are the ones who provide much of the hands-on practical training that the nurses in the certificate programs require. Ramirez estimated that the doctors – many of whom are considered the best in Mexico – offer as many as two hours per day of pro bono service providing supervision of the nurses serving internships. She calculated that these services are worth close to 300,000 pesos (~US\$32,500) per year, almost four times the ABCSN's operating budget.

## **Fundraising**

The ABCSN is in many ways different from the affiliates of the International Council of Nurses discussed in the other case studies in this volume. The most notable difference is the fact that the ABCSN gets a sizable percentage (55%) of its funding from the hospital with which it is connected and so does not have to rely totally on revenue generating activities for its support. Further, while the funding provided by the Pink Ladies (19%) is generated solely through fundraising activities, this organization is independent of the ABCSN. The decision on how much is given to the ABCSN by the Pink Ladies is determined by the ABC Medical Center Board of Directors. Consequently, 74% of the ABCSN's budget comes from fairly stable sources over which the school has little control. However, this difference between the ABCSN and the International Council of Nurses affiliates is itself very much in keeping with the cultural context in which the ABCSN operates; there are very few nonprofits in Mexico that rely primarily on active fundraising efforts as a means of supporting themselves. The ABCSN simply reflects this cultural reality.

Consequently, the ABCSN has direct control over only 26% of its budget, which comes from the income generated by tuition for the professional courses and diplomas (25%) and workshops (1%) that they offer. As the tuition from courses, diplomas, and internships account for the largest percentage of the ABCSN's operating budget over which it has the most direct control, the material that advertise these proves to be the most interesting example of the promotional discourse used by this Mexican nonprofit to generate interest in one of its services. We will look at the promotional materials for one of these specialized courses more closely.

## Course Promotion

The promotional material we have chosen to examine is for the post-basic specialization course that provides certification in nursing oncology. According to Ramirez, the promotional efforts for this course are very typical of how the ABCSN seeks to promote all of its courses, workshops and internships. This promotional material consists of two pieces: an 8 1/2" x 11" poster and a tri-fold brochure printed on two sides of an 8 1/2" x 11" sheet of paper. The production of these materials underscores the tight budget and limited resources that the ABCSN must contend with. Both the flyer and the poster are nothing more than a computer-generated document printed in three colors (blue, red, and gray) on an ink-jet printer. These promotional materials are all the more surprising when one considers that the ABCSN is one of the best funded and one of the most prestigious schools of nursing in Mexico.

Both the flyer and the poster offer only the barest information about the course. Looking at it from top to bottom, the flyer has a header that includes the logos of the ABC Hospital and the Universidad Nacional Autonoma de Mexico, the affiliate university. Beneath the logos are the full names of the American British Cowdray Medical Center and the School of Nursing. The course is then announced with the wording: "*Convocan Al Diplomado de Enfermería en Oncología*" (An Invitation to a Certificate in Nursing\_Oncology) in bold letters, followed by the dates the courses are offered. There is then a bulleted list of six *requisitos* (requirements) for registration. At the bottom of the flyer is a footer that indicates the address, dates and times for registration, and the telephone number. Interestingly, the 1,850 peso (~US\$200) registration fee is not specifically listed anywhere and can only be found by contacting the school.

The brochure basically just duplicates the information given on the flyer and adds two other pieces of information. The first is a general description of the certificate, which is given on the first inside panel of the tri-fold flyer. Translated into English, this description reads: "The certificate will be taught in five modules based on the practical and theoretical aspects of oncology. The focus is to help students develop a process of nursing care that can be applied to patients with this pathology." The other piece of information that is given which is not on the poster is specifically when the course is offered: Tuesdays and Thursdays, 8:00 - 14:00.

What is most striking about these promotional materials is their rather casual and informal nature. The goal of the materials is plainly just to list the details on the certificate: what the topic is, what the requirements are for registering, and when and where it will be offered. There is little effort to try and sell the course through overtly persuasive strategies. There is little color, there are no pictures and catchy phrases, and the flyer and brochure have little eye appeal to them in their design and presentation.

There is also no major effort made to 'get the word out.' The ABCSN maintains no mass mailing list of nurses to whom they send their promotional materials, nor is there any other

sort of targeted campaign. Essentially, the only efforts are to post the flyers in various locations around the ABC Medical Center and to pass out flyers to nurses who express interest in finding out more about the certificate. The result of this effort was that about 20 nurses registered to take the certificate course during fall 2001, which is considered fairly typical.

## **Cultural Influences on ABCSN**

The most important cultural influence on the field of nursing as a whole is that nursing in Mexico is saddled with a fairly low-level of professional prestige, although there are signs that this is changing. Job opportunities, employment conditions, and salaries are for the most part poor, and there is not a strong sense of professional unity across the field; this is most clearly reflected in the fact that there is not a strong national nursing organization to unite nurses toward common causes. In Mexico, most nurses do not have the disposable income, the time, or the motivation to be actively involved in self-supporting professional organizations. Consequently, there seems to be a reliance on organizations like the ABCSN, tied to hospitals which have a continuing need for trained nursing staff, to meet many of the professional development needs of nurses and to serve as a (not unbiased) voice seeking improvements in the profession. Even the ABCSN alumni association, very active through the 1980s, no longer meets due to lack of interest.

How the ABCSN funds its programs and services is also very much in keeping with Mexican cultural traditions for nonprofit organizations. Most obvious is the fact that there is almost no direct solicitation of financial support from outside organizations or foundations. Carmen De Villela, Director of Public Relations at the ABC Medical Center, did provide two grant proposals that were submitted to local foundations seeking support for the ABCSN – one in 1983 and the other in 1990 – but neither was funded. That these were the only two efforts to apply for foundation support over the past two decades, and the lack of any follow up when proposals were denied, underscore the cultural barrier that exists to the idea of soliciting external funds from in Mexico.

When asked why the ABCSN did not try to pursue funding from individuals, foundations, or from government grant sources to support the many worthy efforts that they spearheaded, the answer was, "We just don't do that." There is this underlying reluctance to go to outside organizations who are not connected in some fashion to the ABCSN to seek financial assistance; in effect, this would be asking for help from strangers, not from family and friends. According to Ramirez, the Board of Directors for the ABC Medical Center does regularly solicit funds from wealthy local benefactors who have had long relationships with the hospital, but this is a very informal process. The benefactors are approached individually by members of the Board who know them, with the specific need and financial request made personally. There are no grant proposal forms that are filled out and submitted to be considered in competition with other institutions looking for funds.

The Mexican tradition of only seeking help from family and friends has a profound impact

on ABCSN as a nonprofit organization. This clientilistic, paternalistic approach to philanthropy, while working reasonably well for the well-situated ABCSN, severely restricts the potential sources of funding, not only for the ABCSN but also for nonprofits in general in Mexico. Unless benefactors can be identified to provide financial support, most nonprofits find it very difficult to generate operating funds. Not only is there a general reluctance to pursue funding from outside sources, more importantly, there is almost no tradition for giving financial support to organizations that are not directly connected to the giver. For the field of nursing, this results in a double hit. Not only do most nurses not make enough money to contribute to a professional nursing organization, even if they did, they would not likely be inclined to support it, nor would the organization be active in seeking that support.

Two other factors must also be considered when looking at the influences that constrain fundraising practices for the ABCSN. First is the overall level of poverty in Mexico. While nurses do make less than satisfactory wages, this must be seen in the context that over 40% of Mexicans scrape by on just \$2 a day, the World Bank's definition of poverty. Nearly 25% live in extreme poverty, surviving on only the equivalent of \$1 per day.<sup>16</sup> And those living above the poverty line do not for the most part live a comfortably middle class life; economically, life is difficult for most Mexicans. Consequently, there are many demands on the economic resources that are available. The professional needs of the field of nursing are easily lost among the competing needs of a large segment of the Mexican population.

One last factor that puts constraints on the ABCSN fundraising efforts is Mexico's tax laws with regards to nonprofits and donors. While Mexico's tax laws can be seen as fairly progressive in comparison to many countries, there are at least two features that dampen some fundraising efforts. The first is that very few Mexican states grant local fiscal incentives to nonprofit organizations; the second is that in-kind donations produced by corporations and professional services are not deductible.<sup>17</sup> Both of these features of the Mexican tax law only diminish the incentive for giving by many individuals and businesses.

It is important to note, however, that fundraising practices in Mexico are very quickly changing. For example, as noted earlier, just within the past few years the Mexican Center for Philanthropy (CEMEFI) was established to promote philanthropic activities. There are also a growing number of links between U.S. and Mexican philanthropic organizations, such as the Indiana University Center of Philanthropy and the Mexican organization Procura, whose mission is to train local people on how to better run nonprofits and do fundraising. In fact, the ABCSN has expressed interest in working to find new ways of raising funds for its programs. Nevertheless, there are many cultural and economic barriers that still need to be overcome before this 'third sector' of the Mexican economy plays a more significant and mainstream role in the country.

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