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UNDERSTANDING THE BENEFITS OF LATINO GIVING CIRCLES:
AN EMANCIPATORY RESEARCH STUDY

by

Adriana Loson-Ceballos

A dissertation submitted in partial fulfillment
of the requirements for the degree of

Doctor of Philosophy

May 2022

Dissertation Committee

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Julia L. Carboni, PhD, Member

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TITLE OF DISSERTATION: UNDERSTANDING THE BENEFITS OF LATINO GIVING
CIRCLES: AN EMANCIPATORY RESEARCH STUDY

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ABSTRACT

This dissertation shows how Latino giving circle members understand their philanthropy and how participation affects their well-being, civic engagement, and philanthropic activities by focusing on giving circles' composition, members' goals, and perceived benefits. I used an emancipatory research paradigm with Latino-focused critical race theory, LatCrit, to study the Latino Giving Circle Network (LGCN). A survey was used for data collection, and research practices were employed in the survey's analysis; both were selected and designed centering Latinos to overcome challenges in researching Latinos.

Demographic findings reveal a range of Latino experiences. Sixty-six percent reported Mexican ancestry, compared to 83% of California Latinos, showing diversity in Latino ancestry. Thirty-four percent were foreign-born and 41% were first-generation, conveying transnational roots that challenge notions that philanthropy comes from assimilation. Seventy-three percent reported earning more than California's median income, which was likely related to LGCN's overrepresentation of those 30–59 years of age (82% for LGCN versus 41% for California), employment rate (81% for LGCN versus 47% for California), marriage rate (65% LGCN versus 47% for California), and educational attainment (42% bachelors and 38% masters for LGCN versus 35% bachelors for California). These numbers show LGCN members come from working, middle class families and are active in their communities.

The study also examined variables that may contribute to Latinos' motivations for joining and staying in giving circles. Latinos enter and stay engaged in philanthropy to (a) make changes in their communities, (b) pool resources to increase their impact, and (c) be part of a movement. Ancestry did not relate to different motivations for joining or staying, although members' immigrant generation showed similarities in joining and differences in staying. Both variables

showed similarities that elevate Pan-American values and expressions of philanthropy, with more recent immigrants sharing how giving circles aligned with giving in their or their parents' countries of origin.

In considering benefits to members and their communities, findings showed how giving circles support members' capacity to (a) affect social change, (b) build community, and (c) inspire impactful philanthropy. These benefits contribute to the understanding of giving circles' effect on civic engagement levels and add to their influence on wellness, community building, and philanthropic strategies. Findings indicated the impact of giving circles needs to be understood at both the individual and community levels.

DEDICATION

To my husband who has spent half of our marriage telling me not to give up on this endeavor. To other Latinas pursuing their graduate degrees, I see you, this system is not built for us, I stand ready to support you in your research.

ACKNOWLEDGMENTS

The most important person to thank is my husband, who has continuously kept me pushing forward when I could not see how I could possibly go on. I also must begin by thanking my family and friends who understood all that I had to miss in their lives to make this happen.

This dissertation was a community effort in its design and execution. I must thank my Latino Community Foundation familia, both their leadership team and staff. I must also thank the Latino Giving Circle Network members who answered my surveys, came to the pláticas, and encouraged me to pursue this line of inquiry. Not only did they push me to be bolder, but they reinforced my commitment to the beautiful vision of what we are all trying to achieve. In particular, I want to thank Sara Lomelin who has changed the trajectory of my career in more ways than one. Not only did she answer my outreach email asking how I could be involved in this network, but she worked with me for years to start a giving circle and ensure I was part of the evaluation process that became my dissertation. She saw in me what few in academia saw—that I was a researcher who needed to be heard and supported.

To my dissertation committee, particularly Hans, who worked to be flexible and forgiving in my nontraditional approaches, progress, and availability. Thank you for trusting me to keep this moving at my own pace and in my own way and for sitting with and growing from any of the discomfort that came with having me as your student.

To Audrey Jordan and Shiree Teng who served as mentors in this dissertation, thank you for intervening when you saw my imposter syndrome shut me down, leaving me unable to write. Thank you for reminding me that my voice matters and that I have something important to say. Most of all, thank you for showing me how we can support one another, as women of color, in unlearning white dominant culture within academia.

Finally, I would like to thank my dear friend, Bettina, who chose to take a chance in hiring a PhD student just starting in her journey, giving me the ability to pursue both my professional and academic goals. Your example showed me what true leadership is, and, seeing your courage in approaching death, you showed me how I want to live.

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CHAPTER ONE

INTRODUCTION TO THE STUDY

After the 2016 elections, I felt massive anxiety as the beast of white supremacy, now freshly wounded, began an administration attacking the wins of social justice movements. Backlash, or retrenchment, was to be expected after the first Black president was elected and as society continued to shift demographically and normatively. Yet, it still paralyzed me.

It was in this context, and after decades of activism and a career working as a fundraiser for social justice organizations, that I began my doctoral studies. Moving resources was my contribution to our collective action efforts, but resources were not moving where they were needed and my patience with funders was wearing thin in the face of compounding losses and threats to our communities.

The day my stepfather was deported and my mother self-deported to be with him, I began to see other families separated at the border on the news. In pure helplessness, I put out a call on social media: “Where can I find Latinos moving resources to stand up to all of this? I can’t do this alone anymore.” A lifelong friend of mine from Mexico City was living in San Francisco at the time and replied, “Have you heard of the Latino Community Foundation? They have giving circles that are awesome; I am part of the one here” (Linda Ruiz, personal communication, September 2016).

This led to years of involvement with the Latino Giving Circle Network (LGCN) that is hosted by the Latino Community Foundation (LCF). I started a giving circle in San Diego, where I lived, and joined the leadership council composed of giving circle leaders. I also started to see the power of responding to crises together. As I began to bring my studies of Latino movements and activism experience, LCF leaders and fellow members began to ask questions about how to

better share with others what was happening in the LGCN so we could collectively learn and grow.

In the summer of 2018, LCF leaders invited me to join a team evaluating the LGCN because I was a member and could bring that experience and the voices of my fellow members to the table. This invitation became my dissertation. The two other evaluators were also women of color, one was Asian American and the other African American, both of whom let me take the lead and mentored me through moments of imposter syndrome and more. With their guidance, I designed my dissertation to be of service to our collective efforts to create change as a network and to inform the wider giving circle movement.

I conducted a literature review in the fall of 2018 on Latino philanthropy, giving circles, and challenges in studying Latinos. The survey was designed and translation occurred in the first part of 2019. Plans to roll out the survey were developed later that year. The survey was launched in January 2020 and closed mid-February with data clean up and analysis beginning in the spring and continuing through the summer. The evaluation report for LCF was presented in January 2021 and invitations for giving circle leads to take part in dialogical meaning-making conversations were sent soon after. Four *platicas* took place in May 2021. I began drafting my dissertation later that summer and completed it in early 2022.

My dissertation process spanned shocking attacks on minorities in the United States and the rise in visibility of white supremacy only to be bookmarked by the COVID-19 pandemic and its compounding effects on our communities. It was difficult to write about hope and see ourselves as powerful during these trying times, yet this research kept me grounded in what could be and how we could get there. One *platica* participant said to me as we closed out our time together, “mija, thanks for going to school for us.” She was not wrong; I stayed in this

program *because* of my belief that this is a movement that needs to be supported. Without this dissertation, I would have quit many years ago.

In this chapter, I lay the groundwork for the dissertation. In the first section, I begin by describing the who and what of this study—myself, Latinos, and the LGCN. First, through a statement on positionality, I share who I am as a researcher and what this meant for the research I conducted. Second, I note the complexity of *Latino* as an identity and how it can be used to maintain the racial status quo or undermine it. Third, I describe the characteristics of the LGCN. In the second half of this chapter, I explore what the literature tells us about Latino philanthropy and giving circles to place this case into what is known and share key ways this dissertation adds to our collective understanding of both. This is followed by the research design of the dissertation where I explain how I discovered new findings and the contributions this design makes to designing emancipatory research. The chapter concludes with a map of the dissertation and notes the structure of each chapter.

Determining This Dissertation's Who and What

In this section, I describe myself, the research, the participants, and the topics I examined. I share the characters in the play that took shape as the dissertation unfolded. The purpose is to make visible my positionality as the researcher, present an understanding of the term Latino (i.e., how and why it is used in this dissertation), and describe the case being studied—the LGCN.

Positionality

I was born in Mexico City soon after the devastation of the 1985 earthquake. My parents migrated north, like so many others, to find work. This brought me to the San Diego-Tijuana border. Having grown up on the most transited border in the world, I thrive in the spaces in between, the spaces that give me the perspective of seeing where worlds come together or

collide. I thrive amid waves and currents moving resources and generosity. I was born to spend most of my adult life in the whirlwind of fundraising, philanthropy, and social justice. I believe what we invest in will grow, and philanthropy has a role to play in ensuring these investments seed the right growth.

I have deep familial ties to Latin America and have been fortunate enough to travel in the region and form relationships with immigrants and their descendants in the United States. I first identified as Mexican, then as Mexican American, and now as Latina. This evolution took place as I moved from the border to the east coast and developed connections with Latinas from other regions of Latin America. Like a snake shedding its skin to grow, so, too, did my identity. I found more community and power as the region's diaspora made me feel at home in the United States.

Over the last decade, I have pursued graduate degrees in human rights and leadership studies while conducting research on philanthropy and social movements among Latinos throughout the United States and Latin America and the Caribbean (LAC). In 2008, I received a BA degree in political science and French with a concentration in theological studies. As an undergraduate, I concentrated on the politics of religion and feminist movements in Abrahamic religions along the U.S.-Mexico land border and along the sea border between Europe and the Maghreb region of North Africa. In 2014, I earned an MA degree in human rights studies with a concentration in women-led and student-led movements in LAC and among Latinos in the United States. Throughout my studies, research, and writing, I have focused on social movements, particularly of women who are marginalized from formal power structures and, yet, are able to collectively catalyze change.

My roots and background in studying movements of Latinos make this dissertation one where the voice of the researcher comes from the community being researched. This rarely passes the bias test in research, but it should. It makes me more likely to see what other researchers miss, more likely to hear what other researchers would not be told, and more likely to commit to producing research of utility to our cause. I do not take an unbiased stance in this dissertation. I bring an overt commitment to developing emancipatory research using critical race theory to change systems of oppression and challenge the everyday nature of racism in our communities.

A Note on Terminology

Racial classifications have socially constructed roots that reflect systems of oppression, more than scientific reality, and which exist to uphold white supremacy. As Laura Gomez (2020) wrote in her book, *Inventing Latinos*, “Race isn’t in our heads because it’s ‘real,’ race is real because it’s in our heads” (p. 5). The racialization of Latinos, thus, has its roots in white supremacy and is linked to settler colonization and foreign intervention in LAC. It is no surprise, then, that Latino is officially considered an ethnicity over a race, allowing those with white Spanish ancestry to pass as white and to overrepresent the larger society’s expectations of what Latinos should be and what they should look like. This misses those who have Black or Indigenous ancestry and replicates racial categories found in wider U.S. society, fostering colorism among us.

Yet, at its core, Latino is a term that is meant to capture those who have immigrated to the United States from LAC and their descendants and has also been a political identity, a joint expression of existing similarities to allow for collective action and protection. In this way, and like other cultural identities, it is not a monolithic or static term, but, rather, a vessel through

which the interlinking of our liberations can be seen. The more aware those who espouse this term are of the differences among us, the more places we can see through lines and ancestral knowledge to combat white supremacy.

Culture is the framework in which our narratives of what is possible form. Ignoring it causes us to miss the role it can play in keeping alive ancestral forms of knowing and living that are essential to reimagining a world without white supremacy, but, to achieve this envisioning, we must decolonize our understanding of culture to center those marginalized by white dominant culture. If this is done, then culture work can shape social norms and systems through movements. This is where the power of culture meets change and where this network takes shape.

It is with this understanding of the political power of Latinos coming together that I traced the history of Latinos' relationship with philanthropy and saw the patterns emerge of mutual aid and collective action. It is with the commitment to end racism that I adopted the principles of Latino-focused critical race theory, LatCrit, to develop the research design for this dissertation. And it is with this awareness that I intentionally start the findings section by highlighting the differences that exist among members of the LGCN.

As a final note, I had intended to use Latinx when drafting this dissertation and included a question on race and ethnicity in the survey design that was multiselect so as not to ignore multiple racial identities and to track people's identities. On that question, more than twice as many respondents selected Latino than Latinx or Hispanic. It was clear the term to use was the one that reflected the most common identity among members of the network. It was not my intention to leave out those who did not identify with the gender binary—or to perpetuate the patriarchal linguistic use of the male as neutral when a group includes more than one sex—but to

listen to and present how members of the network negotiated their collective action and identity. Where possible, my commitment is to elevate our diversity and avoid single-select demographic questions that ask people to fit into one of the categories whose mere existence is there to sustain white dominant culture and the patriarchy that comes with it. Although this limited my ability to test differences along racial and gender lines, it made us visible in the demographics and showed the diversity of the LGCN.

Latino Giving Circle Network

According to conversations with LCF staff, the network began in 2012 when a group of Latinas based in San Francisco were convened by the then vice president of philanthropy of the LCF, Sara Lomelin. The impetus of this meeting was to strategize how to engage Latino giving in support of Latino-led and Latino-serving organizations. Sharing personal stories of giving, the idea of creating giving circles seemed to be a natural fit with the cultural roots of these women's generosity. Since then, giving circles have been created throughout California for the purpose of (a) inspiring philanthropy by and for Latinos to increase investments in Latino communities, (b) promoting civic engagement among members by educating them on community issues and providing them with opportunities for collective action, and (c) building familia through the joy of giving back and through spaces where relationships can grow among those who care about the Latino community and who are committed to push for social change (LCF, 2019). Today, the network is the largest movement of Latino philanthropists in the country, engaging close to 500 members through 19 active giving circles donating \$1.85 million dollars to 100 Latino-led organizations in California (LCF, n.d.).

Hosted by the LCF, the LGCN creates opportunities for Latino leaders to drive change in their communities by developing a greater understanding and awareness of Latino community

needs and organizations. A review of internal documents, previous evaluation reports, and annual reports showed this form of donor and philanthropic education has led to targeted investments by Latinos in Latino-led organizations; and, amid compounding crises facing Latino communities, the LGCN has become a powerful antidote to fear, prejudice, and inaction by tapping into communities of donors who have yet to be seen as such. In turn, grantees have connected with people who share their culture and pride and who want to rally resources to support them. For many LGCN grantees, their first grant came from the giving circle.

Section Conclusion

In this section, I showed how I used my voice through this research by sharing what my voice was grounded in and the identity I hold. I also showed how my voice is part of a larger shared identity that has the power to continue the racial status quo of white supremacy or to reimagine a world without it—and the potential that can come from coming together. I closed by sharing an example of this coming together, the LGCN. Collectively, these descriptions help explain the who and what behind this dissertation and begin to allude to the why. In the next section, I turn to what is known about Latino philanthropy and giving circles to better explain why this research matters and how it contributes to what we know.

Reviewing What was Known and What is Known Now

In this section, I share a summary of what is known about Latino philanthropy and giving circles. A full review of these two bodies of literature is found in Chapter 2. However, in this section, I seek to ground this dissertation in previous research and highlight key findings that contribute to collective knowledge.

Latino Philanthropy

Latino philanthropy research makes the case that, to understand it, it must be studied as a phenomenon that exists beyond, through, in relationship with, and despite white philanthropy—particularly that found in the United States (Allatson, 2014; Escobar, 2015). This requires Latino philanthropy not be defined in relationship to white philanthropy, but on its own by taking a deterritorialized approach rooted in Pan-American culture and history (Orozco, 2006). Beginning with the wrong definition of Latino philanthropy can cause researchers to miss it altogether. Not seeing it means it will not be supported through infrastructure and additional investments, which is paired with a divestment of philanthropic funds in Latino communities and nonprofit organizations. This misunderstanding perpetuates the status quo of underfunding Latino-led and Latino-serving organizations. On the other hand, the right definition can further unleash the power of Latino resources and inspire philanthropy by and for Latinos. It can shed light on divestment and promote investment. It can move much needed resources.

Understanding the characteristics of Latino philanthropy is essential to seeing what can be and how to get there. The literature on Latino philanthropy has begun to elevate some common characteristics. For example, Latino philanthropy has deep mutual aid roots that are pre-Columbian and that have continued for centuries through *mutualistas*, such as those who gave rise to Latino social movements in the United States during the 1960s and 1970s. Latinos also give spontaneously, in moments of crisis, in ways that help other Latinos and with a strong sense of cultural heritage. It is also clear relationships and trust are important when determining where Latino funding goes. Such an approach has implications for nonprofits seeking Latinos as donors, noting the importance of building trust and having Latinos represented in leadership

positions in nonprofits (Rovner, 2015; Gonzalez, 2003; Gonzales, 2010; Pole et al., 2003; Ramos, 1999).

Findings from Chapter 4 contribute to Latino philanthropy literature in two ways. The first is by presenting the demographics of the Latino network to show its diversity and the range of Latino experiences and voices it includes. This is important because it challenges the white-centric definition of who is a philanthropist and provides demographic information that can be used to understand differences in motivations behind Latino philanthropy, including Mexican ancestry, immigrant generation, gender, age, and income. Considering the motivations of Latinos who join and stay engaged in their giving circles helps us understand how Latinos give, to whom they give, and why they give.

In this research, I found Latinos engage in philanthropy to make changes in their communities. Latinos pool their resources because of an awareness that together they can increase the impact of their giving and because of cultural alignment with the type of giving they learned growing up in their community. Latinos come together to be part of a movement that is greater than themselves. Age seems to have a relationship with motivations for joining later in life, and there is some variation within immigrant generation for first generation respondents. However, overall, the considered variables did not appear to be associated with motivations for joining, and the lack of differences is telling. For example, the lack of differences in ancestry and immigrant generation points to transnational roots and Pan-American experiences and values in Latino philanthropy. The lack of differences in giving by gender shows the potential of giving circles to attract men to a heavily female form of philanthropy. Income does not seem to have meaningful impact on why members join.

In this research, I also found the reasons for joining a giving circle were not very different from the reasons why members stayed engaged in their giving circles. Latinos continue to give to better support Latino-led organizations and to be part of the greater giving circle movement. Members stay because of the relationships this network and movement provide for them. The importance of relationships and trust underscore known characteristics of Latino philanthropy.

Gender did appear to have a relationship with motivations for staying in a giving circle. Where male members showed a strong drive to form relationships and community, female members had a stronger connection to the power of the giving circle model, both in why they joined and why they stay. It is interesting that what attracted both genders is the same, but the reasons male members stay includes the aspects of giving circles often associated with female expressions of philanthropy in giving circle literature, such as community (Bearman, Beaudoin-Schwartz, & Rutnik, 2005; Shaw-Hardy, 2000, 2009).

Mexican ancestry did not appear to be associated with motivations for staying any more than it did for joining. On the other hand, immigrant generation appears to play a role in motivations for staying more than it did for joining. Like motivations for joining, immigrant generation shows through lines that underscore the transnational nature of Latino philanthropy. These commonalities show the importance of giving collectively, giving to Latinos, and in trusting and being in relationship with each other to give. However, foreign born and first-generation members stay because of the cultural resonance they find in how their giving circles move resources, while later generations stay because they find a culturally aligned community through which to give.

Age appears to play a role in reasons for staying. While all age groups stay to better support Latino organizations, networking with other Latinos is a top motivation for those ages 20–29 and 30–39 and is tied with the need to connect with other giving circle members for those ages 60–69 and 70–79. The desire to connect with other members appears to grow in importance beginning for those in their 50s. Meanwhile, as income increased, networking was less important and connecting with others grew in importance. Although many in the network made more than California’s median income, there is a spread that suggests class difference is not something associated with who is attracted to giving circles. However, those on the wealthier end of the income spectrum wanted to stay because of the cross-class nature of the community. In other words, wealthier Latino philanthropists seem more interested in connecting across class through their philanthropy.

Finally, giving circle tenure appears to be associated with motivation for more recent members (up to 2 years of membership) who favor networking and connecting with other members. Those who had been members for 3 to 5 years stayed engaged out of a desire to be part of the giving circle movement and connecting with members, and those with 6 to 8 years of membership stayed to network and be part of the movement. This hints to a decrease of importance placed on relationships the longer members are part of their circle.

As mentioned, these findings may help nonprofits seeking to engage Latino donors for the long run by underscoring the need for authentic relationships and the importance of having Latinos in leadership roles. It also may help other funders who seek to support Latino philanthropy by illustrating that philanthropy moves at the speed of trust and can be sustainable with the right infrastructure to support the ongoing maintenance of community relationships.

Giving Circles

Given the relational and community-centric nature of Latino philanthropy, it is also important to consider why the giving circle model is a natural fit for Latino collective giving efforts. Giving circles are a philanthropic model whereby members pool their resources and jointly determine where they should go. Their growth has spawned a movement. Although this movement may feel recent—tracing its current roots back to the 1990s as women, particularly white women, gained personal wealth—its roots are centuries old and in the margins of U.S. society (Bearman, Beaudoin-Schwartz, & Rutnik, 2005; Ho, 2008; Rutnik & Bearman, 2005; Shaw-Hardy, 2000, 2009). The movement has opened the door to spaces where philanthropic decisions are made and expanded philanthropy to be more democratic along lines of race, ethnicity, gender, ability, and other marginalized identities (Ho, 2008; Lindsey, 2006; W. K. Kellogg Foundation, 2012). In the United States, since 2000, giving circles have granted out \$1.29 billion dollars and engaged 150,000 highly diverse individuals, with 60% of circles formed around a common identity that is not usually at philanthropic tables (Bearman, Carboni, et al., 2016).

The benefits of giving circles have focused largely on what members gain from participation and the benefits that host organizations receive from their partnership with giving circles in their community. This has left a gap in knowing how giving circles affect their grantees, with one study showing that, when expectations align between a donor base that will be very engaged in the organizations they fund and the nonprofits desire for that level of involvement, giving circles can be beneficial to nonprofit organizations (Eikenberry, 2010).

Giving circle literature shows giving circles provide members with learning environments by creating access to community leaders and speakers and creating spaces to learn about

philanthropy (Eikenberry, Bearman, et al. 2009). Giving circles also provide members with community and networks to be more strategic and involved with their philanthropy (Bearman et al., 2005; Carboni & Eikenberry, 2018). Meanwhile, host organizations have reported an increased ability to reach new and diverse donors and increase their visibility in the community (Bearman & Franklin, 2018).

Literature also shows giving circle members are more likely to be civically engaged than those who are not members (Carboni & Eikenberry, 2018; Eikenberry, Bearman, et al., 2009). Members are more likely to volunteer than nonmembers and more likely to get philanthropic advice from a diverse network (Carboni & Eikenberry, 2018). Together, these findings show giving circles create higher levels of civically engaged members with stronger community ties and agency to use their voices for change. In this way, members show community-level benefits that come with having a giving circle in a community.

This dissertation focuses on reframing the benefits that come with giving circles by considering the benefits to individual members and their communities. Specifically, in Chapter 5, I focus on how giving circles support members' capacity to affect social change, build community, and inspire impactful philanthropy. These findings contribute to our understanding of the impact of participation in giving circles on levels of civic engagement, wellness and community building, and philanthropic activities and strategies. Findings also confirm the essential level of analysis—community impact.

On an individual level, I found participation in giving circles contributed to members' sense of personal agency. On a community level, I found a positive relationship between participation and civic engagement regardless of how civically engaged members were upon joining a giving circle. Participation does this by providing those who were unengaged a place to

start and a crucible for collective action for those who were already civically engaged. I also found participation contributed to levels of wellness by reducing isolation and providing a safe space for members to be themselves and practice their culture while finding a purpose beyond themselves. This is a new finding in the literature; previous research has not looked at the link between participation and wellness or the importance of a collective space for shared cultural identities. Finally, findings showed giving circle members become strategic donors who form authentic and trusting relationships with grantees. Members use their gifts to give exposure to grassroots and Latino-led organizations, which makes giving circles into scouts for underfunded and over-performing organizations in marginalized communities.

Section Conclusion

This dissertation contributes to two bodies of literature by describing how giving circles are an expression of Latino philanthropy and what that says about giving circles and Latino philanthropy. This makes visible aspects of each that reinforce one another and the importance of considering the benefits that results from marginalized groups influencing philanthropic flows of investments. Together, this dissertation's findings show one of the many paths possible in democratizing philanthropy by diversifying who is at the table and how decisions are made. In this way, it is clear that supporting the infrastructure behind giving circles and the organizations that giving circles fund is essential to dismantling the racism that exists and is sustained by philanthropic systems established by white dominant culture. In the next section, I describe how these findings were produced by looking at the research design and how it serves as an example of emancipatory research.

Designing this Dissertation

In this research, I studied the LGCN to explore three research questions:

1. What can be learned about Latino philanthropy's motivations and characteristics by examining Latino giving circles?
2. What benefits do members receive by participating in a Latino giving circle?
3. Does participation in a Latino giving circle affect levels of philanthropic and civic engagement?

I used an emancipatory research (ER) paradigm as the epistemological framework for the design of the study. ER asks researchers to produce useful research for emancipatory efforts that remove oppressive systems and norms. ER provides a hospitable environment for critical theories of all types, as it asks the researcher to overtly commit to using research as a tool to support collective actions that upend oppression in all its forms (Campbell & Oliver, 1996). I used the Latino-focused critical race theory called LatCrit to guide my research and to tailor the ER paradigm from one that is a legacy of the disability justice movement to one that can center Latino experiences with oppression. This theory led me to literature on the challenges of collecting and analyzing data from Latino communities, which, in turn, heavily influenced (a) how I designed the survey questionnaire and (b) the decision to incorporate a dialogical meaning-making portion to my analysis in the form of pláticas with the community being researched.

The logic that took me from paradigm to theory selection ultimately led me to identify methods that would (a) provide reliable results, (b) challenge the divestment in Latino communities, and (c) elevate a way forward that centered ancestral forms of solidarity and support. In doing so, this dissertation presents an example of how to (a) design a survey questionnaire focused on overcoming challenges when surveying Latinos, (b) include Latinos in the data analysis, and (c) tailor the ER paradigm's principles to support the collective efforts of

Latino communities. This may serve researchers from other marginalized groups in designing ER.

This dissertation makes an additional contribution because of its use of theory. Most research on giving circles has largely used exploratory qualitative methods, though more recent studies have used quantitative methods (Bearman et al., 2016; Carboni & Eikenberry, 2018). This dissertation is the first to use any critical theory in the review of giving circles, which is also a contribution to the literature on Latino philanthropy. Though, because most of the literature I reviewed came from the Americas, none used critical race theory.

This dissertation demonstrates the power of undertaking research in partnership with the community being researched and by members of that community. It has the potential to help other critical researchers reimagine how to design research that is useful to our collective liberations. The next and final section of this chapter provides a map of what is included in each chapter.

Structuring this Dissertation

This section provides an overview of each chapter in the dissertation. By offering a guide to what each chapter of this dissertation includes, it is my hope the dissertation can be consumed in parts or in its entirety as each chapter adds to our collective knowledge and power.

Chapter 2 Summary

As the literature review chapter, Chapter 2 is divided into three sections. In the first, I present the search strategies and parameters for the reviewed literature. The second portion focuses on the literature on Latino philanthropy, and the third presents the giving circle literature. The section on Latino philanthropy begins with a historical analysis of the Latino experience with philanthropy before turning to why Latino philanthropy is missed and how dangerous this is

when paired with a larger philanthropic divestment in Latino communities. I close the chapter by presenting known characteristics of Latino philanthropy. The section on giving circle literature begins with a definition of giving circles, their characteristics, existing typologies, and a look at the membership demographics of the giving circle movement. I then present known benefits of giving circle participation. I make the connection between the two bodies of literature to show how giving circles mirror the characteristics of Latino philanthropy and, in so doing, support the growth of Latino philanthropy.

Chapter 3 Summary

Chapter 3 is the methodology chapter of this dissertation. It begins with the research paradigm used (i.e., ER) by providing a background of the paradigm and showing how it led to the selection of theory and, ultimately, of methods. I then describe how I overcame challenges when surveying Latinos through the design of the questionnaire before reviewing how the surveyed population was incorporated into the analysis of the survey data to add nuance and depth to the findings. I also present how the dissertation came to be and what scales were used in the survey. The through line in this chapter is the inclusion of network members throughout the dissertation, from conception to analysis, and how this can be an example for others who make research design decisions.

Chapter 4 Summary

Chapter 4 is the first of two findings chapters and focuses on answering the Research Question 1: What can be learned about Latino philanthropy's motivations and characteristics by looking at Latino giving circles? Findings are linked to those of others who have studied Latino philanthropy. Chapter 4 begins with the demographics of the network to show the rich diversity and commonality that exist. The chapter then turns to motivations for joining giving circles and

motivations for staying engaged in giving circles. In the two sections on motivations, I examine differences that emerged when considering immigrant generation, Mexican ancestry, gender, age, and income.

Chapter 5 Summary

Chapter 5 is the second of two findings chapters and focuses on answering Research Questions 2 and 3: What benefits do members receive by participating in a Latino giving circle? Does participation in a Latino giving circle affect levels of philanthropic and civic engagement? Findings are linked to research on giving circles presented in Chapter 2. In the first of four sections, I examine benefits from giving circle participation reported by respondents. In the second section, I link giving circle participation with members' sense of personal agency and levels of civic engagement to show how circles support members in becoming agents of change at an individual and community level. In the third section, I explore the connections between giving circle participation and community, particularly individual wellness and community building. In the fourth section, I consider the effect of giving circle participation on members' philanthropic activities and the type of giving that takes place—along with its potential impact on the community. In Chapter 5, I show how the impact of giving circles needs to be understood on two levels—individual and community—to show their power lies in their capacity to support individuals through collective self-empowerment.

Chapter 6 Summary

Chapter 6 is divided into two sections. In the first section, I explore how the findings of the dissertation can be understood through the six principles that guided the research design and show how the design helped clarify and elevate findings in ways other design decisions may have missed. In the second section, I discuss implications of the findings for various actors

within the giving circle ecosystem, thus making the findings actionable and useful to the wider giving circle movement.

CHAPTER TWO

LITERATURE REVIEW

The structure of this chapter is divided into three sections. In the first section, I present the search and coding strategy I used in reviewing the literature. The next section contains a review of Latino philanthropy research, and the remainder of the chapter is focused on giving circle research. The section on Latino philanthropy begins with a summary of the history of Latino philanthropy and continues with an examination of why research and the philanthropic sector have ignored the topic and community. I then consider the urgency around ending this status quo and close the section with characteristics of Latino philanthropy. The section transitions to a review of giving circle literature beginning with the characteristics, existing typologies, operations and structure, membership demographics and trends, and giving circle benefits. I make connections between sections to demonstrate how giving circle characteristics can mirror those innate to Latino philanthropy.

Search Strategy

Given the paucity of research on either topic and the unique nature of this study, I review two bodies of literature in this chapter: (a) Latino philanthropy and (b) giving circles. Literature for each body of research required different search strategies. For example, Latino philanthropy necessitated a transnational and bilingual review of research, whereas giving circle research has largely focused on the United States where the giving circle network is based. Approximately 30 pieces of research were reviewed from each of these two areas of literature. In this section, I describe the search strategy for each of these bodies of literature beginning with Latino philanthropy.

Because of the transnational nature of Latino culture, literature from the United States and Latin American and the Caribbean (LAC) were considered in both English and Spanish. Portuguese literature was excluded because of my linguistic limitations. I used two search phrases in Google Scholar: “Latino philanthropy” and “filantropia latina.” This search produced approximately 100 articles, of which about 25 were selected because of their focus on individual, secular, and/or institutional philanthropy. I excluded research on non-Latino philanthropy in the region, research on Latino alumni in the United States, and studies on corporate philanthropy in the region. I did not limit the search by year, but research appears to have begun in the 1980s. Most authors of the articles I reviewed are Latinos, and the research designs were largely case studies, history summaries, and literature reviews.

In contrast, my search for giving circle research began with the collection of giving circle research shared with me by Angela M. Eikenberry, a giving circle scholar, and included approximately 20 individual pieces, all publicly available. A thorough review of the collection’s references helped me identify additional pieces and was followed by a Google Scholar search using the term “giving circle.” In total, I reviewed 30 articles, equally mixed between academic and practitioner pieces and ranging in publication dates from 2000–2019. Most authors of these studies are women and/or white and the methodologies used were mostly qualitative; a few articles were authored by men and were international research or the burgeoning quantitative studies on the topic. My review focused on giving circles in the United States because much of the international research examined giving circles in Europe and Asia rather than Latin America.

After reviewing both bodies of literature, I used an iterative coding process that included coding sections of each piece into clusters around different topics. In the case of Latino philanthropy, I considered its history, characteristics, why it is missed by researchers, and why

the status quo cannot continue to ignore the power of Latino philanthropy. In the case of giving circles, I considered how giving circles are understood and structured, the depth and breadth of the movement, its origins and history, and other major characteristics and benefits of giving circles. Once I coded the literature into clusters, I reviewed each cluster individually to identify emergent themes and organized the themes to note potential evolutions of our understanding around the cluster's topic. I then further coded areas where an evolutionary process could clearly trace how giving circles evolved. This process continued until no new codes emerged. In the remainder of this chapter, I review findings from each body of literature, beginning with Latino philanthropy and followed by giving circles.

Latino Philanthropy

Literature on Latino philanthropy began after a 1988 convening organized by the then new Hispanics in Philanthropy (Campoamor et al., 1999; Gonzales, 2010; Pole et al., 2003; Ramos, 1999). Initial research focused on how to raise funds for Latino nonprofits (Campoamor et al., 1999; Gonzales, 2010; Pole et al., 2003; Ramos, 1999). Researchers sought to understand Latinos' generosity in comparison to white counterparts (Campoamor et al., 1999; Gonzales, 2010; Pole et al., 2003; Ramos, 1999) and then considered various Latino traditions of philanthropy and how U.S. society ignores, disincentivizes, and discourages Latino philanthropy in the United States (Martinez, 2017; Pole et al., 2003; Sanborn & Portocarrero, 2003). More recently, researchers have argued considering Latino philanthropy through an American understanding of philanthropy is limited because Latino philanthropy affects American philanthropy and exists beyond, through, in relationship with, and despite American philanthropy and U.S. intervention in the Americas (Allatson, 2014; Escobar, 2015). As such, a deterritorialized approach is needed when considering Latino philanthropy, one rooted in a Pan-

American culture, history, borders, faith, and languages and one that promotes Latinos' power to philanthropically support development work as immigrants, Americans, and organized diasporas (Orozco, 2006).

In this section, I further examine findings of this body of literature according to the emergent themes from my review. I begin with a summary of the history of Latino philanthropy by reviewing its history in LAC during the pre-Columbian and conquest periods. I then move from Spanish/Portuguese colonial influence on American settler expansion and foreign intervention in LAC and conclude with the establishment of Latino funds, such as the Latino Community Foundation (LCF), the subject of this study. Next, I review the main reasons researchers and U.S. philanthropic actors ignore Latinos and Latino philanthropy and consider the urgency of challenging this oversight. I end by presenting characteristics of Latino philanthropy before I transition to the review of giving circle literature to demonstrate the similarities between Latino philanthropy and giving circles.

Latino History with Philanthropy

Much of the literature on Latino philanthropy shows the historical evolution of giving in the region. In the case of Mexico, for example, the Mexican Center for Philanthropy (Centro Mexicano Para la Filantropía; CEMEFI) divides the history of Mexican philanthropy into four stages: (1) pre-Columbian; (2) Spanish conquest; (3) Mexican independence, revolution, and nation building; and (4) today's context (CEMEFI, n.d.). Similar timeframes are used when exploring LAC's history of philanthropy, with a few changes. In Latin America, the second stage includes the Portuguese conquest with the Spanish, and the third stage is replaced with a regional period of independence wars between 1810–1840 that cost Spain and Portugal most of their colonies in the region (Gonzales, 2010). In the United States, the third stage includes two

important pacts that grew the U.S. Latino population: (a) the Treaty of Guadalupe Hidalgo (1848) that cost Mexico half of its land and gave the United States its first Latino minority (Aranda, 2010; Pole et al., 2003), and (b) the 1904 Jones Act that gave Puerto Ricans access to American citizenship and which brought on a continuous wave of Latino transplants (Gonzales, 2010). The fourth period includes waves of Latino revolutionary, civil, and dirty wars between 1950–1990 that brought U.S. philanthropy into the region and caused new diasporas to enter the United States and move their own philanthropic resources (e.g., Cubans, Dominicans, Guatemalans, and Salvadorians; Escobar, 2015; Gonzales, 2010; Sanborn, 2005; Sanborn & Portocarrero, 2003). U.S. intervention in these wars also led to Latino movements across the United States (Gonzales, 2010). What follows is a summary of each of these stages.

Pre-Columbian

There is limited research on pre-Columbian forms of philanthropy, with cursory mentions of prevalent practices of giving and mutual aid in LAC's indigenous civilizations (Aranda, 2010; CEMEFI, n.d.; Gonzales, 2010; Sanborn, 2005; Sanborn & Portocarrero, 2003). Forms of support are thought not to have compromised the dignity of the recipient nor exalted the benevolence of the giver, instead focusing on the social benefit stemming from mutual aid (CEMEFI, n.d.; Gonzales, 2010). Such practices were so prevalent they were subsequently used by the Spaniards as a springboard for an early form of taxation of Indigenous people in their colonies in the region (Gonzales, 2010).

Spanish and Portuguese Conquest (1500–1800)

The Spanish and Portuguese introduced the Catholic Church as the lead recipient and distributor of charity (Almaraz, 2014; Gonzales, 2010; Pole et al., 2003; Sanborn, 2005; Sanborn & Portocarrero, 2003). This introduction shifted the purpose of philanthropic activities from

mutual support into *obras pías*, acts of faith (Almaraz, 2014). As social classes emerged, these acts continued to grow away from previous forms of support (Almaraz, 2014; Sanborn, 2005; Sanborn & Portocarrero, 2003). The Catholic Church's charity was paternalistic and supported the colonial governments' priorities, serving as a social control tool strategically paired with the forced evangelization and exploitation of Indigenous and Black slaves (Sanborn, 2005; Sanborn & Portocarrero, 2003). For example, *cofradías religiosas*, religious brotherhoods, were among the earliest philanthropic vehicles, serving the dual purpose of expanding religious observance and providing financial or legal support (Aranda, 2010; Pole et al., 2003).

U.S. Settler Expansion and LAC Nation Building (1810–1930)

With independence from Spain and Portugal in the first half of the 19th century (Gonzales, 2010), governments throughout LAC began to change their relationship with the Church and take its place as the lead provider of charity (Almaraz, 2014; Gonzales, 2010; Sanborn, 2005; Sanborn & Portocarrero, 2003). Elite classes and foreign investors also began to undertake large philanthropic projects in partnership with Latin governments (Almaraz, 2010). In the United States, the national takeover of territory through the forced relocation of Indigenous populations and a war with Mexico paired with the industrialization of the late 19th century caused demographic shifts of Latinos across the country and made them into a minority group. These shifts drew some rural Latinos into cities and others across borders, leading to the establishment of mutual aid organizations (Aranda, 2010; Pole et al., 2003). *Mutualistas*, as these organizations became known, were formed around a common identity, such as a nationality or hometown. They were led by community organizers who (a) protected Latinos from discrimination and abuse, (b) helped when needed, (c) promoted Latino culture, and (d)

advocated for members before local politicians, police, and employers—often defending those accused of crimes (Aranda, 2010; Gonzales, 2010; Pole et al., 2003).

Self-Determination (1960s–Present)

The social movements of the 1960s that rocked U.S. society served to transform mutualista organizations into nonprofits. For example, the Chicano movement gave rise to hundreds of new nonprofits coming from mutualistas, such as those that hosted the farm workers movement in California (Aranda, 2010, Pole et al., 2003). This transformation helped nonprofits grow in size and number but also made them vulnerable by moving their dependence for funding from the community to governmental and institutional sources of revenue (Aranda, 2010; Gonzales, 2010; Pole et al., 2003).

In LAC, between the 1960–1990s, wars and natural disasters (e.g., colossal earthquakes in Nicaragua and Mexico) led to the growth of strong civil society organizations funded through remittances, U.S. foundations, and governmental aid (Gonzales, 2010; Sanborn, 2005; Sanborn & Portocarrero, 2003). The role of the Catholic Church also gained importance through the spread of liberation theology, though this time as an ally of the poor and of human rights—with a notable exception in Argentina—and again placing the Church as a lead distributor and recipient of philanthropy in the region (Sanborn, 2005; Sanborn & Portocarrero, 2003).

The neoliberal government cuts of the Reagan administration in the 1980s hurt Latino nonprofits on both sides of the border, as they had shifted their model to governmental support. This led to the rise of research on Latino philanthropy, the establishment of Latino funds in the United States, and the growth of private foundations in LAC (Pole et al., 2003; Sanborn, 2005; Sanborn & Portocarrero, 2003). In the United States, Latino funds were set up to meet Latino

nonprofit needs due to governmental cuts and a lack of philanthropic investment in these organizations (Pole et al., 2003).

In LAC, private and corporate foundations arose in the 1990s with the spread of neoliberal policies and the fall of authoritarian governments in the region. This rise was significant for multiple reasons. First, these changes marked a shift back to individual forms of philanthropy (Pole et al., 2003). Second, they sought to fund Latino nonprofits while providing philanthropic skills to Latinos and Latino nonprofits. Third, they led to increased research on Latino needs and Latinos and philanthropy. Finally, they offered flexible, responsive, culturally sensitive forms of philanthropy by which Latinos could continue to support their local and transnational communities through their community-based mutual-giving tendencies (Gonzales, 2003).

The 1990s also gave rise to an increasingly robust network of philanthropic actors, researchers, foundations, and centers in LAC with efforts focusing on distancing philanthropy from the Christian charity of the past and moving toward development and social justice. It also gave rise to elite philanthropy, like that of celebrities and business leaders, which appears similar to elite philanthropy in the United States. Nonetheless, the state continues to play a more active role than the government in the United States in the funding of social services, as does the Catholic Church (Sanborn, 2005; Sanborn & Portocarrero, 2003). It is important to consider a transnational deterritorialized lens for elite Latino philanthropy (Allatson, 2014).

Section Conclusion

In this section, I demonstrated the need to look at historical events and philanthropic practices in the United States and LAC when exploring Latino philanthropy. I also showed, for hundreds of years, the Latino experience with philanthropy has been either as Iberian colonies or

dealing with U.S. settler expansion, war, and interventions. This history has affected the growth and funding of civil society organizations in LAC and Latino nonprofits in the United States. As mentioned in the introduction to this section, Latino philanthropy has existed before, beyond, in relationship with, and through U.S. philanthropy, making it necessary to study it as its own phenomenon rather than as an expansion of white philanthropy in the United States. This understanding has given rise to Latino philanthropy research to examine why Latino philanthropy has been ignored, along with pleas for investments in Latino nonprofits and communities. In the next two sections, I discuss these topics and close this portion of the chapter by examining characteristics of Latino philanthropy.

Missing Latino Philanthropy and Philanthropy Missing Latinos

Nonprofits and researchers have missed Latino giving despite numbers showing Latinos are too large a group to ignore. Demographically, Latinos will constitute the plurality of the United States population in the next 50 years (Allatson, 2014). Currently, the United States is the second largest Spanish speaking country (Allatson, 2014) and has the second largest population of Latinos in the world (Gonzales, 2010). Latino purchasing power and remittances demonstrate the capacity of Latinos to impact their communities (Campoamor et al., 1999; Gonzalez, 2003). Between 2000–2015, although non-Latino purchasing power grew by 76%, Latino purchasing power grew by 167% (Neilson, 2016). In 2014 and 2015, U.S. foundations granted \$1 billion in Latin America (Foundation Center, 2018), but U.S.-based Latinos sent \$74.3 billion dollars in remittances to the region (Budiman et al., 2018). Furthermore, 63% of U.S. Latino households give to charity (Rolland, 2016). Yet, more giving exists and could exist but is not being elevated by philanthropic researchers as a viable revenue source for nonprofits. For example, even though 45% of U.S. Latino households are likely to be low-income, 18% say they would give more if

they were asked more often, compared to 9% of non-Latinos. Twenty-one percent of Latinos do not know how to support nonprofits they care about compared to 10% of non-Latinos (Rovner, 2015). In this section, I examine why philanthropic researchers miss Latino philanthropy in their findings and describe how the sector does not invest in Latino communities.

The literature presents a handful of hypotheses about why Latino philanthropy is missed by researchers (Campoamor et al., 1999; Gonzalez, 2003; Ramos, 1999). Two hypotheses are problematic when considering findings described in the previous section. According to the first hypothesis, until recently Latino philanthropy was not as prevalent or likely to be found because of the high levels of poverty among Latino communities (Gonzalez, 2003; Ramos, 1999). This hypothesis reflects how everyday giving and mutual aid is missed in less affluent and nonwhite communities rather than proof it does not exist (Martinez, 2017). The second hypothesis posits diaspora philanthropy takes time to evolve from (a) overcoming adversity, to (b) giving beyond immediate circles, and, ultimately, to (c) mirroring elite philanthropy from the host country (Gonzalez, 2003; Orozco, 2006). This argument loses credence when considering (a) how much money flows across borders from Latino migrants in the form of remittances and (b) an understanding of the history of philanthropy in LAC and among Latinos that has always had a deterritorialized frame.

A particularly compelling reason why Latino philanthropy is missed by researchers is that research and the philanthropic sector have focused on understanding elite forms of U.S. philanthropy, missing the complexity of elite Latino philanthropy (Allatson, 2014; Campoamor et al., 1999; Gonzales, 2010; Gonzalez, 2003; Pole et al., 2003; Ramos, 1999). Although research has largely overlooked the effect social class has on Latino philanthropy, a notable exception is a study on celebrity philanthropy by Shakira and Ricky Martin (Allatson, 2014). This research

found Latino elite philanthropy to have transnational aspirations and connections in LAC and the United States, which challenges the notion they are simply emulating U.S. elite philanthropy—let alone foreign philanthropy in the region. For elites like these, their experience with philanthropy is just as much a product of the global South as of the global North and is as related to U.S. intervention in the Americas as it is to a Pan-American Latino identity (Allatson, 2014). This reasoning can also miss informal community philanthropy models regularly seen in Latino communities. For example, some of the more popular informal forms of philanthropy include community savings groups known as *cundinas* or *tandas* (Aranda, 2010) and hometown associations (HTAs)—both of which have deep roots in Latino communities (Aranda, 2010; Gonzales, 2010; Orozco, 2006). Cundinas are similar to and often considered a form of giving circles, yet there is no literature on cundinas other than to note they serve as informal community banks for a population that is hard to serve through traditional financial institutions (Aranda, 2010). HTAs, on the other hand, have been widely researched and will be further discussed in the section of this review that addresses characteristics of Latino philanthropy. Departing from an overall U.S. definition and standard of philanthropy can miss philanthropic figures and examples, as the role and definition of philanthropy are understood differently in LAC (Gonzales, 2010; Gonzalez, 2003; Sanborn 2005; Sanborn & Portocarrero 2003).

One of the primary reasons Latino philanthropy is missed by researchers is because most philanthropic data on Latino giving is self-reported, and Latino forms of giving are often ineligible for tax deduction purposes (Gonzalez, 2003). This results from the U.S. tax code that has disparate impact on Latinos and a lack of dependence on tax benefits as an impetus to donate throughout LAC (Gonzales, 2010; Gonzalez, 2003; Pole et al., 2003). In the case of the U.S. tax code, Latinos are less incentivized to itemize their deductions because tax credits are less

available to them, either because of their income level or nationality status (Martinez, 2017). Combined, these explanations demonstrate the challenges that can arise when trying to identify Latino giving trends, scale, and changes.

Foundations and government policies moved Latino nonprofits in the 1960s to search for institutional funding rather than look to their community members, so it is deeply problematic that foundations miss Latino organizations. As described in the previous section, Latino nonprofits began to grow from the 1960s through the 1990s—from an average of 1–14 new registered nonprofits a year to 300 (Aranda, 2010). Yet, only 1% of total U.S. foundation funding between 2000–2009 went to Latinos in the United States, with 42% going to the western part of the country. Although over \$1 billion dollars were invested in LAC between 2007–2009, less than half went to LAC nonprofits and one fourth went to Mexico and Brazil (Foundation Center, 2011). In 2019, HIP and Candid released the LATINX Funders dashboard, which showed how little these averages have changed (Candid, 2019). There are also few Latinos working or volunteering in the philanthropic sector and as fundraisers, which itself can affect the amount of money invested in the Latino community and throughout LAC (Gonzalez, 2003). For example, in 2013 (the last year with data) a little over 2% of CEO or president positions in philanthropy and nonprofits and 11% of foundation program officer positions were occupied by Latinos. Board diversity data are even less available, although a 2009 analysis found Latinos made up 4% of foundation trustees (Sato & Shah, 2015). Overlooking Latino philanthropy, along with a lack of investment in Latinos, creates a compounding effect on Latino nonprofits and communities that can (a) miss potential funding from Latinos and (b) look for funding from sources that overlook them.

In this section, I explored some of the reasons researchers miss Latino philanthropy and included figures that show how philanthropy does not invest in Latino communities. Together, this reality demonstrates a need to conduct more research on Latino philanthropy to help unleash the full power of Latino philanthropic resources needed and to understand how the philanthropic sector can better support Latino nonprofits and communities. If Latino philanthropy is to be properly identified and studied, it is important to examine its characteristics.

Characteristics of Latino Philanthropy

In this section, I conclude the review of Latino philanthropy by considering how researchers have described characteristics of Latino philanthropy. I show the deep mutual aid roots found in early mutualistas has continued to be a common thread in Latino philanthropy throughout its history and geography. This description of the characteristics of Latino philanthropy will serve as a transition to the second part of this review, that of giving circle research.

In Latino philanthropic research, two cultural patterns emerge: *personalismo* and *compadrazgo*—both highly relational and social. Personalismo is a pre-Iberian social contract based on *confianza* (trust) and reciprocity (Aranda, 2010; Pole et al., 2003). It means giving is directed to individuals in their family and community circles, such as through remittances (Gonzales, 2010; Gonzalez, 2003; Pole et al., 2003); if donations are given, they occur primarily based on how well they know the person or organization requesting the funds (Aranda, 2010). For example, affluent Latinos are more likely to give to organizations where Latinos hold a leadership position or where they know the leaders (Gonzalez, 2003). Compadrazgo, similarly, is a relationship system based on godparent roles in the Catholic Church, where godparents are expected to support their godchildren's upward mobility and potential (Aranda, 2010). Beyond

these similarities, research shows Latinos give spontaneously (Rovner, 2015) and after emergencies (Gonzalez, 2003; Pole et al., 2003; Ramos, 1999). Latino philanthropy also has a strong sense of cultural heritage, tradition, and family (Gonzales, 2010; Gonzalez, 2003; Pole et al., 2003; Ramos, 1999). When Latinos give, their preference is to help other Latinos and to give where other Latinos give (; Gonzales, 2010; Gonzalez, 2003; Ramos, 1999). Finally, like any other group, beyond culture, there are individual demographic factors that affect philanthropic giving, such as generation, national origin, length of time in the United States, and social class (Gonzalez, 2003).

As previously mentioned, HTAs have been a model for local and transnational giving among Latino populations in the United States for centuries. Composed of people from the same town, village, and sometimes country, HTAs are places where Latino immigrants can come together to share their culture, provide support for one another in their host country, and undertake philanthropic activities back home or in their local community (Aranda, 2010; Gonzales, 2010; Orozco, 2006). Although the exact number of HTA members is unknown, 8% of immigrants who send remittances are members of an HTA, with the highest rates coming from the Caribbean (Orozco, 2006). These numbers are so high, governments and intergovernmental development agencies have established community infrastructure programs that match HTA funds.

Immigrants from throughout LAC form HTAs, but some of the more common groups come from Mexico and Central America. Many HTA leaders are active in mainstream chambers of commerce and consider themselves American while also maintaining strong links back home (Aranda, 2010). For example, members of HTAs are more involved with their families in the United States and in their country of origin and visit their home country more often than non-

HTA immigrants (Aranda, 2010; Orozco, 2006). HTA engagement is not universal. Rather, immigrants from urban LAC areas tend to engage in philanthropy differently than some who come from more rural towns or village settings. This is the case among Colombian and Dominican groups in the United States that have historically migrated from cities. Both groups actively engage with development and philanthropic projects back home but do so more through informal personal networks or private businesses. Although Colombians tend to fund projects back home, Dominicans invest more in their communities in the United States, demonstrating how other factors affect and may continue to affect the transnational nature of Latino philanthropy, such as age and length of time in the United States (Escobar, 2015).

Additional conclusions about Latino philanthropy characteristics need more research and a better understanding around which Latinos are giving, to whom, and to what extent. Collective forms of giving continue to play a role in Latino communities and connect those in the United States with their countries of origin. It is also clear relationships and trust are important when determining where their funding goes. These characteristics have implications for the nonprofits seeking Latinos as donors, noting the importance of building trust and having Latinos represented in leadership positions in nonprofits. As with other groups, demographics play a role in philanthropic capacity and strategy, but an appreciation of culture and a desire to support Latinos are also through lines in Latino philanthropy. These characteristics can also be found in giving circles because they make space for shared identities, culture, relationships, and trust. In the remainder of this chapter I will examine what is known about giving circles to better understand how they serve the Latino Giving Circle Network as a tool for Latinos to inspire and move Latino philanthropy.

Giving Circles

Giving circle literature began to appear in 2000 and, for the first years, was largely practitioner-driven (Rutnik & Bearman, 2005; Rutnick & Beaudoin-Schwartz, 2003, Shaw-Hardy, 2000). Since then, research has largely been exploratory (Eikenberry, 2008; Ho, 2008; Jacobs Caster, 2008; Shaw-Hardy, 2009) and resources on starting giving circles (Bearman, 2007a, 2007b). A handful of graduate theses and dissertations on giving circles have emerged (Andris, 2011; Ray, 2013; Strotz & Bigelow, 2008; Witte, 2012), and the first landscape survey of the movement was conducted in 2005 (Rutnik & Bearman, 2005). Researchers have considered how the movement has diversified and grown, necessitating the need for an additional landscape study of giving circles in the United States (Bearman et al., 2016). Additional research has explored (a) how and why organizations should host giving circles (Bearman & Franklin, 2018); (b) what effects giving circles have on their members (Carboni & Eikenberry, 2018); and (c) international research on giving circles in places like the United Kingdom, Ireland (Eikenberry & Breeze, 2015; Eikenberry, Brown, & Kukins, 2015), and Asia (John, 2014).

In a movement and topic so widespread and diverse, establishing boundaries and understanding patterns is essential. I begin this section by examining the term “giving circle” and crafting a definition based on the current literature. I then explore existing typologies of giving circles, review the demographic data related to giving circle members and provide a brief history of the movement’s growth. I conclude this section with a description of giving circle benefits to grantees, hosts, members, and the circle’s community.

Terminology

The term “giving circle” was intentionally selected in the early 2000s on the belief women would be more likely to see themselves as givers than philanthropists. Patricia Lewis,

former president of the Women's Philanthropy Institute, is credited with deciding the movement needed a gendered term because early giving circles were largely female-dominated and supported with explicit goals of attracting and growing the number of women donors (Shaw-Hardy, 2009). Shaw-Hardy (2000) and Eikenberry (2006, 2007, 2010, 2018) helped popularize the term, the first through an early resource guide on how to start a giving circle (Shaw-Hardy, 2000) and the second through the earliest academic research on the movement. Although understanding of what motivates people to give along sex and gender lines has continued to grow—making it seem like an outdated understanding of gender and giving—the term reflects an understanding of women donors at the time and of the movement's deep racial roots reclaimed in today's minority giving (Shaw-Hardy, 2000, 2009). Perhaps more importantly, the term represents a concerted effort to think about, undertake, and define philanthropy differently and based on different values and identities—a factor that continues to reflect the ever-diversifying movement (Bearman et al., 2005; Jacobs Caster, 2008; Shaw-Hardy, 2000, 2009).

Characteristics

The grassroots nature of giving circles and their efforts to practice philanthropy differently, many times along culturally relevant lines, makes a full description of circles difficult. Nonetheless, researchers (Bearman, 2007a; Carboni & Eikenberry, 2018; Eikenberry, 2006, 2010; Shaw-Hardy, 2000) have noted giving circles: (a) educate members about philanthropy and issues in their community, (b) create social connections and grow personal networks, and (c) promote volunteerism and community problem solving. Additionally, giving circles function by (d) pooling funds (and other resources) with the intent to grant them, (e) deciding together where to donate these resources, and (f) maintaining their independence from any one organization. In this way, giving circles are an educational, participatory, and proactive

form of community philanthropy. (Carboni & Eikenberry, 2018; Eikenberry, 2006; Shaw-Hardy, 2000).

Giving circle sizes vary. The average number of circle members is 116, the median is 50, and the most common is 100. Three fourths of giving circles report having constant membership; two thirds meet in person, and, of the two thirds that meet in person, they meet on a quarterly basis (Bearman et al., 2016). Structures also vary, with some circles hosted by an organization with a 501(c)(3) status, some forming their own organization, and others remaining highly informal in structure without fiscal sponsorship or tax-deductible status. Across all types of giving circles, the decision-making processes try to focus on equality of members and give every member an equal say as to how resources are distributed. The required contribution ranges from \$4.00 to \$2 million dollars with an average donation of \$1,312 and \$400 as the most frequent (Carboni & Eikenberry, 2018).

Typologies

A spectrum can be created among circles, ranging from those that are highly formal and organized to those made up of individuals gathering around someone's dining room table (Bearman et al., 2005; Jacobs Caster, 2008; Rutnik & Bearman, 2005; Rutnik & Beaudoin-Schwartz, 2003). Nonetheless, initial typologies of giving circles were developed before the most recent landscape study. As such, they miss the evolution of giving circle infrastructure, including networks like the Latino Giving Circle Network. This limitation creates the case for the existing typology (Eikenberry, 2006, 2010) to be reviewed and revised. Research by Ho (2008) may point to a more useful way to group giving circles, by the stage in which they find themselves. As networks become composed of various types of circles Eikenberry (2006, 2010) noted, a giving circle life cycle framing may better explain the differences among giving circles.

According to Eikenberry (2006, 2010), giving circles fall into three categories: (a) small groups, (b) loose networks, and (c) formal organizations. Small groups are the least formal, composed of people who both pool and determine how to distribute their resources. If they are hosted, small groups often receive administrative support from their host, and they generally support organizations. Loose networks typically come together around a fundraising event and are organized by a core of people from the overall membership. Loose networks tend to be the most connected with those they fund and typically fund because of and directly to an individual doing good work or in need. Their primary focus is social and fundraising. Formal organizations are like traditional membership organizations with committees or boards that manage and structure the overall group. The major activities of formal organizations are member education, engagement with funded organizations, and circle management. In terms of funding patterns, formal organizations tend to strategically fund actors of different types in an area of interest to their membership (Eikenberry, 2006, 2010).

Apart from this dissertation, the only other known research study of a racially-based giving circle network contributes to our understanding of the ebbs and flows of a giving circle's lifespan (Ho, 2008). In a study of Asian American and Pacific Islander in Philanthropy's giving circles, Ho (2008) developed categories based on the state of evolution of the giving circles. Ho noted this typology is not meant to be linear, proposing instead a giving circle life cycle. According to Ho, circles in the emergence phase are those that are still establishing their values, goals, and processes. A core group of members are actively engaged and (a) act as founders, (b) recruit members, and (c) set their fundraising goals. Giving circles in the growth phase have their processes and policies established and continue to engage the founders in conjunction with other active members. At this time giving circles begin distributing funds. Those giving circles in the

maturation phase have completed a few grantmaking rounds, are considering membership retention and potential leadership transitions, and are well-known in their community. In the adaptation phase, circles are faced with a need or desire to change to address their membership and community needs differently (Ho, 2008).

Membership

Giving circle membership is changing as they grow in popularity. Between 2000–2009, membership was found to be largely white and women (Bearman, 2007b), but membership between 2010–2016 became more diverse in almost every way except for education (Bearman et al., 2016; Carboni & Eikenberry, 2018). Although Latinos were small in number in early giving circle research (Bearman, 2007b), new members are more likely to be Latinos (Carboni & Eikenberry, 2018), and Latinos are part of the larger growth of identity-based circles (Lindsey; 2006; W. K. Kellogg Foundation, 2012). Women's groups are still the most common, comprising 48.5% of all giving circles. However, other identity circles are growing (e.g., men only circles, LGBTQ circles, Jewish circles, Asian American and Pacific Islander circles, African American circles, and age-specific circles; Bearman et al., 2016). This growth has led to some philanthropic studies aimed at supporting racial, ethnic, and tribal forms of collective giving (Ho, 2008; Lindsey, 2006; W. K. Kellogg Foundation, 2012).

Now that I have described giving circles by considering the definition of a giving circle, their characteristics, potential typologies, and membership, I turn to examining them as a collective. In the next section, I explore the origins of the giving circle movement and its current known scale before ending this chapter with a review of the benefits of giving circles to grantees, members, hosts, and communities where giving circles reside.

The Giving Circle Movement's Origin and Current Scale

As noted in the review of Latino philanthropy and elsewhere, forms of collective giving have been found around the world and throughout time (e.g., mutual aid or voluntary fraternal organizations; Bearman, 2007a, 2007b; Bearman et al., 2005; Eikenberry, 2006; Ho, 2008; Rutnik & Bearman, 2005; Rutnik & Beaudoin-Schwartz, 2003; Shaw-Hardy, 2009).

Nonetheless, the current giving circle movement traces its roots to the end of the 1990s with the arrival of women who earned, inherited, and controlled wealth like never before (Bearman & Beaudoin-Schwartz, 2005; Ho, 2008; Rutnik & Bearman, 2005; Shaw-Hardy, 2000, 2009).

These circles pushed philanthropy to reconsider who a philanthropist is and who should be at the decision-making table deciding where philanthropic funds should be distributed (Bearman & Beaudoin-Schwartz, 2005; Rutnik & Bearman, 2005; Shaw-Hardy, 2000). Opening this door has allowed other identity-based philanthropic groups to further push to democratize giving along race, ethnicity, gender, sex, ability, and other marginalized identities (Ho, 2008; Lindsey, 2006; W. K. Kellogg Foundation, 2012).

Multiple sources and case studies refer to one seminal event—a 1998 article in *People Magazine* (Miller & Kelly, 1998) that told the story of how Colleen Willoughby established the Washington Women's Foundation to engage, educate, and empower women philanthropists (Rutnik & Bearman, 2005; Shaw-Hardy, 2009). Today, the Washington Women's Foundation is considered one of the first giving circles of the movement. Willoughby's story inspired many others to think of ways to bring women together to give collectively while changing philanthropy (Shaw-Hardy, 2009). Among those inspired, Shaw-Hardy (2000) went on to establish her own giving circle and, in partnership with the Women's Philanthropy Institute, to publish a widely cited manual on how to start giving circles (Rutnik & Bearman, 2005). Shaw-Hardy (2009)

interviewed 18 women giving circle founders to capture the stories of these early movement builders across the country. Shaw-Hardy found much of the movement spread through the sharing of stories about the power of giving together, demonstrating the grassroots nature of the movement's origin.

Today, with 2 decades of the giving circle movement to analyze, the movement continues to grow on multiple fronts. For example, of those giving circles found in the 2016 landscape survey with identifiable start dates, 5.8% launched before 2000, 48.1% launched between 2000 and 2009, and 46% launched between 2010 and 2016 (Bearman et al., 2016). There are currently more than 1,500 circles, including chapters of giving circle networks and more than a dozen networks of giving circles such as the Latino Community Foundation (Bearman et al., 2016). This number of circles is more than three times the number found in the 2005 landscape survey a decade earlier, which also found no existing networks when the first survey was conducted (Rutnik & Bearman, 2005).

Since the movement began to grow in 2000, it has engaged an estimated 150,000 highly diverse individuals and granted out \$1.29 billion dollars, with 60% of circles formed around a common identity and representing those not typically engaged by traditional philanthropy (Bearman et al., 2016). With the scale of the growing movement now established, I turn to the benefits of having giving circles as a model for engaging marginalized communities and elevating their philanthropic activities.

Giving Circle Funding and Benefits

I begin this section by examining giving circle funding figures and trends and grantee benefits from receiving funding from giving circles. I then move to what has been theorized to be benefits to members, hosts, and communities with giving circles—leaning on the view that

giving circles can be laboratories of, and for, democracy (Eikenberry 2006, 2008, 2010; Carboni & Eikenberry, 2018).

Funding Patterns and Trends

Giving circles have granted out \$1.29 billion dollars since their inception (Bearman et al., 2016). Giving circles established during 2000–2009 and from 2010–2018 funded similarly in all ways except one; more recent circles prioritize social change grantmaking, but more established circles prioritize religious giving (Carboni & Eikenberry, 2018). Most circles fund human services, women and girls, and education. Religion-related and international causes receive the least funding. The latter is most likely related to giving circles' local focus, with 84% of giving circles granting at least some of their money locally (Bearman et al., 2016). Giving circle members also take into consideration cultural differences, race, class, and/or gender when making funding decisions. The longer a giving circle member is part of a circle, the more they are likely to report giving to ethnic and minority groups beyond their own identities (Eikenberry, Bearman, et al., 2009). However, women are more likely to donate to women and girls than are men members (Carboni & Eikenberry, 2018; Eikenberry, Bearman, et al., 2009).

Beyond the funding they provide, there is little research on how giving circle funding affects recipients. In an exploratory study, Eikenberry (2008) asked nonprofit professionals about their experiences as circle grantees and found, when the relationship is a match in terms of expectations on both sides, funding from giving circles may open the organization to new volunteers, donors, contacts, and resources, adding prestige to the organization. Ho (2008) found Asian and Pacific Islander-led and -serving organizations receiving funding from Asian American and Pacific Islander in Philanthropy giving circles reported it was important to them that the money came from their same racial and local community. Furthermore, studies on

identity-based philanthropy have reported similar feelings of solidarity on the part of grantees who appreciated and felt empowered knowing the funding came from their community (Lindsey, 2006; W. K. Kellogg Foundation, 2012). Nonetheless, some challenges arise if the organization is not in a place that can support such a highly engaged form of philanthropy or who expect year-over-year gifts, as giving circles tend to change funding recipients regularly (Eikenberry, 2008).

With little known about the effects of giving circles on grantees, in the next section I turn to the known benefits of giving circles on members, host organizations, and their communities to explore the impact giving circles can have beyond the total amount funded.

Giving Circle Benefits

As previously mentioned, giving circles are a form of highly engaged community philanthropy that prompts members to learn more about philanthropy and community issues and then together decide where to give funds. This is not done in partnership with an organization or the larger public, so there can be times when what a circle wants to fund is not what an organization can provide or what is most needed. It can, therefore, be difficult to determine the ultimate benefit of giving circle funding or who benefits the most (Eikenberry, 2006, 2008, 2010). It is important to remember giving circle members are philanthropists from traditionally marginalized communities bringing new voices and resources to the table; they are not diverting current philanthropic resources and giving more power to elite models of giving. Although the \$1.29 billion dollars granted over 16 plus years is an impressive amount, it pales in comparison to the larger philanthropic resources granted out annually or governmental funding that addresses society's needs. Grants given are the secondary benefit to giving circles (Bearman et al., 2005; Rutnik & Bearman, 2005); the real beneficiaries are the members themselves, host organizations, and democratic society.

Benefits to Giving Circle Members. An understanding of the benefits to members is more complete than for grantees or society. Trends are still emerging on how multiple factors affect how individuals benefit from giving circle participation. Nonetheless, research has shown circles provide members with a hands-on learning environment and increased access to speakers about community issues and philanthropy (Eikenberry, Bearman, et al., 2009). Circles also provide members with community and wider networks (Bearman, Beaudoin-Schwartz & Rutnik, 2005; Carboni & Eikenberry, 2018), and many members report feeling the greatest benefit is to themselves as the givers (Rutnik & Bearman, 2005).

Considering why members join giving circles may point to some of the intangible and tangible benefits they are looking for and report receiving. The common reasons for joining are shifting away from the social and educational goals of early circles (Bearman, 2007b; Bearman et al., 2005; Carboni & Eikenberry, 2018; Rutnik & Bearman, 2005) to changing narratives around who is on the demand and supply side of philanthropy (Jacobs Caster, 2008; Lindsey, 2006; W. K. Kellogg, 2012). Similarly, there appears to be a desire among members to participate more strategically in their communities (Carboni & Eikenberry, 2018) and to use philanthropy as a change-making tool in an increasingly diverse nation (Eikenberry, 2010; Ho, 2008; Lindsey, 2006; W. K. Kellogg Foundation, 2012). Other common reasons people join or create giving circles include (a) doing philanthropy differently from how it has been carried out by an elite few and more in line with how their communities gave in the past (Jacobs Caster, 2008); (b) growing community philanthropy and increasing the number of philanthropists (Bearman et al., 2005; Carboni & Eikenberry, 2018; Shaw-Hardy, 2000, 2009); (c) increasing the potential of their personal philanthropic resources (Carboni & Eikenberry, 2018; Eikenberry, 2006; Rutnik & Bearman, 2005); (d) learning about philanthropy and issues facing their

community (Carboni & Eikenberry, 2018; Rutnik & Bearman, 2005); and, (e) being part of a community of givers (Carboni & Eikenberry, 2018; Eikenberry, 2006). Ultimately, however, the reason most people join a giving circle is because they want to give back with others to their community through philanthropy (Bearman et al., 2005; Carboni & Eikenberry, 2018; Shaw-Hardy, 2000, 2009).

Benefits to Host Organizations. Host organizations support giving circles by accepting, holding, and disbursing the circle's funds and by providing a range of other services (Bearman, 2007a). These relationships can be mutually beneficial if expectations are managed on both sides (Bearman, 2007a; Bearman & Franklin, 2018; Rutnik & Bearman, 2005). Based on recent data on giving circles, 45% of giving circles are part of one of the approximately 25 networks or alliances that seek to grow the giving circle movement, such as the Latino Giving Circle Network (Bearman et al., 2016). A similar amount (42%) is hosted mostly by community foundations. The 2005 landscape survey (Rutnik & Bearman, 2005) found 68% of giving circles were hosted, but it is possible this number was overrepresented because some circles were easier to find than others before networks existed or the internet became a viable place to find more circles (Bearman et al., 2016).

A study in 2018 built on the 2016 landscape survey and found community foundations reported engaging more than 9,000 donors through their hosting of giving circles, about 6% of estimated donors in giving circles today (Bearman & Franklin, 2018). This study found the most reported motivation and benefit to hosting was to grow and cultivate a culture of philanthropy in their community (Bearman & Franklin, 2018). Host organizations have reported the following motivations and benefits: (a) reach new donors (reported hosting reason by 81%; reported benefit by 85%), (b) reach more diverse donors (reported hosting reason by 74%; reported benefit by

64%), and (c) increase community visibility (reported hosting reason by 70%; reported benefit by 74%; Bearman & Franklin, 2018).

Benefits to Democratic Society. If giving circles are seen as laboratories of democracy and self-help or mutual aid organizations deeply rooted in marginalized communities, expectations would be more in line with the benefits members and society can expect to receive from the movement (Eikenberry, 2008, 2010). For example, giving circle members are more likely to undertake a wide range of political and civic activities than nongiving circle members (Carboni & Eikenberry, 2018; Eikenberry, Bearman, et al., 2009). It is not clear if giving circles attract people more likely to be politically and civically active or if participation in a giving circle is what sparks the activity. However, it is clear the longer an individual is engaged, the more that individual is likely to increase their political and civic activities (Carboni & Eikenberry, 2018). The size of the giving circle also influences these outcomes, with larger circles exerting more influence. Sex also has an influence, with men giving circle members reporting they were more involved in bringing about policy change because of the giving circle (Eikenberry, Bearman, et al., 2009).

Similarly, giving circle members volunteer more than nongiving circle members (Carboni & Eikenberry, 2018). In fact, 52% of members volunteer, 48% donate beyond their giving circle contribution, 45% join grantee boards, and 38% help nonprofits fundraise. About half of giving circle members said they fundraise for their circle (Bearman et al., 2016). Giving circle members are also more strategic philanthropists than nonmembers and develop more diverse networks for philanthropic advice (Carboni & Eikenberry, 2018).

Finally, giving circles engage and empower members of society who have historically been excluded from philanthropic decisions and spaces in ways that are culturally relevant and

rooted in these communities (Lindsey, 2006; W. K. Kellogg Foundation, 2012). For example, affinity-based local circles comprised of minorities continue to grow and make up about two thirds of circles (Carboni & Eikenberry, 2018). White women still comprise the largest portion of membership, but this has begun to change with reports that almost one fifth of circles do not have white-majority membership. Furthermore, circles formed around a shared identity are as likely to be formed around a mutual race or ethnic identity as a religious one and together comprise about one fourth of shared identity circles. Circles also include members from a variety of ages (e.g., young professionals, youth, and teens; Bearman et al., 2016).

Section Conclusion

In this section, I presented research findings on the power of giving circles, demonstrating that influence goes beyond the funds given. The impact of giving circles extends to how individuals benefit as participants, how they support community engagement for their host organizations, and how giving circle participation increases both civic engagement and philanthropic activity for members. Together, these findings show giving circles create higher levels of civically engaged members with stronger community ties and agency to use their voices for change.

Chapter Summary

I began this chapter by presenting the search strategy employed to find relevant literature in two areas—Latino philanthropy and giving circles. In the section on Latino philanthropy, the research presented underscored the need to consider the history and practice of philanthropy in the region and in the United States, as these have been intertwined with the migrations of Latinos and the effect of U.S. domestic and foreign policies. Throughout the review, I presented examples of how Latino philanthropy has existed before, beyond, in relationship with and

through American philanthropy, making it necessary to study it as its own phenomenon rather than as an expansion of white philanthropy in the United States. I also considered how this legacy has created circumstances and systems that neglect to pay attention to Latino philanthropy, making it invisible in research—a fact that is paired with a disinvestment of philanthropic funds in Latino communities that has further placed Latino nonprofits in unsustainable funding scenarios. Together, the research points to a need for more research on Latino philanthropy and an invitation for non-Latino philanthropy to better support Latino communities. In last portion of this section, I considered the deeply communal and relational nature of Latino philanthropy and other characteristics that need more research to examine which Latinos are giving, to whom they are giving, how they are giving, and to what extent they are giving. Demographics play a role in Latino philanthropy, as with any other group, but understanding the role identity and culture play in Latino philanthropy will better elucidate the importance of collective forms of giving, such as giving circles.

I then turned to findings from giving circle research and examined the following aspects of circles: (a) characteristics, (b) existing typologies, (c) operations and structure, and (d) membership demographics and trends. I noted a need to expand and revisit typologies of giving circles and described shifts in membership. I then looked at giving circles as a collective, described the origins of the current giving circle movement in the United States and presented the 2016 landscape study's figures on the size and composition of the movement. With 2 decades of the giving circle movement to analyze, the movement continues to grow on multiple fronts. I described funding figures and trends, noting a shift in benefits experienced by giving circle members, their host organizations, and the communities with circles. An understanding of the benefits to members is more complete than for grantees or society, but trends have emerged

around the education and engagement of members and how circles can support members' community and network development. Host organizations benefit from having giving circles, as it helps diversify their donor base and engage a wider range of community members thus increasing the visibility of their organization in their community. Giving circle participation also positively affects civic engagement and philanthropic activities of members, showing democratic society can benefit from having circles in their communities that engage marginalized members and promote collaboration.

Together, both bodies of literature show the power of collective forms of giving and of expanding the definition of philanthropy and preconceived notions of who a philanthropist is based on elite or white forms of philanthropy in the United States. Characteristics of Latino philanthropy—such as its highly relational nature, communal models, and cultural solidarity—are also found in the giving circle movement, making giving circles and their infrastructure essential to inspiring and growing Latino philanthropy and that of other minority groups.

CHAPTER THREE

METHODOLOGY

The focus of this dissertation is on the Latino Giving Circle Network (LGCN) hosted by the Latino Community Foundation (LCF). My aim was to better understand (a) how giving circles serve as a tool for culturally relevant Latino philanthropy, (b) the benefits of giving circle participation, and (c) how participation in giving circles affects participants' civic engagement and philanthropic activities. The following research questions guided this study:

1. What can be learned about Latino philanthropy's motivations and characteristics by examining Latino giving circles?
2. What benefits do members receive by participating in a Latino giving circle?
3. Does participation in a Latino giving circle affect levels of philanthropic and civic engagement?

An emancipatory research (ER) paradigm provided the epistemological framework to guide my selection of theory and methods. ER is considered a home for critical theories because of the commitment to produce research that serves collective efforts to address oppressive systems and norms. As such, I selected the Latino-focused critical race theory called LatCrit. This led me to adapt the guiding principles of ER to the Latino experience by using LatCrit's standards for research design. With an overt political commitment to Latino struggles, I reviewed known challenges in designing data collection instruments for Latinos and designed a survey that met these paradigmatic principles. I then immersed myself in Chicana methods of data analysis that ensured there was a meaning-making space for findings to be interpreted by survey participants before being included in this dissertation.

Previous research on giving circles has mostly used exploratory qualitative methods and has not employed critical theories to guide method selection. The 2016 landscape study (Bearman et al., 2016) used a survey questionnaire to produce descriptive statistics. More recently, Carboni and Eikenberry (2018) used inferential statistics to identify links between giving circle participation and civic engagement. Similarly, literature reviewed in Chapter 2 on Latino philanthropy suggested the research has been largely qualitative and focused on tracing the history of Latino's relationship with philanthropy. In this research, I have sought to address structural deficiencies that divest in Latino communities and organizations and that disincentivizes and ignores Latino philanthropy. Nonetheless, because much of the literature came from the Americas, it did not employ critical race theory, though it can be said to meet many of LatCrit's research principles by focusing on a deterritorialized approach that sees the unity and differences among Latino groups. This dissertation reports the first research known to use methods commonly used by giving circle researchers but with a critical theory guiding the instrument's design. This study also builds on the literature on Latino philanthropy's methods through my commitment to LatCrit principles in the design of data collection processes and instruments and in using platicas as a method for analysis of survey findings.

This chapter begins with an exploration of the research paradigm and theory I used in this dissertation's design. I then describe the design and implementation of the data collection survey instrument that went out to all LGCN members ($N = 476$) with a response rate of 49% ($n = 232$). I conclude the chapter by describing the data analysis of survey findings with LGCN members through platicas, a dialogical method for data analysis proposed by Chicana scholars as a culturally relevant way to make meaning collectively.

Research Paradigm

In this section, I discuss how the selection of methods for data collection and analysis was determined by the theory and paradigm and designed to provide reliable results to answer the research questions. To show the logic that took me from paradigm to methods, I first describe ER's origins and principles and how I adapted these for the population studied with LatCrit. I then consider each principle and reflect on design decisions I made as the study progressed.

Emancipatory Research Paradigm

ER is a paradigm that aims to socially produce knowledge that is useful to the self-emancipation efforts of disadvantaged people. ER asks researchers to approach their studies as activists trying to make sense of their collective actions—not as researchers trying to be where the action is—understanding empowerment is not a gift from the powerful but something people collectively do for themselves (Campbell & Oliver, 1996, Oliver, 1997). Taking this stance on the utility and purpose of research has made ER a home for critical theories (e.g., critical race or feminist theories), as these theories seek to go beyond generating new knowledge to generating knowledge that removes barriers and promotes social inclusion and equity. The ER paradigm is one open to academics because of earlier research by social disability justice scholars from the 1990s leading to the motto “nothing about us, without us” (Charlton, 2000). In a much-quoted article, Stone and Priestley (1996) identified six principles that define and govern ER. These principles require that researchers:

- (a) adopt a social model of disablement as the epistemological basis for research production;¹

¹ An epistemology of disablement—whereby disability is understood as a social relationship created by a disabling environment and disabling attitudes, socially constructed and culturally produced, and a form of structural oppression. This view has been articulated as the standpoint of disabled people and the disability rights movement for decades and has profound implications for the production of disability research.

- (b) surrender objectivity claims through overt political commitment to the struggles of disabled people for self-emancipation; and
- (c) undertake research where it will be of practical benefit to the self-empowerment of disabled people and/or the removal of disabling barriers.

ER also demands the researcher not sit comfortably in the academy but confronts the accusations of irrelevance. The researcher's political standpoint is tied to political action in challenging oppression and facilitating the self-empowerment of disabled people by:

- (d) ensuring research production is fully accountable to people with disabilities;
- (e) giving voice to the personal as political while endeavoring to collectivize the political commonality of individual experiences; and
- (f) adopting a plurality of methods for data collection and analysis in response to the changing needs of disabled people.

This research paradigm was an invitation to think of the utility of this dissertation beyond my doctoral program. In other words, I considered how this research can be used to affect systemic change necessary to support Latino philanthropy and increase investment in Latino nonprofits and infrastructure organizations essential to collective giving efforts by Latinos. This led me to select a theory that focused on the experience of Latinos as a minority group in the United States. I describe this theory in the next section and then discuss how this theory helped guide the design of this research to center the group being studied.

LatCrit Theory

Critical theories question the utility and purpose of conventional research and underscore the important role of activism in knowledge production for social transformation. The choice in theory is a political one and its tenets serve as guides in research design. The selection of theory

for this dissertation is critical Latino race theory, known more commonly as LatCrit theory. Emerging from critical race theory of the 1970s and beyond, LatCrit emerged alongside critical Asian theory in the 1980s and 1990s. Both groups moved to call attention to how racial oppression is expressed in immigration and refugee systems, language rights and education, and internal colonialism and racial erasure (e.g., through the census racial categories; Bender & Valdes, 2011; Bender, Valdes, et al., 2017; González, 2008; González et al., 2021; Mutua, 2006; Valdes, 2005; Valdes & Bender, 2021). Originators of LatCrit defined “nonnegotiable shared commitments” as the foundation of LatCrit (Valdes & Bender, 2021, p. 7). These commitments include (a) intergroup justice, (b) antisubordination, (c) antiessentialism, (d) multidimensionality, (e) praxis/solidarity, (f) community-building, (g) critical/self-critical, (h) ethical, (i) transnational, and (j) interdisciplinary.

Using LatCrit theory’s commitments, I adapted the six ER principles to center the Latino experience and commitment to producing research that moves from studying oppression to transforming society. These principles, thus, became: (a) adopting a social and normal (rather than abhorrent) model of racism, (b) surrendering claims of objectivity with overt political commitment to Latino struggles, (c) undertaking research of utility to self-empowerment efforts of Latinos and/or that remove structural racism upholding oppression of Latinos, (d) ensuring research is accountable to Latinos, (e) giving voice to the personal as political and to the commonality of individual experiences, and, (f) adopting a plurality of data collection and analysis methods that are responsive to Latino needs and culture.

In the next section I share examples of how I responded to challenges in data collection and analysis among Latino populations and the methods I employed to overcome these challenges. First, though, I reflect on how these six principles played out in this study’s evolution

and how they led to the selection of methods for data collection and analysis to ensure they produced reliable results in answering the research questions.

Adopting a Social and Normal Model of Racism

Critical race theories call researchers to discuss the socially constructed and everyday nature of racism. It is not something abhorrent that occurs infrequently; it permeates social systems and interactions (Bell et al., 1995; Delgado & Stefancic, 2017). The idea that race and racism are constructed means they can be deconstructed and transformed. With this understanding, and based on research that shows how white moderate donors affect movement priorities (Peller, 1990) and how U.S.-based foundations have deradicalized social movements (e.g., Chicanismo; Bartley, 2007; Faber & McCarthy, 2005; Marquez, 2003), I chose to review literature that centered Latino giving and forms of collective giving that make space for marginalized voices in decision-making spaces in philanthropy. This focus is made with the commitment to better understand how Latinos, in general, and giving circles, in particular, are seeking to transform philanthropy and deconstruct the systems and processes that maintain the racial status quo. I traced the roots of giving to pre-Columbian practices and elevated the calls both to see and sustain Latino forms of giving. In this decision, I chose not to expand a white-centric definition of philanthropy and philanthropists to define Latino philanthropy because of the role white philanthropy has played in maintaining the status quo and systems of racial oppression and because of the potential of Latino giving to dismantle this legacy.

Surrendering Claims of Objectivity

It is rare that a Latina researcher comes from the community she studies. It is even more rare that the community asks her for the research, participates in it, and inquires about its development. As such, my intention from the onset of my dissertation journey has been to

incorporate emancipatory research principles into my research design decisions as much as possible—understanding it as a guide and spectrum rather than an all or nothing binary. I have had mixed experiences and have kept notes and reflections on this intention. This has allowed me to continuously reflect, learn, adapt, pivot my research design, and let much of the knowledge and support for my research emerge. As a Latina and LCF giving circle cofounder, I did not intend to be unbiased. Being a member of this community is a strength to my legitimacy as a researcher who can design, execute, analyze, and publish research on engaging marginalized voices in philanthropy with an overt commitment to our liberation from racism and racist systems. Furthermore, I believe my identity has increased community involvement and voice through completing the survey, joining me for research pláticas, and asking me to add certain questions in further surveys of the network of giving circles studied in this dissertation. My connection to the community and Spanish fluency have also been essential in translation efforts for this survey and my ability to host pláticas in both English and Spanish and establish trust with participants.

Undertaking Research of Utility to Self-Empowerment Efforts of Latinos

The idea for this dissertation emerged from my engagement with the Latino philanthropic community and understanding how little philanthropic investments were made in Latino communities. As noted in Chapter 2, only 1% of U.S.-based foundation funds went to Latino causes in the first decade of this century, and recent figures indicate this has not changed much (Foundation Center, 2019). A recent report by the National Committee for Responsive Philanthropy (2020) found more philanthropic investment goes to leisure sports than the less than 2% of funds that go to immigrant or refugee causes. Despite this reality, I was surrounded by Latinos who were pooling their resources across the state and looking for underfunded

Latino-serving organizations and leaders in which to invest. It made me proud as a Latina, and it also made me want to understand what was needed to inspire and support more Latino philanthropy, mobilize our collective power, and build our connections to each other. In speaking to the original giving circle members of the first circle in the LGCN and LCF staff, I teased out what could be useful research to our collective efforts. What emerged was this dissertation.

Ensuring Research is Accountable to Latinos

The effects of designing research accountable to the population whose collective efforts for change are being studied led to a long survey design timeline because of the need to share the questionnaire with members who would be taking the survey and longer analysis time to incorporate member voices and perspectives in making meaning of the survey findings. In both cases, data collection and analysis, giving circle leaders were asked for feedback that was incorporated into revisions, causing changes to questions and framing of findings throughout the dissertation process. Developing spaces for feedback loops to take place kept me accountable to the network's members and to Latinos overall.

In practice, conducting community accountable research meant, as I designed the survey questionnaire and pulled descriptive statistics from the data, I went back to giving circle leaders and asked clarifying questions and checked my assumptions. As a result, more than 10 leaders saw the survey questionnaire in its various iterations. These leaders kept me honest and pushed me to be bolder in considering the connection and effect of their participation in their wellness, giving, and civic engagement levels. After I pulled descriptive statistics from the survey response dataset, I sent a two-page summary to members of the leadership council of the LGCN and invited them to join me for platicas. Eighteen of the 32 members of the leadership council joined me to review the data and ensure the findings were useful to their giving circle recruitment,

execution, and sustainability. The pláticas also provided a space where I asked about questions these data elevated for them and where they saw, or did not see, themselves in the numbers. This gave an opportunity for survey participants to provide depth and nuance to the findings. These interactions led to more questions around their self-perception of wellness after joining their giving circle that were incorporated into a second survey questionnaire released in September 2021.

Giving Voice to the Personal as Political and to the Commonality of Individual Experiences

As noted in Chapter 2, when considering literature on Latino philanthropy's characteristics, giving tends to be based on trust and social relations. I was curious if this translated into civic engagement in forms of activism that may take place behind closed doors, around a kitchen table, and as we face ourselves and the pervasive racism and homophobia in Latino communities. I brought up this topic in the pláticas to explore how giving circle participation left members feeling comfortable talking about uncomfortable topics with loved ones and how this might translate to public forms of civic engagement. Although we may all share the identity of Latino, I also wanted to ensure the commonality behind that term did not erase our individual experiences and compounding identities. Rather, I wanted us to speak of a whole where it made sense and elevate nuances where that was more powerful than oversimplifying our *Latinidad* for the consumption and understanding of white audiences.

Adopting a Plurality of Culturally Responsive Data Collection and Analysis Methods

In this dissertation, I used descriptive statistics from a survey questionnaire, much like other giving circle research. However, I began the survey's design with a review of challenges in surveying Latino populations to design the study with Latino needs and culture at the center of all design decisions. Similarly, although descriptive statistics could suffice in terms of an

analysis approach, incorporating survey participants in meaning making of the statistics added the nuance needed to avoid oversimplifying the study population. This ensured my findings did not perpetuate stereotypes, but, rather, acknowledge and affirm differences in our communities and make visible groups of Latinos often overlooked in research.

Section Conclusion

In this section, I shared reflections on how I translated the ER paradigm using LatCrit to explore Latino's collective change efforts with a political commitment to removing and replacing oppressive systems and norms. Using LatCrit theory guided every research design decision I made along the way, and the reflections I shared show how these decisions led me to select data collection and analysis methods that will lead to reliable results under this theory and paradigm. In the next two sections of this chapter, I turn to data collection and analysis. The data collection section begins with challenges in surveying Latinos and then turns to how I mitigated these in the survey questionnaire design. I also describe how I coded the survey to pull descriptive statistics that would be shared with platica participants. In the final section of this chapter, I turn to the analysis of survey findings and begin by exploring why the method of platicas was selected and how these served as a space for data analysis.

Data Collection

As noted in the previous section, my commitment to making research design decisions that would be responsive to Latino needs and culture necessitated I begin the survey questionnaire design by understanding the challenges in surveying Latinos. By beginning with this, I was able to make decisions on how the questionnaire could (a) capture diversity among Latinos, (b) make ethical decisions based on the community's vulnerabilities, (c) ensure the questionnaire met the technological formats accessible to most Latinos in the United States, and

(d) be translated to ensure reliable data results regardless of the language used when completing the survey. I begin this section by presenting the challenges and then discuss how each challenge was addressed in the development of the questionnaire. I then present a summary of the development timeline before describing how the questionnaire was coded and which scales were used. I conclude the chapter with an explanation of how data analysis took place.

Challenges in Surveying Latinos

Survey research with the Latino population in the United States presents unique challenges with little methodological consensus. Despite continual population growth, Latinos are largely ignored in U.S. academic journals. A review of nonethnic specific journals conducted a decade ago found only 2% of peer-reviewed articles in the United States had focused on Latino issues. When Latinos do receive attention, research has been mostly on acculturation, academic achievement, and health behaviors (Liang et al., 2009). This omission in the literature speaks volumes about how the data we seek as researchers can perpetuate harmful stereotypes; it also meant that I needed to design the survey instrument for Latinos and focus on their resources and assets.

Two components of Latino identity are worth noting as challenges to capturing the diversity in Latino communities—race and levels of acculturation or assimilation. For example, the racial diversity in the Latino population of the United States is often missed in demographic questions that do not list Hispanic as a race or ethnicity (Parker et al., 2015; Tienda & Mitchell, 2006; Swinton & Rivera, 2014). The U.S. Census Bureau has identified this as a challenge, and criminal justice activists say the rate at which Latinos are incarcerated is lost due to survey design and the multidimensional and multifaceted nature of racial identity among this community (Brown, 2015; Tilsley & Matos, 2016). In the 2010 U.S. census, “Hispanic” was

considered a category under ethnic origin, not a race. However, 37% of Latinx respondents to the 2010 census marked their race as “other” filling in the response of Latino or Hispanic as the write-in option. A similar figure (42%) did the same in the 2000 census. This complex understanding of racial identity among Latinx people puts many into the multiracial or other category, lowering the overall visibility of the community and missing its diversity. This omission has caused minorities (e.g., Afro-Latinos and Indigenous Latinos) to be lost in the question’s design.

Levels of acculturation or assimilation are also difficult to capture in surveys of Latino communities. Foreign-born and U.S.-born Latinos show differences in everything from opinions (Brown, 2015; Evans et al., 2008) to health outcomes (Tienda & Mitchell, 2006). To account for this, data tend to be weighted by the number of years in the United States, where they are born, and if they are Mexican (Brown, 2015; Parker et al., 2015).

Federal agencies have experimented with adding additional demographic questions when surveying Latino communities, with the U.S. Department of Health and Human Services (Swinton & Rivera, 2014) identifying 10 additional data elements to consider when seeking to capture the diversity among Latino populations. These include (a) Hispanic ancestry, (b) personal and parental countries of birth, (c) citizenship and/or legal residency status, (d) time in the United States, (e) languages spoken at home and English proficiency, (f) literacy level, and (g) highest educational attainment.

Designing a Questionnaire to Capture Diversity

When designing the demographics portion of the survey, I incorporated questions to capture levels of acculturation or assimilation (e.g., immigrant generation, place of birth, and Mexican ancestry; Brown, 2015; Parker et al., 2015). I also included some of the previously

identified federally recommended key data elements for Latinos. However, I did not include length of time in the United States, opting instead for a question about immigrant generation to better capture acculturation or assimilation. I also did not include citizenship and/or legal residency status questions due to the sensitive nature of the topic of undocumented migration. I saw no purpose in questions that could cause respondents any fear or trepidation, so I decided to not include them. I also incorporated a skip pattern question that asked if they were registered to vote, not if they were ineligible to vote, which could be the result of citizenship status or having been formerly incarcerated. These decisions were made to be able to capture nuance without capturing information that could harm or trigger trauma. To limit likelihood of receiving socially desirable responses, I separated some questions to minimize their influence on responses. For example, gender and sexual orientation questions were asked well before religious affiliation. Demographic findings are presented in Chapter 4.

Ethical Considerations

The resistance to provide information because of fear or mistrust among Latino respondents comes from a place of migratory vulnerability, one that is acknowledged by LatCrit theory (Evans et al., 2008; Parker et al., 2015; Swinton & Rivera, 2014). Working with this population requires specific ethical considerations when including certain types of questions. Beyond the required ethical considerations and planning necessary to obtain institutional review board approval, I chose to further limit questions around legal status and citizenship. Questions on health and well-being were framed positively and included a holistic definition of health that is typical of Latino's understanding of the concept (Brown, 2015), including mental, physical, and spiritual health. I decided to use a positive framing based on Kahneman's (2011) suggestion to avoid negative priming of responses and to limit negative feelings when completing the survey

(Fowler, 2014). I also put health questions before social determinants of health behaviors, housing situations, and access to health care. Order appears to matter when asking these questions of Latinos, with poorer health reported by older Latinos when asked about sociodemographic and health-related characteristics before self-reported health status (Lee et al., 2014).

Technology

Like any other form of data collection, online surveys have weaknesses, including limits on coverage and access (Brown, 2015; Neuman, 2014). This limitation is particularly important when surveying Latino communities. According to the Centers for Disease Control and Prevention (CDC; Blumberg & Luke, 2014), almost 60% of Latino adults live in wireless telephone-only households (compared to 40% of non-Hispanic White and 46% of non-Hispanic Black). As such, I worked with the Center for Effective Philanthropy (CEP) to design a mobile-friendly interface of the survey with the capacity to adapt to various mobile screen sizes. The survey for this dissertation was launched by the CEP, a nonprofit organization that focuses on understanding philanthropy's effects on grantee organizations. This separation meant the dataset I received was de-identified, and I could not tell which of my peers responded. This anonymity was essential to me because I valued the trust the LGCN and LCF placed in me. The CEP allowed me to have access to the survey platform's technology features, such as designing a mobile-friendly interface of the survey. The interface allowed participants to toggle between English and Spanish versions of the survey depending on their language preference and fluency levels. The survey was shared by email, but members were also given time and tablet computers to complete the survey in person during the February 2020 LGCN retreat. This option helped

make up for the lack of access to the internet or the frequency with which Latinos access the internet via their phones.

Translation

Language and communication barriers tend to require translation of the survey instrument, as 73% of U.S. Latinos report speaking either only Spanish or both Spanish and English at home (Parker et al., 2015). Yet, I found little consensus on best practices in the translation of the survey questionnaire. Instead, I found a common recommendation to do a literal translation of the survey instruments given the cost and time needed to do a more multicultural or normative equivalence translation. This approach can decrease the validity and reliability of the measures (Evans et al., 2008). Generally, and with budget, the following processes are used for survey translations: (a) simple direct translation, (b) translation with back translation, and (c) translation by committee.

Due to the lack of consensus and budget around the need for any of these processes, we chose instead to focus on cross-cultural adaptation (CCA) of the Spanish instrument to achieve equivalence between the two instruments rather than direct translation (Epstein et al., 2015). The concern centered around whether Spanish-speaking respondents would understand the questions in the same way as English-speaking respondents (Brown, 2015). There is no consensus around CCA methods, and evidence for the best methods is lacking; back translations are considered less and less necessary in favor of equivalence, as most appear to produce similar results (Epstein et al., 2015). Nonetheless, having all respondents understand the question in the same way increases reliability and reduces random errors (Fowler, 2014).

I began my career in nonprofits with a focus on serving as a simultaneous translator for international nonprofit organizations. I also oversaw translation of materials (e.g., proposal and

data collection instruments) more recently in my career. I leaned into this experience and translated the survey through a combination of all three previously mentioned processes to aim for a CCA translation of the survey. It helped to have Dominican and Peruvian partners in CEP and LCF who were able to support me as I translated and designed the survey. Although I did the initial translation, we each took the translation to a Spanish speaker from another country in LAC to ensure the Spanish translation did not favor one vocabulary over another. In addition to the three of us, the survey was shared with Spanish speakers from Nicaragua, Argentina, and Colombia.

Survey Design Process and Timeline

It is important to take a step back and recall the origin of this dissertation. As I noted in the section on surrendering claims of objectivity in favor of taking an overt political commitment to Latino struggles, I began this process being a member of the LGCN. In my participation in the network, I developed relationships with LCF staff and fellow LGCN members. This positionality was important in LCF's decision to invite me in the summer of 2018 to join an evaluation team they had hired to conduct an evaluation of the network. The team included two other women of color, one Asian American and one African American. The purpose of my participation was to ensure I could bring member voices and experiences to the evaluation's design. It also presented me with an opportunity to make the evaluation project the space in which I could design my dissertation to ensure the findings had further reach and capacity to inform the wider giving circle movement's collective efforts to mobilize resources.

I spent the fall of 2018 reviewing literature on Latino philanthropy, giving circles, and challenges in studying Latinos. In the first part of 2019, the survey was designed with the translation and roll out plan taking place in the latter part of the year. The survey launched in

January 2020 and closed mid-February 2020. The data set arrived in the second quarter of 2020 and the cleanup and analysis took place during that summer. I led the drafting of an evaluation report in the fall and presented it to LCF in January 2021 (Loson-Ceballos et al., 2021).

As noted in the section of this chapter where I discuss how I ensured this research was accountable to Latinos, a summary of findings from the survey was shared with giving circle leads in the leadership council of the LGCN. All leads were invited to four platicas in May 2021 in preparation for an additional survey design that builds on the dissertation's findings. These platicas served as a place to report back to the community and make sense of the early study results together. Questions around the effect of their participation on members' wellness during the multiple crises faced by Latinos in 2020 and 2021 emerged as an area of interest for members and LCF, leading to codesigned questions and recommitment by research participants to continue to evaluate the impact of collective efforts.

Survey Coding and Scales

The survey questionnaire went out to all members of the network ($N = 476$), and I received 232 responses, a response rate of 49%. I designed the 34-item survey with four sections. The first section included questions about (a) their experience as a member of the LGCN, (b) reasons why they joined or why they remained involved, and (c) perspectives on the impact of the giving circle on themselves and their community. The second section included questions that explored members' level of civic engagement and the variety of their civic activities. The third section included questions about social determinants of health to examine how health disparities can be mitigated through participation in giving circles and what effect their participation had on their overall wellness. The fourth, and final section, focused solely on the demographics of the respondents. Both the English and Spanish versions of the survey can be found in Appendix A.

The first section of the questionnaire included 11 questions, four of which were scaled. The scale progressed from *not at all* to *somewhat* to *quite a bit* to *very much* with two questions adding a non-applicable option. Coding for these selections went from 1–5 beginning with *not at all*. Two questions asked members to select the three main reasons they joined and stay involved in their giving circle. Each potential response received a numeric value beginning with 1 for coding purposes. One question asked members to select up to four benefits from their participation with a similar coding process based on numbering each potential benefit. Two questions asked respondents to select *all that apply* but were ultimately not used because they went beyond the scope of findings and were not coded. One question provided drop down options of the LGCN giving circles for members to select which one they participated in. This question was included in the evaluation report but not the dissertation; it helped LCF leaders understand the participant representation of the network without knowing who. Finally, one question asked members to enter in the year they joined their giving circle. These responses were later grouped into giving circle tenure with 2-year intervals for each tenure range.

The second section had six questions, none of which were scaled. One question asked members about their civic engagement activities with the instruction to check all that apply. Each response was given a numeric value for coding purposes beginning with 1 for the first possible response provided. There was one question with a skip pattern that asked members if they were registered to vote in the United States and provided them with *yes* or *no* options. If members selected *yes* then they saw a matrix table of questions that asked if they voted or intended to vote in the past few elections with *yes*, *no*, and *prefer not to answer* options. All respondents, regardless of whether they noted they were registered to vote, saw another matrix table of questions about their participation or intention to participate in the 2010 and 2020 census and

community mobilizing efforts around the census. Answer options were *yes*, *no*, and *prefer not to answer*. Each response received a numeric value beginning with 1 for *yes*, 2 for *no*, and 3 for *prefer not to answer*. The final question in the section asked about participation in LCF's annual policy summit, which was a question provided for the evaluation report and not included in the dissertation.

The third section of questions included five questions, one of which was scaled. The scaled question asked members to rate their overall health from a scale of 1 for *poor*, 2 for *fair*, 3 for *good*, and 4 for *excellent*. For the remainder of the questions in this section, participants were instructed to select all that apply. Each response was given a numeric value beginning with 1 for the first listed possible response. Only one of these questions, the one focused on wellness, was included in the dissertation. The other questions were about the social determinants of health and were included in the evaluation report.

The fourth and final section of questions focused on demographic variables of respondents and included 12 questions. Three questions were *select all that apply*; five were *select one*; three were text answers for country of birth, birth year, and ancestry; and one was a *yes or no* question. The select-all-that-apply questions focused on race and ethnicity, employment status, and protected classes. Like other select-all-that-apply questions, each response was given a numeric value beginning with 1 and starting with the first listed possible response. The select-one questions asked about immigration generation, education level, household income, marital status, and community geography. The final *yes or no* question asked participants if they wanted a copy of the final evaluation report, which was provided through LCF.

Section Summary

In this section, I presented the known challenges to surveying Latinos and how these were mitigated in my research design decisions. These decisions include demographic questions that capture the rich diversity among Latinos, ethical questions that removed questions that could trigger fear or bring up trauma, technology formats that brought the survey to the technology medium most used by Latinos and which also provided space and devices to complete the questionnaire during an LGCN retreat, and translation decisions made to ensure respondents understood the questions in the same way regardless of the language in which they interacted with the questionnaire. This was followed by a presentation of the timeline of the survey development that grounded this dissertation in a larger evaluation of the LGCN and which gave it its first push to center an emancipatory research design paradigm and a LatCrit theory to ensure Latinos were centered in all aspects of the research design. The description of the questionnaire included the formats of the questions, scales where applicable, and how these were coded to produce descriptive statistics. In the final portion of this chapter, I turn to data analysis.

Data Analysis

Based on my reflections on ER, I decided to add a dialogical meaning-making component to the dissertation when I began writing about the analysis of data. Platicas differ from focus groups in that the purpose is not to collect additional data, but to make meaning of information together. There is no prescribed format, questionnaire, or protocol to follow. Platicas serve as a space where conversation can happen, stories and reflections shared, and lessons imparted (Fierros & Bernal, 2016). The decision to use platicas over focus groups was made with the cultural understanding that Latinos share and cocreate knowledge through conversations, not by

a researcher asking targeted questions to participants, which creates a one-way dialogue and separates the researcher from the researched.

Chicana feminist scholars like Gloria Anzaldúa (1987), Norma Alarcón (1990), Mary Pardo (1990), Emma Pérez (1999), Carla Trujillo (1991, 1998), and Dolores Delgado Bernal (1998) have long described the role of “cultural intuition” in breaking through epistemological boundaries of research to elevate cocreated meanings. Through long conversations, such as with a *cafecito* or during the *sobremesa*, I have learned my entire life how we make sense of our lives and the world around us as Latinos. It taught me to listen to my living ancestors and hear the stories of my relatives, to challenge whose knowledge is valued and whose realities are shared. It made me into the Latina scholar I am now and influenced my desire to include those researched into how I made sense of the survey’s findings. The use of *platicas* adds an essential dialogical component to this dissertation’s data analysis and my commitment to center and lift a racialized, possibly normative, standard of what and how society should support and remove barriers for Latino philanthropy. In the last section of the chapter, I share how I designed the *platicas* with the LGCN. As noted in the timeline for the survey, an evaluation report of the LGCN was presented to LCF in early 2021, and this report became a two-page summary document that was shared with members of the LGCN leadership council in the spring of 2021. Translation of the document was not necessary as all the leads were fluent in English. I scheduled four *platicas* during various hours of the day to accommodate time limitations and competing priorities of participants. The invitation went out to 35 individuals, 19 of whom indicated they would attend and 18 of whom actually attended. The invitation stated the purpose of the *platicas* was “to conversationally make sense of these findings with them” and “because the world has changed dramatically since the survey took place, these *platicas* are also a place where we welcome you

to share the role the LGCN played last year in your philanthropy, civic engagement, and well-being” (see Appendix B).

Platicas took place between May 12 and May 14, 2021, over Zoom, and each lasted a little over 1 hour. The sessions were recorded and transcribed using the free transcription service, Otter. This service only supports English, but I went through the transcripts and corrected the transcriptions of things that were shared in Spanish. I did not translate because the Spanish words were clearly used because an English equivalent was not fully possible. This helped preserve the intention behind the words used by members and allowed a flow of Spanglish that kept us from having to code switch culturally in what was intended to be a Latino space.

Participation was optional and the language spoken alternated between English and Spanish. Through storytelling, participants identified in the survey’s findings areas where they felt seen in the data. This dialogue provided an additional level of qualitative analysis of the numbers. All platicas began by an invitation to describe Latino philanthropy in their own words and continued with a short presentation of findings for those unable to read it in advance. Most participants had read the summary in advance and arrived with notes and requests for additional questions to be incorporated into subsequent surveys of the network.

Through these platicas, we explored what a Latino-centric definition of philanthropy is and how their experiences in a Latino giving circle have served as an expression of Latino philanthropy. Departing from the survey’s findings on benefits, we found additional benefits not listed in the survey (e.g., providing beneficiaries with a place where they do not have to code switch and can be their most authentic selves). Serving as a springboard to develop better questions that capture the connection between participation and wellness, these platicas validated the analysis I presented of the findings and pushed me to be bolder in owning the conclusion that

giving circles have served as a culturally relevant way to come together to share and magnify our collective power. In the subsequent chapters, I note where platicas contributed to my understanding of the survey findings.

Chapter Summary

This chapter began with a description of the ER paradigm used for this dissertation and how this paradigm can be a hospitable home to critical theories, like LatCrit, the critical race theory focused on the Latino experience in the United States. I described how I translated the key research principles of ER using LatCrit research commitments as a guide and to center the Latino experience in my research design. This led me to create a data collection tool with the intention of overcoming challenges when surveying Latinos and to help me see the importance of incorporating a dialogical approach to make meaning of the descriptive statistics from the survey. By doing this, Chapters 4 and 5 include descriptive statistics paired with nuance and depth from the platicas that showcase the diversity of experiences and identities among Latinos in the LGCN. This approach also ensured findings were of use to our collective efforts to inspire and support Latino philanthropy, mobilize our collective power, and build connections with one another by being part of a larger evaluation that fed member needs and feedback back to the LCF. The approach also ensured this dissertation would be designed to contribute to our collective knowledge on the power of giving circles as part of the larger giving circle movement.

Findings will contribute to the literature on the characteristics of Latino philanthropy by describing (a) why Latinos join and stay in giving circles, (b) the additional philanthropic activities they undertake, and (c) the perceived impact of their giving. Findings will also add to knowledge about the benefit of giving circles beyond the funds distributed, showing the effect of giving circle participation on levels of civic engagement, philanthropic activities, and overall

wellness. Together, findings make the case that infrastructure for these forms of collective giving is essential and that giving circles can serve as a place to reimagine philanthropy and what it means to be a philanthropist. Given the highly relational nature of Latino philanthropy, findings demonstrate giving circles can serve to create stronger communities and effectively engage marginalized groups. Findings are presented in the next two chapters.

At every point in my dissertation design, implementation, and analysis I included an invitation for giving circle members to ask me questions, bring me their concerns, or consider how to produce recommendations and findings that were useful to our collective learning. It is perhaps this intentionality and continual reflection and reiteration that lengthened the time frame of my research; it took 2.5 years to get to the point of writing. But the process also underscores the importance of having used LatCrit theory and an emancipatory research paradigm to maintain the humanity of the participants and their lived experiences front and center in every decision I made.

As I reflect on the massive undertaking required to design this research with intentionality and overt commitment to dismantling oppressive systems and norms faced by Latino communities, I see huge opportunities for this dissertation to help others reimagine how to partner with philanthropic voices from other racial and demographic minorities to support investments in our communities and joint struggles.

CHAPTER FOUR

FINDINGS

Latino Philanthropy

The literature on Latino philanthropy presented in Chapter 2 underscores the need to examine Latino philanthropy from a transnational lens that considers the practice of philanthropy in Latin America and the Caribbean (LAC) and the United States, including the history of philanthropy as an extension of colonial rule and U.S. intervention in LAC and in response to social marginalization in the United States. With this historical perspective, examples emerge time and again that show how Latino philanthropy has taken on collective forms missed by scholars, other funders, and nonprofit organizations. Paired with governmental and private philanthropic disinvestment in Latino nonprofits, the need to identify and support Latino philanthropy presents an opportunity to examine its characteristics more deeply.

Findings presented in this chapter contribute to this examination by considering the motivations behind why Latinos joined and stayed engaged in their giving circles. Being aware of the reasons Latinos come and stay together to pool resources can elucidate the necessary infrastructure and conditions to inspire philanthropy by and for Latinos. Findings in this chapter further add to this examination in two ways: (a) by providing a more complete and diverse view of who Latino philanthropists are and what brings them to and keeps them engaged in their giving circles, and (b) by considering the role of key variables in these motivations, including Mexican ancestry, immigrant generation, gender, age, income, and giving circle tenure. In Chapter 5, I will present findings that contribute to the literature on giving circles by exploring the benefits of giving circle participation to members and their communities.

Findings in this chapter answer the first of the three research questions presented in Chapter 3: What can be learned about Latino philanthropy's motivations and characteristics by examining Latino giving circles? In this chapter, I report on analysis of data from the first and last portion of the survey. The first portion of the survey included questions about giving circle and philanthropic activities. The final section included questions on demographics of respondents. Because of the use of LatCrit theory within an emancipatory research paradigm, I turn the personal into the political by presenting demographics that show the rich diversity within Latino communities rather than oversimplifying Latino identity to ease white consumption of our Latinidad. I also describe the commonality among Latino differences to raise the Pan-American aspects of our culture to develop and deploy political power through the collective.

This chapter is divided into three sections: (a) demographics, (b) motivations for joining giving circles, and (c) motivations for staying engaged in giving circles. The demographics of the Latino Giving Circle Network (LGCN) are diverse along all variables considered, generally paralleling the demographics of Latinos in California and the United States overall. In other ways, data showed increased diversity among LGCN members in comparison to official figures. The motivations for joining and staying in giving circles are also telling in the ways they mirrored Latino philanthropy characteristics presented in Chapter 2 and in how they appeared to be associated or not associated with other variables.

Respondent Demographics

Demographic data from the survey showed the diversity of representation in the LGCN from a wide range of Latino subgroup experiences. As noted in Chapter 3, the questions for this section of the survey were designed to capture this diversity and collect information that is necessary when learning about Latino experiences, such as Mexican ancestry and immigration

generation. These and other variables (e.g., gender, age, and income) were helpful in examining motivations for joining and staying engaged in Latino giving circles and will be discussed in subsequent sections. By exploring the composition and motivations of LGCN members, it becomes clear Latino philanthropy challenges people to think differently about who a philanthropist is and from where resources are being mobilized for social change.

Race and Ethnicity

Figure 1 shows the responses for questions on race and ethnicity. On the question about race, respondents were asked to “select all that apply” to capture diversity within Latino populations that is often missed. Because respondents could check more than one race, additional statistical analyses are not possible along the category of race. Nonetheless, seeing the racial diversity among Latinos in this figure provides valuable descriptive statistics. The most recent U.S. census separated race and ethnicity into two questions and led to noticeable shifts in how Latinos reported their race. The census considered Hispanic or Latino an ethnicity inclusive of all the racial categories. This was an improvement in question design from previous years that led many respondents to select “other” as a racial category and write in Hispanic or Latino.

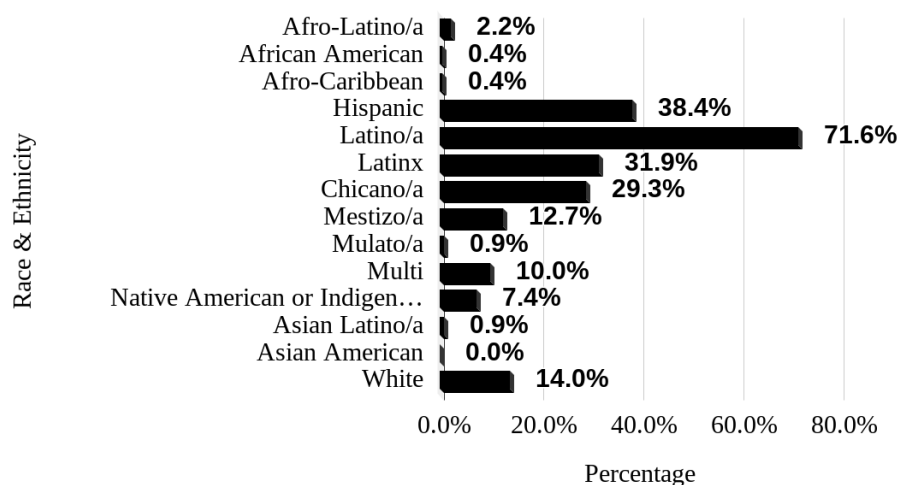


Figure 1. Respondents' race and ethnicity ($n = 229$).

The ability to reflect on race as its own question in the census resulted in big changes in how Latinos have maintained their ethnic identification while showing more of the racial diversity that exists in our communities. For example, in the 2020 census, 52.9% of Latinos dropped identifying as “white alone,” and 6.4% dropped the identification of “Black or African American alone.” This change can be seen in tandem with a 567% increase in Latinos identifying as “two or more races” and selecting the Hispanic or Latino ethnic option (Jones et al., 2021), demonstrating the importance of making race questions multiselect for Latino populations and not asking them to choose between identifying as Latino and any one race.

As Latino populations continue to grow, such changes to questions about race and ethnicity increases in importance; Latino populations are growing faster than other groups in the country. For example, the 2020 U.S. census found the Latino population had grown by 23% since 2010 compared to non-Latinos, which grew by 4.3%. The 2020 census also reported a total of 62.1 million Latinos in the United States, of whom 15,579,652 lived in California, making the state home to one fourth of the nation’s Latino population and the state with the second highest Latino population (U.S. Census Bureau, 2021c). It is important to note the LGCN is located in such a heavily populated Latino state because the network can more accurately capture what Latino philanthropy looks like within the U.S. context.

In California, Latinos comprise 39.4% of the state’s population, and 83% of California Latinos reported Mexican origin (U.S. Census Bureau, 2021c). Because of the large number of Latinos in the United States with some Mexican ancestry and their concentration in California, their experiences can sway analysis of Latino survey responses. To mitigate this and to further capture some of the diversity lost elsewhere, respondents to the survey were asked if they had Mexican ancestry. Of the 206 respondents who answered the ancestry question, 66% indicated

they have some Mexican ancestry. This number shows diversity in ancestry within the LGCN is greater than the state's overall Latino population, making the network even more likely to represent the diversity of the Latino experience with philanthropy.

Immigrant Generation

Immigrant generation is also an important variable in Latino philanthropy (see Figure 2). It was interesting to learn most of the network's membership is either foreign-born (34%) or first generation born in the United States (41%). This finding counters preconceived notions that philanthropy is learned by assimilation into U.S. culture or that a different understanding of philanthropy in the Americas translates into less philanthropy—two notions described in Chapter 2 as potential reasons why Latino philanthropy is understudied and seemingly difficult to identify. Figure 2 shows immigrant representation decreases in the second generation born in the United States (11%), third generation (9%), and fourth or higher generations (5%). In the United States, the non-U.S. citizen population constitutes 48.4% of the population, a number that is slightly higher than the 46.4% of California's population who do not have U.S. citizenship (U.S. Census Bureau, 2021f). It is possible those with citizenship were born elsewhere and migrated to the United States, as I did after being born in Mexico City and arriving in California as a toddler. Nonetheless, having 34% of the network report being foreign-born and 41% being born to immigrant parents shows parallels to the larger state and national context of immigration and transnational influences on the group.

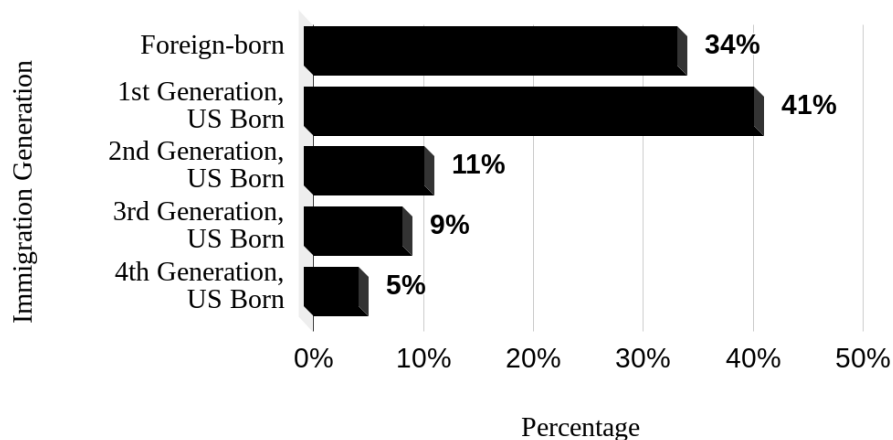


Figure 2. Respondents' immigrant generation ($n = 228$).

Gender and Sexuality

Perhaps the least surprising finding from the survey was related to gender where, of the 223 responses received, and despite being offered multiple selections, 68% self-identified as female and 32% as male. The gender ratio, males to females, in the United States is 97 to 100, and in California, 98 to 100 (U.S. Census Bureau, 2021a). However, giving circles have been shown to attract more women than men, and the LGCN is no exception. This gender ratio is like the data reported in the 2016 landscape survey of giving circles in the United States (Bearman et al., 2016).

Sexuality received the lowest completion rate of any survey question with a total of 191 responses, or a completion rate of 84%; all other questions hovered above 90% and some closer to 98%. An 84% response rate is still very high, but it suggests this is an area where good survey design can improve data collection among Latinos. It is possible that different wording or placement among demographic questions could have increased the completion rate. Of those who answered, 89% identified as heterosexual, 8% as gay or lesbian, and 3% as bisexual. The census does not ask about sexuality, though in the summer of 2021 it did conduct a household

pulse survey—surveys designed to deploy quickly—to examine the effects of the COVID-19 pandemic on the LGBTQ population (U.S. Census Bureau, 2021d). Official figures are less available. Nonetheless, a 2021 national Gallup poll found LGBTQ identification has risen to 5.6% from 4.5% in 2017 (Jones, 2021). In comparison to these national data, 11% identification as gay, lesbian, or bisexual in the network is high.

Household Income

Household income range was used as a variable for social class and showed a wide distribution (see Figure 3). The intention behind these income ranges was not to have the median income for the state of California as the lowest range. According to the most recent census, the median household income in California is \$80,440, which is likely to be lower for Latinos (U.S. Census Bureau, 2021e). At the time of the survey's development, the median income was \$76,000 (Economic Research, 2021). Although the income question used uneven ranges, it added nuance to the comparison of respondents to the state of California's income distribution. In terms of household income range, 73% of respondents reported household income over \$100,000, 41% reported income over \$200,000, and 21% reported income over \$300,000. In comparison, 13.5% reported household income between \$25,001–\$75,000 and \$300,001–\$500,000. With 73% of the LGCN respondents reporting an annual household income more than \$100,000, it is clear this is a mostly a movement of middle-class Latinos.

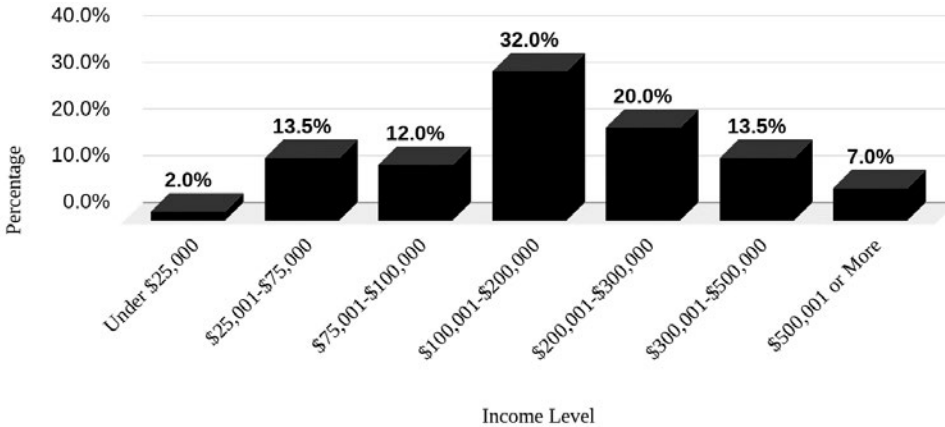


Figure 3. Respondents' income level ($n = 221$).

Geography

In terms of geography 56% of respon lived in urban communities, 38% in suburban communities, and 6% in rural areas (see Figure 4). The U.S. Census Bureau information of urbanization rates for California were last updated in October 2021 but still use 2010 census data. This information shows 95% of California is urban (U.S. Census Bureau, 2021c). When including the survey's suburban category as part of the census' urban category, then the 94% who reported either urban or suburban are representative of the state's highly urbanized population.

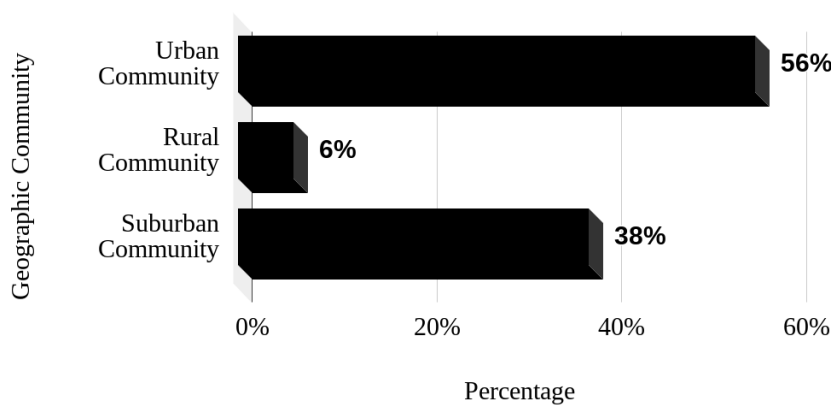


Figure 4. Respondents' geographic community ($n = 229$).

Age

Age was determined by asking members the year they were born and grouping responses into decades, with the youngest in the 20–29 age range and the oldest in the 70–79 age range (see Figure 5). The largest representation was in the 40–49 age range (31%), followed by the 30–39 (27%) and the 50–59 (24%) age ranges with equal representation in the 20–29 (9%) and 60–69 (9%) age ranges. When compared to the 2020 census data for California, the networks’ top three age ranges are overrepresented (see Figure 6). In other words, although 41% of the state of California is between the ages of 30–59, 82% of the network is between those ages. In contrast, although 15% of Californians are between the ages of 20–29, these ages were represented by only 9% of the network. Although 11% of Californians are between the ages of 60–69, these ages are represented by 9% of the network. Similarly, the 4% of the network that is between 70–79 is close to the state’s rate of 6% (U.S. Census Bureau, 2021c).

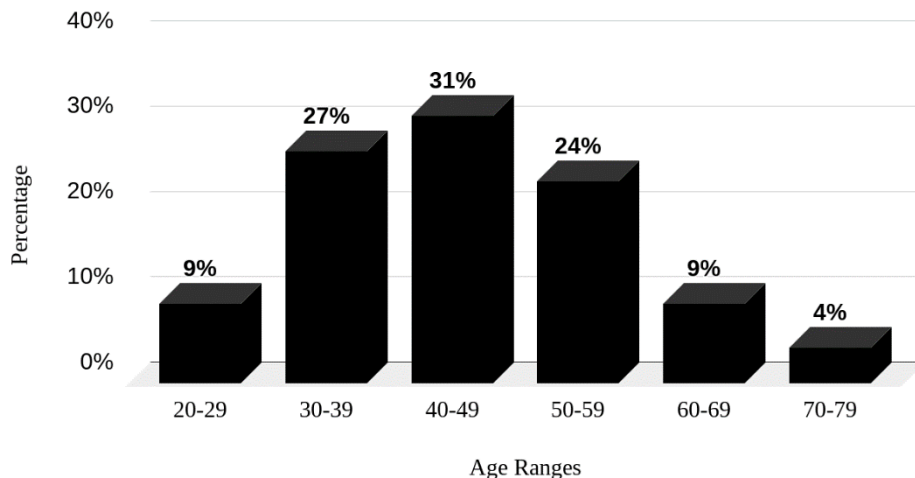


Figure 5. Respondents’ age range ($n = 195$).

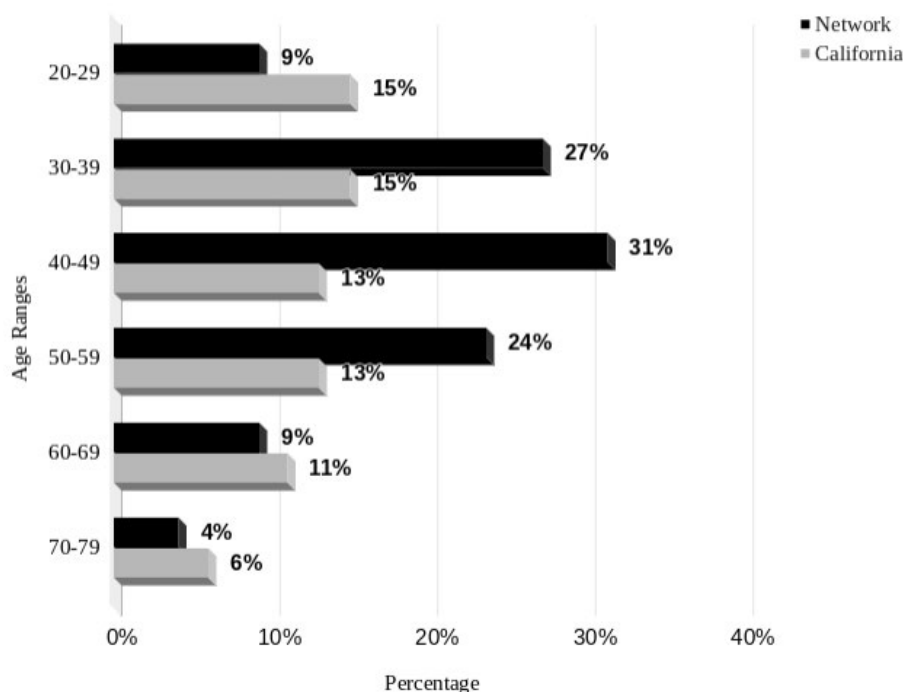


Figure 6. Respondents' age compared with California.

Employment

The employment question was multiselect, acknowledging that respondents may have held more than one form of employment. This question received 227 total responses, of which 11 selected more than one option. Seventy-eight percent of those who selected one option, selected “employed full time,” although 59% (7 of the 11 respondents) who selected more than one option selected “employed full time” and something else (e.g., student or gig economy job). In other words, 184 respondents (81%) selected “employed full time,” a large percentage of the total responses for this question. A breakdown of the percentage is not possible given its multiselect nature, so Figure 7 shows the selections made for employment status without those who selected more than one option, and Figure 8 shows the answers of those who selected more than one option. Employment status was likely affected by the pandemic, but, according to the

2020 census, 60.3% of California residents were employed full time, giving this network a higher employment rate than the state's rate (U.S. Census Bureau, 2021c). This disparity is likely because of the overrepresentation of the age groups previously mentioned. Sixty-five percent of respondents indicated they were married, compared with the state's 46.5%. This disparity is also likely higher because of the age distribution of the LGCN (U.S. Census Bureau, 2021c).

Together, age, employment, and marriage status point to a network of 30–59-year-old working professionals with families.

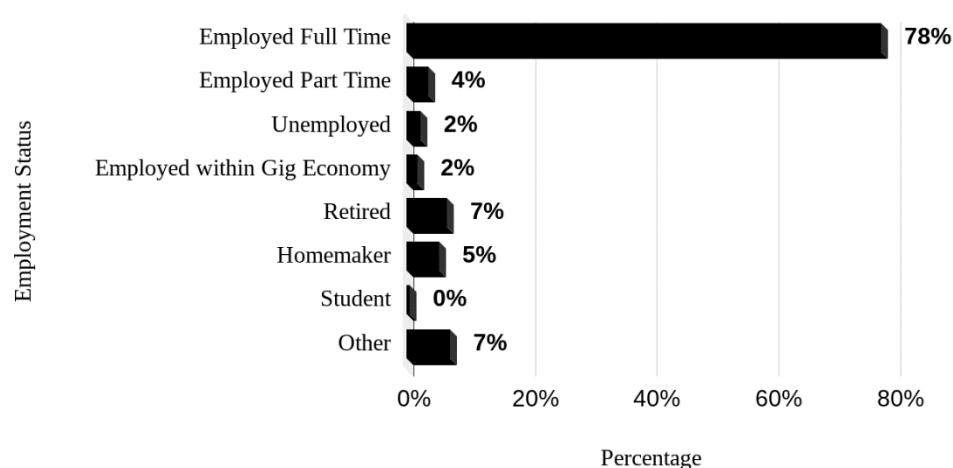


Figure 7. Respondents' employment status ($n = 227$).

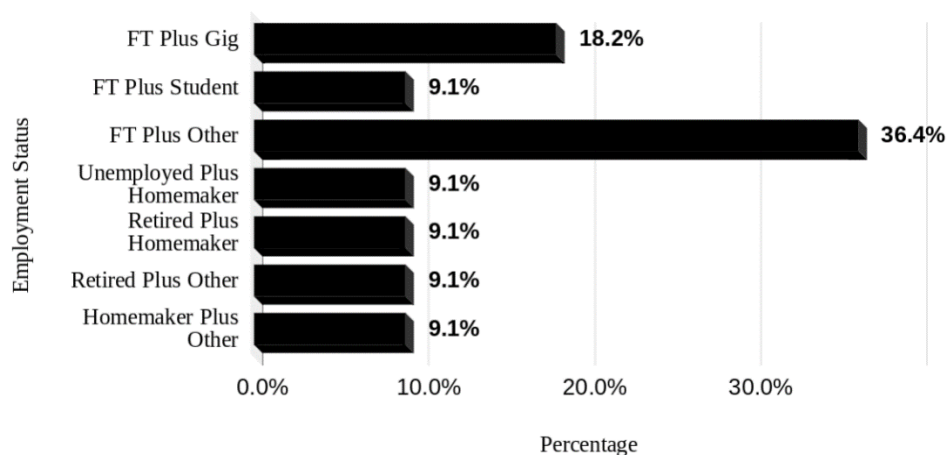


Figure 8. Respondents' Multiselect Employment Status ($n = 11$).

Education

The question about highest completed education level showed a highly educated network with bachelor's degrees held by 42% and master's degrees by 38% (see Figure 9). Compared to California, where 35% of those over age 25 have earned a bachelor's degree or higher (U.S. Census Bureau, 2021c), this is a highly educated group. Compared to California Latinos, where 14% of those over age 25 have earned a bachelor's degree or higher (U.S. Census Bureau, 2021c), this is an extremely educated group.

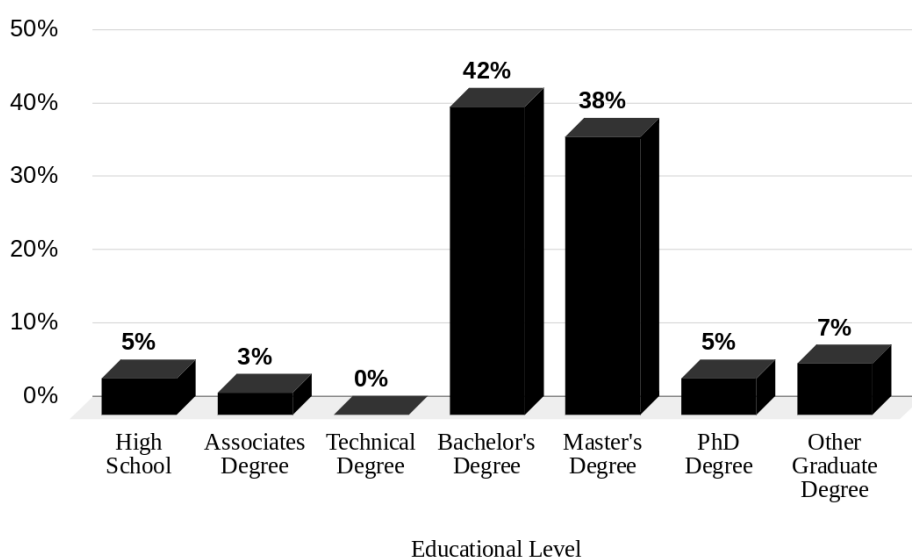


Figure 9. Respondents' education level ($n = 230$).

Section Conclusion

In this section, I described how, overall, members of the LGCN are racially diverse, have a high representation of women, are highly educated and professional, well-resourced, and are active family and community members. Members are also closer to their ancestral Latino countries of origin by migration generation but are giving locally through their giving circle.

The race and ethnicity question showed the racial diversity of the group and the importance of making race questions multiselect for Latinos. This was supported by the new format of the U.S. census separating Hispanic or Latino into an ethnicity apart from race, with respondents showing they were more likely to select more than one race and still identify ethnically as Latinos if given the option. The data also made visible the large percentage of Latinos in California, making it even more important that members of the LGCN call California home.

Immigration generation showed the LGCN is transnational in its roots, with a third not born in the United States and 41% born to immigrant parents as first-generation U.S.-born Latinos. This underscores the transnational roots and experience with philanthropy among Latinos and challenges notions that philanthropy is learned with assimilation or acculturation. Although not the same measure, the fact that more than 46% of California residents are not U.S. citizens shows the state itself is transnational in its roots. People can gain citizenship and still be foreign-born, so this comparison should be made loosely.

In terms of gender, it was not surprising that more than two thirds of LGCN members were women because this ratio is like that previously identified in the most recent landscape study of giving circles in the United States (Bearman et al., 2016). When comparing this ratio to the male to female ratio of California, it shows Latino giving circles, like other circles, attract more women than men. This can have implications for how the findings of this dissertation are associated with Latinos overall. However, as shown in subsequent sections of this chapter, gender is an important variable to consider when exploring motivations for joining and staying engaged in a giving circle.

Sexuality was the hardest demographic variable to compare with state or national data, but comparison with a relatively recent Gallup poll (Jones, 2021) suggests there was high representation from the LGBTQ community in the network. LGBTQ members are also understudied in the larger giving circle research field, making it imperative to consider how to include their experiences more explicitly in subsequent research.

Household income of network members was also high compared to the state's median income, which itself is likely to be lower for Latinos. The higher incomes are likely affected by the overrepresentation of 30–59-year-old Latinos (82% compared to California's 41%) and the higher employment rate (81% compared to California's 60%) and married households (65% compared to California's 47%). Taken together, higher income, employment and marriage rates are likely the result of overrepresentation of the mentioned age groups. As noted, when compared to the state of California, the network had twice the representation of those 30–59, a lower rate of those 20–29 and 60–69, and a similar rate for those 70–79.

This demographic overview included many factors that are recommended when surveying Latinos, as noted in Chapter 3, such as Mexican ancestry. This description also included factors that can affect the characteristics of Latino philanthropy noted in Chapter 2, such as class and immigration generation. In this section, I showed the LGCN was highly representative of the Latino experience in the United States. This makes the next two sections more important, as I consider these key variables in exploring more deeply what motivates Latinos to join giving circles and what keeps them engaged.

Motivations Behind Latino Philanthropy

I begin this section by considering the reasons members of the LGCN joined their giving circles. I describe the single-select demographic variables to examine which, if any,

demonstrated changes in the top reasons selected. This provides a more nuanced understanding of the characteristics of Latino philanthropy identified in the LGCN given its diversity. The variables used for this analysis include (a) Mexican ancestry, (b) immigration generation, (c) gender, (d) age, and (e) income. As noted previously, Mexican ancestry and immigrant generation are two key variables to consider when studying Latino populations. Race, sexuality, and other demographics presented in the previous section were multiselect to capture the diversity within Latino groups; as such, they were not used to produce descriptive statistics in this and subsequent sections of this chapter. In the next section, I discuss reasons members stayed engaged and similarly consider the single-select demographic variables. Because previous giving circle research has shown a positive relationship between length of participation in a giving circle and levels of civic engagement, respondents' tenure in their circles was also considered in exploring why members stayed engaged in their giving circles.

Motivations for Joining a Giving Circle

Understanding what attracts Latinos to giving circles can shed light on what is at the heart of philanthropy among Latinos. Analysis of the top three responses why LGCN members joined and stayed revealed many characteristics previously identified in Latino philanthropy literature. The top three reasons for joining LGCN included the desire to (a) affect change in the local Latino community, (b) pool resources with others to increase their impact, and (c) be part of the LGCN philanthropic movement. Figure 10 shows the percentage of respondents who selected each of these reasons. This question did not ask respondents to rank the reasons but to simply select their top three. The frequency of each response helps in ranking the reasons and making comparisons based on other variables.

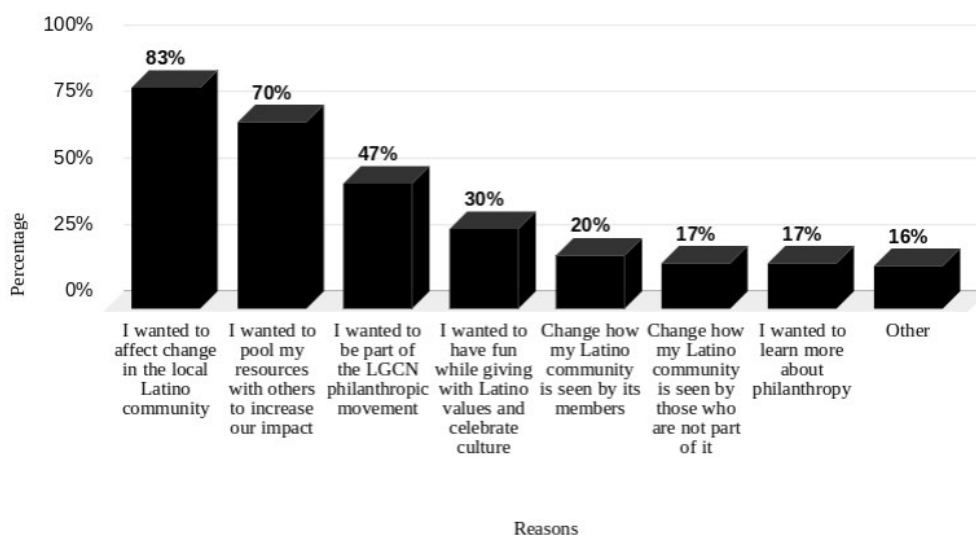


Figure 10. Respondents' top three reasons for joining a giving circle ($n = 232$).

In Figure 11, I compare reasons for joining LGCN between respondents with some Mexican ancestry and those with no Mexican ancestry. Both groups selected wanting to pool their resources and the desire to be part of the LGCN movement as the top two reasons. However, wanting to have fun giving with Latino values and culture was the third most frequent reason, and wanting to affect change in their community was fourth. This finding suggests Mexican ancestry is not associated with the reasons why members joined their giving circle, in spite of the diversity of Latino ancestry among LGCN members when compared to the diversity of those with Latino ancestry in California. In other words, a similarity between responses among those with and without Mexican ancestry points to a Pan-American cultural resonance with the Latino philanthropy of their giving circles.

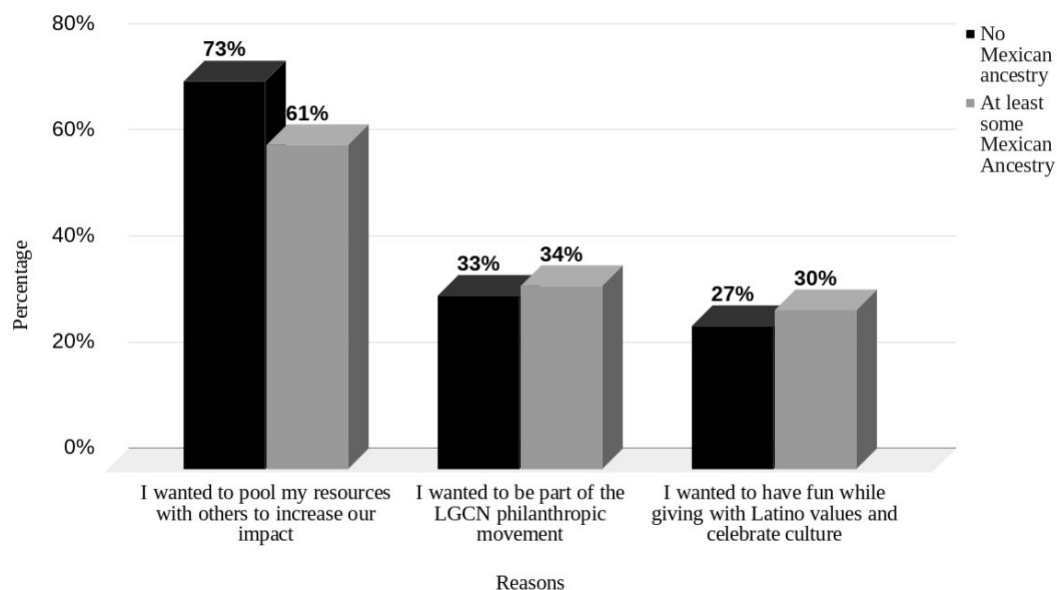


Figure 11. Reasons for joining by Mexican ancestry ($n = 206$).

Figure 12 shows similar results when considering the gender of participants. Although multiple options were provided for gender, respondents only selected male or female. For both male and female members, the top three reasons for joining their giving circle were (a) wanting to pool their resources, (b) being part of the LGCN, and (c) having fun while giving with Latino values and culture. The fourth most frequent reason was wanting to affect change in their local Latino community. Although the network's composition of roughly two-thirds women is consistent with the most recent national landscape of giving circles, LGCN membership is far more female than male when compared to the general population of California, which has a 98:100 male to female ratio (Bearman et al., 2016; U.S. Census Bureau, 2021c). In spite of this disparity, giving circles have the capacity to attract male members for the same reasons they attract women members, even if they attract more women than men. In the next section, however, I describe how reasons for staying engaged in their giving circle does vary between men and women.

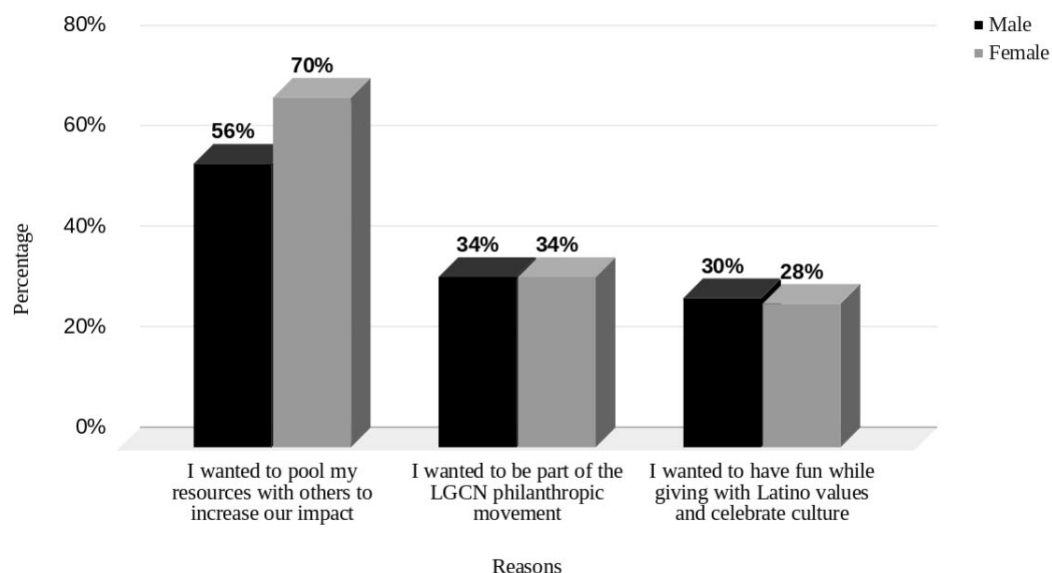


Figure 12. Reasons for joining by gender ($n = 222$).

When considering immigrant generation, certain patterns and through lines emerge (see Figure 13). For all generations, except for the first generation born in the United States, the desire to affect change was the top motivation for joining their giving circle. This reason was the second motivation for first generation members. For second-generation respondents, the desire to affect change was tied with the desire to pool resources to increase impact as the most frequent response. The desire to pool resources to increase their impact was the most frequent response for first generation members and second for foreign born, third generation, and fourth generation LGCN members. For all generations, being part of the LGCN network was the third most frequent response. This finding makes visible certain through lines across generations (e.g., a generation-wide desire to affect change with their giving and a desire to be part of the LGCN network) with only slight variation in whether the top motivator was affecting change or pooling their resources. These similarities are important because they show the transnational nature of Latino philanthropy and the collective movement of resources to affect change found in the giving circle model are also intrinsic to expressions of Latino philanthropy.

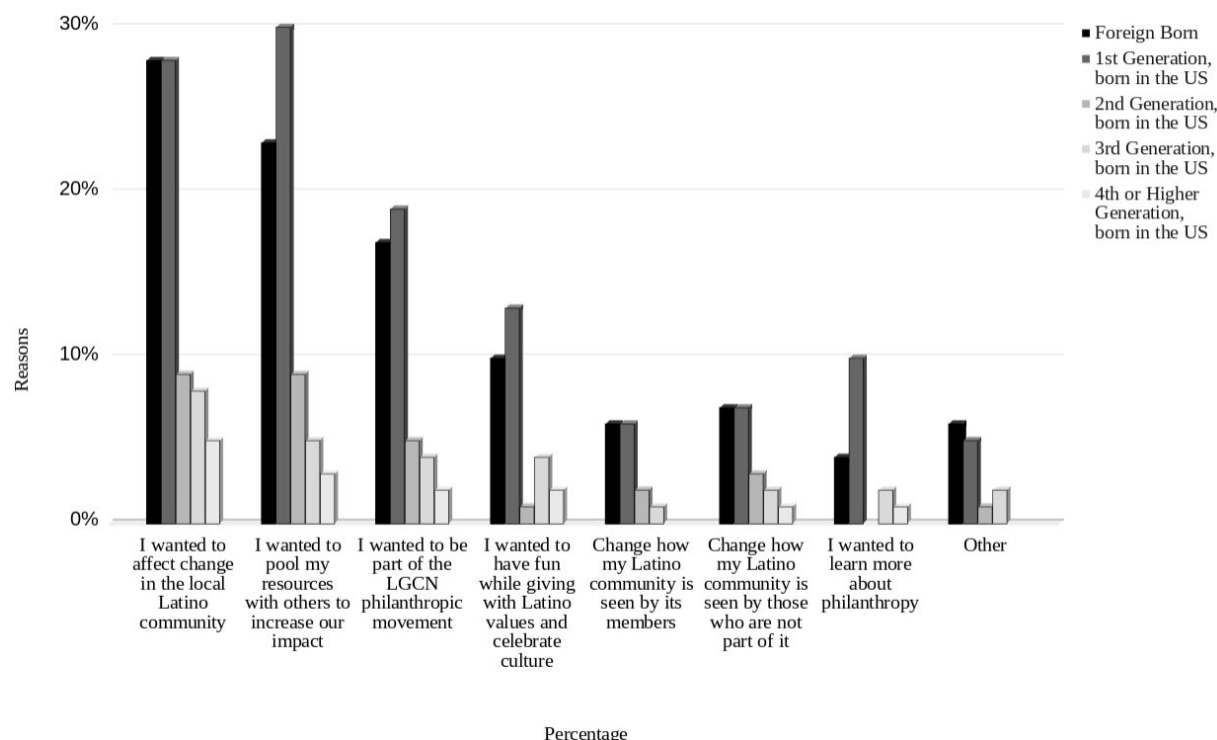


Figure 13. Respondents' top three reasons for joining giving circle by immigrant generation ($n = 228$).

The desire to be part of the LGCN reveals a yearning for community that was further teased out in the platicas and that became clearer when I examined the motivations for staying engaged. In the platicas, multiple respondents described how they joined their giving circle when they were new to their community, saying they joined to build relationships with Latinos and have a community in which their children could grow. These responses came from various immigrant generations and demonstrated how familial experiences with others who had also arrived in a new place and built relationships in their new homes helped them know how to do that themselves.

For those in the age categories 20–29, 30–39, 40–49, and 50–59, the top selected reasons for joining their giving circle mirrored those for the wider network (see Figure 14). The most

frequent reason among these age groups was the desire to affect change in their local Latino community. The second most frequent reason was wanting to pool their resources with others to increase the impact, and the third most frequent reason was wanting to be part of the LGCN philanthropic movement. For those between the ages of 60–69, these top three reasons were tied for first place and wanting to have fun while giving with Latino values and celebrating culture was in fourth place. Similarly, those 70–79 shared the top reason with every other age range (i.e., wanting to affect change in their local Latino community), but, like those 60–69, wanting to have fun while giving with Latino values and celebrating culture came in second, tied with wanting to change how their Latino community is seen by those who are not part of it. It seems age is not associated with motivations for joining until later in life.

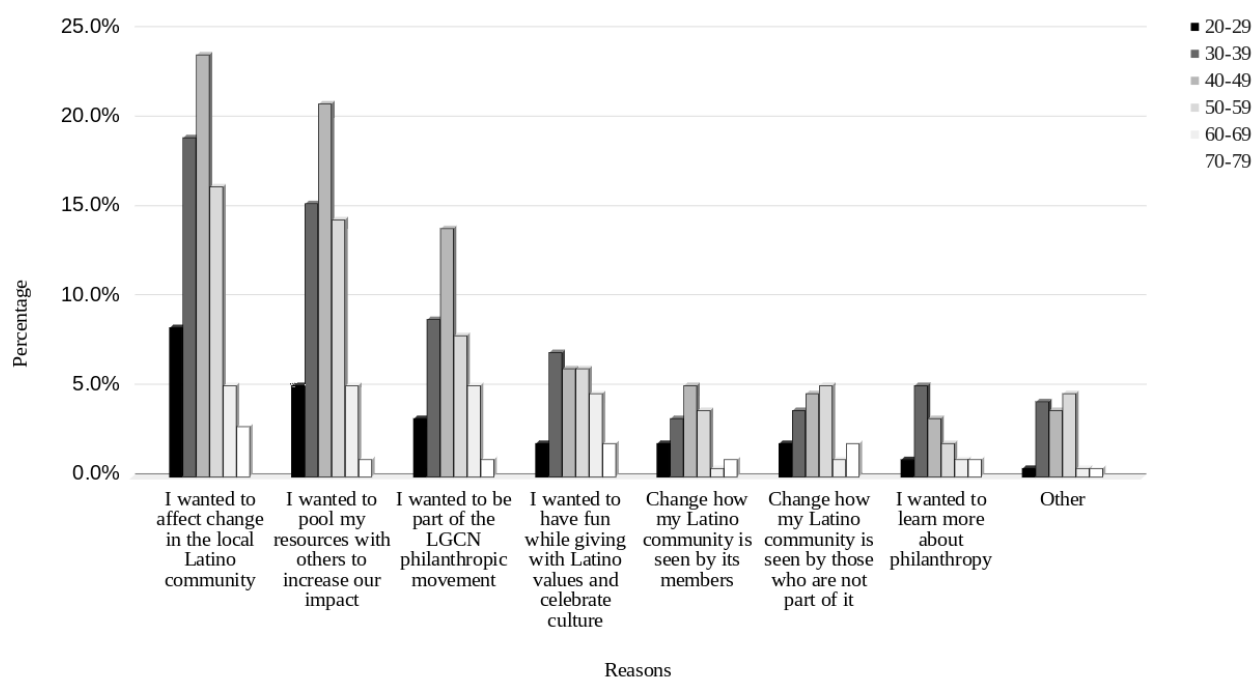


Figure 14. Respondents' top three reasons for joining giving circle by age range ($n = 195$).

Income is another demographic variable that appears to have little relationship to motivations for joining a giving circle. The survey questionnaire included seven income levels: (a) under \$25,000, (b) \$25,001–\$75,000, (c) \$75,001–\$100,000, (d) \$100,001–\$200,000, (e) \$200,001–\$300,000, (f) \$300,001–\$500,000, and (g) \$500,001 and over. Results can be found in Figure 15. Respondents with income between \$25,000 and \$200,000 and \$300,001 and over reported the same motivations for joining a giving circle; the most frequent reason was wanting to affect change followed by the desire to pool their income and the desire to be part of the LGCN. The desire to affect change and pool resources were tied as the most frequent response for those earning between \$200,001 and \$300,000. For those with incomes under \$25,000, affecting change was the most frequent selection; pooling resources was tied for second with having fun and learning about philanthropy. The fourth and fifth reasons among this income group were also tied (i.e., changing how members and nonmembers perceive their community).

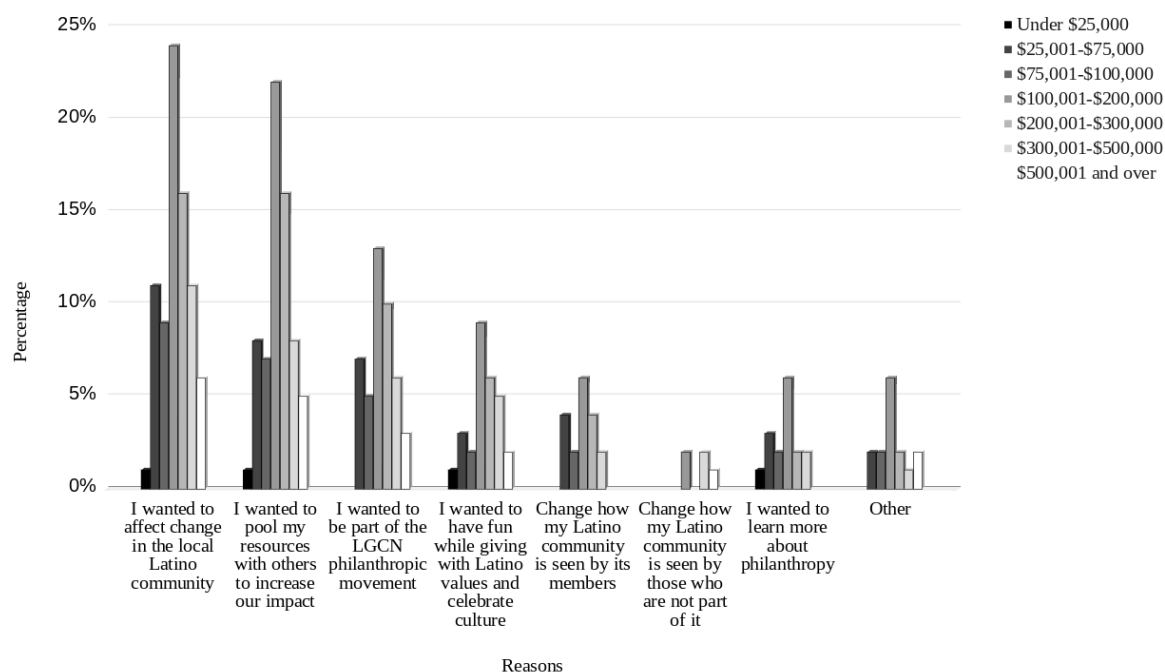


Figure 15. Respondents' top three reasons for joining giving circle by income level ($n = 221$).

Section Conclusion

The desire to affect change in their local community was the most frequently cited reason for joining their giving circle, revealing a highly motivated group of philanthropists. The second most frequently cited reason was to pool their resources to increase impact. This finding indicates the LGCN is a strategic and collaborative group of philanthropists who understand the exponential impact of the giving circle model. The third most frequently cited reason for joining was to be part of the LGCN philanthropic movement, demonstrating philanthropists' need for community. Together, this motivated, strategic, and communal form of giving creates a network of highly engaged members.

When examining characteristics of Latino philanthropy (e.g., the personalism, trust-based, and relational nature of Latino philanthropy noted in Chapter 2), it makes sense that so many members described the importance of relationships and community in their giving. One *platica* participant shared that, upon moving to a new city, he searched for a Latino community and found his giving circle. He said, although he could have gone to any nonprofit website to donate, he knew the “sum was bigger than the parts” and the relationships were how he and the community could support one another. Another *platica* participant shared she knew she wanted to change the world for her son, but she “needed the networking piece” to do that because it would take a community of people to make the change she had in mind. This need for a relationship-centric form of giving attracts Latinos to giving circles and, as I describe in the next section, keeps them engaged.

In this section I also described how variables such as Mexican ancestry, gender, immigrant generation, or income did not appear to affect motivations for joining giving circles and, by extension, participating in Latino philanthropy in general. Only age appeared to be

related and then only much later in life. This lack of differences can be telling. In the case of Mexican ancestry, because this network had ancestral diversity, the lack of difference points to a more Pan-American cultural alignment within Latino philanthropy. Meanwhile, giving circle research has examined its connection to women and capacity to attract women (Bearman et al., 2005; Shaw-Hardy, 2000, 2009), so it is telling that the same reasons that attracted women members attracted men members. Although the demographic composition of the network was consistent with the wider giving circle research (i.e., giving circles attract more women than men), I found the men who joined did so for the same reasons as women (Bearman et al., 2016). For example, one giving circle participant shared in the platica that the first all-men group of the network formed because husbands saw how much fun their wives were having and wanted their own group. Considering how to attract men to giving circles may be informed by exploring why they stay or how they initially find out about the network rather than focusing on why they join.

The most interesting variable with little difference in reasons for joining a giving circle was immigration generation. The through lines in the responses by immigrant generation demonstrated the transnational roots of Latino philanthropy by showing a commonality in using collective philanthropy as a tool for social change. If differences in reasons for joining varied across generations, it could be argued philanthropy is either imported or learned. Yet, the motivation across generations to move resources together shows the connection to mutual aid and civic engagement that was documented in the literature on Latino philanthropy described in Chapter 2. That LGCN members of all generations wanted to be part of the LGCN movement shows their desire to share resources with Latino values and culture with other Latinos. This finding is also consistent with the literature, described in Chapter 2, that Latino philanthropy is highly relational and trust-based. Together, these similarities show Latino philanthropy is not

something that emerges in the United States; it is brought with Latino immigrants, nurtured through generations, and seen in their values around giving and in their desire to be in community when giving.

It is interesting that reasons for joining a giving circle did not vary much by income. In the literature presented in Chapter 2, social class was noted as likely affecting Latino philanthropy, but few studies supported this assumption other than those that examined celebrity philanthropy. Although much of the LGCN membership had household incomes over the state's median income, there is representation across all income levels. It is interesting that class does not seem to relate to reasons why members join. In the next section, however, I will describe the connection between income and reasons why members stayed in their giving circles, particularly among those whose income is above the median.

Age also did not appear to relate to reasons why Latinos joined their giving circle, at least not until later in life. Despite an overrepresentation of those between 30–59, no real differences emerged among age categories except for those in their 60s and 70s, among whom having fun while giving with Latino values and culture rose in importance.

In the last section of this chapter I examine why members stayed engaged in their giving circle. To enhance this analysis, I included length of tenure in a giving circle as an additional demographic variable. Immigrant generation, gender, age, income, and giving circle tenure all showed some relationship with reasons why members stayed engaged in giving circles.

Motivations for Staying in a Giving Circle

Understanding what keeps Latinos engaged in their giving circle can point to the long-term motivations behind Latino philanthropy and can help those seeking to sustain donors from this community. In Figure 16, I show the percentages of respondents who selected each reason

for staying in their giving circle. Although the response options for this question differed from those offered in the question on why they joined, the reasons for staying engaged in their giving circles were very similar to the reasons they joined in the first place. The most frequent reason for joining was to affect change in their local Latino community. When asked why they stayed in their giving circle, the answer members most frequently selected was to better support Latino-led organizations, which was the only option relating to communal level change.

A desire to pool resources to increase impact was the second most frequent reason members selected for joining their giving circle; the desire to be part of the greater giving circle movement was the second most frequent reason members selected for why they stayed in their giving circle. Both responses demonstrate an understanding of the power of collective giving in the form of giving circles. Almost tied in third place for reasons members stayed in their giving circles were (a) to connect with other members of the giving circle and (b) to network with other Latinos. This result is also like their third reason for joining, to be part of the LGCN philanthropic movement, underscoring the important role of being part of a Latino philanthropic community in both attracting and keeping members engaged. When designing the continued engagement question, I distinguished networking with other Latinos and connecting with other members of the giving circle. The logic behind creating two similar response options was that “networking” might imply professional relationships while “connecting” with other members was more about building their community and personal relationships.

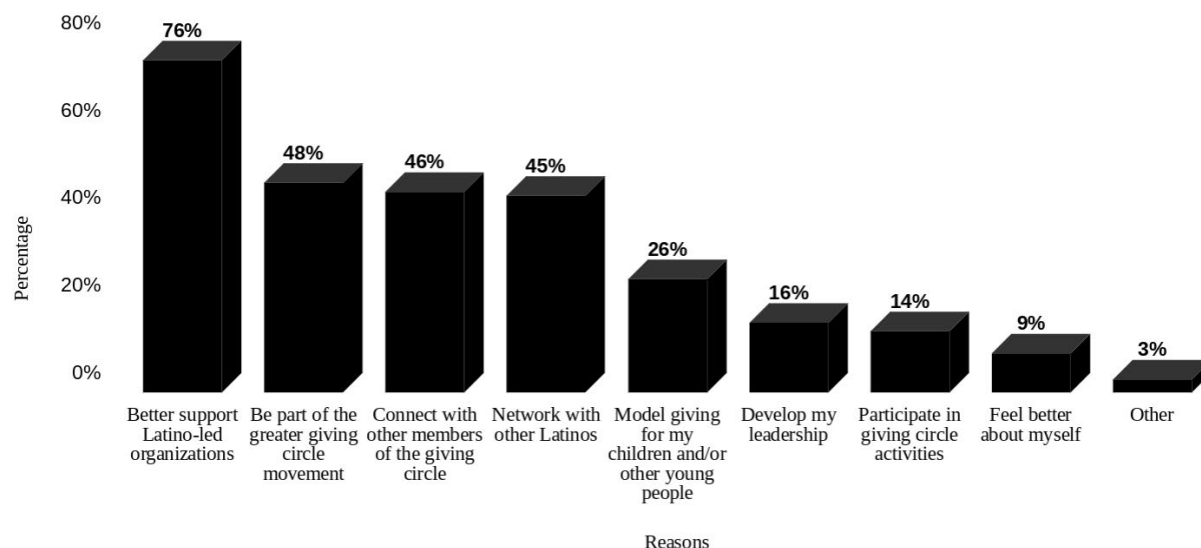


Figure 16. Respondents' top three reasons for staying in giving circle ($n = 232$).

During the pláticas, it became clear respondents understood the difference in networking and connecting with others in the community, and many shared stories about the desire for one over the other. For example, one plática participant shared that being a Latino in the tech industry can be professionally isolating and without much representation, but the giving circle, Latinos in Tech, allowed him to find other Latinos in his industry and mobilize their collective power for change. This participant also shared that, during the racial protests that took place in the summer of 2020, they used their circle as a place to collectively discuss how to push their respective tech companies to issue statements of support for their Black colleagues. It was through their collective voice as a giving circle that they made calls for change and solidarity. In contrast, another plática participant shared how, after moving to a predominantly white community, she was looking for a space and group where she did not have to code switch and where her children could see what a Latino community could offer them.

Interestingly, further analysis of the key demographic variables (i.e., Mexican ancestry, gender, immigrant generation, age, income, and giving circle tenure) revealed all members,

regardless of demographic differences, selected to better support Latino-led organizations as their primary motivation for staying in their giving circle. Given how little funding goes to Latino-led and -serving organizations, as noted in Chapter 2, having the capacity to identify and fund Latino leaders in their communities seems to be a key area of interest for Latino philanthropists. This finding also underscores another characteristic of Latino philanthropy noted in Chapter 2—solidarity with other Latinos and the need to know and trust those leading the organizations they fund. A few platica respondents shared that, when they took stock of all the organizations they gave to, they did not know what impact it had or what the organization did with their money. In contrast, when they came to the giving circle, they met and trusted the Latinos leading the organizations within their communities and gave more and became more involved in the organizations as a result.

Those with at least some Mexican ancestry and those with no Mexican ancestry both selected the same first reason for staying engaged—better supporting Latino-led organizations (see Figure 17). Those without Mexican ancestry selected networking with other Latinos as their second motivation for staying, but those with at least some Mexican ancestry selected connecting with other members of the giving circle. The third most frequent reason selected for those with no Mexican ancestry and for those with at least some Mexican ancestry was to be part of the greater giving circle movement. In other words, the only difference was the second reason; those who had no Mexican ancestry selected networking and those with some Mexican ancestry selected connecting. Both responses imply developing a collective, but it is unlikely Mexican ancestry had much impact on why members joined or stayed engaged. These responses do, however, reflect Pan-American similarities behind Latino experiences with, and expressions of, philanthropy.

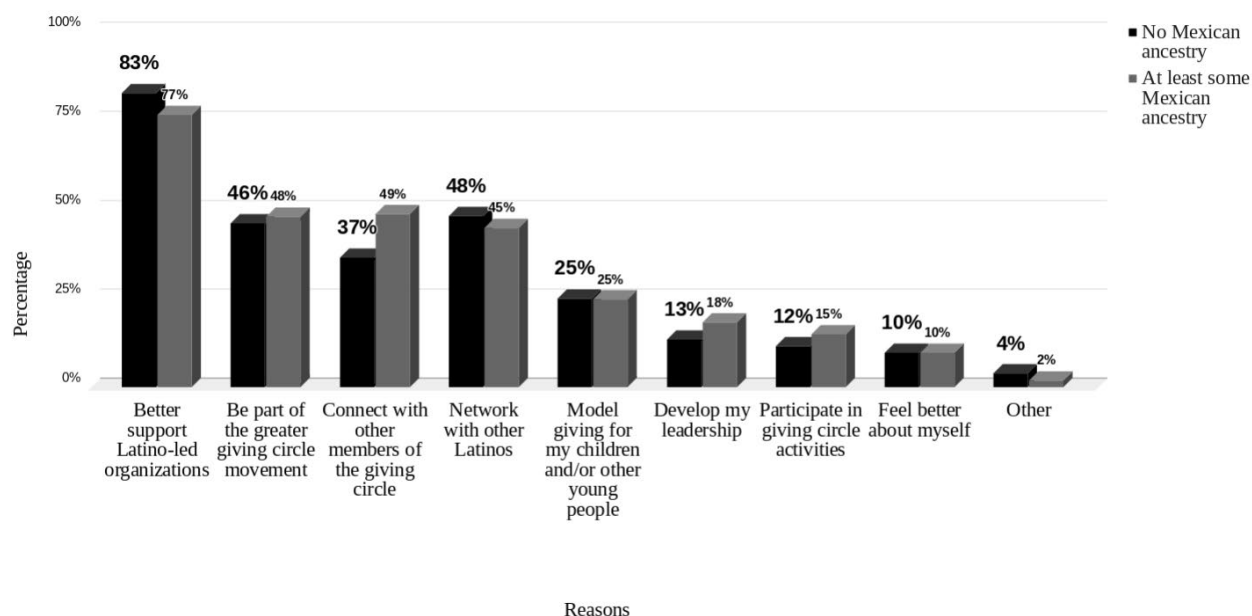


Figure 17. Respondents' top three reasons for staying in giving circle by Mexican ancestry ($n = 206$).

Gender did not appear to impact why members joined their giving circle, but it did appear to impact why members stayed in their giving circles. Both men and women in the LGCN cited providing better support for Latino-led organizations as the most frequent reason for staying in their giving circle (see Figure 18), but there were differences in the frequency of other responses. Females selected being part of the giving circle movement as their second reason for staying engaged (51%) and connecting with other Latinos as their third (44%). This understanding of the power of the giving circle model can be seen in the top reason for joining—to pool their resources to increase their impact. In contrast, men respondents selected networking with other Latinos as their second most frequent reason (54%), closely followed by connecting with other Latinos as third most frequent (52%). This finding suggests there is a strong drive to form relationships and community by male members and desire to engage with collective giving

through giving circle movement, for female members. Male respondents were as likely to join because of a desire to pool resources to increase their impact as women respondents, but they were more likely to stay engaged because of a desire to create community or a network.

Interestingly, this came up in various stories during the platicas; men longed for community, and women wanted to be more intentional about how giving circles helped them be better philanthropists and create the change they wanted to create.

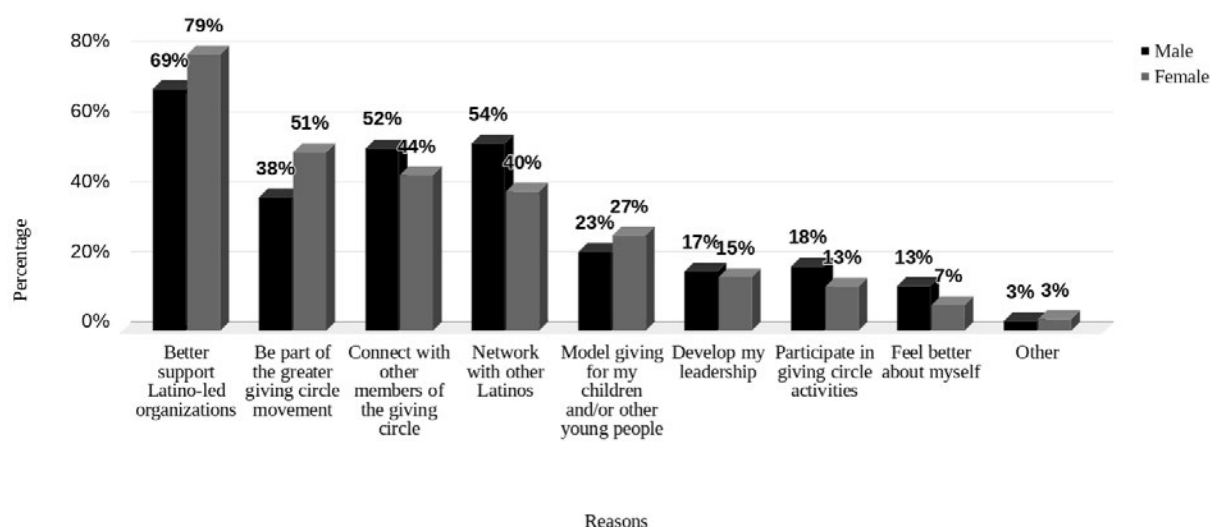


Figure 18. Respondents' top three reasons for staying in giving circle by gender (n = 222).

Immigrant generation is an important demographic variable in this study. Members of all generations selected to better support Latino nonprofits as their most frequent reason for staying involved in a giving circle (see Figure 19). When analyzing the second most frequently chosen reasons, a pattern emerged where foreign born and first-generation members selected being part of the giving circle movement, but second and third generation members tied between connecting with other members of the giving circle and networking with other Latinos. The inverse was true for the third most frequently cited reason for staying involved, where foreign

born and first-generation respondents cited connecting and networking at similar rates, and second and third generation respondents selected being part of the giving circle movement. It is interesting that the closer members are to being born abroad, the more important being part of a giving circle movement is, underscoring how the giving circle model aligns with how Latino culture has taught us to give.

This finding was supported in the platicas. Participants who were closer to the point of emigration were more likely to reference how giving was done in their or their parents' country of origin. Platica participants closer to the point of emigration also more readily shared how they learned to give to their family “back home” in ways that made it easier for them to see philanthropy and being philanthropists as a powerful tool for their local community and one they wanted to model for the next generation. In this way, having representation from those closer to the generation that emigrated underscores the resonance between the giving circle model and expressions of Latino philanthropy.

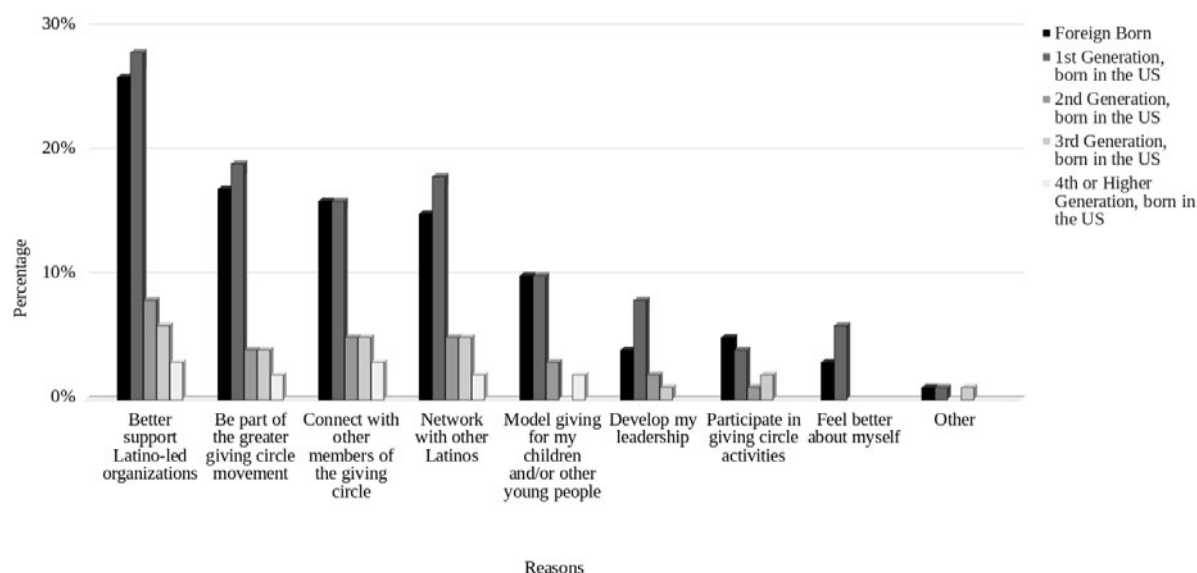


Figure 19. Respondents' top three reasons for staying in giving circle by immigrant generation ($n = 228$).

Fourth generation or higher members most frequently cited supporting Latino nonprofits and connecting with other giving circle members as their primary reasons for staying in their giving circle. Among this group, the next most frequently chosen reasons were being part of the giving circle movement and networking with other Latinos. Having a Latino community and network were increasingly important the further members were from the generation that emigrated. However, community was important to members of all generations, underscoring the essential role relationships and trust play in Latino philanthropy.

Age was another interesting variable related to continued engagement. When analyzing why members stayed engaged by age (see Figure 20), there was consistency across age groups in the most frequently chosen reason (i.e., supporting Latino-led organizations) but considerable variation in the second and third most frequently chosen options. Networking with other Latinos was the second most frequently cited motivation for those 20–29 and 30–39 but connecting with other giving circle members moved to second place, dropping networking to third place, among those ages 50–59, 60–69, and 70–79. The third most frequently cited motivation for staying engaged for those ages 70–79 was a tie between networking with other Latinos and connecting with other giving circle members. Being part of the greater giving circle movement was the second most frequently chosen motivator for those ages 40–49, 60–69, and 70–79 and the third most frequently chosen motivator for those ages 20–29. Therefore, networking seems more important earlier in life, with a shift to connecting with other giving circle members gaining importance beginning around the age of 50. Being part of the giving circle movement seems more important for those in their 40s, and again in later years, than it does for those in their 20s and 30s.

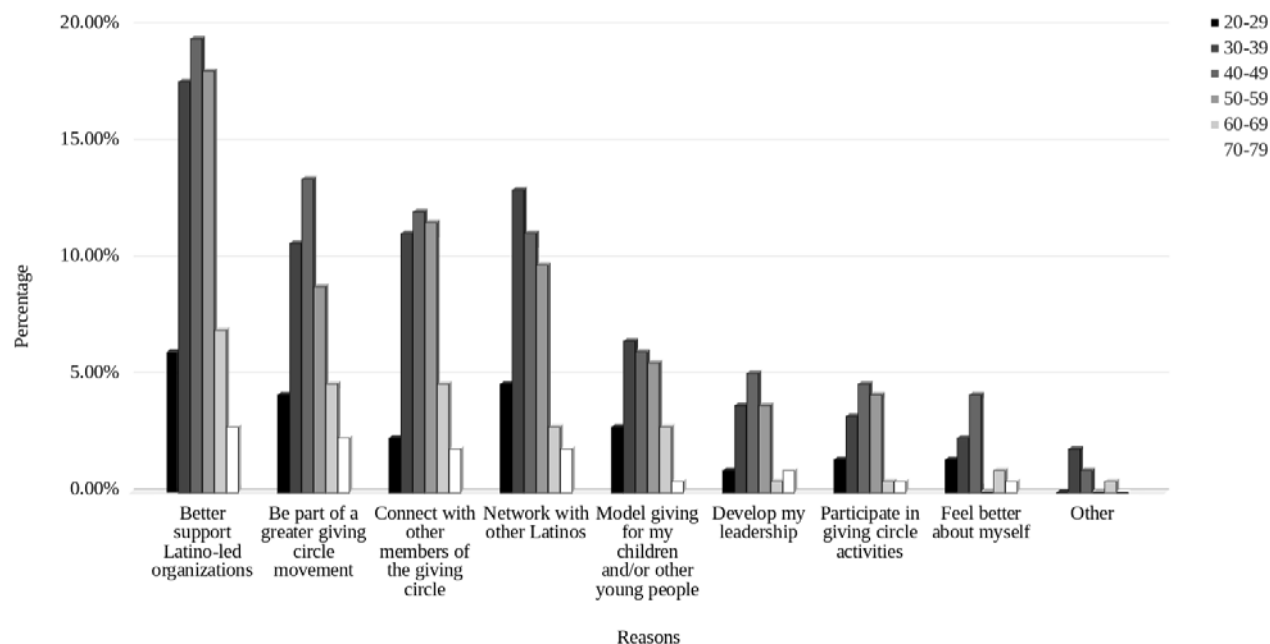


Figure 20. Respondents' top three reasons for staying in giving circle by age ($n = 195$).

I also compared motivations for remaining engaged by household income (see Figure 21). Those whose family income was under \$25,000 a year were the only group who did not select supporting Latino-led organizations as their top motivation. For this group, connecting with other members was the primary motivator; supporting Latino-led organizations was second, and connecting with other members was third. Networking with other Latinos was the third most frequently chosen option for those earning \$25,001–\$75,000 and the second most important motivator for the subsequent income group, \$75,001–\$100,00. Networking with other Latinos dropped from the top three for the next groups, appeared again in third place for those earning \$300,001–\$500,000, and then fell off the top-three list again for those earning \$500,001 or more. This finding indicates the higher the income, the less likely networking is the reason members stay involved. Connecting with other members and being part of the greater giving circle movement were at least the second or third most frequently selected motivator for all groups earning \$75,001 and over.

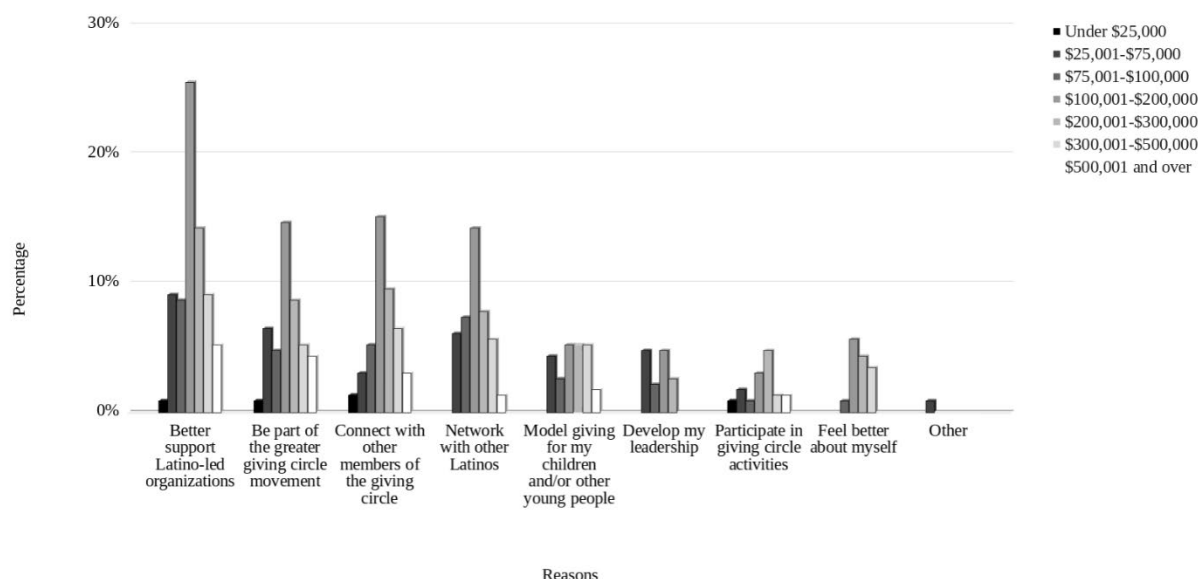


Figure 21. Respondents' top three reasons for staying in giving circle by income level ($n = 221$).

Giving circle tenure is the final variable considered in these analyses of motivators for remaining involved in giving circles (see Figure 22). As with the other variables, all groups selected supporting Latino-led organizations as their top motivator. For those with the longest tenure of giving circle membership (i.e., 6–8 years), the second most frequently chosen motivator for staying was networking with other Latinos followed by the desire to be part of the giving circle movement. For those who had been members between 3–5 years, being part of the movement was more important followed by the desire to connect with other members. For those who had been members for 2 years or less, connecting was the second most important reason followed by networking. This finding shows newer members placed a higher value on the relationship building potential of the giving circle network than those who have been around longer and for whom being part of the greater giving circle movement became more important.

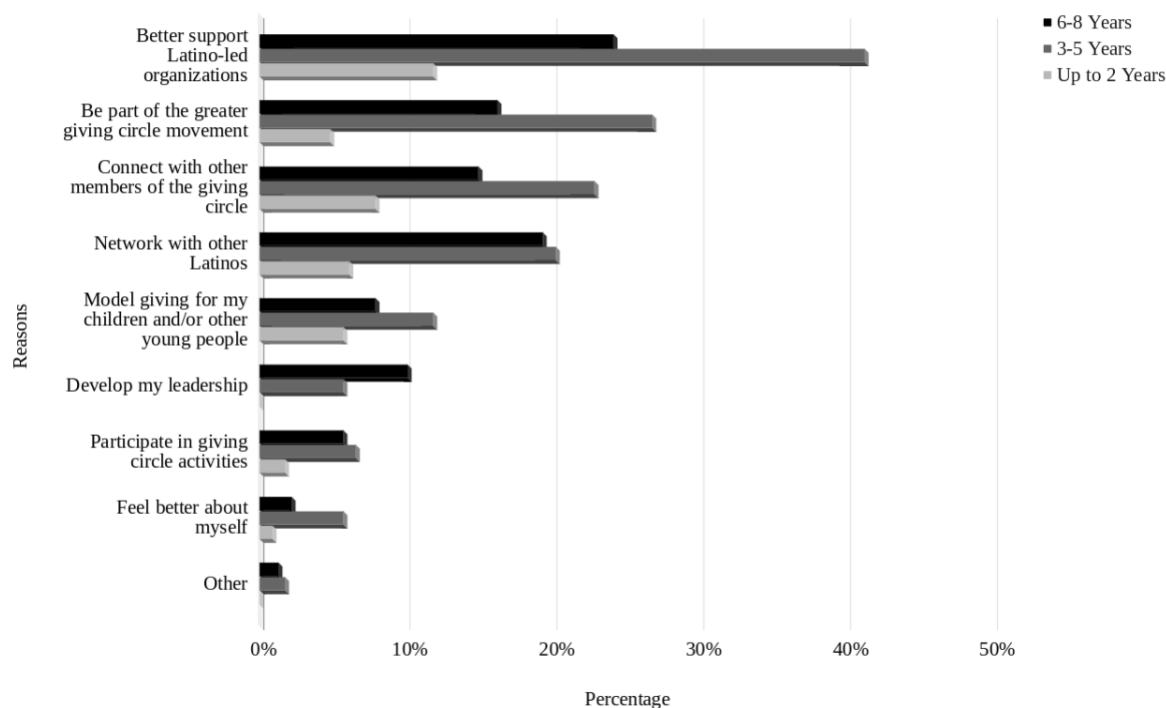


Figure 22. Respondents' top three reasons for staying in giving circle by giving circle tenure ($n = 229$).

Section Conclusion

In this section, I examined the motivations behind the sustained engagement of giving circle members in the network. Understanding what keeps Latinos engaged in giving circles can support those who are looking to create long-term relationships with Latino donors. I found a similar pattern in the top three most frequently selected reasons for joining as the top three most frequently selected reasons for staying. For the most frequently chosen motivator, members went from joining to affect change to staying to better support Latino-led organizations. The second most frequently chosen motivator went from joining to pool resources to staying to be part of the giving circle movement. The third most frequently chosen motivator went from joining to be part of the LGCN to staying to network and connect with other members (tied for third place). These

reasons show the giving circle model is important in understanding why members join and stay as are the relationships that come with giving circle membership.

The variables considered when analyzing variations in responses related to motivations for staying involved were the same as those of the previous section: (a) Mexican ancestry, (b) immigrant generation, (c) gender, (d) age, and (e) income, with the addition of giving circle tenure. Regardless of demographics, the strongest motivator for staying engaged in their giving circle was overwhelmingly to better support Latino-led organizations. Literature on Latino philanthropy presented in Chapter 2 showed the underinvestment in Latino-led and -serving organizations. The literature review also identified characteristics of Latino philanthropy that affirm Latinos fund other Latinos and are more likely to fund organizations led by Latinos. Given how little funding goes to Latino-led and -serving organizations, having the capacity to identify and fund Latino leaders in their communities seems to be a key area of interest for Latino philanthropists, regardless of ancestry, immigrant generation, gender, age, income, or giving circle tenure. This finding shows the importance of solidarity with other Latinos in their giving.

Motivations for staying involved in giving circles did not vary based on Mexican ancestry any more than it did for joining. This finding is interesting because the diversity of Latino ancestry within the network does not appear to be related to variations in motivations, showing a more Pan-American experience of Latino values and culture related to philanthropy.

Motivations for remaining involved in their giving circle did, however, vary based on gender. Where men showed a strong drive to form relationships and community, women had a stronger connection to the power of the giving circle model, both in why they join and why they stay. Women members also favored professional connections over personal connections slightly

more than their men counterparts. This observation was also supported by conversation in the platicas. It is interesting that what attracts both genders to giving circles is the same, but the reasons men stay reflect aspects of giving circles often associated with female expressions of philanthropy in giving circle literature (e.g., community; Bearman et al., 2005; Shaw-Hardy, 2000, 2009).

Motivations for staying involved in giving circles appear to vary more by immigrant generation than they did for joining. As with motivations for joining, immigrant generation showed through lines in motivations for staying involved that underscore the transnational nature of Latino philanthropy. These commonalities show the importance of giving collectively, giving to Latinos, and in trusting and being in relationship with each other as motivators for giving. Platicas added nuance to the motivations for continued involvement by showing the closer members were to the point of emigration, the more they referenced how giving was done in their or their parents' country of origin. Platicas also showed the further members were from emigration, the more important community and network development were to why they stayed engaged in their giving circle. In other words, foreign born and first-generation members found cultural resonance in how to give in their giving circles, but later generations went in search of a culturally aligned community through which to give.

Age was also related to reasons for staying. Although all age groups stayed to better support Latino organizations, networking with other Latinos appeared to be a top motivation for those ages 20–29 and 30–39 and was tied with the need to connect with other giving circle members for those ages 60–69 and 70–79. The desire to connect with other members appeared to grow in importance beginning with those in their 50s.

As household income increased, networking was less important and connecting with others grew in importance. One platica participant who is part of the resource generation noted that, as a philanthropist, she rarely can connect with other philanthropists of different income levels and that being part of the network was important to her because of this opportunity to connect across class and other differences. It is possible more affluent Latinos connect and pool resources with other Latinos of different income levels. Although much of the network makes more than California's median income, there is a wide income spread among the members. This income diversity may indicate class differences are not something that affects who is attracted to giving circles but does influence those on the wealthier end to stay involved because of the cross-class community. In other words, wealthier Latino philanthropists seem interested in connecting across class through their philanthropy.

Finally, giving circle tenure appears to affect motivation for more recent members (up to 2 years of membership) who favor networking and connecting with other members. Those who have been members for 3–5 years stay engaged primarily out of a desire to be part of the giving circle movement and to connect with members. Those with 6–8 years of membership are motivated to stay involved to network and to be part of the movement. This finding hints at a decrease of importance placed on relationships the longer members are part of their circle.

Chapter Summary

I began this chapter by describing the diverse demographics of the LGCN and comparing the composition of the LGCN with the demographics of Latinos in California and the United States overall. On some characteristics, members of the LGCN reflect greater diversity when compared to official figures. For example, although 83% of California Latinos report some Mexican ancestry, only 66% of LGCN members did so, showing a diversity in Latino ancestry

within the network. The network is also highly transnational, with 34% born abroad and 41% being first generation born in the United States. This finding challenges notions that philanthropy within minority communities comes with assimilation. The network is skewed along income, employment status, age, marital status, and educational attainment lines, revealing a working, middle class movement of people who are highly educated, likely to be married, and active in their communities.

I explored the motivations for joining their giving circle and found the most frequently selected reason among members was to affect change in their communities, showing Latino philanthropy is seeking to make changes. Pooling resources to increase impact was the second most frequently cited reason, underscoring the familiarity of Latino philanthropy with the pooled giving model that is innate to giving circles. A desire to be part of the LGCN movement was the third most frequently chosen reason for joining a giving circle. Age seemed to be related to motivations for joining later in life, and there was some variation among first generation respondents. Overall, however, the demographic variables did not appear to be strongly related to motivations for joining. However, this lack of difference is telling. For example, the lack of differences in ancestry and immigrant generation point to transnational roots and Pan-American experiences and values in Latino philanthropy. The lack of differences in gender point to giving circles' potential to attract male members to a heavily female form of philanthropy. Household income did not seem to play a meaningful role in reasons why members join.

In the final section of this chapter, I examined why members stay engaged in their giving circles and found parallels with the motivations for joining in the first place. Members most frequently selected joining to affect change and staying to better support Latino-led organizations. Joining to pool resources and staying to be part of the greater giving circle

movement were the second most frequently selected motivators. Joining to be part of the network and staying to connect with network members were the third most frequently selected motivators. The top motivator for both joining and staying was to create communal level impact. The second was to give through the giving circle model, and the third was to build relationships and community. Together, these reasons show the importance of giving circles as a model for Latino philanthropy, the importance of relationships, and the desire to create change that improves the circumstances of their fellow Latinos. Although ancestry did not appear to affect motivations for staying, the variable of immigrant generation showed the closer members are to being born abroad, the more important being part of a giving circle movement is to them. Having a Latino community and network becomes increasingly important the farther a member is from the generation that emigrated.

In terms of gender, men were as likely to join a giving circle because of a desire to pool resources to increase their impact as were women respondents, but men were more likely to stay engaged because of a desire to create community or a network. Age also appeared to relate to motivations for staying, with networking being more important earlier in life. A shift could be seen toward connecting with other giving circle members beginning around age 50. Being part of the giving circle movement was more important for those in their 40s and again in later years, than it was for those in their 20s and 30s. Finally, the higher the household income level, the less likely networking was the reason members stay involved. Connecting with other members and being part of the greater giving circle movement fluctuated between second and third place motivators for all groups earning \$75,001 and more.

In the next chapter, I focus on the benefits that come from giving circle participation at the individual and communal levels. The focus shifts from exploring Latino demographic

variables to examining the connection between giving circles and members. Although this shift leads to deeper understanding of what attracts Latinos to giving circles and what may keep them engaged, it will also help clarify the benefits of giving circles overall, bringing the Latino experience to the wider giving circle literature.

CHAPTER FIVE

FINDINGS

Benefits of Giving Circle Participation

Giving circle literature presented in Chapter 2 showed the power of giving circles goes beyond funds given to include benefits members and hosts receive from their participation. The literature also shows membership has a positive effect on civic engagement, volunteerism, and the development of more strategic and networked philanthropists. Research findings show giving circles create higher levels of civically engaged members with stronger community ties and agency to use their voices for change. Findings presented in this chapter add to the literature by describing benefits that come from participation at the individual and community levels and describing how giving circles affect members' capacity to affect social change, build community, and inspire impactful philanthropy.

In this chapter, I will focus on the last two research questions presented in Chapter 3: What benefits do members receive by participating in a Latino giving circle? and Does participation in a Latino giving circle affect levels of philanthropic and civic engagement? I present data from the first three sections of the questionnaire that explored (a) giving circle and philanthropic activities, (b) civic engagement and census participation, and (c) wellness. This chapter contributes findings of utility to support self-empowerment efforts of Latinos and other members of the giving circle movement. I do this by considering the benefits that come from the inclusion of marginalized voices that comprise the giving circle movement. Findings can be used to challenge structural racism found in philanthropic decision-making spaces. In Chapter 6, I make recommendations for how the philanthropic sector can support the infrastructure of giving

circles to add sustainability and essential voices in determining where philanthropic investments should go.

The chapter is divided into four sections. In the first section, I describe benefits respondents reported receiving from their giving circle participation and consider how these relate to findings reported in the literature about benefits from participation. In the second section, I discuss how giving circle participation contributes to members' sense of personal agency and levels of civic engagement to show the individual and communal benefit that comes from supporting members to become agents of change. In the third section, I describe how giving circles build community, contributing to members' personal levels of well-being and stronger social ties. In the fourth section, I examine the effect giving circle participation has on members' philanthropic activities, the type of giving that takes place, and the impact this participation can have on nonprofits and the community. In this chapter, I show how the impact of giving circles needs to be understood on two levels, the individual and the community, to demonstrate how their power lies in their capacity to support individuals through collective self-empowerment.

Giving Circle Benefits

The literature discussed in Chapter 2 showed that, although understanding of the benefits members or host organizations receive is more developed, understanding of the effects of giving circles on grantees is not widely understood. When considering the diversity of the giving circle movement's members, it becomes clear their experiences can lead to more informed and engaged community members and donors—ultimately benefiting nonprofits. For example, circles provide members with (a) hands-on learning environments and access to speakers on community issues (Eikenberry, Bearman, et al., 2009) and (b) community and philanthropy networks beyond those with which they enter (Bearman et al., 2005; Carboni & Eikenberry, 2018). In Chapter 4, I

described how and why members join and stay engaged in their giving circle, pointing to the tangible and intangible benefits they receive. Giving circles meet members' desires to (a) affect change and support organizations in their communities (b) pool resources and be part of the giving circle movement, and (c) be part of the Latino Giving Circle Network (LGCN) and part of their circles' community. Behind these motivations are change agents, strategic philanthropists, and individuals looking for community. In this section, I focus on the self-reported benefits of giving circle members to contribute to the collective understanding of giving circles' impact.

I developed a list of potential benefits of giving circle participation from which members could select up to four they experienced as part of their participation. I considered the literature's findings on giving circle benefits (e.g., to learn about philanthropy) and the characteristics of Latino philanthropy (e.g., to connect with Latino culture and to form relationships with Latino-led organizations). I also considered what giving circle members were sharing with me and revisions they made to the survey questionnaire. This led to a list of benefits worded to understand nuances that emerged the more I listened to community members. For example, one benefit was to contribute to social change, and another was to create political change. Although these benefits seem similar, they point to different desires. The first arose in conversations about social norms, such as those around gender, sexuality, or race. The second was linked to the political atmosphere and social systems that oppress Latinos (e.g., those that separate our families through deportation or incarceration). Similarly, members shared their desire to bring joy to their giving, which became to enjoy the act of giving, although others talked about the desire to belong to a community and have fun as they moved into or found a new community. Finally, some members spoke of the need to network to create the change they were trying to create, which included the need to form relationships with other LGCN members and to connect

to people with power. The entire list, including options for “I have not experienced any of these benefits” and “other,” is presented in Figure 23.

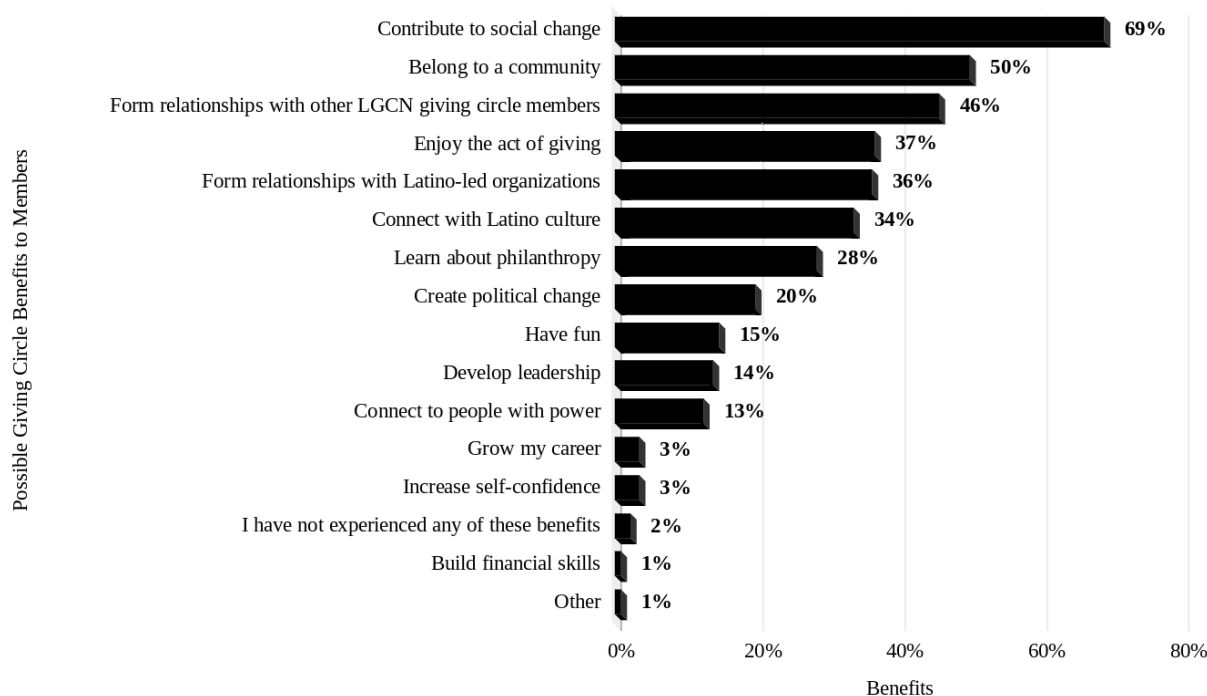


Figure 23. Giving circle benefits.

The most frequently selected benefit (69% of respondents) was to contribute to social change, creating political change was selected by only 20% of respondents. Platica participants elevated desires to change social norms more frequently than political systems, so it is possible to see how nearly three fourths of respondents would be more interested in social change than systems change. This finding is consistent with the most frequently selected reason why members joined their giving circles (i.e., to affect change in their local Latino community) and why they stay (i.e., to better support Latino-led organizations). On an individual level, this benefit can look like personal agency or an ability to see one’s capacity to change their circumstances. On a communal level, this benefit looks like increased levels of collective action

and civic engagement. As the benefit with the most frequent selection rate, I will discuss it more thoroughly in the next section.

The second and third most frequently selected benefits, belong to a community (50%) and form relationships with other giving circle members (46%), point to the need to belong. I will discuss these as personal wellness and sense of community. As previously noted, although these benefits sound similar, one is more about building a community and the other about building a network and tapping into collective action already underway. As I showed in Chapter 4, although gender was not related to reasons why members joined their giving circle, it did relate to reasons why members stayed engaged. Men respondents showed a stronger desire to form relationships and community than women respondents, who favored professional over personal relationships that came with their membership. Nonetheless, both benefits demonstrate the importance of relationships and community—though one at an individual level and the other at the community level—with the first supporting members’ personal wellness and the second serving as a crucible for social change.

Four benefits were selected by approximately one third of respondents and point to the impact of their giving: (a) enjoy the act of giving (37%), (b) form relationships with Latino-led organizations (36%), (c) connect with Latino culture (34%), and (d) learn about philanthropy (28%). These benefits can be seen as characteristics of Latino philanthropy as presented in Chapter 2. For example, forming relationships with Latino-led organizations can be seen as an example of the highly relational and social nature that leads Latinos to fund individuals or organizations in their community circles or where they know the person requesting the funds (Aranda, 2010; Pole et al., 2003) or demonstrate a preference to help other Latinos through their giving (Gonzales, 2010; Gonzalez, 2003; Ramos, 1999). Enjoying the act of giving and

connecting with Latino culture illustrate how Latino philanthropy has a strong sense of cultural heritage, tradition, and family (Gonzales, 2010; Gonzalez, 2003; Pole et al., 2003; Ramos, 1999). The last benefit, to learn about philanthropy, shows the importance of supporting Latino donors. As research presented in Chapter 2 showed, 45% of U.S. Latino households are likely to be low-income, but 18% say they would give more if they were asked more often and 21% do not know how to support nonprofits they care about, compared to only 10% of non-Latinos (Rovner, 2015).

In this section, I have described how the benefits of giving circle participation mirror the reasons why members joined or stay in their giving circles and how those benefits align with the known characteristics of Latino philanthropy. The benefits also match expectations of the benefits of giving circle participation for members while making clearer the social benefits that come from giving circles. This last point sets the framework through which I will describe the top four benefits presented in subsequent sections of this chapter. I begin by examining the power of giving circles to support members in their efforts to become agents of change. In the next section, I explore personal agency as the individual level benefit and increased levels of civic engagement as the communal level benefit. In the subsequent section, I describe how giving circles create community and relationships that support individuals' well-being and the communal space for cultural expression and collective action. In the final section, I examine the impact of giving circles on individual levels of philanthropic activity and the communal impact of strategic and community-led philanthropic giving.

Supporting Agents of Change

Giving circle participation supports agents of change on two levels. On the personal level, participation contributes to members' sense of personal agency by supporting their ability

to create change within their circumstances. The most frequently selected benefit from joining a giving circle was to contribute to social change, which shows giving circles help members face their communities and beyond to address ways in which they are oppressed. On a communal level, participation helps members influence politics by facilitating a community of people with whom to venture out into the agora. I begin this section by examining how giving circle participation affects sense of personal agency and conclude with a description of how it supports increased levels of civic engagement and collective action.

Personal Agency

Giving circle members who responded to the survey and those who attended the pláticas reported their perceived sense of personal agency was strengthened through their giving circle. From the pláticas, it became clear some members arrived confident in the actions they could/should take to create change, the importance of their voice and of collaboration, and their ability to engage in conversations about important social issues; however, many did not. Members' responses revealed a varied sense of agency upon arriving to their circle but were able to describe how circle participation had helped them develop this capacity. For example, respondents were asked to rate the following statements based on their experience *after* joining their giving circle using a scale that ranged from *not at all* through *very much*:

1. After joining my giving circle, I have felt confident of actions I could take to positively change my community.
2. After joining my giving circle, I have understood that my voice matters on social issues.
3. After joining my giving circle, I have worked with others to address social issues that matter to me and/or that affect my Latino community.

Responses to these statements are presented in Figure 24. Personal agency is defined as feeling confident about actions one can take to positively change their community. Sixty-eight percent of responses were on the higher end of the scale (i.e., *quite a bit* and *very much*). Understanding one's voice matters on social issues is a sign of empowerment and perceived ability to influence change. This statement was similarly ranked on the higher end of the scale by 75% of respondents. The third statement shifts the sense of personal agency and empowerment to action (i.e., working with others to address social issues). For this reason, it is less surprising that the statement received more evenly distributed responses across the scale. An almost equal percentage of members said they had worked with others *quite a bit* (27%) and *somewhat* (28%), and 60% of respondents selected *quite a bit* and *very much*—not an insignificant percentage. Taken together, responses to all three statements show 60% or more of members indicated giving circles contributed to their sense of personal agency, empowerment, and ability for collaboration in pursuit of issues that matter to them and their communities.

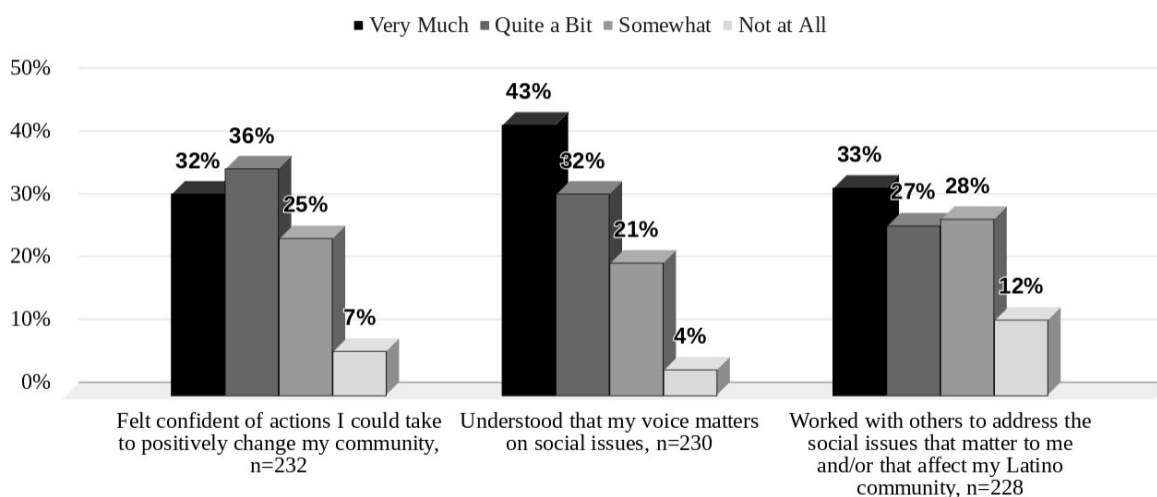


Figure 24. Responses personal agency.

The pláticas added context to these findings. For example, one member described how she did not need her circle to understand her voice mattered or how important the census and presidential elections of 2020 would be, but, when the pandemic hit, she was grateful to have her giving circle help her pivot her strategies around community engagement for both issues. This member also described how she registered Latinos to vote outside a grocery store, something she would have never done without her giving circle. Another member shared how, as an introvert, her circle provided her with a place where she could witness dialogue in ways that left her better informed and aware of actions she could take.

Understanding how one's voice matters on social issues is one sign of personal agency and engaging in conversations on these social issues is another. Question 6 asked members if their giving circle helped them engage confidently on political issues of the day (see Figure 25). At least 50% of respondents selected the options on the higher end of the scale (i.e., *quite a bit* or *very much*) for these topics: (a) economic mobility for Latinos, (b) immigration policies and/or the role of Immigration and Customs Enforcement (ICE), (c) voting in local and/or national elections, and (d) wealth inequality. Similarly, 49% of respondents selected *quite a bit* or *very much* for their confidence level in discussing youth civic engagement. In contrast, at least 50% of respondents selected the options on the lower end of the scale (i.e., *not at all* or *somewhat*) in reporting their level of confidence in conversations about these topics: (a) LGBTQ+ issues, (b) housing issues, and (c) technology and the new economy. Responses to the census question reflected a more even spread between *very much* and *somewhat*.

Six of the nine topics received close to or at least 50% of responses on the higher end of the scale. Of the remaining three topics, all received more than 25% on the higher end of the scale. These findings show increased confidence in conversations among members, and I will

elaborate on this finding in the next section. When asked to select *all that apply* to civic engagement activities members undertook in the past 2 years, the item with the most frequent selection rate was “talked to others about a social and/or political issue,” underscoring the importance of increasing member confidence on topics they care about. One platica participant said giving circle participation helped her feel more informed on the issues she cared about. From listening to community leaders to potential grantee organizations, this member and others in her circle engaged in conversations on topics in ways that left her ready to engage with others, including politicians in her community.

Findings showed a positive relationship between giving circle participation and sense of personal agency, regardless of confidence level before joining the circle. Giving circles provide space and information for members to become more effective change agents, including (a) increasing knowledge of actions one can take to affect their community, (b) understanding one’s voice matters on social issues, (c) informing members on political topics of the day so they can engage confidently in issues they care about, and (d) collaborating with others to create change. In the next section, I examine how members enter the agora as individuals and as a collective.

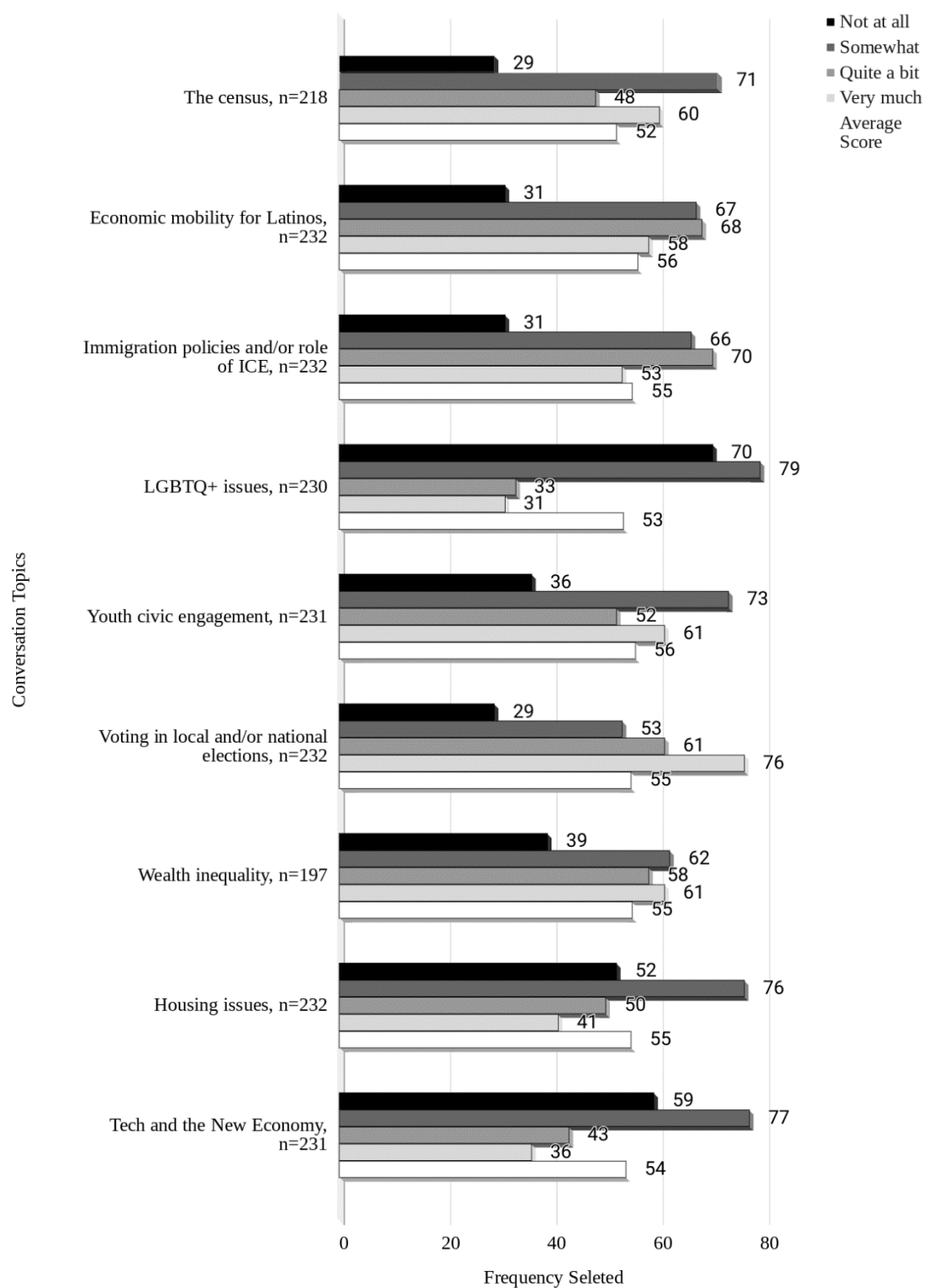


Figure 25. Responses confidence in conversation topics.

Civic Engagement Levels

Responses to questions on civic engagement and stories shared during the pláticas showed giving circle participation had a positive impact on levels of civic engagement. Not all who arrive at giving circles have high levels of civic participation, and the survey and the pláticas provided deeper insight into how this changes. For example, Question 10 included a statement on civic engagement that asked respondents if participation in their giving circle increased their civic participation. Nearly all respondents indicated some level of a positive effect. The distribution of responses is shown in Figure 26 with a relatively even spread between *very much* (36%) and *somewhat* (32%) and few responding *not at all* (7%). Though few members said participation in their giving circle had no effect at all, there were various levels of effect reported, demonstrating at least a positive relationship between giving circle participation and increased civic engagement—regardless of how civically engaged they were before joining. This finding contributes to previous research that has shown a positive relationship between giving circle participation and levels of civic engagement, though, in previous research, it was unclear if giving circles attracted more civically engaged people in the first place (Carboni & Eikenberry, 2018).

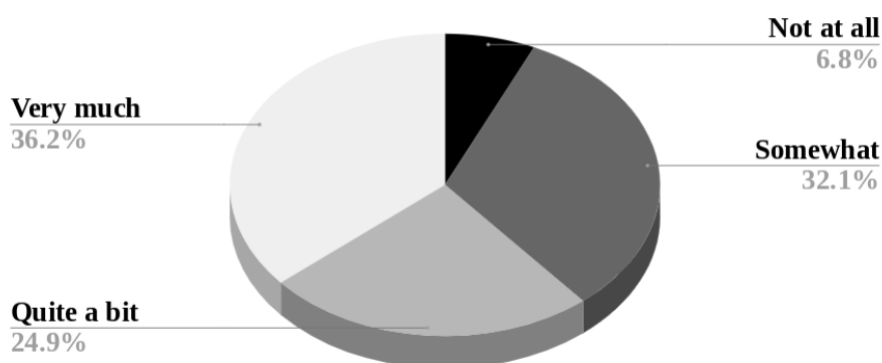


Figure 26. Responses increased civic participation ($n = 221$).

The survey also captured the various types of civic participation members undertook in 2018 and 2019 (see Figure 27). Responses for this question show 50% or more (a) signed a petition (68%), (b) attended a public meeting (58%), (c) made a monetary contribution to politics (57%), (d) took part in a protest or march (56%), (e) aligned their spending with their values (53%), (f) contacted an elected official (50%), and (g) worked with others to solve a community problem (50%). Fewer than 40% of members (a) volunteered for a political group and/or candidate (36%), (b) shared a petition (34%), (c) contacted the media (17%), or (d) were a candidate for public office (3%). It should be noted 84% of participants—by far the most selected form of civic engagement—selected “talked to others about a social and/or political issue.” This mirrors the most frequently selected benefit from participating in a giving circle, contributing to social change, comprised of items reflecting an understanding that their voice mattered on social issues and the increased confidence on engaging in political conversations. These findings indicate giving circles serve as places for members to increase their understanding of important issues and their confidence in engaging others on these topics to drive change. This increase in understanding and confidence can be powerful in more intimate forms of social change efforts (e.g., with families, friends, or colleagues). It can also be powerful in more public forms of civic engagement (e.g., with politicians and community leaders) and in driving collaboration with others.

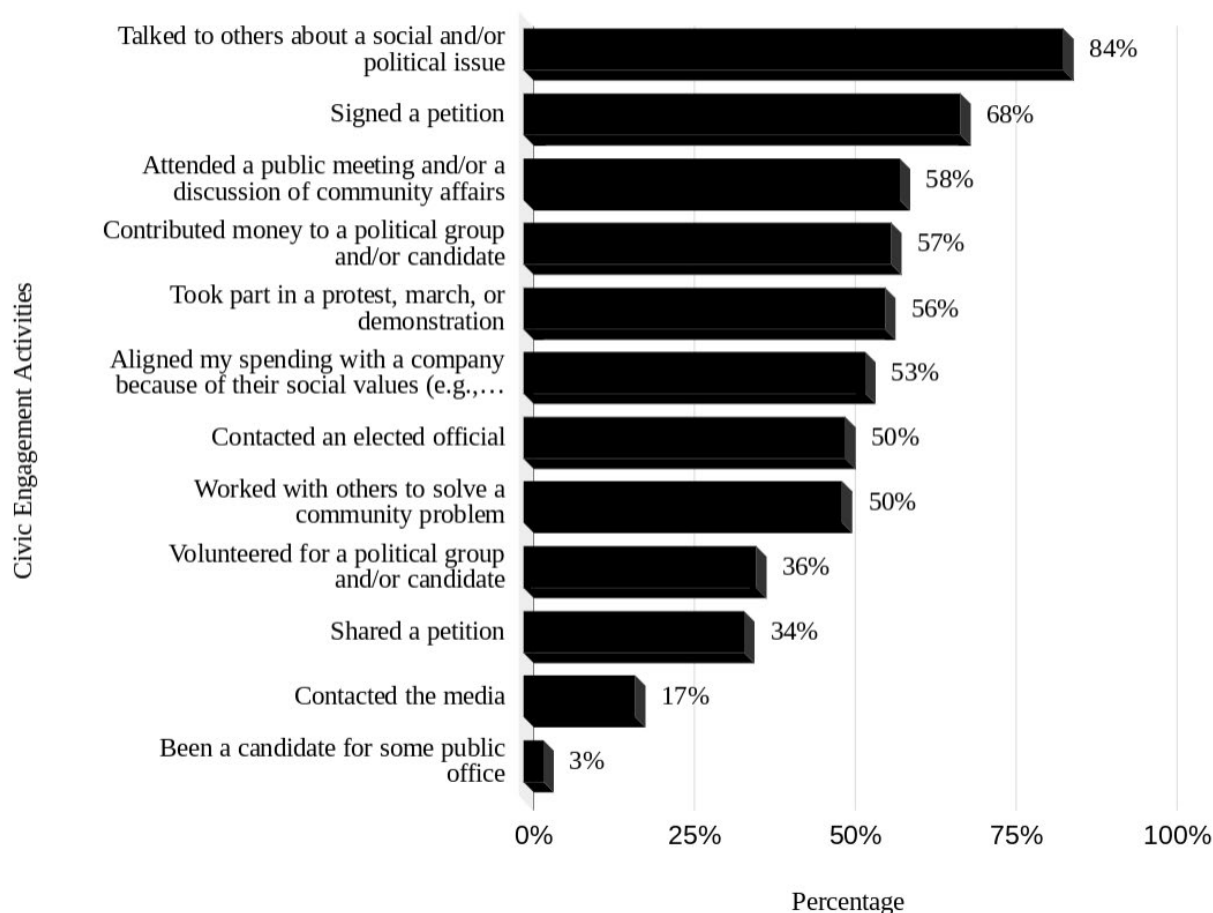


Figure 27. Responses civic engagement activities ($n = 224$).

The platicas showed the relationship between giving circle participation and these forms of civic engagement more clearly. For example, Figure 27 shows 57% of respondents donated to a political party or group and 50% contacted an elected official. This pattern was observed by one platica participant who shared that, in her circle, she found this to be true. According to this participant, her circle is in constant conversation with local politicians, and when 80 or so Latinos show up and say “listen to what we need and we are putting our own money toward fixing this and this is why,” she saw the power of the collective voice of her giving circle. The member further shared some politicians began to join their circle after interacting with them, allowing them to take the message one step further and ask the politicians, “What do you need to

get this done?” Members shared the sentiment that their giving circle helped them understand *how* to be involved with their local politics, moving them from a sense they could not affect politics in any meaningful way to an understanding of the collective weight of their circle and the power they could wield if they did it together.

The timing of the survey release coincided with two major civic engagement opportunities for the Latino community, the 2020 election and the decennial census. When asked if they were registered to vote—a question answered by all 232 respondents—93% said yes. Figure 28 shows responses from registered voters regarding their intention to vote or history of voting in recent biannual U.S. elections, beginning with 2014. Results show a consistently high rate of voter turnout: 87% in 2014, 96% in 2016, and 95% in 2018. The 2014 27% voter turnout rate among Latinos was the lowest rate recorded for a midterm election (Krogstad et al., 2016). The 2016 presidential election brought 48% of Latinos to the polls (Varela, 2017). Unlike the 2014 midterm elections, the 2018 midterm elections saw 40% of Latinos cast ballots (Krogstad et al., 2019). In each case, the turnout rate in the network was higher than the nation’s Latino voting rates. Survey respondents showed a high intention to vote in the 2020 election with 99.5% saying they would vote. An October 2020 Pew poll found about half of registered Latino said they were extremely motivated to vote in the upcoming election, compared with two thirds of U.S. voters overall (Krogstad & Lopez, 2020). These statistics make the network’s 99.5% rate exceptionally high in comparison to the nation.

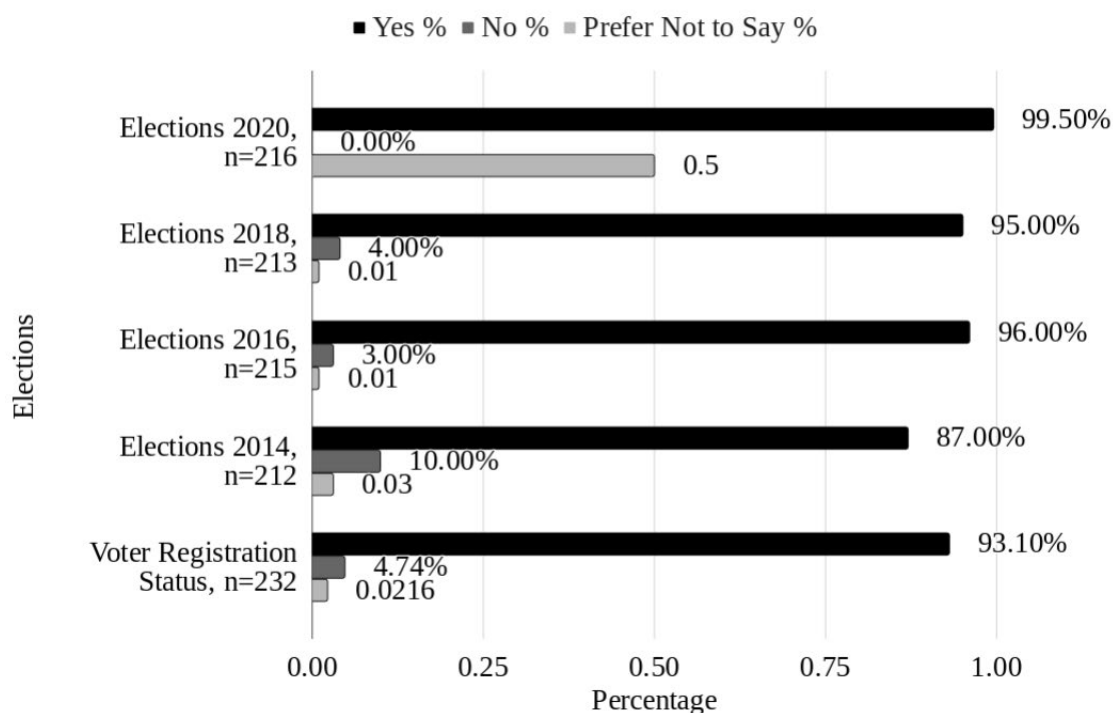


Figure 28. Responses election participation.

The decennial census was also an important opportunity for the network's members to participate in and mobilize their communities. The political climate was one that sought to discourage Latino participation in the census by adding a citizenship question that could contribute to fears of deportation and lower completion rates. Although the question was not added, it made community efforts to provide accurate information and encourage participation more important, and the network was active in these efforts. Figure 29 shows responses related to (a) participation in the 2010 census, (b) intention to participate in the 2020 census, and (c) participation in community mobilization for 2020.

Both censuses showed high completion rates by respondents, 78% for 2010 and 94% intention to complete for 2020. The 2010 rate may have been lower for many reasons (e.g., the year in which they migrated to the United States). In contrast, 82% said they intended to participate in community mobilization efforts, which can be linked to the power of their giving

circle and the network overall to help members mobilize collectively and pivot during the pandemic. In March 2022, the U.S. Census Bureau announced it had undercounted Hispanic, Black, and Native American residents (Wines & Cramer, 2022). Although it is possible to see the network as a resource in ensuring circles' communities were not undercounted during a census undertaken in a pandemic, it is impossible to know to what extent having a giving circle affected that Latino community's likelihood of being counted.

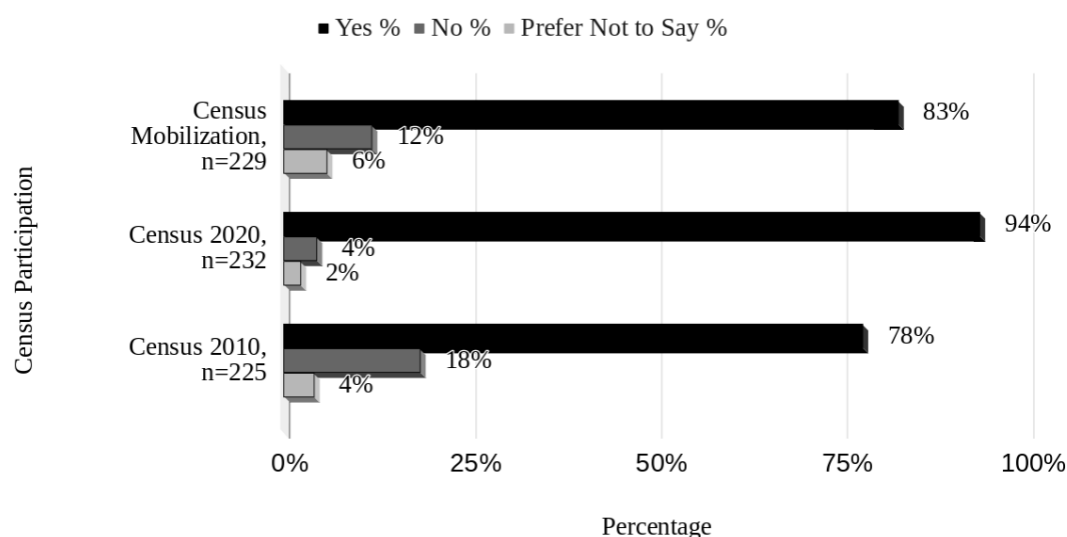


Figure 29. Responses census participation.

As noted previously, the survey took place weeks before the pandemic hit, and many community organizing strategies were affected as a result. It is unknown if the pandemic reduced levels of civic engagement, though, in the personal agency section of this chapter, I described a reflection from a member who said their giving circle helped them pivot their census engagement strategies. Another member described how, in a large urban community, moving meetings to virtual settings actually helped them be more effective in mobilizing their members to be more civically engaged and to encourage them to complete the census, as meeting attendance was no

longer affected by long commutes. Multiple members spoke to their circles about developing political strategies for how to respond to the compounding crises faced by their local Latino communities and seeing their circle as a space to increase access to decision makers. Although it is possible to assume the pandemic affected levels of civic and census engagement, it is also possible to conclude giving circles affected both in a positive way despite, or because of, the effects of the pandemic on Latino communities.

In this section, I showed how giving circle participation had a positive effect on levels of civic engagement by individuals, regardless of levels of civic engagement at the time a member joined their giving circle. I also described how giving circles provided members with spaces for collective mobilization (e.g., with politicians) as much as it prepared them to have informed conversations on social issues with loved ones. Participants in the pláticas helped provide nuance on how circles accomplished this, with many describing how their giving circles helped them understand how to be involved in local politics, alone and together, and how to pivot when needed, such as during the pandemic. Finally, I described the high voter turnout and census completion rates among members of the network and how members mobilized their communities for these highly anticipated and important civic engagement opportunities in 2020. In the next section, I shift to how giving circles create community and relationships that support members' well-being, and which provide members with a communal space for cultural expression and collective action.

Building Community

Giving circle participation builds community and social ties for its members. On the personal level, it affects members' overall well-being by providing them with a community and space where they can be themselves and be part of something bigger than themselves. On a

communal level, giving circles provide members with space for cultural expression, social ties, and other necessary aspects of society's fabric. Separating the individual and community effects of giving circles is difficult because people join to be part of a community and a movement. Community is also what kept members engaged and what sustained their engagement during the pandemic. In this section, I describe how giving circle participation affects personal well-being and how it supports a community of givers.

Personal Well-Being

It is hard to separate the individual benefit of increased wellness from the communal benefit of increased social cohesion, as both are interconnected and interdependent in Latino communities—a fact reinforced by the stories shared during the pláticas. Responses to questions discussed in this section of the survey focus mostly on social determinants of health, but I did not find anything that would be inconsistent with the demographic information reported in Chapter 4. However, responses to two questions on wellness guided pláticas and led to new insight that had been missed by the focus on social determinants of health over wellness. This insight led to a revision of this portion of the survey for subsequent dissemination, with plática participants helping shape what would be asked on this topic. Although those additions are beyond the scope of this dissertation, the requested added questions reveal an interest in better understanding this connection between involvement and well-being. Pláticas participants requested additional questions about (a) what members consider to be aspects of their overall well-being, (b) what effect giving circle participation had on their well-being, and (c) what relationship members think exists between the two. The pláticas' discussion of these new questions led to interesting insight into their perceived connection and how this was affected by the pandemic. In this

section, I focus on responses to two questions on the survey and some of the reflections from the pláticas.

For Latinos, belonging to their community and living their culture is certain to have a positive impact on health and be a driver of why members join in the first place (as described in Chapter 4). During the pláticas, one member said he joined because he had moved to a new city and was looking for a community. He shared that, together, they support their community, but his circle also supports him by giving him a place where he belongs. Another member described how her circle has helped her have a space where she can be herself, speak Spanglish, and not code switch like she had to when she volunteered with white liberal groups. This positively affected her mental health and keeps her engaged. It is not surprising, then, that 94% of respondents said they did not feel alone in the United States after they joined their giving circle.

In preparing the survey questionnaire, the decision was made to include a question that asked respondents about their overall wellness, using a holistic framework that is culturally relevant to Latinos. This became Question 18, which asked respondents to select all the statements that applied to them. These statements can be found in Figure 30. Overall, members reported high levels of well-being. What was interesting in the pláticas was that stories emerged of how circles supported each other during the pandemic. One member described a time when her circle members drove to a parking lot and sat in their own cars in a circle while talking on a joint conference call to catch up and select their grantees. She described how much good that did for her mental health and how it encouraged the circle to do drive-by birthday celebrations or go on hikes once it was safer to be outdoors together. Others shared stories of members who kept the circle active, lifting a weight off their shoulders because it allowed them to engage at the level they were able to engage while maintaining the community.

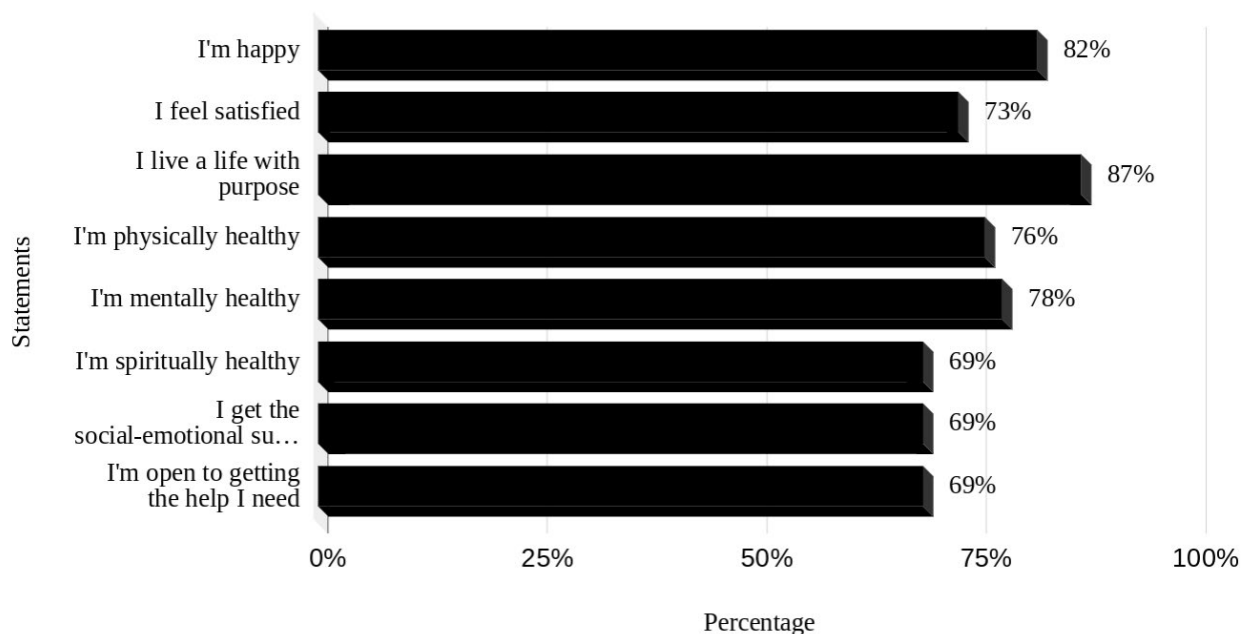


Figure 30. Responses wellness ($n = 229$).

During the platicas, one member said being part of a group of people like her made her happy and that she left all her giving circle meetings feeling high on endorphins. Similarly, another member from a different platica said, “The giving circle gave me the love, fun, and family I was looking for; it brought it all back to me in my new community.” Yet another member perceived this positive effect on members’ wellness was not a case of toxic positivity but the result of being able to experience highs and lows with a group like themselves. After the 2019 shooting in El Paso, the LGCN virtually held space together to mourn, cry, and even sing sad songs together.

Another important aspect of the individual benefit of personal wellness is the personal pride in Latino identity best summarized by one members’ use of a well-known Latino proverb, “dime con quien andas, y te diré quien eres” (i.e., “tell me with whom you socialize, and I’ll tell you who you are”), adding this circle makes her feel Latina and gives her roots and purpose. Similarly, another member said her husband says with great pride “my wife is in the *Latino*

giving circle,” and multiple members said they bring their children to meetings or in other ways involve them so they can see what a Latino community looks like. These examples are consistent with findings presented in Chapter 4 where the fourth most frequently selected reason people stay in their giving circle was to model giving for their children and other youth.

In this section, I described how belonging to a community and living their culture through their giving circle participation has a positive impact on members’ individual levels of well-being. Being in community can do this in various ways, including reducing isolation and providing members with a collective space to celebrate and mourn together—one they can participate in as Latinos. Participants in the pláticas underscored the continued need to better understand the connection between wellness and their giving circles, as they thought there is a strong link that stayed alive during the pandemic.

Strengthening Communal Ties

In Chapter 4, I identified some of the reasons members join and stay engaged in their giving circle, including the desire to be part of a movement and community. This motivation underscores the important role of being part of a Latino philanthropic community in both attracting and keeping members. This insight was reflected in the pláticas where one member noted, “I needed to find my community, so I could get to work on making change” Another participant said, “People aren’t coming together to be more civically engaged or to give, but to be together.” In this section, I examine the need to connect with others as a way to create change, belong to a community, and share pride in Latino culture.

To explore this need to connect with other Latinos, Question 5 included statements about respondents’ sense of community. This question asked respondents to rate the following statements based on their experience using a scale that ranged from *not at all* to *very much*:

- After joining my giving circle, I have connected with people who are positively changing my community.
- After joining my giving circle, I have felt more connected to the Latino community in the United States.
- After joining my giving circle, I have been more proud of the Latino culture in the United States.

The distribution of responses to these statements is presented in Figure 31. More than three fourths of respondents (77%) indicated they had connected with others who are positively changing their community. This finding was discussed during two pláticas. In one plática, a member shared their giving circle members helped connect them to politicians, community leaders, and Latinos leading nonprofit organizations. In another plática, a member said the connections made possible by showing up as a collective, made the “backroom” where decisions were made more accessible. In both cases, these stories show giving circle members can open doors for one another and also open doors together.

Feeling more connected to their Latino communities in the United States after joining their giving circle was also rated highly by 73% of respondents. This finding can best be described as the development of familial relationships that can be key to immigrant communities and others at risk of isolation. The word *familia* came up in all the pláticas, with one member saying she felt like a *tia* with all her *sobrinos* in the circle. Another word that came up throughout the pláticas was *convivio*. Not easily translated, the verb *convivir* means to live with someone, to cohabitate, or to coexist. In Latin America, this word also means to celebrate together, to come together to live life’s joys is perhaps the closest translation. As one member reflected, “We may join for a surface level, but we stay for our heart, for *el convivio*.” This

underscores the importance of living the highs and lows with members of one's community and feeling one has a place in this community.

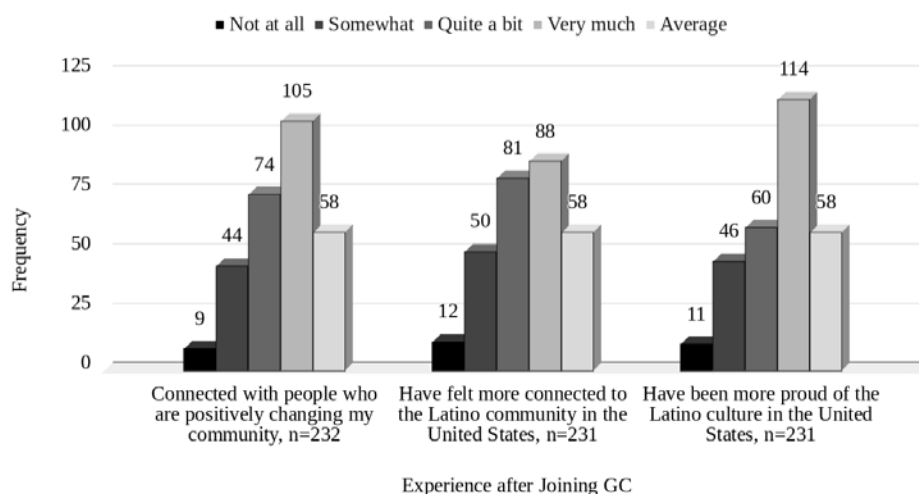


Figure 31. Responses sense of community.

Finally, the personal pride in Latino culture can also be seen as a communal benefit of participation in giving circles, an example of how difficult it is to separate these levels and how clear it is that giving circle participation affects both. When asked if they felt prouder of Latino culture in the United States, 75% responded *very much*. Many participants in the pláticas spoke of their pride in seeing the power of coming together as Latinos and the change it made possible. It is important to underscore the cultural relevance of giving circles as cultural pride. The need to be Latino in a collective was noticeable in the survey and pláticas.

In this section, I explored the communal level benefits that come from giving circle participation by focusing on how it has connected members to others creating change. I also considered how belonging to a community created ties that gave the community a sense of belonging and purpose beyond the members. This provides members with a space in which to experience life and their culture with others. I closed the section by showing how giving circle

participation made members prouder of Latino culture in the United States, an insight that is particularly interesting given the diversity within the network. This insight shows the power in celebrating the differences among us and elevating Pan-American similarities over those that make it easier for non-Latinos to understand our Latinidad. This last point speaks most to the fidelity of the giving circle model reflected in the characteristics of Latino philanthropy presented in Chapter 2 and again in Chapter 4. Pride in Latino culture is also what can help us begin to understand the impact of the funds distributed through the giving circle movement. In the next section of this chapter, I turn to this last point by considering how participation in giving circles affects members' philanthropic activity on a personal level and how the shape of funding creates more impactful philanthropy on the communal level.

Inspiring Impactful Philanthropy

As noted in Chapter 4, the second most frequently selected reason for joining a giving circle was the desire to pool resources to increase impact. This desire to be part of the giving circle movement also keeps members engaged. A thread that emerged in the pláticas was the communal impact of giving circles' philanthropy on grantees. In this section, I focus on the impact of giving participation on members' philanthropy as an individual level benefit and the impact of members' collective philanthropy as a community level benefit.

Levels of Philanthropic Activity

According to research presented in Chapter 2, giving circle members volunteer more than nongiving circle members resulting in members becoming more networked philanthropists (Carboni & Eikenberry, 2018). To explore the effect giving circles have on individuals' levels of philanthropic activities, I examine their levels of volunteerism and donations. Findings come

from responses in Question 4, scaled *not at all* through *very much*, which asked respondents to rate the following statements:

- After joining my giving circle, I have increased the time I dedicate to a nonprofit organization.
- After joining my giving circle, I have given money to support at least one nonprofit organization that I care about and/or that affects my Latino community.

Figure 32 shows the distribution of responses to these statements. Findings from the first statement showed little association between participation in a giving circle and levels of volunteerism, with 77% of respondents selecting the options on the lower end of the scale. Some participants in the platicas said this low number may be related to the fact their giving circle participation had increased their visibility in the local nonprofit community and brought with it more offers to join boards or to volunteer. Yet, consistently, members felt tokenized by organizations that only saw them once they had given and preferred to selectively serve grantee organizations that were Latino-led. Rather than pointing to a small effect on levels of volunteerism, member responses may point to more strategic volunteerism and may miss the increased intentionality with which members support organizations in their communities. This number may also be low because, like levels of civic engagement, some members reported having entered the giving circle with already high levels of volunteerism, thus not associating increased levels of volunteerism with their giving circle participation.

In contrast, 68% of respondents to the second statement reported they had given money to support at least one nonprofit they care about or that affects their Latino community after they joined their giving circle. In the platicas, this finding inspired many to share stories about how their circle does not always select the organization the member would have selected, but

members value the consensus building and collective power that comes from pooling their resources. Nonetheless, members often individually fund an organization they felt most passionately about but which was not selected. In other words, members fund two organizations, one collectively and one individually, both having come to their awareness through the giving circle grants process.

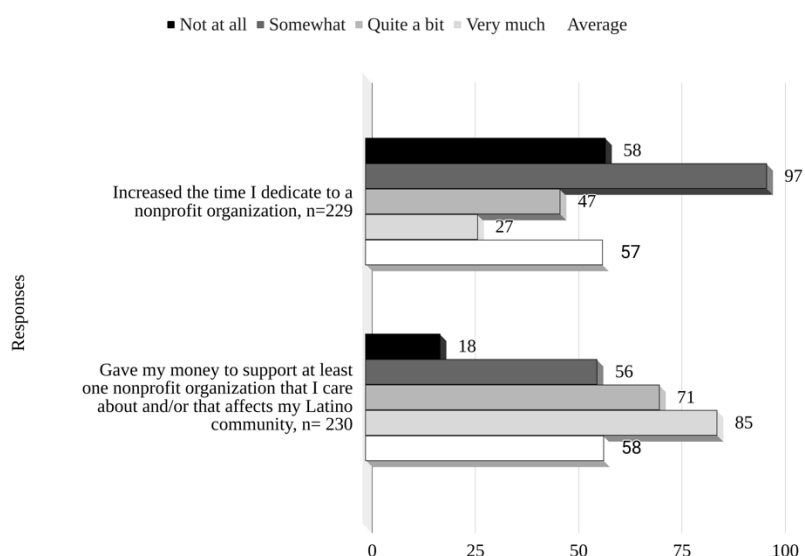


Figure 32. Responses philanthropy.

In this section, I described how giving circle participation does not appear to have a major impact on volunteerism. Participation did, however, affect how many organizations were funded by members who shared funding collectively through their circle and individually. In the next section, I will discuss how members think giving circle participation has helped them be more strategic with their giving, with some members saying their giving has become more targeted and their relationship with grantees is a key part of their giving strategy.

Impactful Philanthropy

Research on the effects of giving circle funding to grantee organizations is limited, as shown in Chapter 2. However, researchers have found if the organization and the giving circles' expectations align for a more involved donor relationship, it can be mutually beneficial (Eikenberry, 2008). In this section, I examine the impact giving circle grants have, beyond the money distributed, by considering members' perception of their impact. In particular, Question 10, using a scale that ranged from *not at all* through *very much* (with *not applicable* offered as an option but not selected by any of the respondents), asked respondents to rate their responses to the following statements:

- My giving circle has increased Latino philanthropy.
- My giving circle has responded to the needs of Latino-led organizations.
- My giving circle has helped raise awareness of the solutions of the problems affecting our community.
- My giving circle has established connections with Latino-led organizations.

Figure 33 shows the distribution of participant responses. As noted in Chapter 2, the amount of philanthropic funds going to Latino organizations is minimal, which makes it even more important to support the donor base that is actively trying to move resources to Latino-led nonprofits. Increasing Latino philanthropy is an important example of this donor base and linking its growth to the giving circle model can show how to inspire and support philanthropy by and for other marginalized groups. In response to the first statement, 76% of members said they believed their giving circle had increased Latino philanthropy. Participants in the pláticas described how their giving circle participation made them feel more confident in their giving because they knew the funds were staying in their community. Members also shared how their

giving circle participation helped them streamline their giving from many small gifts to one or two targeted larger gifts.

Responses to the second statement contribute to the collective understanding regarding whether grantee needs are met by giving circles. Seventy-eight percent of members agreed their giving responded to the needs of Latino-led organizations. Understanding members' perceived impact of their philanthropy is also important data that can point to communal benefits behind Latino philanthropy. In each platica, members mentioned how, in response to the pandemic, they called their grantees and asked what they needed, did an additional grant cycle, or moved resources to their grantees in other ways. Members also described how they wanted to reduce the burden of applying for grants and let organizations do what they needed with their funds to meet their organizational needs.

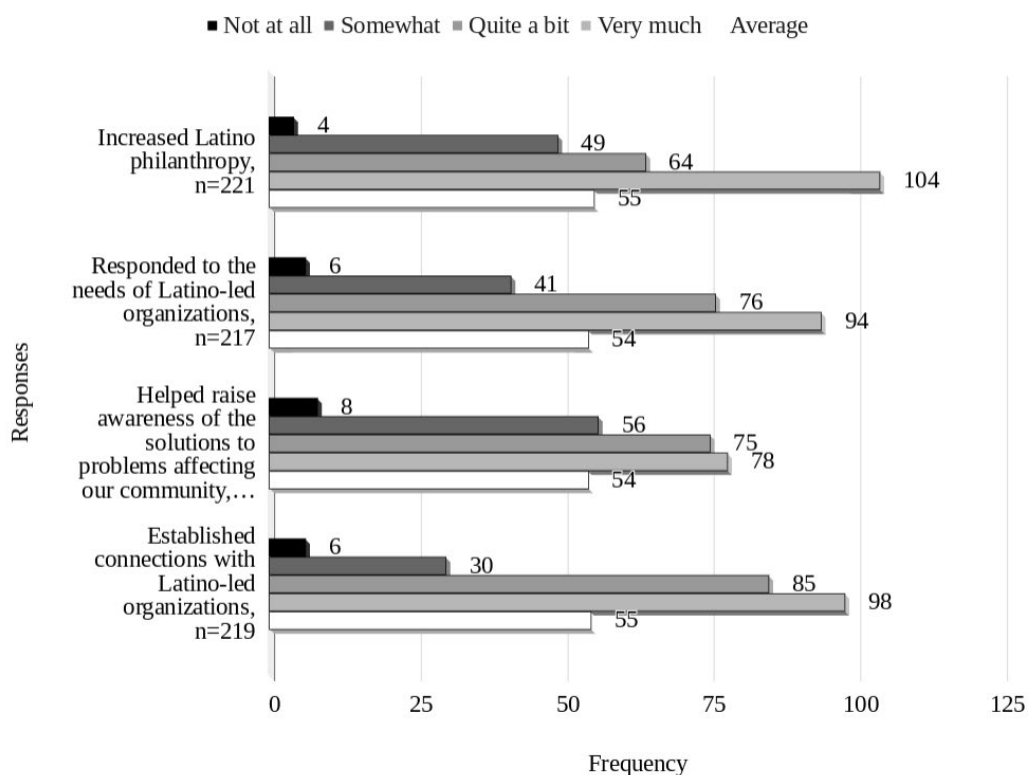


Figure 33. Responses impact of philanthropy.

Helping raise awareness of solutions for problems affecting their communities is also a sign of agency and collaboration and can help raise visibility for organizations that are not on the radar of larger funding sources. Seventy percent of members agreed their philanthropy helped raise awareness of solutions. One member described giving a \$10,000 grant to a local organization that had been serving their community for 20 years and had never received a grant. The publicity the circle created with their grant gave a new level of exposure for this organization that has turned into a revenue stream of donations that had not been there previously. Another member described leveraging their gift to a small nonprofit doing amazing work that, in turn, led the governor to visit the organization on one of his trips to the city because of the publicity this organization began to receive. Members shared other stories of creating visibility and exposure for grantees, demonstrating how giving circles can serve as scouts for underfunded and over-performing grassroots organizations for other donors to support.

The final statement received the highest positive rating of the four noted here, with 84% of respondents indicating they believed their giving circle established connections with Latino-led organizations. Each giving circle has a grantee liaison member who checks in with the grantee organization throughout the year to continue supporting their needs. This arrangement likely helps members feel more connected to the organization beyond the grant cycle. Members also described volunteering with their grantee organizations and reaching out to them during the pandemic to continue mobilizing support and resources for the organization. This level of engagement was described by members, who shared how their grantees felt seen by their communities through the giving circle support. Members felt this kind of involvement led to a more authentic connection and sustained relationship between donors and grantee organizations.

Impactful philanthropy is characterized by (a) making more strategic donors, (b) basing decisions on trust and meaningful relationships with grantees, and (c) trying to minimize burdens on grantees. Impactful philanthropy also points to a more engaged donor base that goes beyond the donation to build relationships with organizations in their community. Through these relationships, giving circles can nimbly respond to emerging needs an organization may face, particularly in times of crises. Although grants may seem small to medium or large size organizations, giving circle philanthropy can be very important because giving circles can serve as local scouts for organizations and provide legitimacy to their grantees among a wider donor pool.

Chapter Summary

Chapter 5 adds to the literature presented in Chapter 2 on giving circles by describing a deeper understanding of the impact of giving circle participation on levels of: civic engagement, wellness and community building, and philanthropic activity and strategy. Findings in this chapter add to the literature by describing the benefits that come from participation at the individual and community levels. Although the literature in Chapter 2 affirmed the power of giving circles beyond the funding amount, findings presented in this chapter add an essential level of analysis on the benefits of giving circles—the communal level benefit from having a local giving circle. This communal benefit was identified by analyzing how giving circles affect members' capacity to affect social change, build community, and inspire impactful philanthropy.

In this chapter, I began by exploring what members perceive to be benefits of their giving circle participation. The most frequently selected benefits mirror the reasons why members joined or why they stayed engaged in their giving circles, as presented in Chapter 4. The perceived benefits also continue to add value to our understanding of the characteristics of Latino

philanthropy. Much of the literature on the benefits of giving circle participation identifies individual benefits and misses what participation brings to the community as well. This finding set the framework for the remainder of the chapter by exploring individual and community benefits more deeply.

Giving circle participation supports members to be agents of change. On an individual level, participation does so by contributing to members' sense of personal agency (e.g., by helping members know how to affect change or how to pivot community engagement strategies). Participation also supports members by helping them engage confidently in conversations on social issues facing Latino communities. This understanding—that one's voice matters and should be used—is a sign that personal agency is supported by participation. Consistent with literature presented in Chapter 2, giving circle participation was found to have a positive impact on levels of civic engagement, and this effect is positive regardless of how civically engaged a person was upon joining a giving circle. This engagement is possible because those who were less engaged have the capacity to be exposed to issues, solutions, and leaders who help them learn where to start, while it simultaneously creates a crucible for collective action and strategy for those who were already active when they joined.

Giving circle participation also helps build community ties and cohesion for members in ways that contribute to their personal wellness and that sustain the group throughout the highs and lows of their lives. Separating the effects of participation on the individual and on the community was difficult because of the importance of community to Latinos' health and wellness, as demonstrated by the large number of members who indicated they joined and stayed because of the community. Giving circle participation affects wellness by reducing isolation and providing members with a place where they can be themselves, live their culture, and find a

purpose beyond themselves. Giving circle participation made members prouder of Latino culture in the United States, which is particularly interesting given the diversity within the network.

In the last section, I focused on how giving circle participation inspires impactful philanthropy by and for Latinos. I found giving circle participation has an impact on how many organizations were funded, with members reporting funding collectively and individually. I also found participation made members more strategic donors with authentic and trusting relationships with grantees. These kinds of relationships led giving circles to intentionally ask grantee organizations what they need and to minimize the burden of applying for funding. Relationships with organizations also allowed circles to leverage their gifts to provide grantees with visibility and exposure to new sources of funding. In this way, giving circles show their strength in serving as scouts for underfunded and over performing organizations.

In Chapter 6, I shift to recommendations for future research and actions giving circle ecosystem actors can take to support Latino philanthropy and the wider giving circle movement.

CHAPTER SIX

CONCLUSION

This chapter is divided into two sections. In the first section, I explore how the findings of the dissertation can be understood through the six principles that guided the research design and show how the design helped clarify and elevate findings in ways other design decisions may have missed. In the second section, I discuss implications of the findings for various actors within the giving circle ecosystem, thus making the findings actionable and useful to the wider giving circle movement.

Understanding Findings Through an Emancipatory Research Paradigm and LatCrit Theory

In this research, I used an emancipatory research (ER) paradigm with LatCrit theory principles to design a study with practical implications for the collective action efforts found in the Latino Giving Circle Network (LGCN). I used six principles in the design of the study by applying and adapting LatCrit theory to ER principles with the goal of centering Latinos and the oppression faced by this community:

- (a) adopting a social and normal (rather than abhorrent) model of racism;
- (b) surrendering claims of objectivity with overt political commitment to Latino struggles;
- (c) undertaking research of utility to self-empowerment efforts of Latinos and/or that remove structural racism upholding oppression of Latinos;
- (d) ensuring research is accountable to Latinos;
- (e) giving voice to the personal as political and to the commonality of individual experiences; and,

- (f) adopting a plurality of data collection and analysis methods that are responsive to Latino needs and culture.

The ER paradigm is a safe home for critical theories of various kinds and holds potential for future research to be designed with these theories. To support these efforts, in Chapter 3, I reflected on how these six principles played out in this study's evolution and where they led to the selection of methods for data collection and analysis to ensure reliable findings that addressed the research questions. Here, I describe how these principles can help explain the dissertation's findings.

Adopting a Social and Normal Model of Racism

Because racism is constructed and lives through our systems and interactions, it can be deconstructed (Bell et al., 1995; Delgado & Stefancic, 2017). Philanthropy is supported by an entire philanthropic sector and the U.S. tax code system. Philanthropy is also something that takes place through social interactions and norms between donors and donation recipients. Therefore, philanthropy is subject to the reality that racism can and does exist through it. From a most basic standpoint, if legislators consider a certain donor profile a philanthropist, they will enact tax benefits that support that profile's form and level of philanthropy; if they do not, they will not. This has led to a systemic undercounting of and lack of subsidy for Latino philanthropy (Martinez, 2017). Findings described in Chapter 4 help make visible a philanthropist profile that sees the diversity and generosity within the Latino community. It does not expand an existing profile; instead, it starts from within the Latino community and looks at where similarities and differences emerge.

This philanthropist's profile does not center Mexican ancestry; rather, it shows a wide range of Latino ancestry in its individuals. Individuals are also transnational with a large

representation of foreign-born and first-generation born in the U.S. Latinos, and subsequent generations. Latino philanthropists begin to emerge in their 20s and continue into their 70s, with many moving resources in their 30s, 40s, and 50s. They do not wait until later in life to give, they give early, with one another, to other Latinos. They come from households that make more than the state of California's median income and are more likely to be women than men.

If we clearly see Latino philanthropy and philanthropists then we can identify how to inspire, support, and scale their giving through infrastructure and investment. In so doing, we employ one way that racism within philanthropy's systems and norms can be deconstructed. This deconstruction can also make clear additional ways to do the same for other racial and gender minorities.

Surrendering Claims of Objectivity With Overt Political Commitment to Latino Struggles

The most recent landscape of the giving circle movement in the United States shows the diversity that exists within it. It can also be seen in the rise of giving circle networks that support dozens of circles along racial and gender lines (Bearman et al., 2016).

In this dissertation, I explicitly focused on showing the diversity within the Latino community and within its expression of philanthropy, adding an additional level of visibility to the voices and experiences giving circles attract. This focus shows how a political commitment to end Latino struggles begins by ensuring we see and invest in all Latinos. As noted in Chapter 1, Latino identity can exist within and sustain a hierarchy of white supremacy, or it can emerge as a political tool for liberation. Oversimplifying Latino philanthropists as one monolithic group can contribute to the former and, in so doing, sustain Latino struggles instead of ending them. To be a tool for liberation, the idea of culture needs to be decolonized, ancestral forms of knowledge must be identified, and our differences need to be seen.

The demographic findings in this dissertation make the diversity within Latino philanthropy visible, although the connection of Latino ancestry and immigrant generation to philanthropic motivations show some of the Pan-American similarities that emerge within our communities and through our generosity. These findings can help erase philanthropy-supported oppression by showing where non-Latino investments in infrastructure and normative change can support the similarities and differences within Latino communities. It can also show how to support the intersection of vulnerabilities in other communities through philanthropic investment.

Undertaking Research of Utility to Self-Empowerment Efforts of Latinos and/or That Remove Structural Racism Upholding Oppression of Latinos

As noted in Chapter 3, this dissertation emerged from my involvement in a network of Latino philanthropists, mobilizing resources in ways I did not find as a fundraiser within the wider nonprofit community in the United States. Findings in Chapter 5 elevate how the giving circle model has created a space for Latino philanthropy to support giving circle members, members' communities, and grantees. On the survey, the most frequently selected benefit from participation in a giving circle was to contribute to social change. This selection also matches the most frequently selected reason why members joined their giving circles (i.e., to affect change in their local Latino community) and why they stayed (i.e., to better support Latino-led organizations). Findings show (a) how giving circle participation contributed to members' sense of personal agency and levels of civic engagement and (b) the individual and communal benefit that came from supporting members to become agents of change. Findings also underscore the importance of giving circles in building community, contributing to members' personal levels of well-being, and strengthening social ties. Findings make visible the effect giving circle

participation has on members' philanthropic activities, the type of giving that takes place, and the impact this giving can have on nonprofits and the community.

In Chapter 5, I described how the impact of giving circles needs to be understood on two levels—the individual and the community—and how the power of giving circles lies in their capacity to support individuals through collective self-empowerment. Understanding the full impact of giving circles tells the story of why it is important that this form of philanthropy is sustained and the implications for those who give the funds, receive the funds, and the community where the funds are moved. Findings expand our collective understanding of this impact by adding a community level and by making visible how Latino giving circles relate to and support their grantees.

Ensuring Research is Accountable to Latinos

The use of ER and LatCrit make this dissertation's design a model for how to develop research that is accountable to any community being studied. This approach shows how the ER paradigm can be tailored to fit the emancipatory needs of Latinos by using a critical theory, in this case, LatCrit. The adaptation of ER principles for research design and analysis, as described in Chapter 3, shows other researchers how they can design critical theory-based research. Results presented in Chapters 4 and 5 illustrate how to present findings by striking a balance between data collection and data interpretation in partnership with the community being studied.

This dissertation makes an additional contribution because of its use of theory. Most research on giving circles has focused on qualitative methods that are largely exploratory, though more recent studies have used quantitative methods (Bearman et al., 2016; Carboni & Eikenberry, 2018). This dissertation is the first to use any critical theory in a review of giving circles. This study also contributes to the literature on Latino philanthropy because most of the

literature I reviewed came from the Americas and did not use critical race theory. The ability to see more clearly the impact that is possible through Latino philanthropy and giving circles occurred *because* of the theory selection and research paradigm.

Giving Voice to the Personal as Political and to the Commonality of Individual Experiences

Findings presented in Chapter 5 show how giving circle participation makes political what was once personal by adding a communal level impact to the activation of change agents. In other words, findings show how giving circles benefit individual members and their communities. Chapter 5 findings show giving circles can provide members with a space and with information necessary to become more effective change agents by supporting an individual's sense of personal agency and collective action. In both cases, findings show participation in giving circles helps members identify which doors need to be opened to create the desired change and how to open these doors for themselves, for one another, and together.

Giving circle participation also builds community and social ties for members. On the personal level, participation contributes to members' overall well-being by providing them with a community and space where they can be themselves and part of something bigger than themselves. On a communal level, giving circles provide members with a communal space for cultural expression, social ties, and other necessary aspects of society's fabric. Giving circle participation helps members become more strategic donors, basing their decisions on trust and meaningful relationships with grantees and trying to minimize burdens on grantees. Participation also helps members become more engaged donors who go beyond the donation to build relationships with organizations in their community and who can nimbly respond to emerging needs the organization may face.

Data Collection and Analysis Methods That Are Responsive to Latino Needs and Culture

Like the reflections on designing research that is accountable to Latinos, in Chapter 3, I described how I designed and translated a survey instrument to overcome challenges in surveying Latino populations. I also described how the use of *platicas* as a research method is more appropriate to Latino communities than focus groups or a survey alone. Findings in Chapters 4 allowed for the diversity of Latino communities to be made visible, although findings in Chapter 5 allowed for the similarities to inform the wider collective understanding of giving circles' impact. I was able to select the most appropriate methods and data collection tools for the community being studied by designing research that could expose differences and similarities within Latino communities and ensure Latino voices were included in the survey design and analysis. Findings were possible because of these decisions.

In Chapter 3, I described how the dissertation's design came from an emancipatory research paradigm and LatCrit theory. In this section, I described how the dissertation's findings were possible because of these decisions and how some of the findings can be interpreted through the research principles that guided the dissertation's design. As noted in Chapter 1, each chapter can be consumed on its own and presents contributions on its own, but together the chapters show the power in designing research that centers the voices and experiences of those being studied. In the next section of this chapter, I discuss implications the findings offer to various actors within the giving circle ecosystem.

Implications for Giving Circle Ecosystem Actors

Dissertation findings can be used by the multiple actors within the giving circle ecosystem, including giving circle (a) infrastructure organizations, (b) funders, (c) researchers, and (d) leaders. In this section, I discuss key takeaways for each of these audiences.

Implications for Giving Circle Networks and Host Organizations

The intention of this dissertation was always to produce useful findings for the collective actions of this network of Latino philanthropists. In many ways, this has already taken place through the production of two evaluation reports to the Latino Community Foundation (LCF), the host of the network. Although these recommendations are specifically for LCF, they are relevant to other giving circle networks and host organizations. As the infrastructure behind the giving circles, networks and host organizations need to see beyond the amount of money being moved by giving circles and further invest in members, the community within their circles and networks, and grantees themselves. In the next section, I explore implications for all funders, which includes some networks and hosts, but these recommendations focus on how to programmatically support the infrastructure giving circles need to reach their full potential. Recommendations made here were also presented in the final evaluation report to LCF (Loson-Ceballos et al., 2022).

Support Members' Understanding of How to Create Desired Social Change

The evaluation shows how LGCN giving circles support members in their efforts to become change agents in their communities. This is an important priority for LCF as it manages the network because the overwhelming reason why members reported joining their giving circle year-over-year was to create social change. The nuanced insight gained from the pláticas and survey data shows members understand social change to be wider than involvement in politics. Many plática participants spoke of how it helped them face racism in their families or workplaces or address gender and sexuality norms in their places of worship. The key takeaway is that members could benefit from understanding how to develop and employ cultural change

strategies. For example, Power California recently released *Cultural Strategy: An Introduction and Primer* (Sen, 2021), which captures the what, why, and how of cultural strategy.

Cultural change strategy presents LCF with an opportunity to build the capacity of members around culture strategy and to focus on conversation skill building around taboo or politically charged topics. These skills are important given the most frequently selected form of civic engagement, year-over-year, was to talk to others about a social/political issue; so many members shared how their circle informed them on topics that led them to engage others in what they learned. By thinking through how LCF is building member confidence and capacity in engaging in conversations, members can most successfully engage in informal and formal forms of civic engagement and collective action. Beyond conversation skill building, there should also be a focus on a wider range of social issues that can emerge from a survey of the network. This can elevate network areas of interest to support members in affecting the issues they care about.

Support Members in Becoming the Best Philanthropists They Can Become

This research shows how LGCN giving circles impact individual levels of philanthropic activity and the community through strategic and community-led giving. By understanding why members join and stay engaged in their giving circle, the rationale behind their giving becomes clear. Members join to affect change in the Latino community and they stay involved to better support Latino-led organizations. The first can be supported in how the network bolsters their changemaking capacity and efforts; the second can be a place for additional skill building. For example, if members are volunteering, joining boards, and fundraising for their grantees, how are they being supported in being good board members or in developing fundraising skills? It is clear relationships with grantees are authentic, seek to reduce the burden on grantees, and develop with an interest in meeting grantee needs. This type of engagement presents LCF with an

opportunity to build members' skills for meeting these needs, as it already does in helping circle members understand the importance of reducing grantees' burden in applying and reporting on grants.

Another area of opportunity for LCF to support giving circles is by helping circles provide visibility and exposure to underfunded and over-performing Latino-led organizations. For example, many members shared stories of how they mobilized themselves to make their grantee organization known in their wider community and how this helped the organization garner new forms of support. It is possible to see how LCF can use its influence in the philanthropic sector to share spotlights on grantees or in other ways spread the word about which organizations are receiving circle funding. This supports the power of giving circles in serving as scouts for their grantee organizations, thus attracting more funding and support.

Support Members' Wellness Through the Relationships That Come With Giving Circles

This evaluation shows how LGCN giving circles can create multiple types of relationships for members that are essential to their capacity to create change, support Latino-led organization, and create community. It is essential to support the infrastructure for the sustainability of these relationships in all their forms. For example, the third most frequently selected reason for joining their giving circle was to be part of the LGCN movement, and, for staying, it was to be part of the greater giving circle movement. This desire to be part of a larger community and movement presents LCF with an opportunity to partner with other giving circle infrastructure organizations to connect members to the wider giving circle movement, much like it does with the leadership council that connects members from various circles at the network level.

Similarly, there were overwhelmingly high responses from members when asked if their giving circle connected them with people who are positively changing their community. Serving as the network convener, LCF can bring in changemakers who can engage the circles at the network level, as it does currently by bringing in organizational leaders at the local level. These connections can create relationships for network members beyond those in their circles or for those who may not be in the leadership council. Overall, thinking about investing in relationship management capabilities and infrastructure is important, as the various forms of relationships appear to have an impact on members' wellness and desire to stay.

Findings on wellness show how difficult it is to separate the individual from the community, as the many are needed to influence the wellness of the one. However, findings show the network serves to stimulate members mentally, support their mental health, and give them a sense of belonging that is culturally familiar and safe. In this way, it is clear members' ability to support one another is as essential as their capacity to give and create change. The pandemic presented everyone with an opportunity to reimagine how to connect, with varying success. The opportunity now is to think about how to create opportunities for connection and community in the new normal, whatever that may look like as the pandemic ends.

Implication for Funders

In this section, I explore dissertation implications for all funders who support giving circle and Latino philanthropy infrastructure organizations and research.

Invest in Giving Circle Grantees and Infrastructure Groups

In Chapter 2, I described the dismal investment the wider philanthropic sector makes in Latino-led organizations and in Latino communities. In Chapter 5, I showed the power of Latino giving circles to identify and support Latino-led organizations that are underfunded and

overperforming in their communities. The most important implication of this dissertation on other philanthropic funders of various types and inclinations is to support giving circles by funding their grantees and the infrastructure organizations that make their giving sustainable. Sector efforts to fund BIPOC-led organizations should include an intentional analysis of who is funded by giving circles that match the desired organizational leadership. Philanthropy Together hosts a directory of giving circles in the United States that can be filtered and searched to identify giving circles in a particular geographic region or who fund various issue areas.

Using this information to find giving circles can help identify potential grantees. Funding these grantees should also be paired with trust- and relationship-based practices that giving circles use to minimize the burden on grantees. Similarly, findings show Latino philanthropy attracts and maintains philanthropists in search of community, and giving circles offer communal-level benefits. Sustaining the space for these relationships to flourish is neither cheap nor optional for giving circle networks and hosts. Funding these organizations is a way to subsidize the philanthropy of minority groups and begin to test the effectiveness of potential systemic reforms to the U.S. tax code by making visible the level and collective nature of philanthropic activity that takes place in marginalized communities.

Help the Giving Circle Movement Grow

Beyond funding giving circle grantees, networks, and host organizations, funders should invest in efforts to grow the giving circle movement in the United States and abroad as part of their commitment to democratize and diversify philanthropy. This dissertation's findings have been presented to giving circle hosts in Latin America, and I have had the opportunity to connect with and hear from hosts that the biggest challenge is in covering the costs to launch giving circles despite the cultural affinity and local interest. Supporting Latino philanthropy in the

United States is one part of the role funders can play; supporting Latino philanthropy in Latin America is the other. The COVID-19 global pandemic presented a unique opportunity for grassroots and collective philanthropy to take place in the region. For example, countries such as Peru and Chile saw *ollas comunes* (communal pots) emerge during the pandemic to address food insecurity by collecting food for neighbors in need (Manos Unidas, 2021; Reyes Jara, 2021). This example and other expressions of collective giving and mutual aid began to reinforce the notion that philanthropy is in our pre-Columbian roots, a collective responsibility, and something in which philanthropic institutions should invest. There is an opportunity to support this regional growth, much like there is in other regions of the world.

Fund the Research That Expands Knowledge on Collective Philanthropy

Finally, more funding should go toward giving circle research and research on philanthropy in minority communities. Each type of research can reinforce the other but should be done by members from that community and in ways that capture the rich diversity that exists in giving circles in terms of race, sex, sexuality, ability, immigration generation, class, and other variables. Knowledge about philanthropy and giving circles needs to be seeded and harvested in these communities, not extracted and generalized. The more continual research is seeded and harvested, the more it can cross-pollinate in the giving circle ecosystem and the wider philanthropic sector to improve practice and sustain collective efforts.

Implications for Research

In this section, I make recommendations for future research on giving circles and Latino philanthropy based on this dissertation's findings.

Future Giving Circle Research

In the first section of this chapter, I showed how the development of this dissertation can be used by other critical theory researchers to design emancipatory research. The use of theory and the adapted ER principles made visible aspects of Latino philanthropy and the impact of giving circles that would not have been visible without the design decisions that both the LatCrit theory and emancipatory research paradigm asked of me as researcher. Additional research on giving circles that uses other critical theories can continue to push the literature on philanthropy, who is a philanthropist, and whose philanthropy should be counted, supported, and subsidized through tax benefits. Similarly, future giving circle landscape studies need to capture as much of the diversity within the movement as possible to see the richness of experiences and voices within the movement. Finally, there is a need to develop a typology of giving circles that is reflective of the evolution this movement can undergo to identify the necessary infrastructure needed to sustain its development. Identifying this infrastructure can also serve to find and nurture the deep roots of mutual aid often found in the margins of society and within collective giving models, like giving circles.

Future Research on Latino Philanthropy

In Chapter 2, I described how research (e.g., philanthropic actors) has ignored Latino philanthropy. I make the case in this dissertation that this is not acceptable. Additional research on Latino philanthropy should include variables I included in this dissertation and others to continue to showcase our differences as much as our similarities. For example, one area where additional research could contribute to our understanding of Latino philanthropy is social class. In this dissertation, income—a proxy for socioeconomic class—was found not to be associated with reasons why members joined their giving circle, but it was associated with reasons why they

stayed. Another area for additional research is Latino ancestry and immigrant generation, both of which underscore transnational roots and Pan-American, in some cases pre-Columbian, cultural values in Latino philanthropy. Finally, race and sexuality are two identity factors that should be considered, though the inclusion of these variables in future research should be done in ways that expands our understanding of Latinos rather than constricts it. In other words, forcing artificial categories onto our identities can oversimplify our collective identity, so this needs to be done in ways that show our differences as much as similarities that may exist.

Implications for Giving Circles

In this section, I present dissertation findings of relevance to giving circle leaders.

Invest in Relationships With Fellow Giving Circle Members and Grantees

Through this research, I found the relationships that giving circle members form with one another, grantee organizations, and community change makers sustained participation in their giving circle. This is an aspect of the day-to-day functioning of giving circles that should not be rushed or devalued. As the stories shared through the platicas demonstrate, sharing the highs and lows of life with a group of similar-minded individuals can be an anchor during hard times, reduce isolation, and promote wellness. It also helps members become more civically engaged and more strategic donors. Many of the platica participants shared how they reached out to their grantees during the pandemic to ask what they needed to keep their organizations afloat, showing the power of giving circles to be nimble and responsive in times of crisis. The invitation is to prioritize the relationships that come with giving circle participation and find ways to grow and sustain them.

Join Forces With a Giving Circle Network and With the Larger Giving Circle Movement

Giving circles, at their essence, pool resources to increase impact. The same can be said about giving circle networks and the larger giving circle movement. Scaling the collective action of one giving circle to that of a network or a wider movement increases the power that comes from coming together to give. Joining forces also contributes to our collective understanding around best practices, potential model adaptations, and awareness of the movement's boundaries and flows. Such collaboration can support learnings within an individual giving circle and the movement. Either way, tapping into a wider community to support a particular circle's collective giving efforts can provide resources and ideas in exponential ways.

Elevate the Visibility of Giving Circle Grantee Organizations

In terms of philanthropic impact, an important finding was that giving circles serve as scouts for grassroots, underfunded, overperforming, and often BIPOC-led organizations. This is an immense contribution to the sustainability of those organizations, partly because giving circles can make these organizations visible to new donor audiences. It is important for giving circles to share who they fund, why they fund them, and the ways they fund them. These efforts can be done collectively or individually through a member's community and network. Efforts can also take the form of opening doors to new donors or helping grantee organizations in their fundraising efforts.

Participate in Research on Giving Circles

The research on giving circles is only as good as it is representative of the movement, and there are easy ways giving circles can participate in giving circle research. One way is entering a giving circle's information in the Philanthropy Together giving circle database to ensure the giving circle is counted. Another way giving circles can participate in research is by participating

in evaluation efforts of a giving circle if it is part of a network or hosted by an organization. Finally, conducting research or partnering with a researcher on giving circle studies could be a way to bridge the gap between practitioners and academics.

Conclusion

In this dissertation, I set out to produce something of utility to collective action efforts within a community of Latino philanthropists. Yet, study findings were only possible because of certain research design decisions that called on me, as researcher, to overtly commit to efforts that challenged oppressive systems and norms faced by the community being researched. As a community member, I felt directly accountable to my fellow community members and responsible for shifting the arrows of knowledge creation from us to others. In other words, I wanted to share what we were learning with others as much as I wanted to learn from what we were doing.

I began this chapter by showing how this desire and commitment to both share and learn drove my research design and led to significant findings that contribute to two bodies of literature—Latino philanthropy literature and literature on giving circles. I closed the chapter by discussing how findings can be implemented to grow the giving circle movement and support Latino philanthropy.

In the end, this dissertation began because, as a fundraiser, I was deeply aware of the danger of elevating a particular standard of philanthropy and of a philanthropist; meanwhile, the philanthropy I saw in my Latino community and in the Latino Giving Circle Network left me feeling abundant and proud. I hope this dissertation serves to inspire other researchers of color to share our generosity and, in so doing, to push to change systems that disincentivize and overlook our giving while, at the same time, praising philanthropy that sustains the status quo.

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APPENDIX A

Survey Questionnaire in English and Spanish

Latino Community Foundation Philanthropy Survey

Please respond online by February 9, 2020.

CEP Confidentiality Policy

The Latino Community Foundation (LCF) is collaborating with the Center for Effective Philanthropy (CEP) and evaluators [REDACTED] and Adriana Loson-Ceballos, and with funding from the [REDACTED] to learn about your giving circle membership experience. In particular, we are interested in understanding how giving circle participation affects areas of members' lives, such as civic engagement, feelings of belonging and connectedness, wellbeing, and outlook. The survey is part of a broader evaluation of the impact of the Latino Community Foundation's Giving Circles as well as Adriana Loson-Ceballos doctoral dissertation. CEP will share de-identified information for the larger evaluation and doctoral research.

The Center for Effective Philanthropy treats all responses as **completely confidential**:

- We will not report or share individual results or identifying characteristics with the Latino Community Foundation or the other evaluators on the team.
- We will not share the names of Giving Circle members that did or did not respond to the survey with the Latino Community Foundation or the other evaluators on the team.
- We will only report average results to the Latino Community Foundation. Your response will be averaged with other responses to protect the identity of all individual respondents.
- We will read all written comments submitted and work to remove any potentially identifying details. We will then share the anonymized comments with the Latino Community Foundation and the other evaluators on the team. We do not ever identify respondents, so please be candid.
- CEP will share an anonymized dataset with evaluators [REDACTED] and Adriana Loson-Ceballos, with the hope of furthering research on Giving Circles.

CEP is a nonprofit organization focused on the development of data and insight to enable higher-performing funders. CEP's mission is to provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness – and, as a result, their intended impact.

If you have any questions about this project or the survey, please reach out to [REDACTED] at CEP

A. *(For non-LGCN members only)* Are you currently or have you ever been part of the Latino Community Foundation's Latino Giving Circle Network?

- ☐ Yes
☐ No

B. *(For non-LGCN members only)* Do you currently reside in California?

- ☐ Yes
☐ No

The questions in this section seek to understand your: experience as a member of the Latino Giving Circle Network (LGCN); reasons why you joined or why you remain involved; and, perspective on the impact of the giving circle on you and your community.

1. *(For LGCN members only)* Which LGCN giving circle are you a member of? _____

2. *(For LGCN members only)* In what year, approximately, did you join your giving circle? _____

3. *(For LGCN members only)* Choose the top three reasons you joined this giving circle:

- ☐ I wanted to pool my resources with others to increase our impact
☐ I wanted to learn more about philanthropy
☐ I wanted to have fun while giving with Latino values and/or celebrate Latino culture
☐ I wanted to change how my Latino community is seen by its members
☐ I wanted to change how my Latino community is seen by those who are not part of it
☐ I wanted to be part of the LGCN philanthropic movement
☐ I wanted to affect change in the local Latino community
☐ Other *(Please specify)*: _____

4. *(For LGCN members only)* Rate the following statements based on your experience **after** joining your giving circle.

After I joined a giving circle, I...

	Not at all	Somewhat	Quite a Bit	Very Much
Increased the time I dedicate to a nonprofit organization	1	2	3	4
Gave my money to support at least one nonprofit that I care about and/or that affects my Latino community	1	2	3	4
Gave food, clothing, or shelter to those in need	1	2	3	4
Sent remittances (money back to country where family is from)	1	2	3	4

Worked with others to address the social issues that matter to me and/or that affect my Latino community	1	2	3	4
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5. *(For LGCN members only)* Rate the following statements based on your experience **after** joining your giving circle.

After I joined a giving circle, I ...

	Not at all	Somewhat	Quite a Bit	Very Much
Felt confident of actions I could take to positively change my community	1	2	3	4
Connected with people who are positively changing my community	1	2	3	4
Understood that my voice matters on social issues	1	2	3	4
Have felt more connected to the Latino community in the United States	1	2	3	4
Have been more proud of the Latino culture in the United States	1	2	3	4
Have felt alone in the United States	1	2	3	4

6. *(For LGCN members only)* Do you think being a member of a giving circle has helped you to engage confidently in conversations on the following political issues of the day?

	Not at all	Some	Quite a bit	Very much	N/A
The census	1	2	3	4	<input type="checkbox"/>
Economic mobility for Latinos	1	2	3	4	<input type="checkbox"/>
Immigration policies and/or the role of ICE	1	2	3	4	<input type="checkbox"/>
LGBTQ+ issues	1	2	3	4	<input type="checkbox"/>
Youth civic engagement	1	2	3	4	<input type="checkbox"/>
Voting in local and/or national elections	1	2	3	4	<input type="checkbox"/>
Wealth inequality	1	2	3	4	<input type="checkbox"/>

Housing Issues					
Tech and the New Economy	1	2	3	4	<input type="checkbox"/>
Other <i>(Please specify):</i> _____	1	2	3	4	<input type="checkbox"/>

7. *(For LGCN members only)* Beyond funding through your giving circle, in what other ways do giving circle members give time, talent, or resources to funding recipients *(Please check all that apply)*

- ☐ Provide technical assistance, including public relations, marketing, technology, financial, legal, or accounting support
- ☐ Provide fundraising support, including introductions to other donors
- ☐ Participate on the board or other governing or advisory body
- ☐ Give additional money directly beyond funding through the giving circle
- ☐ Volunteer in other ways not mentioned above
- ☐ None of the above
- ☐ Other *(Please specify):* _____

8. *(For LGCN members only)* What activities or learning opportunities are provided to members through your giving circle? *(Please check all that apply)*

- ☐ Speakers or training on philanthropy
- ☐ Speakers or training on specific community issues
- ☐ Leadership training
- ☐ Site visits to nonprofits
- ☐ Meetings with nonprofit or community leaders
- ☐ Discussion about funding recipients and/or community issues
- ☐ Discussion about personal and/or group values
- ☐ Discussion of readings
- ☐ Networking opportunities
- ☐ Social activities and/or celebrations
- ☐ Policy advocacy and/or lobbying
- ☐ None of the above
- ☐ Other *(Please specify):* _____

9. *(For LGCN members only)* Choose the three main reasons that keep you involved in your giving circle:

I stay involved in LGCN's giving circle to...

- ☐ Connect with other members of the giving circle
- ☐ Network with other Latinos
- ☐ Participate in giving circle activities
- ☐ Better support Latino-led organizations
- ☐ Develop my leadership
- ☐ Model giving for my children and/or other young people
- ☐ Feel better about myself
- ☐ Be part of a greater giving circle movement

☐ Other (Please specify): _____

10. In your estimation, please rate the following statements about the impact of LGCN's giving circle.

My giving circle has...

	Not at all	Somewha t	Quite a bit	Very much	N/A
Increased Latino philanthropy	1	2	3	4	<input type="checkbox"/>
Helped raise awareness of the solutions of the problems affecting our community	1	2	3	4	<input type="checkbox"/>
Established connections with Latino-led organizations	1	2	3	4	<input type="checkbox"/>
Responded to the needs of Latino-led organizations	1	2	3	4	<input type="checkbox"/>
Increased my civic participation in my community (where I live, work, etc.)	1	2	3	4	<input type="checkbox"/>

11. (For LGCN members only) The following is a list of possible benefits associated with being a member of a giving circle. Please select up to four benefits that you have experienced:

- ☐ Belong to a community
- ☐ Build financial skills
- ☐ Connect with Latino culture
- ☐ Contribute to social change
- ☐ Connect to people with power
- ☐ Create political change
- ☐ Develop leadership
- ☐ Form relationships with Latino-led organizations
- ☐ Form relationships with other LGCN giving circle members
- ☐ Have fun
- ☐ Enjoy the act of giving
- ☐ Increase self-confidence
- ☐ Learn about philanthropy
- ☐ Grow my career
- ☐ Other (Please specify): _____
- ☐ I have not experienced any of these benefits

The questions in this section seek to understand your level of civic engagement and of the variety of your civic activities.

12. The following are some potential civic engagement activities with which you may have engaged. Please check all that apply to you.

In the past two years, I have...

- ☐ Volunteered for a political group and/or candidate
- ☐ Contributed money to a political group and/or candidate
- ☐ Contacted an elected official
- ☐ Contacted the media
- ☐ Signed a petition
- ☐ Shared a petition
- ☐ Talked to others about a social and/or political issue
- ☐ Worked with others to solve a community problem
- ☐ Attended a public meeting and/or a discussion of community affairs
- ☐ Taken part in a protest, march, or demonstration
- ☐ Aligned my spending with a company because of their social values (e.g. did not buy something or did buy something from a company)
- ☐ Been a candidate for some public office

13. Are you registered to vote in the United States? *(Please check only one)*

- ☐ Yes
- ☐ No

14. *Only shown if 'Yes' is selected above.* Did you/do you intend to vote in the following elections?

	Yes	No	Prefer not to answer
U.S. 2014 midterm elections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
U.S. 2016 national elections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
U.S. 2018 elections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
U.S. 2020 elections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

15. Did you/do you intend to participate in the following activities related to the census?

	Yes	No	Prefer not to answer
2010 U.S. census	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2020 U.S. census	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mobilization of your family and community to participate in the 2020 U.S. census	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

16. If you know about LCF's Annual Policy Summit, have you ever participated in it? *(please check only one)*

- ☐ Yes

- ☐ No
☐ Don't know about it

Studies show health benefits that result from reduced social isolation and the positive effect that other community factors can have on health. We appreciate your answers to the following questions, as the information could help us consider how we can address socially determined health disparities and communicate the impact of the LGCN on our health.

17. How would you rate your current overall health?

1	2	3	4
Poor	Fair	Good	Excellent

18. Please check all of the following statements that currently apply to you.

- ☐ I'm happy
☐ I feel satisfied
☐ I live a life with purpose
☐ I'm physically healthy
☐ I'm mentally healthy
☐ I'm spiritually healthy
☐ I get the social-emotional support I need
☐ I'm open to getting the help I need

19. Please check all the statements that currently apply to you.

In the past 12 months, I have...

- ☐ Consumed tobacco
☐ Drank excessively
☐ Exercised on a weekly basis
☐ Eaten fruits and vegetables on a weekly basis
☐ Eaten fast food on a weekly basis
☐ Drank soda on a weekly basis

20. Please check all of the statements that currently apply to your housing situation.

- ☐ My neighbors get along
☐ I trust my neighbors
☐ My neighbors are willing to help each other
☐ My neighbors take care of neighborhood kids
☐ My neighbors get together
☐ I feel safe in my neighborhood
☐ I live near a park or playground
☐ I use the park or playground

21. Please check all the statements that apply to your current access and utilization of health care services.

- ☐ I have a primary health physician
☐ I have visited an emergency room in the past year
☐ I have visited a doctor's office in the past year
☐ I have delayed getting prescription drugs and/or medical care in the past year

- ☐ I have visited the dentist in the last year
- ☐ I have received the flu vaccine in the last year
- ☐ I am uninsured
- ☐ I have less health insurance than I need

The questions in this section are designed to capture the diversity among Latinos that is often lost in data collection.

22. In what country were you born? _____

23. In what year were you born? _____

24. If applicable, where are your Latino family/ancestors from? For example, Peru, Mexico, etc.

25. What immigrant generation are you in the U.S., relative to your ancestry? *(Please check only one)*

- ☐ Foreign-born
- ☐ First generation, born in the U.S.
- ☐ Second generation, born in the U.S.
- ☐ Third generation, born in the U.S.
- ☐ Fourth or higher generation, born in the U.S.

26. What race(s) or ethnicity(ies) do you identify with? *(Please check all that apply)*

- ☐ Amerindian, Native American, and/or Indigenous
- ☐ Afro-Latino
- ☐ African-American
- ☐ Afro-Caribbean
- ☐ Asian-American and Pacific Islander
- ☐ Asian-Latino
- ☐ Chicano and/or Chicanx
- ☐ Hispanic
- ☐ Latino
- ☐ Latinx
- ☐ Mestizo/Mestiza
- ☐ Mulato/Mulata
- ☐ Multiracial
- ☐ White
- ☐ Other *(Please specify)*: _____

27. The following are some protected classes in the United States. Please select all that apply to you:

- ☐ I am heterosexual or straight
- ☐ I am gay or lesbian
- ☐ I am bisexual
- ☐ Other, my sexuality is *(Please specify)*: _____
- ☐ I am male
- ☐ I am female
- ☐ I am transgender man
- ☐ I am transgender woman
- ☐ I am genderqueer/gender nonconforming
- ☐ I am a veteran or in active service
- ☐ I practice a religion *(Please specify)*: _____
- ☐ I am an atheist or agnostic

- ☐ I have a disability
- ☐ I prefer not to answer any of these statements

28. What is the highest completed education level you have attained? *(Please check only one)*

- ☐ Elementary school
- ☐ High school
- ☐ Associate's Degree
- ☐ Bachelor's Degree
- ☐ Master's Degree
- ☐ PhD Degree
- ☐ Technical Degree
- ☐ Other Graduate Degrees
- ☐ No formal schooling

29. What is your current employment status? *(Please check all that apply)*

- ☐ Employed full time
- ☐ Employed part time
- ☐ Unemployed
- ☐ Employed within the "gig" economy
- ☐ Retired
- ☐ Homemaker
- ☐ Student
- ☐ Other *(Please specify):* _____

30. What is your household income? *(Please check only one)*

- ☐ Under \$25,000 a year
- ☐ \$25,001-\$75,000 a year
- ☐ \$75,001-\$100,000 a year
- ☐ \$100,001-\$200,000 a year
- ☐ \$200,001 + \$300,000 a year
- ☐ \$300,001 - \$500,000 a year
- ☐ \$500,001 + a year

31. What is your current marital status: *(Please check only one)*

- ☐ Married
- ☐ Living with partner
- ☐ Widowed
- ☐ Divorced
- ☐ Separated
- ☐ Single

32. Do you live in a(n): *(Please check only one)*

- ☐ Urban community
- ☐ Rural community
- ☐ Suburban community

33. Would you like a copy of the aggregated findings from this survey emailed to you when it is completed?

- ☐ Yes
- ☐ No

Encuesta del Latino Community Foundation

Favor de responder por internet antes del 9 de febrero, 2020

Política de Confidencialidad CEP

La Fundación Comunitaria Latina (Latino Community Foundation, LCF por sus siglas en inglés) está colaborando con el Centro para Filantropía Efectiva (Center for Effective Philanthropy, CEP) y evaluadores [REDACTED] y Adriana Loson-Ceballos, y con fondos de la Fundación Robert Wood [REDACTED] para aprender sobre la experiencia de miembros de giving circles. En particular, nos interesa entender cómo la participación en giving circles afecta áreas de la vida de los miembros, como el compromiso cívico, los sentimientos de pertenencia y conexión, el bienestar y la perspectiva. La encuesta es parte de una evaluación más amplia del impacto de los giving circles de LCF, así como de la tesis doctoral de Adriana Loson-Ceballos. CEP compartirá información no identificada para la evaluación más amplia y la investigación doctoral.

CEP trata todas las respuestas como completamente confidenciales:

- No reportamos ni compartiremos resultados individuales ni características identificativas con la LCF o los otros evaluadores del equipo.
- No compartiremos los nombres de los miembros del giving circle que respondieron o no a la encuesta con LCF o los otros evaluadores del equipo.
- Solo reportamos los resultados promedio a LCF. Su respuesta se promedió con otras respuestas para proteger la identidad de todos los encuestados individuales.
- Leeremos todos los comentarios escritos enviados y trabajaremos para eliminar cualquier detalle potencialmente identificativo. Después, compartiremos los comentarios anónimos con LCF y los otros evaluadores del equipo. Nunca identificamos a los encuestados, así que por favor sea cándido.
- CEP compartirá un conjunto de datos anónimo con los evaluadores [REDACTED] y Adriana Loson-Ceballos, con la esperanza de promover la investigación sobre giving circles

CEP es una organización sin fines de lucro enfocada en el desarrollo de datos e información para ayudar a las fundaciones rendir más. La misión de CEP es proporcionar datos y crear información para que donantes filantrópicos puedan mejor definir, evaluar, y mejorar su eficacia--y, como resultado, su impacto previsto.

Si tiene alguna pregunta sobre este proyecto o la encuesta, comuníquese con [REDACTED] en el CEP
[REDACTED]

A. *(For non-LGCN members only)* ¿Es usted actualmente o ha sido parte de la Red Latina de Giving Circles de LCF (Latino Giving Circle Network, LGCN por sus siglas en inglés)?

- ☐ Sí
☐ No

B. *(For non-LGCN members only)* ¿Reside actualmente en California?

- ☐ Sí
☐ No

Las preguntas en esta sección buscan entender su: experiencia como miembro del Latino Giving Circle Network (LGCN); razones por las que se unió o por qué sigue involucrado; y, perspectiva sobre el impacto del giving circle en usted y en su comunidad.

1. *(For LGCN members only)* ¿De qué giving circle de LGCN es usted miembro? _____

2. *(For LGCN members only)* ¿Aproximadamente, en qué año se unió a su giving circle? _____

3. *(For LGCN members only)* Elija las tres razones principales por las que se unió a su giving circle:

- ☐ Yo quería unir mis recursos con los de otros para aumentar su impacto
☐ Yo quería aprender más sobre la filantropía
☐ Yo quería divertirme dando con valores latinos y/o celebrar la cultura Latina
☐ Yo quería cambiar como mi comunidad latina es vista por sus miembros
☐ Yo quería cambiar como mi comunidad latina es vista por los que no forman parte de la comunidad
☐ Yo quería ser parte del movimiento filantrópico de LGCN
☐ Yo quería afectar el cambio en la comunidad latina local
☐ Otra razón *(por favor especificar)*: _____

4. *(For LGCN members only)* Califique las siguientes declaraciones con base en su experiencia **después** de unirse a su giving circle.

Después de unirme al giving circle, yo...

	Para Nada	Algo	Bastante	Mucho
Aumente el tiempo que le dedicó al menos a una organización sin fines de lucro	1	2	3	4
Di mi dinero para apoyar al menos a una organización sin fines de lucro que me importa y/o que afecta a mi comunidad latina	1	2	3	4
Di comida, ropa o refugio a los necesitados	1	2	3	4
Envíe remesas (dinero de vuelta al país de donde proviene mi familia)	1	2	3	4

Trabajé con otros para abordar los problemas sociales que me importan y/o que afectan a mi comunidad latina	1	2	3	4
---	---	---	---	---

5. *(For LGCN members only)* Califique las siguientes declaraciones con base en su experiencia **después** de unirse a su giving circle.

Después de unirme al giving circle, yo...

	Para Nada	Algo	Bastante	Mucho
Sentí confianza sobre las acciones que podía tomar para cambiar positivamente mi comunidad	1	2	3	4
Me conecté con personas que están cambiando positivamente a mi comunidad	1	2	3	4
Entendí que mi voz importa en temas sociales	1	2	3	4
Me he sentido más conectado con la comunidad latina en los Estados Unidos	1	2	3	4
He estado más orgulloso de la cultura latina en los Estados Unidos	1	2	3	4
Me he sentido solo en los Estados Unidos	1	2	3	4

6. *(For LGCN members only)* ¿Cree que ser miembro del giving circle lo ha ayudado a participar con confianza en conversaciones sobre los siguientes temas políticos del día?:

	Para Nada	Algo	Bastante	Mucho	N/A
El censo	1	2	3	4	<input type="checkbox"/>
Movilidad económica para los latinos	1	2	3	4	<input type="checkbox"/>
Políticas de inmigración y/o el rol de ICE	1	2	3	4	<input type="checkbox"/>
Temas de LGBTQ+	1	2	3	4	<input type="checkbox"/>
Compromiso cívico juvenil	1	2	3	4	<input type="checkbox"/>
Votación en las elecciones locales y/o nacionales	1	2	3	4	<input type="checkbox"/>
Desigualdad de la riqueza	1	2	3	4	<input type="checkbox"/>

Temas de la vivienda	1	2	3	4	<input type="checkbox"/>
Tecnología y la Nueva Economía	1	2	3	4	<input type="checkbox"/>
Otro tema <i>(por favor especificar)</i> :	1	2	3	4	<input type="checkbox"/>

7. *(For LGCN members only)* ¿Más allá de las donaciones que da su giving circle, de qué otras maneras donan los miembros de su círculo su tiempo, talento, o recursos a los recipientes de su donación? *(Por favor marque todas las respuestas que aplican).*

- ☐ Proporcionar asistencia técnica, incluyendo las relaciones públicas, marketing, tecnología, financiera, legal o soporte de contabilidad
- ☐ Proporcionar apoyo de recaudación de fondos, incluyendo introducciones a otros donantes
- ☐ Participar en la junta u otro órgano directiva o de asesoría
- ☐ Dar dinero adicional y directamente, más allá de la donación a través del círculo
- ☐ Voluntariado de otras maneras no mencionadas anteriormente
- ☐ Ninguna de las anteriores
- ☐ Otras *(por favor especificar)*: _____

8. ¿Qué actividades o oportunidades de aprendizaje son proporcionadas a los miembros a través del giving circle? *(Por favor marque todas las respuestas que aplican).*

- ☐ Conferenciantes o entrenamientos sobre la filantropía
- ☐ Conferenciantes o entrenamientos sobre temas específicos a su comunidad
- ☐ Entrenamientos de liderazgo
- ☐ Visitas a organizaciones sin fines de lucro
- ☐ Reuniones con organizaciones sin fines de lucro or líderes comunitarios
- ☐ Discusiones sobre recipientes de donaciones y/o temas comunitarios
- ☐ Discusiones sobre valores personales y/o del grupo
- ☐ Discusiones sobre lecturas
- ☐ Oportunidades para establecer nuevos contactos
- ☐ Actividades y/o celebraciones sociales
- ☐ Incidencia política y/o cabildeo
- ☐ Ninguna de las anteriores
- ☐ Otras *(por favor especificar)*: _____

9. *(For LGCN members only)* Elija las tres razones principales que lo mantienen involucrado en el giving circle:

Me quedo involucrado en el giving circle para...

- ☐ Conectarme con otros miembros del giving circle
- ☐ Hacer "networking" con otros Latinos
- ☐ Participar en las actividades del giving circle
- ☐ Mejor apoyar a organizaciones lideradas por latinos
- ☐ Desarrollar mi liderazgo
- ☐ Modelar cómo donar para mis hijos(as) y/o otra gente joven
- ☐ Sentirme mejor sobre mi mismo(a)

- ☐ Ser parte de un mayor movimiento de giving circles
☐ Otra razón *(por favor especificar)*: _____

10. *(For LGCN members only)* En su estimación, califique las siguientes declaraciones sobre el impacto del giving circle.

Mi giving circle ha...

	Para Nada	Algo	Bastante	Mucho	N/A
Aumentado la filantropía latina _____	1	2	3	4	<input type="checkbox"/>
Ayudado a hacer conciencia sobre los problemas afectando nuestra comunidad _____	1	2	3	4	<input type="checkbox"/>
Establecido conexiones con organizaciones lideradas por latinos _____	1	2	3	4	<input type="checkbox"/>
Respondido a las necesidades de las organizaciones lideradas por latinos _____	1	2	3	4	<input type="checkbox"/>
Aumento mi participación cívica en mi comunidad (donde vivo, trabajo, etc.)	1	2	3	4	<input type="checkbox"/>

11. *(For LGCN members only)* Lo siguiente es una lista de posibles beneficios asociados con ser miembro de un giving circle. Seleccione hasta cuatro beneficios que haya experimentado:

- ☐ Pertenecer a una comunidad
☐ Desarrollar habilidades financieras
☐ Conectar con la cultura latina
☐ Contribuir al cambio social
☐ Conectar con personas con poder
☐ Crear cambio político
☐ Desarrollar liderazgo
☐ Formar relaciones con organizaciones lideradas por latinos
☐ Formar relaciones con otros miembros del giving circle de LGCN
☐ Divertirse
☐ Disfrutar el acto de donar
☐ Aumentar la confianza en sí mismo
☐ Aprender sobre la filantropía
☐ Crecer la carrera
☐ Otro *(por favor especificar)*: _____
☐ No he experimentado ninguno de estos beneficios

Las preguntas de esta sección tratan de entender su nivel de compromiso cívico y de la variedad de sus acciones cívicas.

12. Las siguientes son algunas posibles actividades de compromiso cívico en las que puede haber participado. Por favor, marque todos los que se aplican a usted.

En los últimos dos años, he...

- ☐ Sido voluntario para un grupo político y/o candidato
- ☐ Contribuido dinero a un grupo político y/o candidato
- ☐ Contactado a un funcionario electo
- ☐ Contactado a los medios de comunicación
- ☐ Firmado una petición
- ☐ Compartido una petición
- ☐ Hablado con otros sobre un tema social y/o político
- ☐ Trabajado con otros para resolver un problema comunitario
- ☐ Asistido a una reunión pública y/o a una discusión de asuntos comunitarios
- ☐ Participado en una protesta, marcha o manifestación
- ☐ Alinee mis gastos con una empresa debido a sus valores sociales (por ejemplo, no compre algo o compre algo de una empresa)
- ☐ Sido candidato para algún cargo público

13. ¿Está usted registrado para votar en los Estados Unidos? *(Por favor marque sólo una respuesta)*

- ☐ Sí
- ☐ No

14. *Only shown if 'Yes' is selected above.* ¿Votó o tiene planeado votar en las elecciones aquí presentadas?

	Sí	No	Prefiero no responder
Elecciones de los Estados Unidos 2014	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Elecciones de los Estados Unidos 2016	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Elecciones de los Estados Unidos 2018	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Elecciones de los Estados Unidos 2020	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

15. ¿Participó o tiene planeado participar en las actividades del censo aquí presentadas?

	Sí	No	Prefiero no responder
2010 Censo de los Estados Unidos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2020 Censo de los Estados Unidos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Movilización de su familia y comunidad para que participen en el Censo 2020 de los Estados Unidos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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16. ¿Si usted sabe acerca del Annual Policy Summit de LCF, ha participado en el? *(Por favor marque sólo una respuesta)*

- ☐ Sí
- ☐ No
- ☐ No sé acerca del evento

Los estudios muestran beneficios para la salud que resultan por la reducción del aislamiento social y el efecto positivo que otros factores comunitarios pueden tener para la salud. Agradecemos sus respuestas a las siguientes preguntas, ya que la información podría ayudarnos a considerar cómo podemos abordar las disparidades de salud y comunicar el impacto del LGCN en nuestra salud.

17. ¿Cómo calificaría su salud actual en general?

1	2	3	4
Pobre	Razonable	Buena	Excelente

18. Por favor marque todas de las siguientes declaraciones que se le aplican actualmente.

- ☐ Soy feliz
- ☐ Me siento satisfecha(o)
- ☐ Vivo una vida con propósito
- ☐ Estoy físicamente saludable
- ☐ Estoy mentalmente saludable
- ☐ Estoy espiritualmente saludable
- ☐ Recibo el apoyo socioemocional que necesito
- ☐ Estoy abierto(a) a obtener la ayuda que necesito

19. Por favor marque todas de las siguientes declaraciones que se le aplican actualmente.

En los últimos 12 meses, he...

- ☐ Consumido tabaco
- ☐ Bebido excesivamente
- ☐ Hecho ejercicio semanalmente
- ☐ Comido frutas y verduras semanalmente
- ☐ Comido comida rápida semanalmente
- ☐ Bebido soda semanalmente

20. Por favor marque todas de las siguientes declaraciones que le aplican actualmente a su situación de vivienda.

- ☐ Mis vecinos se llevan bien
- ☐ Confío en mis vecinos
- ☐ Mis vecinos están dispuestos a ayudarse mutuamente
- ☐ Mis vecinos cuidan a los niños de barrio
- ☐ Mis vecinos se reúnen
- ☐ Me siento segura(o) en mi barrio
- ☐ Vivo cerca de un parque o patio de recreo
- ☐ Uso el parque o patio de recreo

21. Por favor marque todas de las siguientes declaraciones que le aplican actualmente a su acceso y utilización actual de los servicios de atención médica.

- ☐ Tengo un médico de atención primaria de salud
- ☐ He visitado una sala de emergencias en el último año
- ☐ He visitado un consultorio médico en el último año

- ☐ He pospuesto obtener medicamentos recetados y/o atención médica en el último año
- ☐ He visitado al dentista en el último año
- ☐ He recibido la vacuna contra la gripe en el último año
- ☐ No tengo seguro médico
- ☐ Tengo menos seguro médico de lo que necesito

Las preguntas de esta sección están diseñadas para capturar la diversidad entre los latinos que a menudo se pierde en la recopilación de datos.

22. ¿En qué país nació? _____

23. ¿En qué año nació? _____

24. ¿Si es aplicable, de que país(es) son sus antepasados/familia Latina? Por ejemplo, Perú, México, etcétera. _____

25. ¿Usted forma parte de qué generación de inmigrantes en Estados Unidos, en relación con sus antepasados/familia Latina? *(Por favor marque sólo una respuesta)*

- ☐ Nací en el extranjero
- ☐ Primera generación, nacida en los Estados Unidos
- ☐ Segunda generación, nacida en los Estados Unidos
- ☐ Tercera generación, nacida en los Estados Unidos
- ☐ Cuarta o mayor generación, nacida en los Estados Unidos

26. ¿Con cual (o cuales) etnicidad(es) o raza(s) se identifica? *(Por favor marque todas las respuestas que aplican).*

- ☐ Amerindio, Nativo Americano y/o Indígena
- ☐ Afro-Latino
- ☐ Afro-Americano
- ☐ Afro-Caribeño
- ☐ Asiático-americano y isleño del Pacífico
- ☐ Asiático-Latino
- ☐ Chicano y/o Chicanx
- ☐ Hispano
- ☐ Latino
- ☐ Latinx
- ☐ Mestizo/Mestiza
- ☐ Mulato/Mulata
- ☐ Multi-racial
- ☐ Blanco
- ☐ Otro *(por favor especificar):* _____

27. Los siguientes son algunas clases protegidas en los Estados Unidos. Por favor, seleccione todos los que le apliquen:

- ☐ Soy heterosexual
- ☐ Soy homosexual o lesbiana
- ☐ Soy bisexual
- ☐ Mi sexualidad es otra *(por favor especificar):* _____
- ☐ Soy hombre
- ☐ Soy mujer
- ☐ Soy hombre transgénero
- ☐ Soy mujer transgénero
- ☐ Soy de género no conforme

- ☐ Soy un veterano o sigo en servicio activo
- ☐ Practico una religión *(por favor especificar):* _____
- ☐ Soy ateo o agnóstico
- ☐ Tengo una discapacidad
- ☐ Prefiero no responder a ninguna de estas declaraciones

28. ¿Cuál es el más nivel de educación más alto que ha terminado? *(Por favor marque sólo una respuesta)*

- ☐ Escuela primaria
- ☐ Escuela secundaria
- ☐ Asociado
- ☐ Licenciatura
- ☐ Maestría
- ☐ Doctorado
- ☐ Grado Técnico
- ☐ Otros títulos de posgrado
- ☐ Sin educación formal

29. ¿Cuál es su situación laboral actual? *(Por favor marque todas las respuestas que aplican).*

- ☐ Empleado(a) de tiempo completo
- ☐ Empleado(a) parte de tiempo
- ☐ Desempleado(a)
- ☐ Empleado(a) dentro de la economía "gig"
- ☐ Retirado(a)
- ☐ Amo(a) de casa
- ☐ Estudiante
- ☐ Otro *(por favor especificar):* _____

30. ¿Cuál es su ingreso familiar? *(Por favor marque sólo una respuesta)*

- ☐ Menos de \$25,000 al año
- ☐ \$25,001-\$50,000 al año
- ☐ \$50,001-\$75,000 al año
- ☐ \$75,001-\$100,000 al año
- ☐ \$100,001-\$200,000 al año
- ☐ \$200,001-\$300,000 al año
- ☐ \$300,001 - \$500,000 al año
- ☐ \$500,001+ al año

31. ¿Cuál es su estado civil?: *(Por favor marque sólo una respuesta)*

- ☐ Casado(a)
- ☐ Viviendo con mi pareja
- ☐ Viudo(a)
- ☐ Divorciado(a)
- ☐ Separado(a)
- ☐ Soltero(a)

32. ¿Vive usted en una comunidad...": *(Por favor marque sólo una respuesta)*

- ☐ Urbana
- ☐ Rural
- ☐ Suburbia

33. ¿Desea que se le envíe por correo electrónico una copia de los hallazgos agregados de esta encuesta cuando se complete?

- ☐ Sí
- ☐ No

APPENDIX B

Email Invitation

Invitation: Platica Participation for LGCN Survey!

[REDACTED] Mon, May 3, 2021 at 3:46 PM
 To: Adriana Loson-Ceballos <[REDACTED]>,
 [REDACTED]
 Cc: [REDACTED]

Hi everyone,

As you know, last February, we asked our members to complete a survey for an evaluation study of the impact of giving circles on members' philanthropy, civic engagement, and wellbeing. The LGCCN responded at a rate of 48%, a great response rate. Thank you again!

Our research team drafted a summary of the report's findings (attached) and are now inviting you to a platica on the findings. Join our researchers Adriana Loson-Ceballos and [REDACTED] for this conversation (cc'd on this email). Thank you in advance as we know this will help LCF better tell our collective story.

The intention of our researchers for these platikas is to conversationally make sense of these findings with you. And because the world has changed dramatically since the survey took place, these platikas are also a place where we welcome you to share the role the LGCN played last year in your philanthropy, civic engagement, and wellbeing.

To participate, [please RSVP using this link](#) for one of the platikas, scheduled for:

- May 12 Wednesday 09:00 AM - 10:15 AM PT
- May 12 Wednesday 06:00 PM - 07:15 PM PT
- May 13 Thursday 12:00 PM - 01:15 PM PT
- May 14 Thursday 03:00 PM - 04:15 PM PT

Thank you for sharing your stories and experiences with our researchers!

Lastly, you should expect to receive follow-up communications from the research team confirming your participation. They are available to answer additional details if you have questions. To show their gratitude for your participation, **they will offer you a \$20 gift card.**

Feel free to reach out if you all have any questions!

Con carino,

[REDACTED]

APPENDIX C

Institutional Review Board Approval

Date: 3-12-2022

IRB #: IRB-2019-515
Title: Latino Giving Circle Network Survey
Creation Date: 8-16-2019
End Date:
Status: Closed
Principal Investigator: Adriana Loson-Ceballos
Review Board: USD IRB
Sponsor: Robert Wood Johnson Foundation - RWJF

Study History

Submission Type	Initial	Review Type	Expedited	Decision	Approved
Submission Type	Renewal	Review Type	Expedited	Decision	Approved
Submission Type	Closure	Review Type	Unassigned	Decision	

Key Study Contacts

Member	Adriana Loson-Ceballos	Role	Principal Investigator	Contact	alosonceballos@san Diego.edu
Member	Hans Schmitz	Role	Primary Contact	Contact	schmitz@san Diego.edu