

LATINX PHILANTHROPY:

Understanding
Generosity Trends
Across Latinx
Communities
in the U.S.

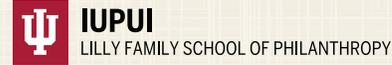


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Hispanics in Philanthropy

Hispanics in Philanthropy leverages philanthropic resources to mobilize and amplify the power of our communities. We've been building, funding, and fueling Latine power for 40 years. We're conveners, creating spaces for organizations, the private sector, and philanthropy to connect and collaborate to dismantle the inequities that affect the wellbeing of Latines in the U.S. and our communities across the Americas.

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FOREWORD

It's been said, especially in philanthropic circles, that what isn't counted doesn't count. We know that measurement matters, especially when seeking to understand the role and impact different communities have in advancing social change. But Einstein is also attributed with saying "Not everything that can be counted counts, and not everything that counts can be counted." Where do communities most underrepresented in philanthropy find the balance between creating and owning data on impact, and acknowledging the reality that much of the history of generosity in communities of color is not transactional but relational and so very difficult to measure?

Latinx Philanthropy: Understanding Generosity Trends Across Latinx Communities in the U.S. is just one step towards building a body of research on the contributions of Latinx communities using philanthropy in different ways for social change. Yet as the report shows, there is still much work to be done to understand different approaches to giving, motivations, trends and patterns over time and across geographies and identities among Latinx. HIP's work is at the nexus of giving and representation, seeking to promote generosity but with a lens towards a future with equity and justice. Our hope, along with our partners at the Indiana University Lilly Family School of Philanthropy, is that this report brings us closer to a necessary understanding about the complexities of giving in and across Latinx communities.

The report's findings draw from a literature review, data from national surveys, and insights from focus groups, in addition to demographic information about Latinx communities. Throughout, readers will see the themes of faith, family, and community as both the current motivators for giving, as well as the groundwork for changes that many Latinx donors hope to see as philanthropy—and their role in it—evolves. Despite declines in giving among Latinx donors in recent years ([a trend across populations](#)), there remains a commitment to supporting family and community, and to building relationships that give greater meaning to the donor-partner dynamic.

In a population that notes they are rarely asked to engage in philanthropy, these desires point to an amazing potential for growth—not just in the amount of giving but also in the ways in which Latinx communities can enhance traditional systems of mutuality and help redefine the future of philanthropy. We invite readers to use this report as a launchpad for their own refinement of giving approaches in and across Latinx populations, and as a starting point for building a more inclusive and informed community of giving by and for Latinx people.

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EXECUTIVE SUMMARY

Latinx philanthropy, which includes both formal and informal charitable giving, is gaining momentum and driving impact across the United States.¹ Latinx communities are diverse in many ways, including changing patterns in countries of origin and/or descent, immigration status, language preferences, values, faith, wealth, and education. Yet, there has been limited research to keep pace with understanding Latinx philanthropic trends, even though they are one of the fastest-growing ethnic populations in the United States (Frey, 2021).

In order to better understand Latinx generosity, the Indiana University Lilly Family School of Philanthropy conducted two extensive scans of existing literature, two focus groups comprised of donors, philanthropic advisors, and nonprofit professionals, and three surveys. The main findings of this report come from the Philanthropy Panel Study (PPS), a longitudinal panel study that surveys households every other year on giving behaviors. Two surveys supplement the main findings of this report: 1) the General Social Survey (GSS) cross-sectional survey includes information about general social behaviors and opinions, and 2) the Bank of America KnowledgePanel (BOA) data provides insights about high net worth donors and their giving motivations, patterns, and priorities.

Based on the data, this report provides key insights into how and why Latinx individuals in the United States give. Although Latinx donors continue to emphasize family, faith, and local communities in their giving, philanthropic strategies are also expanding. Latinx donors are responding to a broader range of social issues and investing in future generations.

This research adds to the literature on Latinx philanthropy by providing new insights into the changing patterns and trends of Latinx philanthropy in the United States. It also offers recommendations for philanthropy, nonprofits, and fundraisers on variations in Latinx giving, barriers and challenges for Latinx nonprofits, and trends to follow. The main research questions are:

1. What are the long-term giving trends among Latinx in the United States?
2. How do wealth, trust, immigration status, values, and preferences help explain Latinx giving?

¹In this report, “Latinx” is adopted as a pan-ethnic umbrella term based on feedback from Hispanics in Philanthropy and members of Latinx communities. Please see the terminology section of the report for more details.

Highlights

The highlights provided in the executive summary incorporate results from all the data sources. Readers are encouraged to refer to the main text of the report to learn how findings are distinguished based on the sources of data.

- 1. Latinx donors commonly give based on values, interests, organizational connections, and identities.** Values and interests often include family and community, with giving often occurring horizontally—between families and communities—rather than vertically toward organizations. Family involvement is also important among Latinx high net worth donors; they are more likely to involve children, grandchildren, and/or younger relatives in giving decision-making than non-Latinx high net worth donors.
- 2. Latinx households are significantly more likely to engage in informal giving** compared to non-Latinx households. This holds true even when controlling for other factors, such as education level, age, marital status, gender, income and wealth, employment status, religion, and immigration status.
- 3. The top priority causes for Latinx household charitable giving were 1) religious congregations; 2) food, shelter, and basic necessities; 3) healthcare and medical research; and 4) education,** which matched those of non-Latinx households. When Latinx high net worth donors were asked if issues, organizations, geographic areas, or something else drove them to give, nearly all selected either issues (53%) or organizations (37%). The remaining 10 percent either selected geographic areas (3%) or “other” (7%).
- 4. While an increasingly smaller percentage of Latinx households gave to charitable organizations over the last two decades (44% in 2000 down to 26% in 2018), this pattern is comparable to trends in the general population.** However, the percentage of Latinx households that gave remained lower than non-Latinx households throughout the period.
- 5. Among Latinx households, giving rates differed based on immigration status.** Although giving among Latinx immigrant households and U.S.-born households experienced similar rates of decline, Latinx U.S.-born households maintained a higher overall rate of giving, beginning at 67 percent (2000) and declining to 51 percent (2018), whereas Latinx immigrant households’ giving rates fell from 56 percent (2000) to 40 percent (2018). Giving to religious congregations also declined for both groups, with U.S.-born households maintaining a higher rate of giving to religious congregations.



- 6. Among Latinx immigrant households, giving patterns diverged by time lived in the U.S.** Giving rates among recent immigrant Latinx households fluctuated but maintained an overall increase throughout the two decades, whereas giving rates among established immigrants remained consistent until 2010, after which they slightly declined, with a sharp decline in 2018. Further, established immigrants maintained higher rates of giving to religious congregations than recent immigrants.
- 7. As the Latinx population grows, donors are pushing for giving beyond traditional outlets**—family, religious congregations, local neighborhoods and communities, and the education sector—and toward a broader range of causes and organizations alongside strategic, long-term investments in Latinx communities.

Implications for Practitioners

- 1.** Family, faith, and community are important for Latinx giving decisions and priorities. The priority causes include religious congregations, basic needs, health, and education, and both the focus group participants and affluent households seek to strategize investments in the next generation. **Understanding the central role of family and intergenerational involvement and engaging with Latinx communities on strategic priorities can inform more robust stewardship practices.**
- 2.** Latinx people are one of the fastest-growing ethnic populations in the United States (Frey, 2021). As members of Latinx communities reside longer in the United States, giving patterns may shift to reflect long-term and U.S.-born trends. For example, U.S.-born Latinx individuals maintained higher rates of giving when compared to Latinx immigrants, and the longer immigrants lived in the U.S., both secular and religious giving increased. Further, vital conversations are emerging to address opportunities for strategic, long-term investments in and by Latinx communities. **Understanding these trends can benefit engagement with Latinx people, whose communities have demonstrated a desire to widen their philanthropic reach.**

3. Latinx households are significantly more likely than non-Latinx households to engage in informal giving across age, education, income, immigration status, and gender. This finding might be contextualized by prior research which suggests that Latinx giving may be linked to feeling a personal connection (Ramos, 1995; Rivas-Vázquez, 1999; Lefty, 2017; Moniz et al., 2018; Méendez, 2020; Orta, 2021). **Future research can explore what factors or types of personal connections make informal giving to extended family and local networks an important practice among Latinx households.** A deeper understanding of how Latinx households engage in informal giving can also inform nonprofit engagement with Latinx households.
4. “Latinx” is a pan-ethnic umbrella term used in the report, but many Latinx individuals do not use this term to self-identify. “Latinx” includes highly diverse groups in terms of their countries of origin or descent, racial identities, gender identities, educational levels, income, linguistic preference, and immigration status. **Understanding the diversity within Latinx self-identification and terminology can inform fundraising and nonprofit communications and relationships.**





INTRODUCTION

Latinx philanthropy is growing in its visibility. Giving circles, dedicated funds, and community-based organizations are among the many ways in which Latinx philanthropy is gaining momentum and responding to local and community-driven needs. Latinx people—of different countries of origin and backgrounds—are making an impact across both Latinx and non-Latinx communities. Faith, family, and country of origin are often integral to Latinx giving, where the need to give back and engage in community-based reciprocity are motivating factors. There has been limited research, however, to keep pace with the growth and changes among Latinx communities and their diverse philanthropic motivations and behaviors. Among the philanthropic research projects that address Latinx communities, few are focused specifically on the growing diversity and changing needs of Latinx donors (Ramos, 1999).

In this report, we aim to expand the understanding of Latinx philanthropy. Latinx people represent a growing population with a diverse range of countries of origin and many ways of expressing generosity. In fact, Latinx communities are one of the fastest-growing ethnic populations in the United States (Frey, 2021). According to the U.S. Census Bureau, the Latinx population in the U.S. totals 62.1 million, making it the nation's largest ethnic minority (Passel et al., 2022). Between 2010 and 2020, the Latinx population grew 23 percent and now constitutes 19 percent of the nation's total population.

We rely on two decades of data to analyze how demographics, values, and preferences are correlated with giving patterns among Latinx households and individuals. The main findings of this report come from the Philanthropy Panel Study (PPS), a longitudinal panel study that surveys households every other year on giving behaviors. This provides information about the long-term giving behaviors among Latinx people. In addition, we included two surveys to supplement the main findings: 1) the General Social Survey (GSS) cross-sectional survey that includes information about general social behaviors and opinions, and 2) the Bank of America KnowledgePanel (BOA) data that provides insights about high net worth donors and their giving motivations and affinities. To contextualize the survey findings, we also conducted two focus groups among Latinx donors, advisors, and nonprofit professionals in 2021 and 2022.

We found that Latinx giving over time shares some of the general patterns of charitable giving in the United States. A lower fraction of Latinx households gave to charitable organizations over the last two decades, with the 2008 recession representing a significant turning point (Lowen et al., 2007;



The Giving Environment: Giving Trends by Race and Ethnicity [forthcoming]). This declining trend was observed across all racial and ethnic groups, with changes in income and wealth explaining a small percentage of the overall drop.

Latinx giving also has distinctive patterns. When compared to non-Latinx households, a relatively large percentage of Latinx households engage in private transfers, which is a form of informal giving to non-household members. Further, immigration status, time lived in the U.S., and language preference are also linked to variations in giving, including giving rates to religious congregations, secular organizations, and informal giving. While overall and religious giving rates declined at similar rates among U.S.-born and Latinx immigrants, U.S.-born individuals maintained higher rates of giving in both analyses. Secular giving followed different patterns. Although Latinx people generally have lower income, have larger households, are younger, and have lower rates of educational attainment, media stories on Latinx giving suggest that Latinx philanthropists are becoming more visible as charitable donors and investors in the next generation (Muñoz, 2022; Smith, 2020; Murray, 2017). Among affluent Latinx donors, family involvement in decision-making and the inclusion of the next generation in philanthropic activity are important. While researchers and policymakers have studied how shifting demographics are reshaping politics and education, they have focused less on how these demographic shifts are linked to philanthropy.

As the U.S. continues to engage in meaningful conversations about the impact of the global majority, the findings provided in this report help illuminate the ways in which Latinx communities are shaping philanthropy in the U.S. The report also provides insights for strategic philanthropic investments among the next Latinx generation and offers implications for the overall scope of the philanthropic sector.

The research questions for this report are as follows:

1. What are the long-term giving trends among Latinx in the United States?
2. How do wealth, trust, immigration status, values, and preferences help explain Latinx giving?

After presenting key findings and discussing terminology, we explore the existing literature on Latinx philanthropy in the United States and Latin America for important context. Then, we detail the methods and research findings and conclude with limitations, implications, and suggestions for future research.





KEY FINDINGS

Everyday Donor Findings

1. The top causes for Latinx household charitable giving were: 1) religious congregations; 2) food, shelter, and basic necessities; 3) healthcare and medical research; and 4) education. Latinx donor priorities matched those of non-Latinx donors.
2. Latinx households were significantly more likely to engage in informal giving compared to non-Latinx households. This held true even when controlling for other factors, such as education level, age, marital status, gender, income and wealth, employment status, religion, and immigration status.
3. Over the last two decades, Latinx household rates of giving to charitable organizations dropped from 44 percent in 2000 to 26 percent in 2018. These rates are consistently lower than non-Latinx households.
4. Among Latinx households, giving patterns varied based on immigration status. Giving among Latinx immigrant and U.S.-born households experienced similar rates of decline. Latinx U.S.-born households, however, maintained a higher overall rate of giving, beginning at 67 percent in 2000 and declining to 51 percent in 2018, whereas the giving rates for Latinx immigrant households began at 56 percent in 2000 before declining to 40 percent in 2018.
5. Giving patterns diverged based on time lived in the U.S. among Latinx immigrant households. Giving rates among recent immigrants fluctuated throughout the two decades with an overall increase in giving rates, whereas giving rates among established immigrants remained consistent until 2010 after which it slightly declined, with a sharp decline in 2018.
6. As researchers have established links between interpersonal trust and charitable giving, decreasing rates of interpersonal trust among Latinx households (46% in 1972 to 26% in 2018, with the lowest rate reaching 12% in 2008) could offer a possible and partial explanation for the decline in Latinx charitable giving.



Focus Group Findings

7. Latinx donors, philanthropic advisors, and nonprofit professionals who participated in the focus groups shared that they commonly gave based on values, interests, and organizational connections. Additionally, focus group participants had an affinity for giving to causes or organizations that aligned with their identities.
8. As the Latinx population and Latinx philanthropy grow, the focus group participants said they are pushing for giving beyond traditional outlets—family, local neighborhoods and communities, and the education sector—and toward a wider range of causes and organizations.
9. The Latinx donors, philanthropic advisors, and nonprofit professionals emphasize the need to shift from short-term crisis responses to strategic, long-term investments in Latinx communities, including philanthropic engagement and education among younger Latinx generations.
10. The focus group participants also overwhelmingly call for structures and tools that would enable more collaboration across communities of color as well as Latinx individuals and organizations.
11. Furthermore, the Latinx donors, philanthropic advisors, and nonprofit professionals call for civic engagement, innovation, and good stewardship of giving and investments.

High Net Worth Household Findings²

12. High net worth Latinx households are significantly more likely to consider themselves knowledgeable about charitable giving and philanthropy (57%) when compared with non-Latinx individuals (48%).
13. High net worth Latinx households are more likely than non-Latinx households to be involved in and to learn about how to engage the next generation of children, grandchildren, or younger relatives in giving, charity selection, or causes to support.
14. When Latinx high net worth donors were asked if issues, organizations, geographic areas, or something else drove them to give, nearly all selected either issues (53%) or organizations (37%). The remaining 10 percent either selected geographic areas (3%) or “other” (7%).

²See Appendix A for an expanded methods section on how high net worth households are determined.



TERMINOLOGY

To maintain consistency for our readers, we consulted with Hispanics in Philanthropy and members of Latinx communities, and additionally researched a variety of practices before adopting the term *Latinx* for this report. In this section, we draw attention to the wider spread of labels and the nuances that each term provides. In the United States, Latino, Latinx, and Hispanic are overlapping, pan-ethnic terms describing a people with extremely diverse backgrounds. *Latino* can broadly refer to people from Latin America, including non-Spanish speaking countries while *Hispanic* typically includes Spain and Spanish-speaking countries, but excludes countries like Brazil (Lopez et al., 2022). *Latinx* is a recently introduced alternative label, but it has faced mixed responses about its use of gender neutrality among non-gender neutral romance languages like Spanish; as of yet, the term *Latinx* is not widely used (Lopez et al., 2022). Based on a 2019 Pew Research report, about 47 percent of Latinos use their family's country of origin to self-identify, while others use the labels of Hispanic, Latino, or American, and others do not have a preference (Gonzalez-Barrera, 2020).

Latinx communities are highly diverse across racial identity, educational attainment, income, linguistic preference, immigration status, and parental backgrounds. Furthermore, ethnic self-identification sometimes varies based on these and other characteristics. For the purposes of this report, we will use the term *Latinx*, including when describing the survey findings. We note that the U.S. Census Bureau, the Philanthropy Panel Study, and the General Social Survey adopt the term *Hispanic* to conduct surveys and collect data. In fact, beginning in 1970, the U.S. Census questionnaire included a question about ethnicity, defining Hispanic or Latino as a person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race. Although the original survey questions used the term *Hispanic*, we will use *Latinx* to describe survey findings.

We also note that Hispanics in Philanthropy (HIP) uses Latinx, Latino, Hispanic, and Latine, depending on staff and regional preferences. To narrow the final selection to Latinx, we consulted with community experts and incorporated their generous feedback.



BACKGROUND

The findings of this report are focused on Latinx communities in the United States, which draw on cultural traditions, institutions, and networks outside of the United States, including from Mexico and countries in Central America, South America, and the Caribbean. To enrich our understanding of Latinx philanthropy, we conducted two environmental scans of Latinx giving, each with a different geographic focus. This section provides an overview of the literature that shapes our perceptions of Latinx philanthropy. It first explores extant literature on Latinx giving trends in the United States and then delves into select Latin American countries to illuminate the diverse landscapes of Latinx philanthropy and give context for this report's findings.

Latinx Philanthropy in the United States³

Latinx people recently emerged as the largest ethnic group in the U.S. electorate (Cilluffo & Fry, 2019). They play an outsized role in the national labor force and have a combined gross domestic product (GDP) that has increased annually, totaling USD 2.8 trillion in 2020 (U.S. Bureau of Labor Statistics, 2013; Caceres & Hanson, 2019; Hamilton et al., 2022). This growth, however, has not yet yielded greater charitable investments for Latinx communities (Caceres & Hanson, 2019). The following review helps contextualize these gaps with a discussion about the range of philanthropic practices, motivations, mechanisms, and challenges among Latinx people.

Past studies have found that Latinx people exhibited lower rates of participating in some types of giving (e.g., money or in-kind donations) when compared to other ethnic groups, yet still gave generously (Diaz et al., 2001). When adjusting for socio-economic factors, the gap seems to lessen, and among higher income ranges, Latinx people give to nonprofits at a higher rate than non-Latinx people (Lowen et al., 2007). Overall, income, education, and linguistic skills have been found to be important determinants in giving (Cortes-Vásquez et al., 2001; Indiana University Lilly Family School of Philanthropy, 2019). Also, increased length of residence in the United States is associated with increased percent of households that gave (40% for 5 years vs. 70% for more than 25 years) (Cortes-Vásquez et al., 2001). Other studies have found that Latinx people give at a comparable (if not higher) level than other ethnic groups (Indiana University Lilly Family School of Philanthropy, 2016a; Solaun, 2018). For example, in a study of Puerto Rican households, 74.9 percent

³This section is based on a literature review conducted by Kenneth Chitwood, Ph.D.





of Puerto Ricans gave to charity, a higher rate than the giving levels of the U.S. mainland (Indiana University Lilly Family School of Philanthropy, 2016a). Among high net worth Puerto Ricans, giving was higher at 88 percent, but lower to the comparable group in the U.S. diaspora.

Among Latinx communities, differences in monetary giving might be influenced by a variety of factors, including disparities in income, inter-generational wealth, and education between Latinx people and the general population (Lowen et al., 2007). Within this context, informal philanthropy is prevalent. Informal philanthropy is directed to family, kin, and community, especially through cash remittances and gifts to the country of origin (Ramos, 1999). This type of giving is more responsive to immediate needs and natural and economic crises; they are not typically reported for tax purposes (Ramos, 1999). In a different study, informal giving patterns were also visible among Mexicans, Guatemalans, and Salvadorians in the United States (Smith et al., 1999). For Latinx donors, family, extended family, and the community took priority as recipients of helping and sharing. Giving took on many forms, including direct cash assistance, goods, clothing sent to one's country of origin, and sharing food, housing, or other resources to support someone in need. In fact, except for churches, little giving was directed to nonprofit organizations.

The three main giving motivations for Latinx individuals include a personal obligation, religion, and a personal connection to the person representing the cause—someone they respect and admire. In fact, a personal sense of responsibility to the community is the most frequent motivation for giving among the Latinx population (Solaun, 2018; Indiana University Lilly Family School of Philanthropy, 2016a; Vallejo, 2012; Vallejo, 2009; Aguirre and Min, 2005; Hispanic Federation, 2002; Center on Philanthropy and Civil Society, 2003). Overall, Latinx people prefer to give first to family and then to extended family, friends, and people in need. This sense of responsibility to the community is reflected in informal giving. For example, Solaun (2018) found that the largest average of Latinx giving (\$726) was dedicated to informal giving to family and friends, higher than average giving to both religious organizations and charitable organizations (Solaun, 2018). This trend of informal giving was found among Puerto Ricans; it also held true among high net worth donors and was especially true among those with a strong ethnic and cultural identification (Indiana University Lilly Family School of Philanthropy, 2016a; Solaun, 2018; Indiana University Lilly Family School of Philanthropy, 2016b). The most preferred channels of giving include “high touch” and direct giving to beneficiaries rather than institutional mechanisms such as endowments or donor-advised funds. And the main barrier for Latinx donors is that they are not being asked to give.



Across multiple studies, religious beliefs are noted as a strong motivator for giving among the Latinx population (Aguirre & Min, 2005; Marx & Carter, 2008; Mottino & Miller, 2005; Rovner, 2015; Solaun, 2018). In a U.S. report on volunteering and giving, researchers found that Latinx people who were either members of a religious group or who felt a religious responsibility were four to five times more likely to donate to religious organizations (Marx & Carter, 2008). Sometimes, religious giving is not even perceived to be giving. For example, one study noted that 80 percent of Latinx people donated to church, but only 15 percent reported church or church-related activities as an area of interest (Rivas-Vázquez, 1999). While giving to church might not be considered giving, the underreporting may also occur due to an expectation to give quietly without recognition (Mottino & Miller, 2005). Of note, giving based on religious beliefs has also diversified among Latinx donors. Following the disestablishment of religion in the Americas in the 19th and 20th centuries came the simultaneous “growth” of non-Catholic religions in Latin America and the Caribbean. These traditions were already present, but following the disestablishment, there was no longer a direct tie between enforcement of orthodoxy and the state, and according to Peterson and Vásquez (2008) this gave non-Catholic religions the ability to surface and proliferate. This has meant Latinx religious giving has come to include more than giving by just Catholics and/or Protestants, but also Muslims, Pentecostals, and others (Morales, 2018; Peterson & Vasquez, 2008; Lopez et al., 2022).

Philanthropy in Latin America⁴

In Latin America, the term philanthropy has been used to describe charitable activities by the Catholic church and donations from “the rich” to “the poor” (Sanborn & Portocarrero, 2003; Sanborn & Portocarrero, 2008). Historically, philanthropy focused on solidarity activities of relief and mutual assistance, which sought to assist the poor through voluntary donations (Fundacion AVINA, 2010). With time, the concept included mobilizing resources towards nonprofit organizations and later a strategy used for corporate donors to give back to society and promote social change. Some potential barriers to philanthropy include the lack of clarity in the role of government, legal impediments to social investments, and the confusion over which donations are tax deductible (Carrillo et al., 2008; CEMEFI & TrustLaw, 2001).

Foundations in Latin America currently focus on deeper systemic issues and use strategic tools to tackle their causes. The primary focus of donations is education, along with other areas such as welfare and social development, issues of poverty,

⁴ This section is based on a literature review conducted by Maura J. Pereira-Leon, Ph.D.





community development, social services, and disaster prevention, which have emerged more recently. Development of art, culture, and heritage also received donations, though to a lesser extent (Berger et al., 2019).

The regionally published literature on Latin American philanthropy is produced mainly by umbrella and academic philanthropic organizations in countries like Mexico, Brazil, Colombia, and Chile, where formal philanthropy is more vibrant than in any other Latin American country. Umbrella philanthropic organizations have been created to organize and strengthen the sector. In Mexico, Brazil, Colombia, and Chile, the reduction of international aid and reduction of state protectionism in the late 1990s paved the way for socially responsible corporations and the growth of the nonprofit sector and civil society organizations (CSO), funded mainly by internal donors, government, and corporate philanthropy (Almaraz, 2014). Although international cooperation still plays a role in some Latin American countries, in countries like Brazil, most donations to philanthropic organizations are given by foundations and businesses (Etchart & Comolli, 2013). In Brazil, Chile, Colombia, and Mexico, corporate philanthropy has been shaped by its relationship with the government sector and the existing regulations that facilitate or hinder the sector's development (Aninat & Fuenzalida, 2017).

In Mexico, most philanthropy is informal, and Mexicans are perceived as generous people (Layton, 2013). Formal philanthropy via philanthropic organizations primarily addresses the following five social issues: arts and culture, basic needs, early childhood education, health and medical research, and religion (Indiana University Lilly Family School of Philanthropy, 2022). 77 percent of the Mexican population is Catholic, and many philanthropic organizations adopt faith-inspired values in their services and programs. Corporate foundations give primarily to human services, followed by education, and are primarily motivated by "giving back to society" and "being good corporate citizens," following the philanthropic traditions of their owners or founders and meeting the basic needs of the communities where they operate (Villar et al., 2014; Carrillo et al., 2008).

In Colombia, philanthropic organizations address the following social causes: pediatric health, natural disasters, human rights, collective movements, corruption, racial discrimination, environment, and traditional festivals (Indiana University Lilly Family School of Philanthropy, 2022). Donors are motivated by altruism, egoism and reputation, and values and self-growth (Ossa-Arboleda & Ceballos, 2019). Volunteering demonstrates solidarity with civil society (Indiana University Lilly Family School of Philanthropy, 2022).



In Brazil, about two-thirds of the population gives, with most Brazilians believing that giving should not be broadcasted. Charitable donations are largely taxable, and tax incentives are complex, often benefitting government-selected projects (Indiana University Lilly Family School of Philanthropy, 2022). Nonetheless, Brazilians give as social investments to a variety of causes, including education, arts and culture, capacity building for civil society organizations, community development, the environment, employment, sports and recreation, human rights, and social assistance. According to research by the Charities Aid Foundation (2018), supporting religious organizations/churches is the most prevalent cause in Brazil, while giving to children is the second most common cause (Charities Aid Foundation, 2018). Overall, social investors spread their efforts across several different areas. Brazilians are more familiar with grassroots organizations, and organizations such as the Institute for the Development of Social Investment (IDIS) and the Group of Foundations, Institutes, and Companies (GIFE) are working to strengthen philanthropy (Indiana University Lilly Family School of Philanthropy, 2022).

The extant literature includes quantitative and qualitative studies and addresses multiple aspects of Latinx philanthropy, including formal and informal trends, motivations, preferences, and mechanisms. We build upon these rich studies about Latinx philanthropy which offer depth and framing. In this report, we analyze two decades of data about Latinx giving combined with trends among high net worth households and community perceptions to support our understanding of long-term giving patterns before considering possible explanations for our findings.





METHODOLOGY⁵

This study uses a mixed-methods approach. Quantitative data analysis is conducted for two general population surveys—the Philanthropy Panel Study and the General Social Survey—to understand broader trends, and the main findings from the report come from the Philanthropy Panel Study. Quantitative analysis is also conducted for high net worth Latinx populations using the Bank of America study. These findings are given texture and meaning through qualitative focus groups. More details about the data sets and focus groups are provided herein, with a brief comparative overview of each dataset provided in Table 1 below.

The surveys included in this report rely on self-reported data using standard, though limited racial and ethnic categories, and breakdowns to specific sub-region that the respondents have cultural or ethnic ties to are often not available. Exploration of the variations in how Latinx donors from different countries of origin and background, including Indigenous people, engage in charitable giving would be valuable future research.

Several figures based on GSS and PPS data contain categories marked as "other". For GSS data, "other" includes individuals who identified as Asian, Native American or Alaskan Native, multiple races, and those who self-identified as belonging to other racial/ethnic groups. In the GSS longitudinal sample, approximately 5 percent of respondents fell within these groups. In the PPS longitudinal sample, "other" refers only to the approximately 2 percent of respondents who self-identified as belonging to a different, unlisted racial/ethnic group.

Results from respondents of certain racial/ethnic groups are presented in the figures below (denoted by the symbol "*") to provide a more complete picture, but the small sample sizes do not offer sufficient statistical power to draw generalized findings for the entire population in these groups. Therefore, future research will need to be done to better understand the philanthropic trends and motivations of these groups.

⁵See Appendix A for elaborated methods and datasets.



TABLE 1: Key datasets

DATA	TIME FRAME	DESCRIPTION	LIMITATIONS
Philanthropy Panel Study (PPS)	2000–2018, biannual	Longitudinal study; Nationally representative sample; Includes immigrant representative sample	Includes formal giving to organizations; does not include data to understand the role of intersectional identities
General Social Survey (GSS)	2002, 2004, 2012, 2014	Cross-sectional survey about general social behaviors and opinions	Has limited information on income and wealth
Bank of America Knowledge Panel Study (BOA)	2020	Nationally representative random sample of wealthy households; Modeled after PPS	Does not include lower or mid-level income households
Focus Groups	2021, 2022	Deeper understanding of trends and future directions of Latinx philanthropy, in conversation with Latinx donors, philanthropic advisors, and nonprofit professionals	Questions and topics differed between focus groups

RESULTS

The results are presented in this section as follows: the main findings—the longitudinal PPS panel study findings about everyday donors—are presented first. The PPS findings illuminate the changing demographic characteristics of Latinx communities in the United States and provide a broad overview of two decades of giving patterns among Latinx donors. To investigate these broader trends, GSS findings provide possible explanations of the Latinx giving trends among everyday donors. Following are focus group findings which offer context for emerging trends and future directions, and BOA findings which focus on Latinx high net worth donors.





Everyday Donor Findings

LATINX COMMUNITIES IN THE UNITED STATES

An analysis of the PPS data confirms earlier research findings about Latinx communities⁶, which in the United States are overall younger and have a lower rate of giving to charitable organizations compared to the general population. Charitable giving tends to be closely linked with income and wealth. While average incomes and wealth have grown over time, Latinx households tend to have lower levels of income, are less wealthy, and less formally educated when compared to non-Latinx households. Additionally, a larger percentage of Latinx people tend to be married or cohabitating.

Overall, the Latinx population has seen an expansion in educational attainment.⁷ Between 2000 and 2018, the percentage of Latinx people who received a high school education (with no college) increased from 21 percent (2000) to 27 percent (2018), peaking in 2004 at 29 percent. The trends have fluctuated throughout the last two decades, with 2018 marking the first time in which the percentage of Latinx people (27 percent) with a high school education surpassed that of non-Latinx people (26 percent). While the gaps in high school educational attainment among Latinx and non-Latinx households have gradually closed over the last two decades, the gap in college education completion or higher have slightly increased. Nevertheless, the percent of college-educated people among both populations have increased. Between 2000 and 2018, the percentage of college-educated non-Latinx people increased from 51 percent (2000) to 63 percent (2018) while the percentage of college-educated Latinx people increased from 25 percent (2000) to 33 percent (2018).

Of note, more than half (59%) of Latinx people identify as Catholic and more than half (51%) are immigrants. In *The Giving Environment: Giving Trends by Race and Ethnicity (forthcoming)*, we found that Latinx households were associated with lower giving amounts and suggested the relationship between giving rates and religion warranted further unpacking.⁸ The table below provides the overall summary statistics for Latinx communities, as observed in the PPS data.

⁶ See Table 2.

⁷ See Appendix C.

⁸ For the overall sample of Latinx donors at $**p < .01$, the coefficient is -0.244 . Research suggests that certain demographic characteristics—recent immigrants and Catholics—are linked to lower rates of giving. For example, Latinx people are predominantly Catholic, and Catholics are less likely to donate than other Christian denominations. Lower giving amounts among Latinx populations can be better contextualized alongside other factors.

TABLE 2: Summary Statistics (2000-2018)

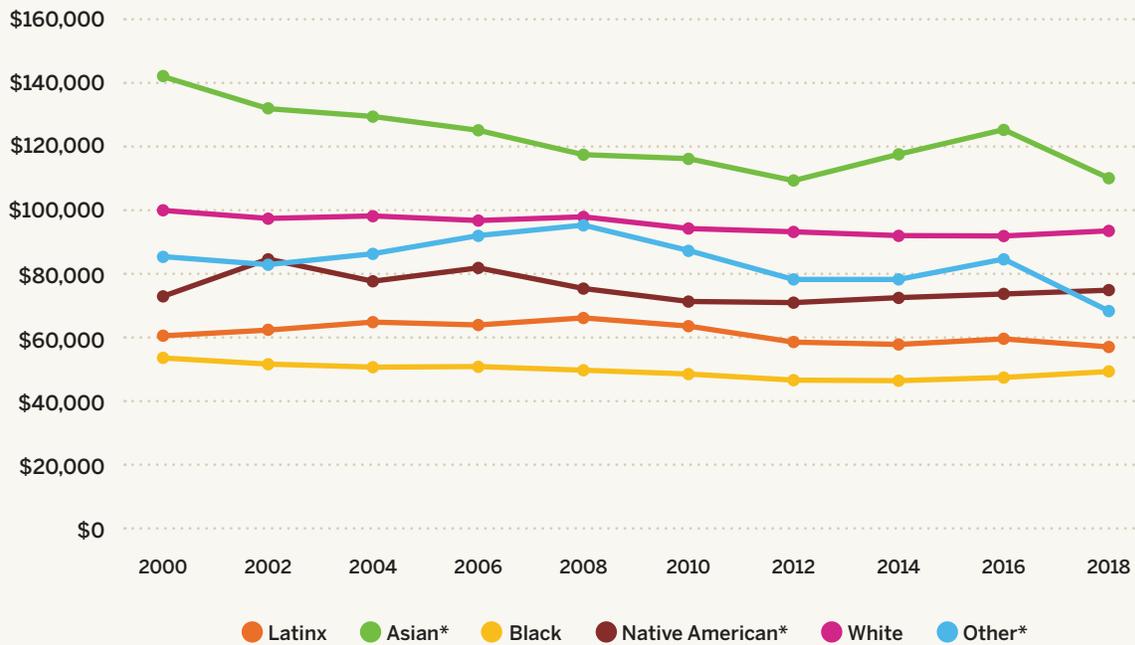
	LATINX	NON-LATINX
Age (average)	45	51
Overall Giving Rate	39.17%	62.50%
Religious Giving Rate	25.62%	39.97%
Secular Giving Rate	27.82%	53.31%
Overall giving as percentage of permanent income	0.78%	1.99%
Religious giving as percentage of permanent income	0.53%	1.25%
Secular giving as percentage of permanent income	0.25%	0.74%
Volunteered in the past year	16.62%	28.62%
High school	25.43%	29.11%
College degree	34.14%	57.62%
Single Men	13.29%	19.59%
Single Women	27.52%	30.57%
Married	51.83%	46.25%
Cohabited	7.36%	3.60%
Self-reported health status good	75.48%	82.48%
Currently employed	66.89%	63.51%
Percent who provide private transfers	16.02%	12.62%
Catholic	58.79%	19.32%
Protestant, all	15.93%	50.91%
Jewish	0.46%	3.29%
Immigrant	51.35%	4.55%
Both parents foreign born	72.79%	8.99%
At least one parent foreign born	83.40%	14.38%
Real family income (average)	\$61,406	\$87,801
Real family wealth including home (average)	\$115,372	\$367,158
Real family wealth excluding home (average)	\$63,621	\$265,221
Overall giving amount (average)	\$536	\$1,748
Religious giving amount (average)	\$344	\$1,034
Secular giving amount (average)	\$191	\$714
Private transfer amount (average)	\$449	\$864

Source: PPS Data, IU Lilly Family School of Philanthropy
Note: All dollar amounts in 2019 U.S. Dollars



Although there has been some growth in formal educational investments, the permanent income⁹ of Latinx households has remained steady and lower than most non-Latinx groups over the last two decades (see Figure 1).

FIGURE 1: Permanent income by race/ethnicity



Source: PPS Data, IU Lilly Family School of Philanthropy

Note: All dollar amounts in 2019 U.S. Dollars

*Results from these groups of respondents are presented in the graphs to provide a more complete picture, but please note that the small sample sizes of these groups do not offer sufficient statistical power to draw generalized findings for the entire population in these groups.

⁹ Permanent income is considered long-term income, and it is less affected by transitory economic shocks. In our sample, we define permanent income as average income for the household in past three waves of data.



Latinx people are spread out across the four regions of the United States, with an overall increase in the percentage of Latinx households in every region over the last two decades. Approximately half of the Latinx population in the U.S. live in the states of California, Texas, and Florida (Funk & Lopez, 2022). Between 2000 and 2018, Latinx people were substantially more likely than non-Latinx people to have at least one or both parents be immigrants, with little variations over time.¹⁰ Further, on average, about 83 percent of Latinx people were from families in which at least one parent was foreign-born, comparing with roughly 14 percent for non-Latinx people. The percentages of Latinx people whose parents were both immigrants range from 69 percent in 2016 to 78 percent in 2000, while the percentages for non-Latinx people remained stable between 8 percent to 9 percent from 2000 to 2016, with slight increase to 14 percent in 2018.

EVERYDAY LATINX DONORS IN THE UNITED STATES

To understand how charitable giving has fluctuated from 2000–2018, respondents to the nationally representative PPS survey were asked whether or not their households engaged in charitable giving in the previous year. We refer to the resulting findings as “giving participation” rates. Over the last two decades, the percentage of households that give to charitable organizations has declined, falling to 50 percent in 2018. When we compare Latinx and non-Latinx households, we see this same trend across two data sets, with consistently lower rates of giving participation among Latinx households (see Figures 2 and 3). In Figure 2, the PPS data shows that when comparing Latinx and non-Latinx households, giving participation among Latinx households decreased from 44 percent (2000) to 26 percent (2018). Prior to the recession, Latinx households saw an increase in giving participation, but giving participation declined after 2008. In the GSS data presented in Figure 3, Latinx giving participation decreased from 85 percent (2002) to 74 percent (2014) and generally remained lower than non-Latinx households.

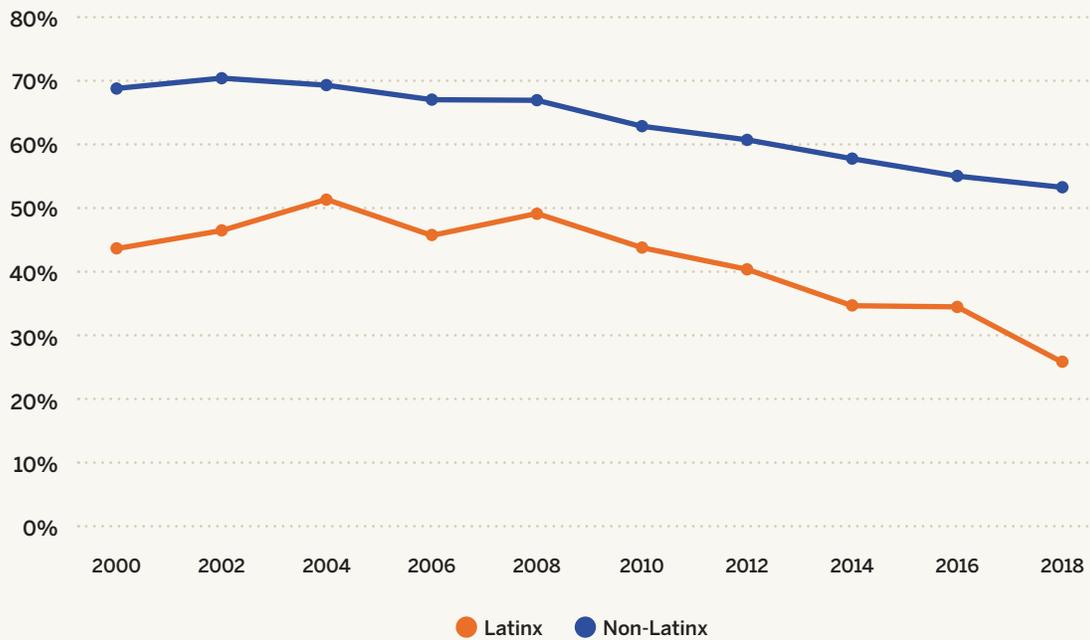
¹⁰ Immigrant refers to an individual who is foreign-born, without regard to legal status. Based on PPS data.

¹¹ Pre-pandemic report.



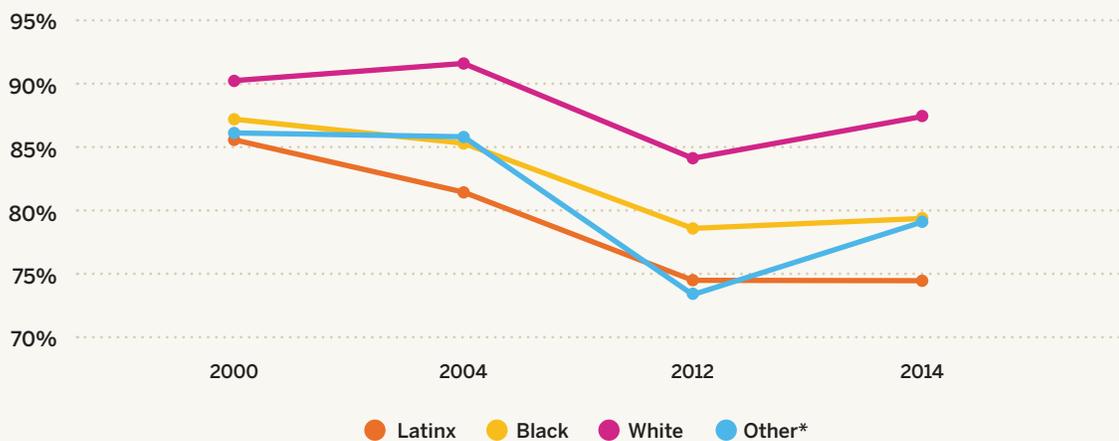


FIGURE 2: Rates of giving by household



Source: PPS Data, IU Lilly Family School of Philanthropy

FIGURE 3: Giving rates by race and ethnicity



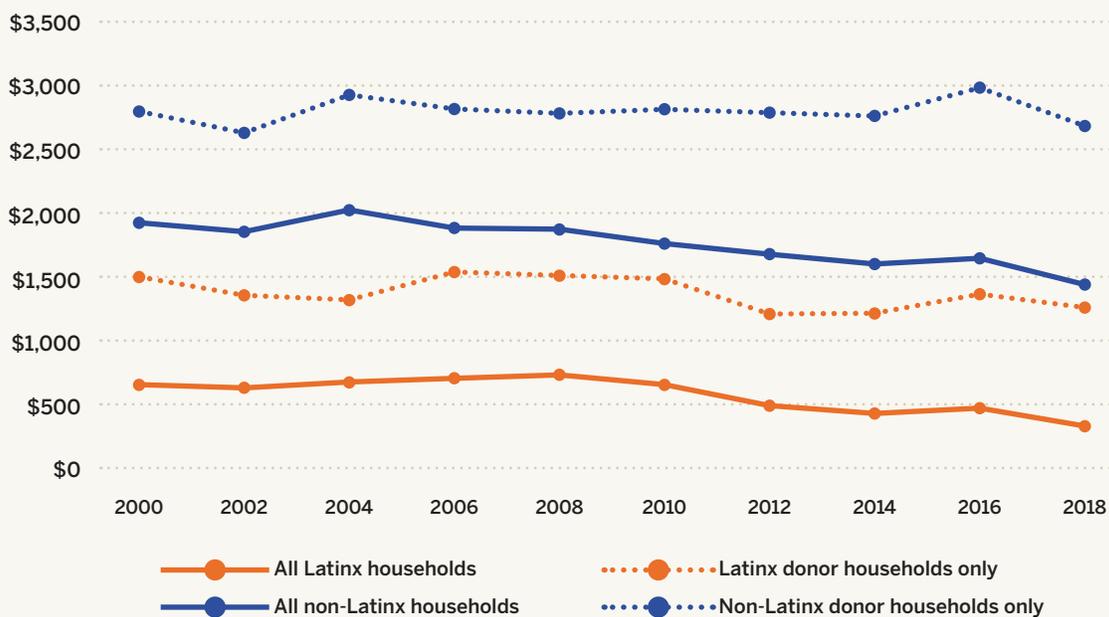
Source: GSS Data, IU Lilly Family School of Philanthropy

*Results from this group of respondents are presented in the graphs to provide a more complete picture, but please note that the small sample size of this group does not offer sufficient statistical power to draw generalized findings for the entire population of the group.

Over the last two decades, Latinx and non-Latinx households giving amounts and giving as a percentage of income have also declined. When we compare all Latinx and non-Latinx households included in the survey, we observe an overall decline in giving amounts and consistently lower giving amounts among Latinx households (see Figure 4).

Further, we can exclude households that did not report any charitable donations. Among the remaining households, which we categorize as “donor households,” we again found a decline in giving amounts (see Figure 4, “Latinx donor households only” and “Non-Latinx donor households only”). However, for both groups the giving amounts remained higher, the declines were softened, and the gap in giving amounts between non-Latinx and Latinx households was less pronounced. Giving amounts as a share of income remained consistently higher among non-Latinx donor households than Latinx donor households (see Figure 5). For Latinx donors, giving as a percentage of income declined from 2.1 percent in 2000 to 1.5 percent in 2018, and for non-Latinx donors, giving as a percentage of income declined from 3.5 percent to 2.8 percent over the same period.

FIGURE 4: Overall giving amounts by household



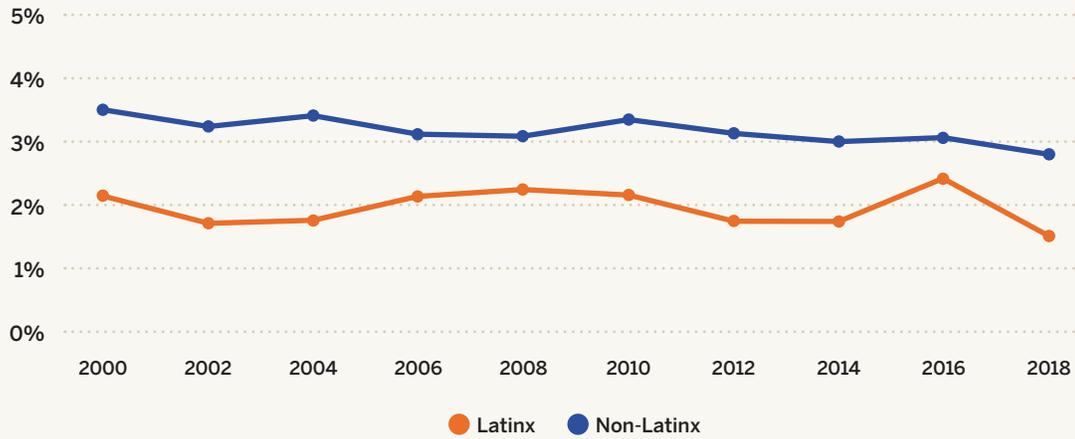
Source: PPS Data, IU Lilly Family School of Philanthropy

Note: All giving in 2019 US dollars





FIGURE 5: Giving as a percent of income (donor households only)



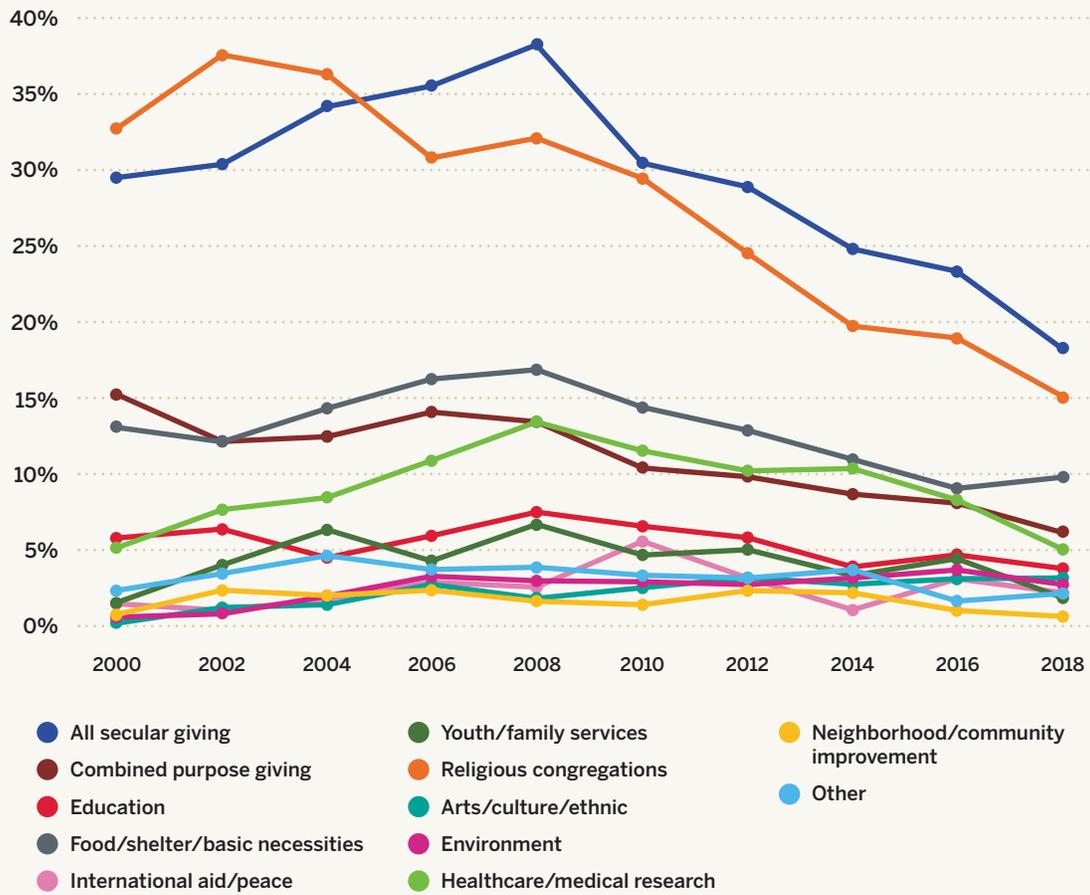
Source: PPS Data, IU Lilly Family School of Philanthropy
Note: All giving in 2019 US dollars

Among Latinx households, the combined total of secular giving surpassed giving to religious congregations in 2006 and remained at higher rates through 2018 (see Figure 6). This pattern reflects general giving trends, where giving to religious congregations declined prior to the recession.¹² The top causes for giving among both Latinx and non-Latinx households were 1) religious congregations; 2) food, shelter, and basic necessities; 3) healthcare and medical research; and 4) education (see Figures 6 and 7).

¹² Pre-pandemic report.



FIGURE 6: Latinx household charitable giving by subsector

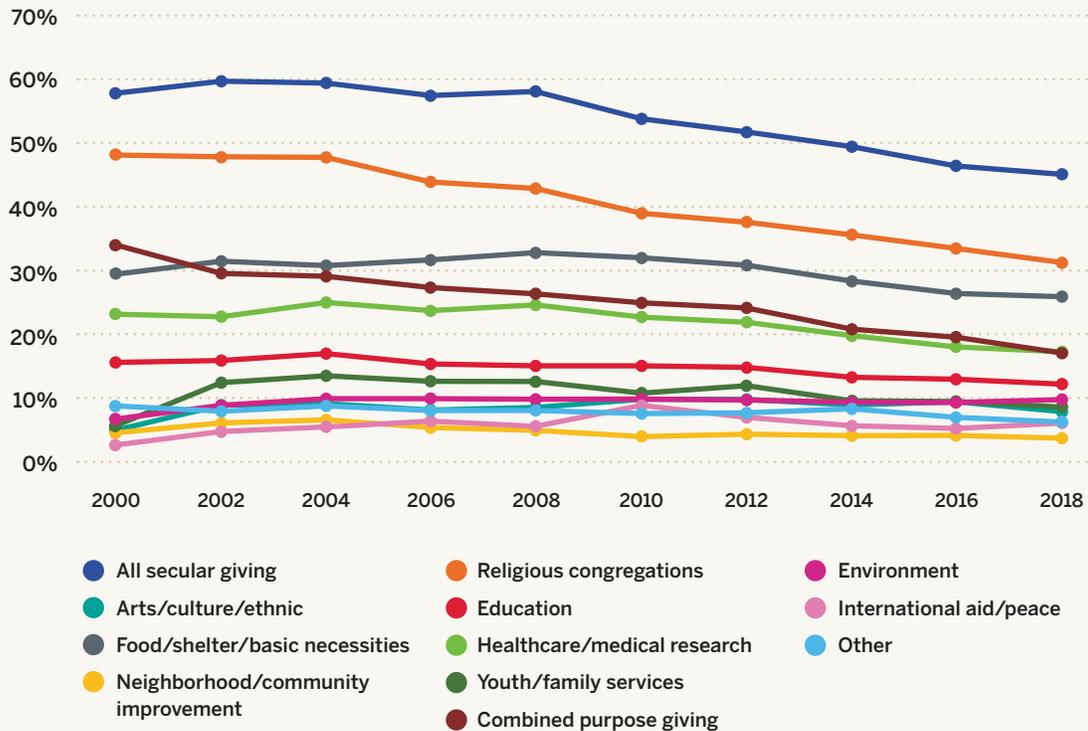


Source: PPS Data, IU Lilly Family School of Philanthropy





FIGURE 7: Non-Latinx household charitable giving by subsector



Source: PPS Data, IU Lilly Family School of Philanthropy

According to findings from the PPS data, the overall lower rate of giving by Latinx households remains statistically significant even when controlling for other factors, such as education level, age, marital status, gender, income and wealth, employment status, religion, and immigration status.¹³

¹³ See Appendix B for full regression results.



HOW IMMIGRATION STATUS, U.S. EXPERIENCE, AND LANGUAGE PREFERENCE ARE REFLECTED IN LATINX PHILANTHROPIC BEHAVIORS

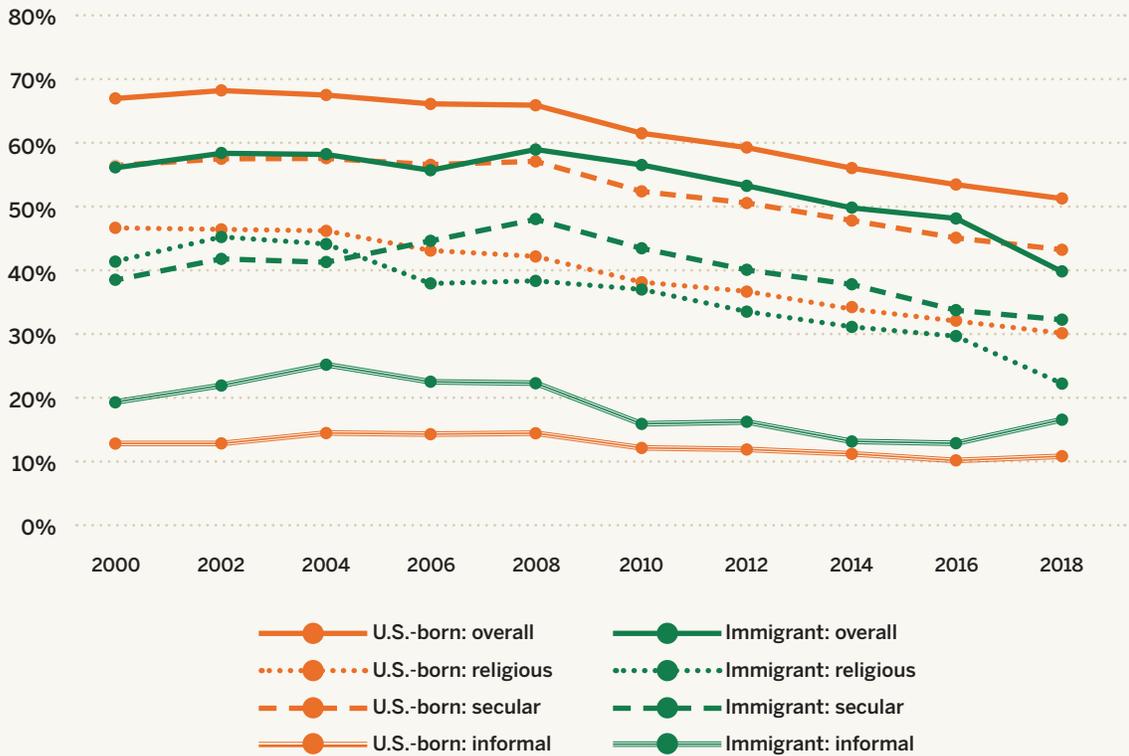
As noted earlier, the Latinx population in the United States represents a diverse range of countries of origin and are one of the fastest growing ethnic populations (Frey, 2021). Within the Latinx population, we observe significant variations in income and wealth. In this section, we further examine how being an immigrant, length of U.S. residency, and language preference is reflected in giving patterns.

Within the Latinx population, immigration status is linked to charitable giving. When comparing immigrants and U.S.-born Latinx individuals, the giving rates similarly declined among both groups. U.S.-born Latinx individuals, however, maintained a higher overall rate of giving, beginning at 67 percent (2000) and declining to 51 percent (2018) whereas Latinx individuals born outside the U.S. had giving rates of 56 percent (2000) which declined to 40 percent (2018) (see Figure 8). Religious giving rates also declined among both U.S.-born and Latinx immigrants, again with a higher starting rate among those who are U.S.-born. Informal rates for Latinx individuals remained higher among immigrants. A slightly different pattern was observed for secular giving rates. Among U.S.-born Latinx individuals, giving rates remained steady between 56 and 57 percent until 2008, after which giving rates continuously declined, reaching 43 percent in 2018 (see Figure 8). Among Latinx immigrants, secular giving rates increased from 39 percent to 48 percent in 2008, after which giving rates declined to 32 percent in 2018 (see Figure 8).





FIGURE 8: Rates of giving comparing U.S.-born and immigrant Latinx individuals

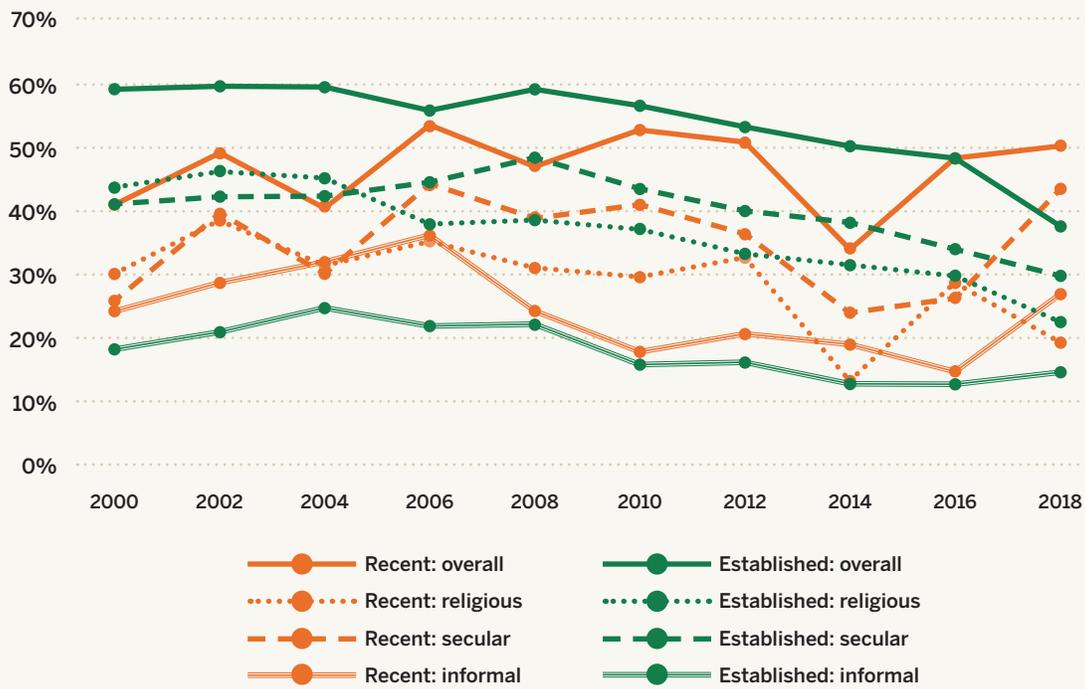


Source: PPS Data, IU Lilly Family School of Philanthropy

For Latinx people born outside the U.S., giving rates vary by time lived in the country. To examine this further, we break down the immigration category and compare immigrants with longer residency in the U.S. to immigrants with shorter residency in the U.S. (see Figure 9). Giving rates followed different patterns between the groups. Giving rates among recent immigrants fluctuated throughout the two decades but increased overall, whereas giving rates among established immigrants remained consistent until 2010 after which it slightly declined, with a sharp decline in 2018.

Giving to religious congregations declined for recent immigrants but was overall higher among established immigrants. Secular giving rates again followed a different pattern. Among immigrants with more time spent living in the U.S., secular giving rates increased from 41 percent to 48 percent in 2008, after which giving rates declined to 30 percent in 2018. Among recent immigrants, secular giving increased from 26 percent in 2000 to 43 percent in 2018 but fluctuated throughout the period. Further, informal giving rates were consistently higher among immigrants when compared to U.S.-born individuals, and consistently higher among recent immigrants when compared to established immigrants.

FIGURE 9: Rates of giving comparing recent and established Latinx immigrants by form of giving



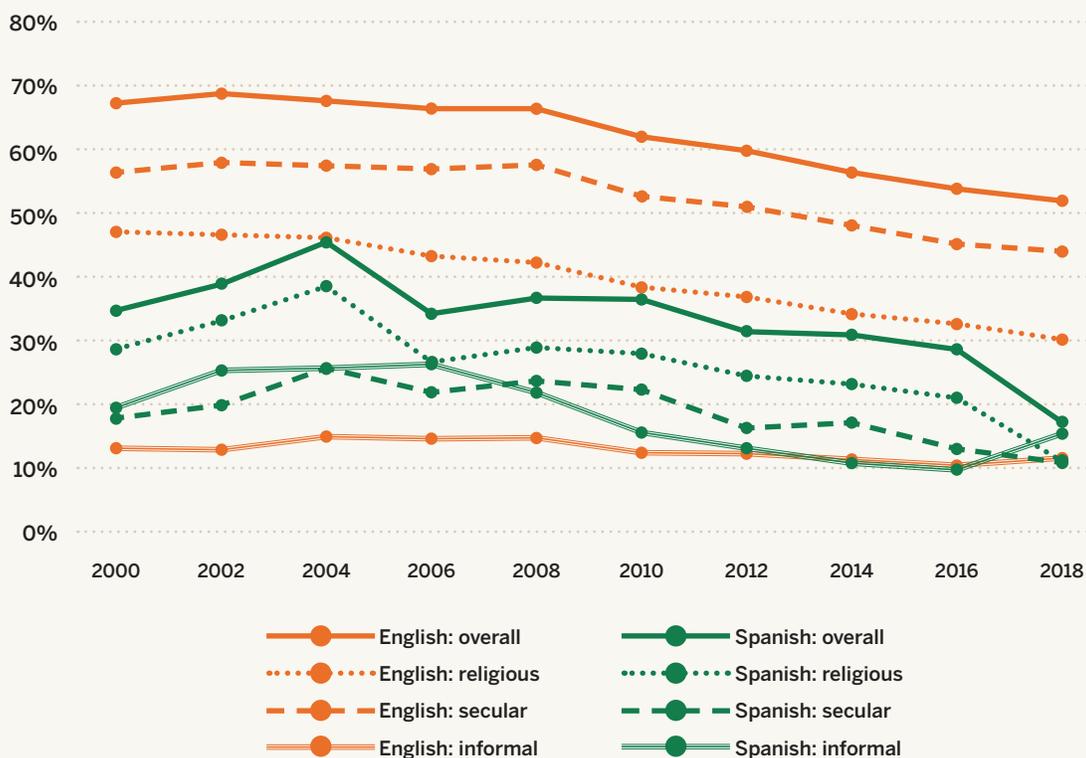
Source: PPS Data, IU Lilly Family School of Philanthropy



In conducting the PPS survey, each household could select a preferred language for completing the survey. Therefore, in this report, “language preference” refers to a household’s selected language for completing the survey. Out of the 8,000 to 9,000 households surveyed in each wave, nearly all surveys were conducted in either English or Spanish. During each round of the survey, fewer than 10 households selected a language different from English or Spanish.

Latinx households with an English preference maintained higher rates of overall giving, and their rates of giving to secular causes were consistently higher than rates of giving to religious congregations when compared to those with a Spanish preference (see Figure 10). The giving trends among Latinx households with a Spanish preference were reversed; rates of giving to religious congregations was consistently higher than giving rates to secular causes. Between 2000 and 2012 and beginning again in 2018, informal giving rates were higher among Latinx households with a Spanish preference when compared to those with an English preference. Between 2012 and 2018, there was minimal difference in informal giving between the two groups.

FIGURE 10: Rates of giving for Latinx households by language preference



Source: PPS Data, IU Lilly Family School of Philanthropy



EXPLAINING EVERYDAY LATINX DONOR GIVING TRENDS

There are several possible explanations for these trends, including income and wealth, trust, and informal giving.

Income and Wealth. An important explanation for the trends in giving participation and amounts among Latinx households is changes in income and wealth.¹⁴ Using PPS data, we find that 20 percent of the decline in giving participation rates among Latinx households can be explained by changes in income and wealth. For total giving amounts to charitable organizations, 30 percent of the decline among Latinx households can be explained by changes in income and wealth. Overall, most of the decline in both giving participation and amounts cannot be explained fully by changes in income and wealth. Therefore, we will explore how other factors—specifically, trust and informal giving—might provide explanations for these differences.

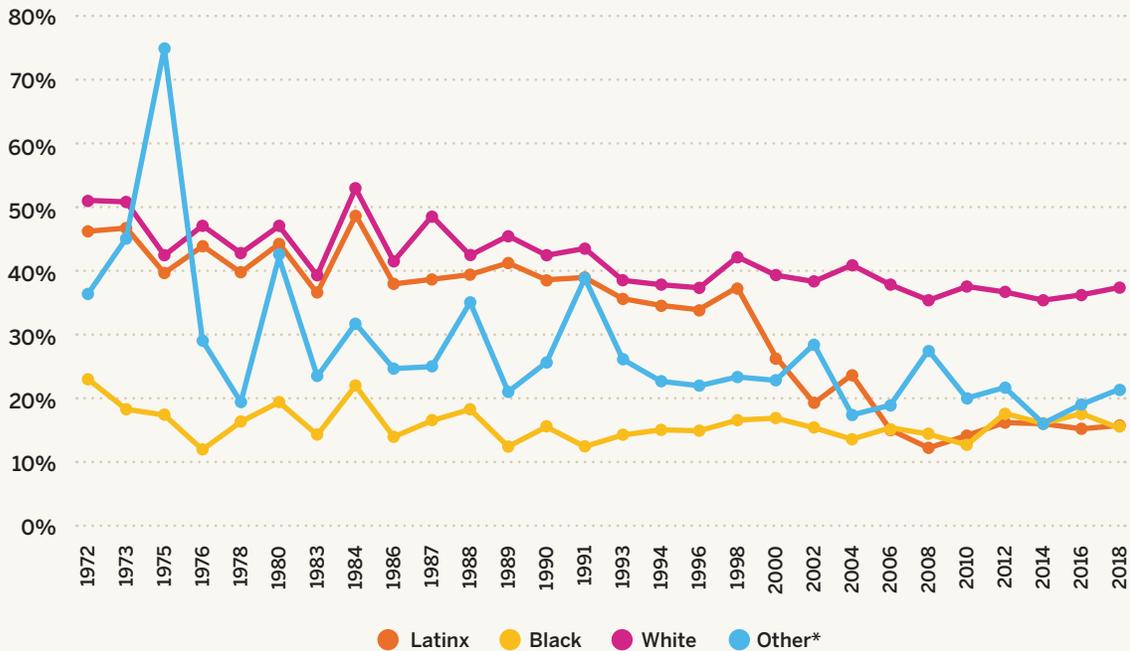
Trust. Existing research has established a positive correlation between levels of interpersonal trust and charitable giving in the United States; as rates of interpersonal trust rise or fall, so do rates of charitable donations (Wang & Graddy, 2008). Therefore, a possible explanation for the decline in both giving rates and amounts is the decline in interpersonal trust that studies have demonstrated (Clark & Eisenstein 2013). GSS data includes a measure of interpersonal trust by asking respondents: “Generally speaking, would you say that most people can be trusted or that you can’t be too careful in dealing with people?”. Here, we use the response from the first part of this question to examine how changes in giving rates and amounts might be influenced by interpersonal trust. The results show a steep decline in interpersonal trust among Latinx people, dropping from 46 percent in 1972 and reaching its lowest in 2008 at 12 percent, ending at 16 percent in 2018 (see Figure 11). Overall, the declining trend in interpersonal trust offers a possible explanation for the decline in Latinx giving to charitable organizations, but it does not explain the overall lower giving participation in giving to charitable organizations as compared to non-Latinx households.

¹⁴ In our analysis, we looked at changes before and after the 2008 Great Recession, where the percentage of decline in giving after the recession was calculated and attributed to changes in income and wealth.





FIGURE 11: Percent of people who think that others can be trusted



Source: GSS Data, IU Lilly Family School of Philanthropy

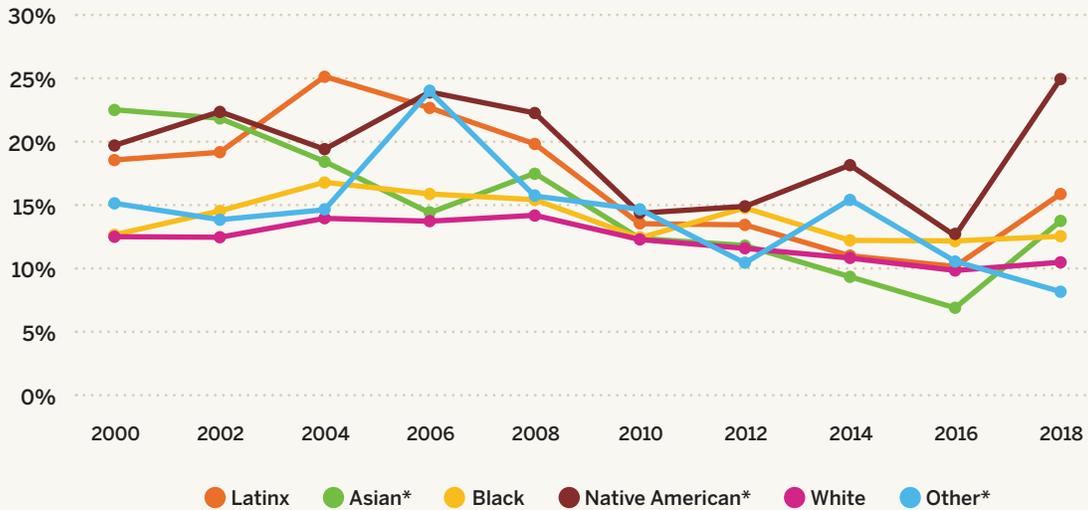
*Results from this group of respondents are presented in the graphs to provide a more complete picture, but please note that the small sample size of this group does not offer sufficient statistical power to draw generalized findings for the entire population of the group.

Private Transfers. One potential explanation for the differences in giving participation among Latinx and non-Latinx households is the rate of informal giving, which is measured by the rate of private transfers to people outside of one’s household. Over the last two decades, the percentage of households that engage in informal giving has fluctuated for most ethnic groups. Yet, Latinx households are statistically significantly more likely to give informally compared to non-Latinx households, even when controlling for other factors such as education level, age, marital status, gender, income and wealth, employment status, religion, and immigration status.¹⁵ At its peak in 2004, for example, 25 percent of Latinx households gave informally (see Figure 12). Latinx informal giving declined between 2006 and 2016, after which it began to increase again.

¹⁵ See Appendix B for full regression results.



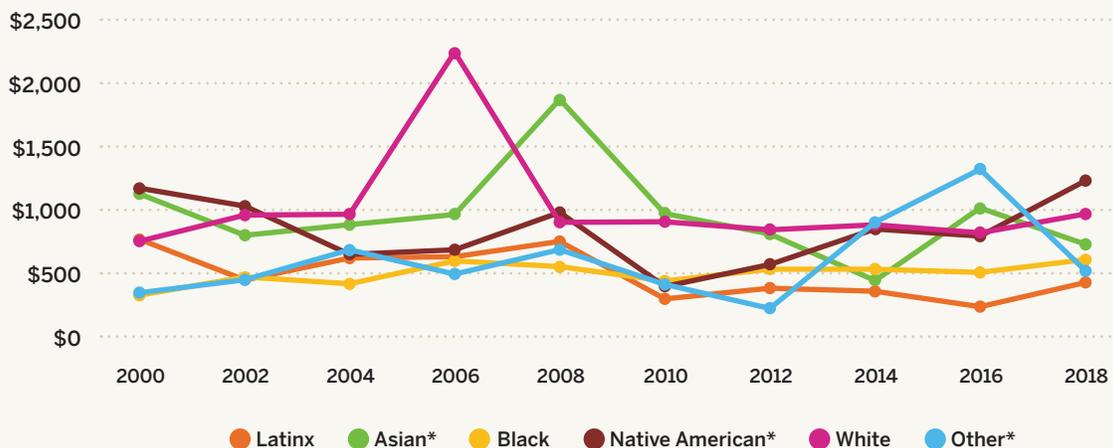
FIGURE 12: Percent of households that provide support to non-household members



Source: PPS Data, IU Lilly Family School of Philanthropy

*Results from these groups of respondents are presented in the graphs to provide a more complete picture, but please note that the small sample sizes of these groups do not offer sufficient statistical power to draw generalized findings for the entire population in these groups.

FIGURE 13: Average amount of private transfers



Source: PPS Data, IU Lilly Family School of Philanthropy

*Results from these groups of respondents are presented in the graphs to provide a more complete picture, but please note that the small sample sizes of these groups do not offer sufficient statistical power to draw generalized findings for the entire population in these groups.





Overall, Latinx giving participation has dropped in the last two decades, a pattern similar to the general population. Among Latinx communities, both immigrants and those born in the United States experienced similar rates of decline in giving, with an overall higher rate of giving among those born in the United States. Giving trends diverged when comparing recent and established immigrants, as well as when comparing Latinx people with a preference for English versus a preference for Spanish. While wealth, trust, and informal giving may have some relationship to everyday Latinx giving trends, they must be further investigated in future research to understand the fuller extent of their impacts.

Focus Group Findings

In this section, we present the qualitative findings of two focus groups—which consisted of Latinx donors, philanthropic advisors, and nonprofit professionals—to provide context and help illuminate the importance of the changing nature of Latinx philanthropy. Latinx philanthropy is community-based, responsive to immediate needs, and focused on education. The participants were motivated by a desire to be strategic in relationship building and developing political power for Latinx communities. Latinx donor concerns include uncertainties about unity and engagement among the younger Latinx generations. Education on specific issues, philanthropic investments, organizational infrastructure, and collaboration between Latinx donors and organizations were deemed important for the sustainability of Latinx philanthropy.

Overall, the COVID-19 pandemic and heightened visibility of racial injustice raised difficult conversations about racial disparities and the need for deeper engagement with grassroots organizations. As a result, many donors and foundations were more flexible in their giving and grantmaking. New platforms for discussion and learning were developed, including increased awareness and actions around diversity, equity, and inclusion. Collaborative efforts among people of color were also accelerated. These reflections provided an opportunity to build on the momentum for long-term investments to address historically neglected issues among Latinx communities.

Philanthropy: Definitions and Trends. Participants associated Latinx philanthropy with support, family, and community. They also viewed Latinx giving as occurring horizontally—between one’s immediate family and community members—more often than vertically towards organizations. Participants also identified giving within

the education sector and to education-related causes as a clear trend in Latinx philanthropy. In particular, they commonly saw first-generation Latinx college graduates giving back to their alma maters. While some described this as a positive aspect of Latinx giving, others believed that Latinx donors could increase support to other sectors to give strategically and ultimately make a greater impact. Finally, participants expressed a keen awareness of how giving is tied to political interests. They discussed goals such as empowerment, “converting [their] money into power and influence,” and “address[ing] the social issues which impact the Latino community.”

Latinx Donors’ Giving Behaviors and Motivations. When asked to discuss their giving behaviors and decisions, three participants described making giving decisions with their family or spouse, three reported involving their children in giving, and two described giving collectively through their workplace or on a corporate level. Only one participant described making giving decisions for a spouse, who was uninterested in philanthropy.

“Definitely the children are heavily involved. It’s kind of an unofficial philanthropic board.”

“Now that my children are the young adult age, we will be sitting down with them more and asking them how they’d like to participate in the fund. But each of them do give a certain amount [to causes of their choice].”

Identity plays an important role in giving for the focus group participants, and one participant highlighted that they typically give based on all of their various identities—from ethnicity to gender, sexuality, and profession. One drew a direct link to her family’s ancestry in Mexico while another linked her identity to a senior Latina in the community.

When asked what motivated them to give, participants discussed direct asks and organizations that took the time to build relationships with their donors as two important factors. Throughout the focus group, participants also discussed a desire to be strategic in their giving and maximize the benefit to Latinx communities.



Strengths and Challenges of Latinx Philanthropy. Participants discussed the growing Latinx population and corresponding economic growth as both a strength and opportunity, often referencing growth as part of a call to action. A related talking point was the idea of unity, which participants understood as both a current and important feature of Latinx philanthropy and an area requiring continuous efforts. At the same time, growth and recent widespread interest in supporting Latinx communities could pose a challenge, straining Latinx philanthropists and organizations. One participant stated,



“Latinos right now are suddenly being discovered in so many ways. ... I think a lot of us are struggling with just the sheer demand on our time, our talent, or money in many directions that extend well beyond our own communities.”

Concerns about Latinx philanthropy primarily revolved around sustainability and the younger generation of Latinx donors. They highlighted two patterns that they viewed as troubling: 1) anonymous gifts from high net worth and young donors, and 2) a tenuous connection to Latinx communities and issues affecting the Latinx population among young donors. While the Latinx population is growing and economic power is increasing, donors were acutely aware that keeping this growth sustainable would require outreach to the younger generation, particularly around the topics of anonymity, public philanthropy, and Latinx community connection.

Participants discussed external factors that complicate efforts by organizations which seek to support Latinx communities. Funder restrictions posed one challenge, as heavy restrictions on funding might not enable an organization to cover the expenses of their day-to-day operations. Participants connected this challenge to a broader critique of the philanthropic power structure, in which philanthropists control the allocation of funds, rather than organizations on the ground, who are better aware of where funds are the most needed.

Donors also found that some organizations striving to help Latinx communities did not always address the most pressing problems or fully understand the needs of the communities they serve. This discussion led participants to discuss the lack of Latinx leaders in philanthropy, including board members and executive roles.



Importance of Grassroots Organizations. All participants acknowledged the disproportionate impact of COVID-19 upon communities of color. Given the historical disinvestment in these communities, participants recognized the opportunity to engage traditional philanthropists with grassroots organizations. Many of these organizations were struggling due to their financial resources and size. Within this historical context, participants also shared that collaboration among people of color had accelerated and facilitated a more coordinated effort to address community needs. For example, in California, a family and a community foundation collaborated to raise 100 million dollars over 10 years to invest in grassroots nonprofit organizations in the region. In Chicago, people of color came together to share data, partnered in mapping neighborhoods impacted by COVID-19, and collaborated with corporations and government agencies. They were also in the process of raising 100 to 150 million dollars to invest in the economic recovery of Black and Latinx communities.

“Many of these [grassroots] nonprofit organizations will not make it, because they are small, they do not have succession plans or endowments. Executive Directors are struggling, worried and exhausted.”

A Watershed Moment. Latinx leaders recognized the unique opportunity for investment in communities of color. However, they advocated for proportional distribution of funds among ethnic groups. They urged for strategic action in capitalizing on the current “momentum” and shifting the focus from “crisis response” to long-term investments in health care, education, and employment. They warned that the country will be further behind if these issues are not addressed now, as Latinx communities have been disproportionately impacted by COVID-19. They contend that the economic benefit of investing in Latinx communities will be not just Latinx success but the country’s success as the population continues to grow. By not investing now, Latinx communities will get worse, they “will not recover in education, labor and economics in general”, and “all of us will be behind as a country.” They called for civic engagement, cross-pollination of good ideas, and good stewardship of giving and investment.

“Our needs are large; our communities are growing. If we don’t concentrate on it right now, it is not going away, it will be a problem for the country.”



Relationship Shifts Between Grantmakers, Donors, and Grantees. All participants acknowledged a substantial increase in philanthropic giving towards communities of color by Latinx and non-Latinx donors. These gifts included grants from corporations, foundations, and individuals. The increase in giving has resulted in the establishment of donor-advised funds for communities of color, seemingly among a “new generation of philanthropists.” Participants also indicated that grantmakers were more flexible and responsive in their grantmaking. For example, grantmakers streamlined applications, gave more agency to partners and grant applicants, and allowed staff members more freedom on investment decision-making. In addition, donors were also more understanding of the need to change restrictive giving and invest in smaller nonprofit organizations.



“[Grantmakers are] giving more agency to partners. Putting partners’ needs first is an important shift.”

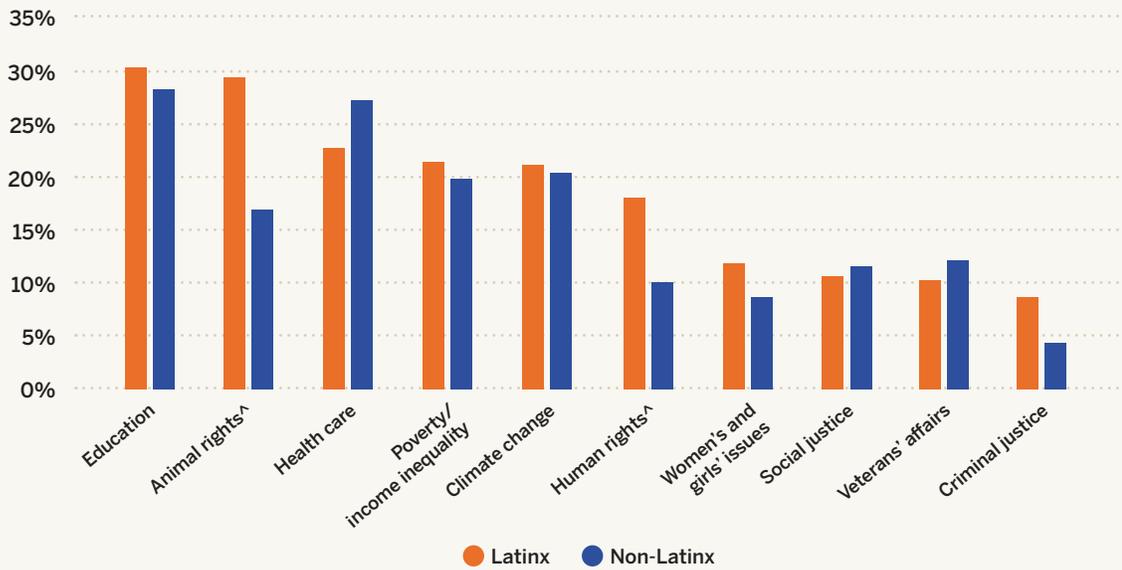
High Net Worth Household Findings

Finally, we turn to the results from the BOA survey, which offers data on high net worth households and differs from the PPS and GSS data in a few ways. It provides data from 2020 only, and it was collected during the pandemic and during heightened attention to racial and social causes. The PPS and GSS data, on the other hand, are longitudinal and were collected prior to the pandemic. Thus, the data is not directly comparable between the general and high net worth Latinx populations. With these limitations in mind, the BOA data provides important insights about giving preferences and behaviors among high net worth households.

High net worth households were provided a list of 24 public policy issues and asked which three were most important to them. Figure 14 displays the top ten issues that Latinx high net worth households selected, with the most common being education (31%), animal rights (29%), and health care (24%). The households were then asked if the issues they selected were reflected in their giving decisions. Among Latinx households, 88 percent said that their giving is either “very linked” or “somewhat [linked], but I’d like them to be more closely linked”. Only 12 percent of households said that the issues were “not really linked” to their giving.



FIGURE 14: Latinx high net worth households: Important issues (top 10)



Source: BOA Data, IU Lilly Family School of Philanthropy

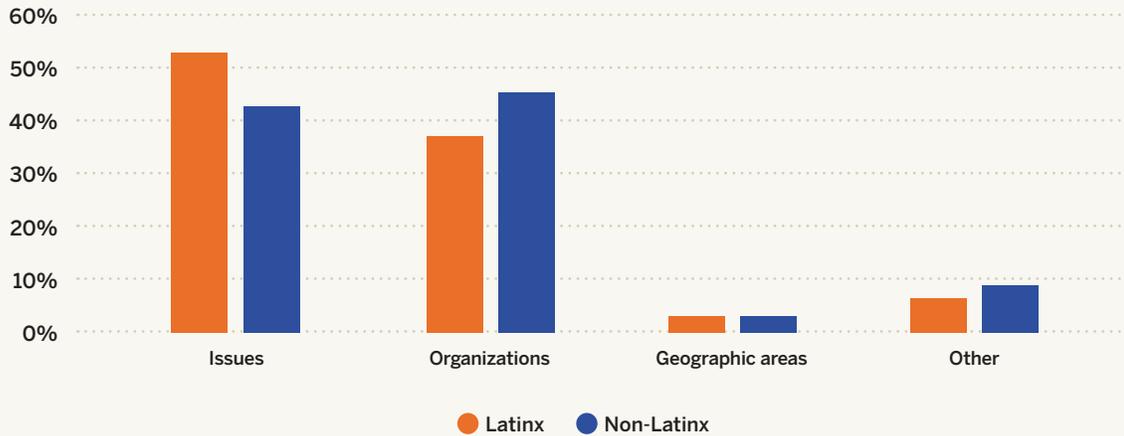
[^]Latinx donors were statistically significantly more likely to select "Animal rights" or "Human rights" when compared to non-Latinx donors ($p < 0.01$).

High net worth donors were also asked “Which of the following [issues, organizations, geographic areas, or other] most drives your giving decisions and/or strategies?” (Indiana University Lilly Family School of Philanthropy, 2021). More than half (53%) of Latinx high net worth donors said that issues drove their giving, while 37 percent believed that organizations drove their giving (see Figure 15). The remaining 10 percent either selected geographic areas (3%) or “other” (7%).





FIGURE 15: Motivations for giving

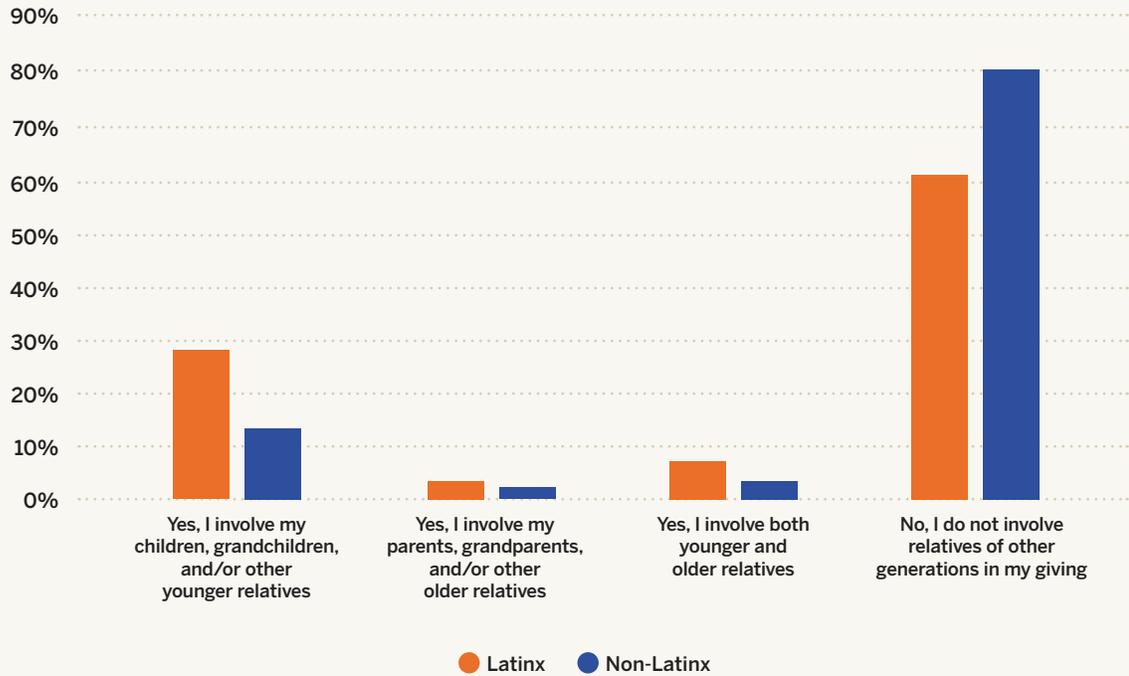


Source: BOA Data, IU Lilly Family School of Philanthropy

Similar to the focus group findings, high net worth Latinx households emphasized intergenerational family in their philanthropy-related decisions (see Figure 16). They were more likely to involve the next generation of children and grandchildren in their giving, though this finding was not statistically significant. Overall, Latinx high net worth households were significantly more likely to consider themselves knowledgeable about charitable giving than non-Latinx households (see Figure 17).

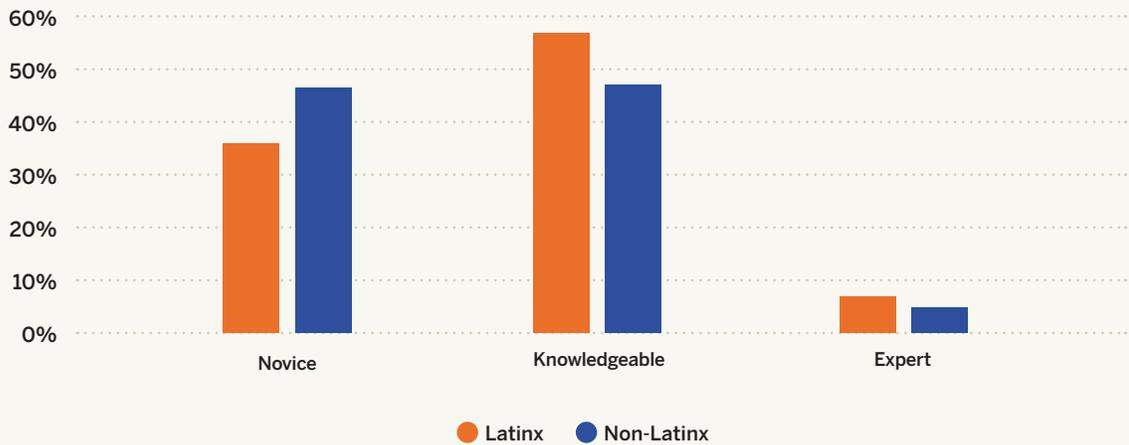


FIGURE 16: Do you involve other generations in your giving?



Source: BOA Data, IU Lilly Family School of Philanthropy

FIGURE 17: Self-evaluated knowledge of philanthropy



Source: BOA Data, IU Lilly Family School of Philanthropy





LIMITATIONS

We acknowledge that the report findings are limited in a few ways. First, Latinx is a pan-ethnic label adopted for the report, but many Latinx individuals do not use this term to self-identify. Rather, “Latinx” includes highly diverse groups with origin or descent in different countries, diverse racial identities, gender identities, educational levels, income, linguistic preferences, and immigration status. Further, the data does not provide information about participants’ countries of origin, nor if they came from Indigenous communities in Latin America. Thus, it is not possible to distinguish to what extent practices and norms from their countries and communities of origin might influence their giving patterns in the United States.

Additionally, the data does not distinguish between the various types of legal status, including citizenship or undocumented status. Yet, permanent legal status might have distinctive implications for giving. Also, although more than half the Latinx population identifies as Catholic, there are other religious affiliations and shifting religious trends among Latinx people. While this report examines multiple dimensions of philanthropy—formal, informal, secular, religious, and high net worth—there is room to better understand the relationship between Latinx philanthropy and engagement in advocacy and civic engagement, the relationship between the age of the donor and which charitable causes they prioritize, and how remittances from Latinx people to their families and communities abroad differ from or are similar to charitable donations. Each of these areas can benefit from future research.





IMPLICATIONS

Latinx households commonly give based on values, interests, organizational connections, and identities. Although giving participation has declined among Latinx households—as with the general population—giving patterns vary based on a variety of factors, including immigration status, U.S. experience, and language preference. Further, Latinx households are more likely than non-Latinx households to give informally, and family intergenerational involvement is important among everyday and high net worth Latinx donors. Looking ahead, the Latinx population is expected to grow, and philanthropic investments, organizational infrastructure, and close collaboration between Latinx donors and organizations are key strategies.

This report provides key insights into understanding whether and how philanthropic practices are shifting in relation to demographic changes. As with the general population, the last few decades have seen some declines in total giving among Latinx households, yet there are some important aspects of Latinx philanthropy to consider moving forward. Notably, family and intergenerational involvement in giving are important features of giving among many Latinx people, including high net worth households. Also, both informal and horizontal giving—between families and communities—are more common among Latinx donors than non-Latinx donors, and informal giving is important for Latinx households across income, education, gender, and immigrant groups. Understanding the central role of family and informal giving can inform a variety of practices, including nonprofit donor stewardship.

Further, giving priorities may continue to evolve. For example, as more Latinx donors reside for a longer period in the United States, giving patterns may shift to mimic long-term and U.S.-born trends. And as national leaders and affluent households seek to strategize investments in the next generation, giving priorities may shift. Additionally, according to the Latinx donors, philanthropic advisors, and nonprofit professionals who participated in the focus groups, Latinx donors and nonprofit leaders could create greater impact by shifting from short-term crisis responses to strategic, long-term investments in their communities, including philanthropic engagement and education among younger Latinx generations. Additionally, they overwhelmingly called for building structures and tools that would enable more collaboration across communities of color and Latinx individuals and organizations.

Ultimately, Latinx communities are diverse and continue to expand their philanthropic footprint across the United States. Understanding long-term patterns, shifts and trends, and explanations for giving patterns can benefit both Latinx and non-Latinx communities, as Latinx people respond to a variety of needs and as nonprofits and philanthropists seek to engage diverse supporters and communities.



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