

Evaluation Report

Latino Giving Circle Network

Understanding the Benefits of
Latino Giving Circle Participation

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Executive Summary

This report focuses on a multi-year evaluation of the Latino Community Foundation's (LCF) giving circle network, the Latino Giving Circle Network (LGCN, 'the network'). It begins with a summary of the methodology used in designing this evaluation before turning the bulk of its attention to the findings. Findings are organized into four sections. The first looks at giving circle participation benefits and groups these into three clusters: benefits around social change, philanthropy-related benefits, and wellness benefits. The second section then turns to each of these clusters and looks at them from an individual and community level. This framing helps to make clear the power of giving circles on the collective, members' communities, and their grantees. The report closes with recommendations to LCF and to other funders interested in supporting philanthropy by and for marginalized groups in the US. The appendices include a list of charts and tables from survey questions not incorporated into the report, such as demographic information of respondents. Other appendices include the most recent survey questionnaire and the year 1 evaluation report which includes the survey questionnaire from year 1 and other appendices related to the first report submitted to LCF in early 2021.

Methodology

Purpose: The purpose of this evaluation is to better understand the impact of participation in the LGCN and the relationship between members and their broader community. This two-year evaluation provides insights on the degree to which, and how, the LGCN is an instrument for Latinos in creating their desired social change. In particular, this evaluation was designed to better understand what benefits come with giving circle participation and if participation affects philanthropic activity, civic engagement levels, and overall well being.

Timeline: This is the second and final evaluation report of the LGCN. A full evaluation timeline is found in the methodology section. In summary, this evaluation consists of two surveys of the network and four platicas with members. The first survey took place in early 2020, the second in fall 2021, the platicas took place in the spring of 2021. Pairing year 1 survey findings with platica feedback and insight, the survey questionnaire for year 2 was revised in the summer of 2021 and launched in October. Data analysis took place between December and January 2021, with this report serving as the receptacle of the findings from the second survey's iteration.

Data Collection & Analysis: Data collection for year 1 and 2 was conducted through a survey questionnaire. Platicas served as a data analysis method and bridge between surveys by providing reflections on year 1's report and recommendations for survey revisions that could better capture the connection between participation and wellness. The survey for year 1 was divided into four parts with questions on: (1) philanthropy, (2) civic engagement, (3) health and social determinants of health, and, (4) demographics. Revisions to the year 1 survey largely took place in the third section. Rather than presenting questions on social determinants of health, the year 2 survey's third section asked questions on wellness.

Comparison Limitations: A comparison between both years is not possible for two reasons. First, the population surveyed in both years varied and responses were anonymous. Second, the survey questionnaire was changed between years. As such, this report elevates ongoing patterns rather than long-term effects of giving circle participation.

Findings: Giving Circle Benefits

The first findings section focuses on the benefits members reported experiencing as a result of their giving circle participation. Members were asked to select up to 4 benefits. Results are presented for both years the survey was conducted, with benefits grouped into three clusters: social change, philanthropy, and community. These clusters will each form a subsequent findings section and represent the top three selected benefits year-over-year, without much variation. Findings point to two levels of benefits from giving circle participation, an individual and a communal or social level. This helps understand what benefits grantees can receive and how giving circles strengthen their communities.

Social Change: The most selected benefit was ‘contribute to social change’. Meanwhile, ‘creating political change’ was selected by about a quarter of participants and ‘connect to people with power’ by a tenth. These rankings are similar in year 1 findings, showing a pattern of members’ desire to contribute to social change more than political change, though both are present. This nuance was elevated during all four platicas, with members sharing how they were better able to affect the social norms that cause them harm.

Philanthropy: The second most selected benefit was ‘enjoy the act of giving’ which rose from 4TH to 2ND place between years. Nearly half of members selected ‘forming relationships with Latino-led organizations’ and a quarter selected ‘learn about philanthropy’. The ranking of these philanthropy-related benefits did not change dramatically year-over-year. The findings further explains how the rise in ‘enjoy’ the act of giving’ is likely linked to slight changes made to the list of benefits from which respondents could select from between years 1 and 2.

Community: The third most selected benefit was ‘forming relationships with other LGCN giving circle members’ selected almost as much as ‘forming relationships with Latino-led organizations’, or nearly half of members. ‘Connect with Latino culture’ was selected by one-third and ‘have fun’ by one-fifth. The rankings for community-related benefits are similar year-over-year. When considering the third most selected benefit with these other two, a pattern emerges among 20-40% of members that begins to show a link between giving circle participation and members’ overall wellness.

Findings: Social Change Benefits

The second findings section looks at how giving circles support members’ efforts to become change agents. At the individual level, giving circle participation contributes to members’ personal agency. On a community level, giving circles help members create change by facilitating a community of people with which to pursue change. This section begins with looking at how giving circle participation affects sense of personal agency and concludes with how it supports increased levels of civic engagement and collective action.

Individual Level: Survey responses and stories shared in the platicas show that members believe their giving circle contributed to their sense of personal agency. Findings in this section come from a survey question in year 2 that asked members to select from various statements, which they think were affected by their giving circle. A similar question from year 1 asked members to rank the effect between participation and similar statements. In both cases, responses demonstrate that giving circles contribute to members’ sense of personal agency, empowerment, and ability to pursue change on issues that matter to them and their

communities. These findings show that giving circles provide connections to changemakers, increase members' confidence in how to create change, and help members understand that their voices matter on social issues. In other words, giving circles help members become more effective change agents.

Community Level: Findings in this section look at levels of civic engagement and if members' giving circle participation had an effect on them. In both years, members were asked to select all the forms of civic engagement activities they undertook in the previous two years. In both years, the most selected activity was 'talking to others about a social and/or political issue'. Year 1 and 2 results were very similar, showing an active network. Most activities offered as options in both years were selected by 50% or more of respondents. Findings from additional questions and participant stories show that giving circles do affect levels of civic engagement, regardless of how civically engaged you were at the time of joining. These findings show that giving circles serve as places for members to increase their understanding of important issues, as well as their confidence in engaging others on these topics to drive change.

Findings: Philanthropy Benefits

The third findings section looks at the impact of giving circle participation on philanthropic activity. At an individual level, findings presented look at motivations for joining and staying engaged in their giving circle. This shows how members become highly motivated and engaged to use their philanthropy to create change. At the community level, findings look at how giving circles use their collective power to increase the impact of their giving and create sustainable and authentic relationships with grantee organizations. Together these findings show that the impact of giving circles' philanthropy goes beyond the total amount donated.

Individual Level: The motivations behind why members join and stay engaged appeared the same year-over-year. The top motivations for joining were 'to affect change in the local Latino community', followed by 'to pool my resources with others to increase our impact', and, 'to be part of the LGCN philanthropic movement'. Responses from which members could select top motivations for staying engaged were different from those provided for why they joined. Nonetheless, they showed similar patterns of wanting to create change, increase impact, and be in community. The top selected reasons for staying were: 'to better support Latino-led organizations', 'connect with other members of the giving circle', and 'be part of the greater giving circle movement'. These rankings held year-over-year. Findings in this portion also show that members give beyond their giving circle, volunteer with local organizations, and help organizations fundraise for additional resources. This shows how giving circle funding is only one way in which giving circle members mobilize resources.

Community Level: Findings show how giving circles channel giving that is strategic, trust-based, sustained by meaningful relationships, and with processes that minimize grantee burdens. Findings also point to a more engaged donor base that goes beyond the donation to build relationships with organizations and that can nimbly respond to emerging organizational needs—particularly in times of crises. Finally, findings show an additional value from giving circles, their ability to find and elevate the work of organizations not funded by others.

Findings: Wellness Benefits

The fourth, and final, findings section looks at the impact of giving circle participation on wellness. It is hard to separate the individual benefit of increased wellness from the communal benefit of increased social cohesion, as they are interconnected and interdependent in Latino communities. Nonetheless, efforts were made to try to disentangle the two where possible. At an individual level, findings presented look at reported levels of wellbeing and show how members define wellness. At the community level, findings look at how giving circles create an essential community and a space for cultural expression. Together these findings show that giving circles affect wellness levels for members through community, making it difficult to separate the benefits on an individual and community level, but making it clear that both benefit.

Individual Level: In year 1 and 2, members report high levels of wellbeing. When asked if participating in their giving circle had any effect on their wellness, 72% said that their giving circle had a positive effect on their wellness, with the remainder saying it had not. This is a strong relationship with none saying it had a negative effect. In year 2, a question was added that asked members to select from a range of statements which they considered to be part of their wellness. A holistic framing of wellness was clear in the responses and throughout the platicas with many stories shared focused on how their giving circle supported their wellness during the pandemic.

Community Level: A review of Latino philanthropy (found in year 1's report) and stories shared during the platicas, it becomes clear that belonging to a community and cultural expression are linked to individual wellness levels. That said, this section looks at them as community level benefits as they need the many to feel the effects on the individual. The importance of community in survey findings and platica stories show how difficult it is to separate individual wellness from community strength. It also shows how community can affect so many aspects of wellness. As such, this section's findings focus on themes that emerged in the open-ended question on the link between participation and wellness given the strong thread of community across all themes. Together these findings show the power of giving circles beyond the funding, by focusing on relationships.

Methodology

Original Purpose

This evaluation set out to better understand the impact of participation in the LGCN by looking at benefits from giving circle participation. This two-year evaluation provides insights on the degree to which, and how, the LGCN is an instrument for Latinos in: creating their desired social change, developing their philanthropic strategy, and improving their wellness. By better understanding what benefits come with giving circle participation, it becomes clear what effect giving circles have on civic engagement levels, philanthropic activity, and overall wellness.

Evaluation Timeline

This is the second and final evaluation report of the LGCN. A report for year 1 was based on a survey that launched in early 2020. Data clean up was conducted by the Center for Effective Philanthropy (CEP) and a d-eidentified data set presented to the evaluation team in the spring. Analysis took place over the summer and the report was drafted and revised with LCF feedback in the latter half of 2020. The final report was presented to LCF in January 2021. Members of the Leadership Council were invited to meaning-making conversations, *platicas*, of year 1's findings. Platicas also sought to hear from members what survey revisions were needed to better capture the connection between giving circle participation and members' wellbeing. Platicas are a research method often used over focus groups with Latino communities as it is more culturally-aligned with how Latinos make meaning and share knowledge. Four platicas took place in the spring of 2021. Pairing year 1 findings with platica feedback and insight, the survey questionnaire was revised in the summer of 2021 and launched in October. Data analysis took place between December 2021 and January 2022, with this report serving as the receptacle of the findings from the second survey's iteration.

Data Collection & Analysis Methods

The evaluation team partnered with LCF, CEP, and members to develop a survey questionnaire that would go out to the entire network on two occasions. The design for the questionnaire sought to include community voices throughout its development. In particular, one member of the evaluation team was also an LGCN member, to further bring community voices into the design of evaluation tools and findings. The appendices include the year 1 report which has a section on obstacles that can present themselves in studying Latino populations and which presents how the survey design sought to overcome or sidestep them (section titled, 'Data Collection Challenges when Studying Latinos').

Platicas served as a data analysis method and bridge between year 1 and 2 findings. They provided the evaluation team with reflections on the report's findings and recommendations on how to revise the survey questionnaire for year 2 in order to better capture the impact they believed their giving circle participation had on their wellness. This method was selected as an additional place for this evaluation to center and lift the community voices found within the LGCN. Platicas differ from focus groups in that the purpose is not to collect additional data, but to make meaning of information together.

Year 2's data collection was also undertaken through a survey that was largely based on the previous survey. The survey for year 1 was divided into four parts with questions on: (1) philanthropy, (2) civic engagement, (3) health and social determinants of health, and, (4) demographics. Some questions were cut or revised throughout, but the largest of these changes were limited to section 3 of the survey which shifted from questions of social determinants of health to wellness. The revisions of these survey questions were made based on feedback from the platicas, from LCF staff, and year 1 findings. The revised questionnaire is found in this report's attachments.

Response Rates & Comparison Limitations

Both survey questionnaires were translated and offered in Spanish and English and went out to the entire network's membership. Responses were anonymous and the evaluation team received a de-identified data set from the CEP who oversaw the survey launch and response collection efforts in both years. In year 1, the survey went out to n=476, all current LGCN members, and n=232 responses were received, for a response rate of 49%. In year 2, the survey went out to n=444, all current LGCN members, and n=163 responses were received, for a response rate of 37%. A comparison between both years is not possible for two reasons. First, the population surveyed in both years varied in size and composition; and, because responses were anonymous, there is no way to know how many of the same people responded in both years. Second, the survey questionnaire was changed between years, with questions refined, dropped, or added. As such, this report will present findings from year 2's survey and bring in patterns that can be seen year-over-year, rather than over time, between year 1 and 2's findings. This elevates ongoing patterns rather than long-term effects of giving circle participation.

Findings

Giving Circle Benefits

Introduction

Findings from this section contribute to the collective understanding of giving circles' impact by looking at benefits members reported experiencing as part of their participation. Results from three groups of benefits are presented, these are: social change, philanthropy, and community. These groupings follow the top three most selected benefits.

Giving circle research has focused on benefits that members and host organizations receive, with minimal attention given to benefits to grantees. That said, members' experiences can lead to informed and engaged community members and donors—ultimately benefiting grantees. For example, research has shown that circles provide members with: hands-on learning environments and access to speakers on community issues (Eikenberry & Bearman, 2009); as well as, community and philanthropy networks beyond those with which they enter (Bearman, Beaudoin-Schwartz & Rutnik, 2005; Carboni & Eikenberry, 2018).

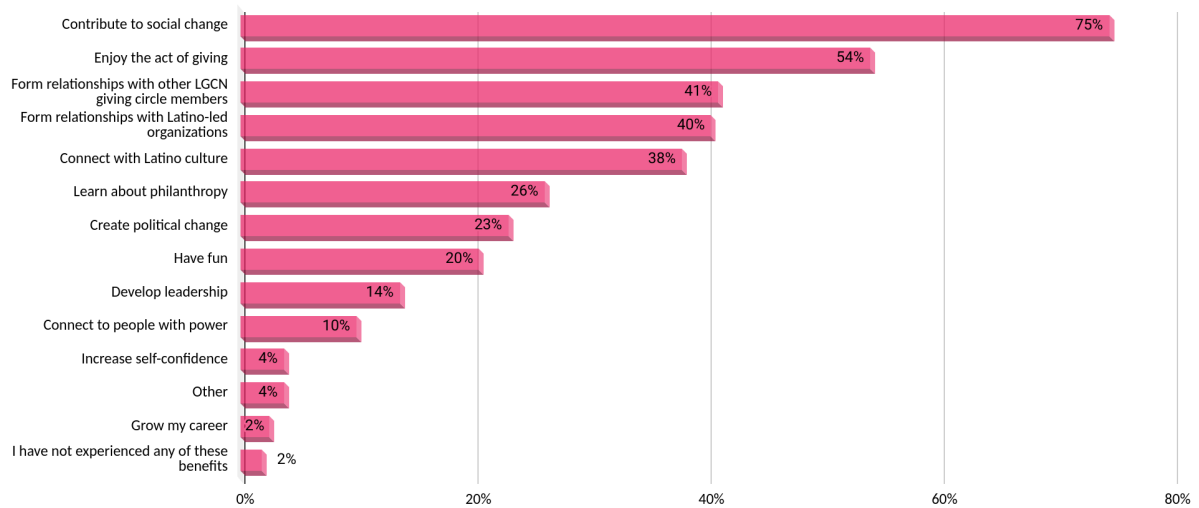
Findings in this section present answers for a multi-select question on self-reported benefits included in both years of the survey, with one change. In year 2, two benefits were removed: 'belong to a community' and 'build financial skills'. The decision to remove the first was because two other benefits offered more nuance to the type of relationships that come with giving circle membership, those with grantees and those with fellow members. By asking members to be more clear on this front, the potential benefits to grantees becomes clear, as does the potential benefit on wellness through increased sense of community belonging. The second removal was requested by LCF staff because of its minimal selection.

When designing the list of potential benefits from which members could select up to four they experienced, the evaluation team considered the literature's findings on giving circle benefits and what giving circle members shared throughout the evaluation process' evolution. This led to a list of benefits that captured nuances that emerged from listening to community members. For example, one benefit was 'contribute to social change' and another was 'create political change'. While similar, they point to different desires. The first arose in conversations about social norms, such as those around gender, sex, sexuality, or race. The second was linked to the political atmosphere and social systems. Similarly, members shared their desire to bring joy to their giving, which became 'enjoy the act of giving', while others talked about the desire to 'have fun' as they moved into or found a new community and sought to reduce their isolation.

Results

There was not much variation year-over-year in benefits when looking at them in clusters of benefits around social change, philanthropy, and community. One notable difference was seen as a result of the removal of 'belong to a community' between year 1 and 2. This change made more visible the various types of relationships that come with participation and how they are valued by members. Findings also point to two levels of analysis around benefits, an individual and a community level. This contributes to our understanding of the power of giving circles.

Possible benefits associated with giving circle membership. Select up to 4.



Social Change

In both years, the most selected benefit was ‘contribute to social change’. In year 1 it was selected by 69% and in year 2 by 75%. A similar benefit ‘creating political change’ was in 8TH place in year 1 and 7TH place in year 2 (selected by 20% in year 1 and 23% in year 2). Similarly, ‘connect to people with power’ was ranked in 11TH place in year one and in 10TH place in year 2 (selected by 13% in year 1 and 10% in year 2). In other words, the ranking of these three benefits is similar year-over-year and points to the network’s desire for social change more than political change. This nuance was elevated during all four platicas, with members sharing how they were better able to affect the social norms that cause them harm. This matches with findings from the section on philanthropy which shows that the top selected reason why members joined their giving circles was ‘to affect change in their local Latino community’. It presents LCF with an opportunity to design programming on culture change strategies (see recommendations).

Philanthropy

In year 2, the second most selected benefit was ‘enjoy the act of giving’ (selected by 54%). This was the 4TH most selected benefit in year 1 (selected by 37%). ‘Forming relationships with Latino-led organizations’ came in 5TH place in year 1 and in 4TH in year 2 (selected by 36% in year 1 and 40% in year 2). Meanwhile, ‘learn about philanthropy’ was in 7TH place in year 1 and 6TH in year 2 (selected by 28% in year 1 and 26% in year 2). Besides the rise in ranking for ‘enjoying the act of giving’ the rankings for philanthropy benefits did not change dramatically between year 1 and 2. This matches with findings from the section on philanthropy which shows that the top selected reason why members stay in their giving circles was ‘to better support Latino-led organizations. This demonstrates how the network’s grantmaking model supports connections to Latino-led organizations, facilitating Latino philanthropy.

Community

In both years, the third most selected benefit was 'form relationships with other LGCN giving circle members' (selected by 46% in year 1 and 41% in year 2). As noted, in year 2, this benefit is in close 3RD place with 'form relationships with Latino-led organizations' found in 4TH place. This adds nuance to year 1's findings, showing that the network facilitates Latino philanthropy by connecting donors to organizations and by creating spaces for relationships with one another that contribute to collective action and members' wellness. Both of these types of relationships sustain Latino philanthropy. A pattern emerges among 20-40% of members showing the link between giving circle participation and members' overall wellness when looking at the benefits of 'connecting with Latino culture' and 'have fun'. The first was in 6TH place in year 1 and 5TH place in year 2 (selected by 34% in year 1 and 38% in year 2). 'Having fun' was in 9TH place in year 1 and 8TH place in year 2 (selected by 15% in year 1 and 20% in year 2).

Social Change

Introduction

This section looks at the power of LGCN giving circles to support members in their efforts to become agents of change. On the individual level, it contributes to members' sense of personal agency. In other words, giving circles support members' ability to create changes to their circumstances. On a community level, by creating a community, giving circles help members change society and politics. This section begins by looking at how giving circle participation affects sense of personal agency and concludes with how it supports increased levels of civic engagement and collective action.

Research has presented giving circles as laboratories of democracy and self-help or mutual aid organizations that are deeply rooted in marginalized communities. This frame can align expectations of giving circles with those members and society can expect (Eikenberry, 2008; 2010). For example, giving circle members are more likely to undertake a wide range of political and civic activities than non-giving circle members (Carboni & Eikenberry, 2018; Eikenberry & Bearman, 2009). And, the longer an individual is engaged, the more that individual is likely to increase their political and civic activities (Carboni & Eikenberry, 2018). Finally, giving circles engage and empower members of society which have historically been excluded from philanthropic decisions and spaces in ways that are culturally-relevant and -rooted within these communities (Lindsey, 2006; W.K. Kellogg Foundation, 2012).

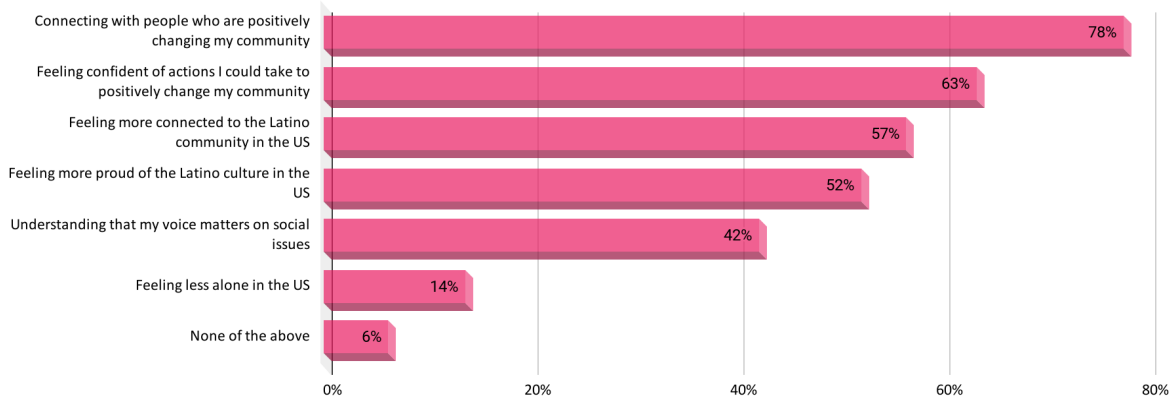
Findings for this section are pulled from questions on civic engagement in both surveys. On the individual level, the year 2 survey asked members to select all that apply from a list of personal agency statements that they believe were affected by their giving circle. Results from a similar question in year 1's survey are also presented. On the community level, respondents were asked about the types of civic engagement activities they undertook in the last two years. Results from both years are presented. Finally, results from an open-ended question in year 2 and a ranked question in year 1 are presented to show the link between giving circle participation and civic engagement.

Results

Individual Level

From the platicas, it becomes clear that some members arrived confident in what actions they could/should take to create change, but many did not. Members' survey responses show that their circle participation has helped their sense of agency grow, particularly by connecting them to change agents. The chart below shows responses from year 2's survey which asked members if their giving circle involvement contributed to various statements. In particular, the most selected statement was 'connecting with people who are positively changing my community'. The second most selected statement, 'feeling confident about actions I could take to positively change my community', is the definition of personal agency. Meanwhile, the third most selected statement, 'understanding that my voice matters on social issues', is a sign of empowerment and perceived ability to influence change. Through the platicas, the nuance was added that giving circles contribute to personal agency regardless of its level upon joining. For example, one member shared that she was grateful her circle helped her pivot her community engagement actions once the pandemic hit. Another member shared that, as an introvert, she was less active but that her circle provided her with a place where she can witness dialogue in ways that leave her better informed and aware of actions she can take. These findings show that giving circles provide connections to changemakers, increase members' confidence in how to create change, and help members understand that their voices matter on social issues. In other words, giving circles help members become more effective change agents.

Has your GC involvement contributed to the following for you (select all that apply)



This pattern was also clear in the findings from year 1, though the question at that time was structured differently. It asked members to rate the following statements based on their experience after joining their giving circle from 'not at all' through 'very much':

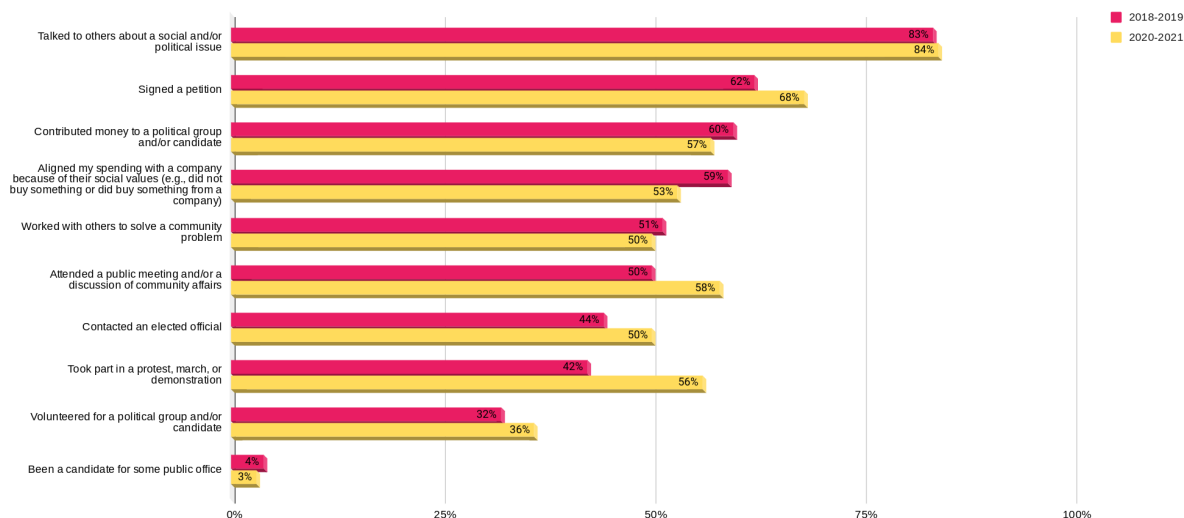
1. After joining my giving circle, I have... Felt confident of actions I could take to positively change my community.
2. After joining my giving circle, I have... Understood that my voice matters on social issues.
3. After joining my giving circle, I have... Worked with others to address social issues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

'Feeling confident about actions I could take to positively change my community' received 68% of responses on the higher end of the scale. Meanwhile, 'understanding that my voice matters on social issues' was similarly ranked on the higher end of the scale by 75% of respondents. Finally, the third statement moves the sense of personal agency and empowerment to action; 60% of respondents selected the higher end of the scale for this statement. Together, these statements received 60% or more of the responses, again, demonstrating that giving circles contribute to members' sense of personal agency, empowerment, and ability for collaboration in pursuit of issues that matter to them and their communities.

Community Level

In both surveys, members were asked what civic engagement activities they had engaged in during the previous two years. For year 1, that time period was 2018 and 2019. For year two, that time period was 2020 and the first half of 2021. Results from both show an active network of members, with most activities offered as options having been selected by 50% or more of respondents. In both years, the most selected activity was 'talking to others about a social and/or political issue'. This shows a consistent finding that giving circles serve as places for members to increase their understanding of important issues, as well as their confidence in engaging others on these topics to drive change. This can be powerful in more intimate forms of social change efforts, such as with families, friends, or colleagues. It can also be powerful in more public forms of civic engagement, such as with politicians, community leaders, and to drive collaboration with others. Like the opportunity to provide programming on cultural change, given the interest by members in 'creating social change', this presents LCF with an opportunity to intentionally partner with members on increasing their confidence in discussing social/political issues. Results for both years can be seen in the chart below.

Civic Engagement Activities from both Surveys



The platicas showed the relationship between giving circle participation and these forms of civic engagement more clearly. For example, one platica participant shared that her circle is in constant conversation with local politicians, saying that when 80 or so Latinos show up and say 'listen to what we need and we are putting our own money towards fixing this and this is why,' she saw the power of the collective voice of her giving circle. Members shared the sentiment

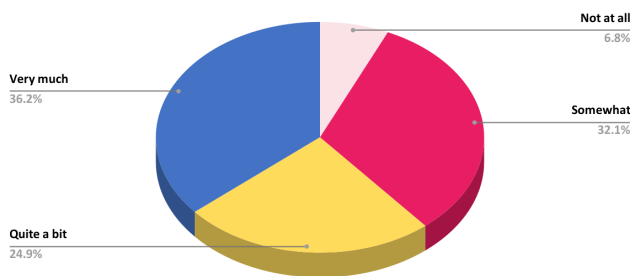
that their giving circle helped them to understand *how* to be involved with their local politics, moving them from a sense that they could not meaningfully affect politics to an understanding of their circles' collective weight and the power they could wield together.

The responses to questions on civic engagement and the stories shared during the platicas showed that giving circle participation does have a positive impact on levels of civic engagement. In year 2, members were asked an open-ended question on this connection, and four themes emerged, with members reporting that their participation helped them to:

- **Increased understanding of candidates, propositions, and community leaders:** Members reported increased social awareness of issues, leaders, and solutions. Saying they felt better informed on how to vote, who to fund, and what solutions exist.
- **Increased connections to other Latinos and to Latino-led organizations:** Members reported feeling more connected to other Latinos seeking to create change, reducing the feeling that they had to create change alone.
- **Increased sense of collective responsibility and potential for collective action:** Members shared the importance of being involved in their communities, for themselves and one another and the power that comes from coming together to create change.
- **Increased understanding of the power of philanthropy to create change:** Many noted the lack of funding that goes to Latino-led organizations as something they learned in their giving circle and which motivated them to use philanthropy as a tool to create change.

This open-ended question was not asked in year 1. However, a different question in year 1 asked them to rate the effect of their giving circle participation on their level of civic engagement. The breakdown can be seen in the chart on the right. Few say participation in their giving circle did not have an effect at all. Yet, with varying levels of effect reported, a positive relationship between participation and civic engagement is found—regardless of how civically engaged they were before joining. This finding contributes to research that found a positive relationship between giving circle participation and levels of civic engagement, but which was unsure if giving circles attracted more civically engaged people in the first place (Carboni and Eikenberry, 2018).

Effect of giving circle on civic engagement



Philanthropy

Introduction

This section looks at how LGCN giving circles impact individual levels of philanthropic activity and on the community through strategic and community-led giving. On the individual level, this section looks at why members joined and stayed engaged in their giving circle to understand the rationale behind how they give. On the community level, it focuses on how circles have supported grantee organizations.

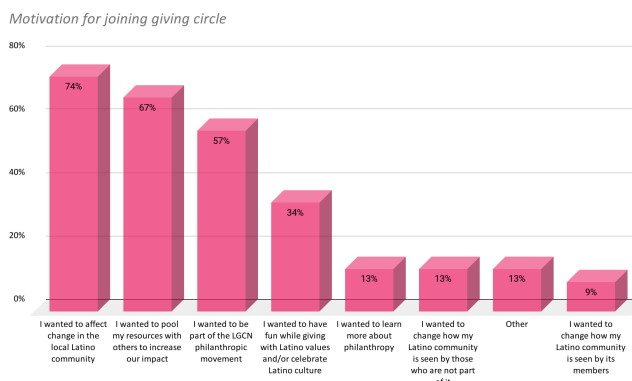
Beyond the funding they provide, there is little research on how giving circle funding affects its recipients. An exception is Eikenberry’s exploratory study from 2008 which found that when the relationship is a match in terms of expectations on both sides, funding from giving circles may open the organization to new volunteers, donors, contacts, resources, and visibility. Also, in 2008, Ho found that Asian and Pacific Islander-led organizations receiving funding from AAPIP giving circles reported how important it was to them that the money came from their same racial and local community. Furthermore, studies on identity-based philanthropy found a similar feeling of solidarity on the part of grantees who felt empowered knowing that 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 (Eikenberry, 2008).

Findings for this section come from the philanthropy portion of the survey in both years. At the individual level, findings presented come from questions on members’ motivations for joining and staying in their giving circles. Together, these show the rationale behind how members give—individually and collectively. Additionally, this section presents findings for a question on types of giving undertaken by members that was offered in both years, though the question format was revised from a scaled question to a ‘select all that apply’. These questions also show why and how members’ engage in philanthropy. On the community level, to better understand how giving circles channel their philanthropy, the section presents findings from a question in year 1 on perceived impact of their giving circle grantmaking and platica findings. Together, these findings show the strategic and collaborative nature of giving circles’ relationships with grantees.

Results

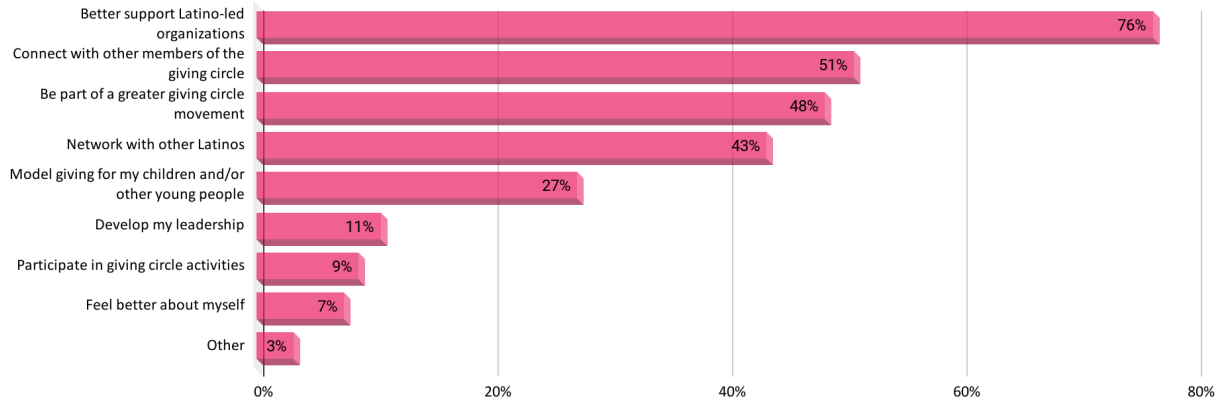
Individual Level

Rankings for why members joined their giving circle were the same in year 1 and 2, with the most selected being ‘to affect change in the Latino community’. This was followed by the desire ‘to pool my resources with others to increase our impact’ and ‘to be part of the LGCN philanthropic movement’. Together, this motivated, strategic, and communal form of giving creates a network of highly engaged donors. The bar chart to the right shows all the motivations and their selection rates.



Similarly, rankings for why members stayed in their giving circle were the same in year 1 and 2. In the bar chart below, responses for the top three motivations for staying can be seen. The top motivation was ‘to better support Latino-led organizations’, followed by ‘connect with other members of the giving circle’, and ‘be part of the greater giving circle movement’. While the responses offered were not the same for why they joined, the top reasons for staying engaged in their giving circles were similar to the top reasons why they joined in the first place.

Three main reasons you stay involved in your giving circle



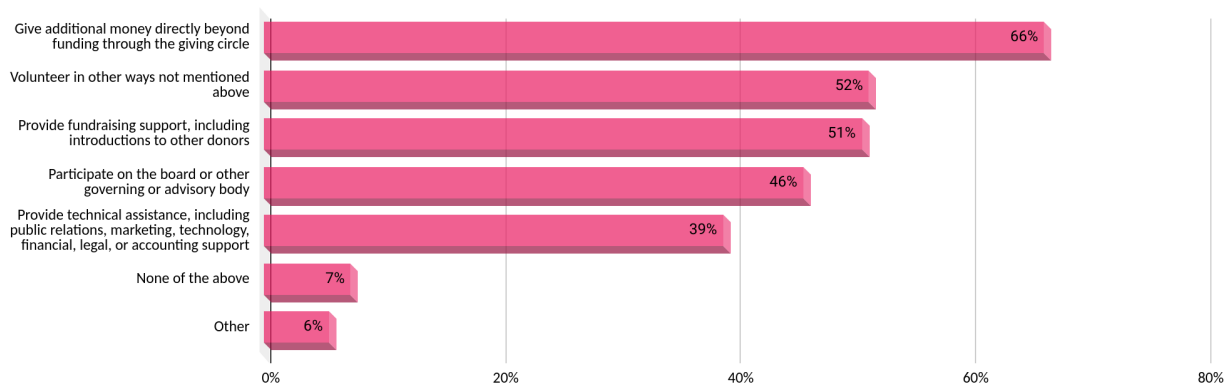
In both years, in fourth place, was ‘network with other Latinos’. When designing the continued engagement question, this option was included in addition to ‘connecting with other members of the giving circle’. These were separated because the “networking” one implied professional relationships while “connecting” with other members implied building community through personal relationships. During the platicas, it became clear that respondents understood this difference and many shared stories of the desire for one over the other. For example, one platica participant shared that through his circle he found other Latinos in his industry and together pushed for solidarity with Black colleagues during the racial protests in 2020. While, another platica participant shared that 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. These two reasons were selected almost equally in both years, demonstrating that giving circles sustain many types of relationships, even when it comes to relationships between members, as well as with grantees.

In year 1, members were asked to rate statements about their volunteerism, donations, and other intimate forms of philanthropy. In year 2, members were asked similar statements but asked to select all that applied to them. Findings from year 1 show that 77% of respondents ranked on the lower end of the scale, a statement on increasing their levels of volunteerism after joining their giving circle. Some of those who attended the platicas shared stories that may add nuance to the seemingly low effect of giving circle participation on levels of volunteerism, saying they were more intentional about what organizations they supported. In this way, rather than pointing to a low effect on levels of volunteerism, it may point to more strategic volunteerism. While a statement on supporting more than one nonprofit after joining their giving circle was ranked on the higher end of the scale by 68% of respondents. Meanwhile, the statements on individual forms of philanthropy, such as giving food and clothing to individuals or sending remittances, was ranked on the lower end of the scale by half of members. What is interesting is that many participants shared stories of how they learned philanthropy as children by seeing their relatives support individuals, yet half said they did not undertake similar forms of charity. This might show a shift in how philanthropy is conducted between generations.

The chart below shows responses for the revised question included in year 2. Results show that members gave beyond their giving circle, volunteered with local organizations, and helped to fundraise for various organizations. From these statements, it appears that volunteering also took the shape of joining a board, and providing technical assistance. This shows how the network is composed of highly strategic and engaged donors in their communities, and how

giving circle funding is only one way in which giving circles mobilize resources from members. It also shows that volunteering is fairly common, though the link between participation and volunteering levels provided mixed findings between years.

Ways you have supported nonprofits in your community between 2020 and now. Select all that apply.



Community Level

In year 1's survey, a question was asked that sought to capture the perceived impact members had of their giving. This question asked them to rank the following statements from 'not at all' through 'very much':

1. My giving circle has... Increased Latino philanthropy
2. My giving circle has... Responded to the needs of Latino-led organizations
3. My giving circle has... Helped raise awareness of the solutions of the problems affecting our community
4. My giving circle has... Established connections with Latino-led organizations

The first statement was ranked on the higher end of the scale by 76% with participants in the platicas sharing that their giving circle participation made them feel more confident in their giving because they knew the funds were staying in their community. They also shared that their giving circle participation helped them to streamline and target their giving.

The second statement contributes to the collective understanding regarding whether grantee needs are met by giving circles. It was rated positively by 78% of respondents. In each platica, members brought up how, in response to the pandemic, they called their grantees and asked them what they needed, did an additional grant cycle, or in other ways moved resources to their grantees. Members also talked about how they wanted to reduce the burden of applying for grants and let organizations do what they needed with their funds, to meet grantees' needs.

The third statement was rated on the high end by 70% of respondents. One member shared that they gave a \$10,000 grant to a local organization who had been serving their community for twenty years and had never received a grant. The publicity the circle created with their grant gave a new level of exposure for this organization and has turned into a revenue stream of donations. Creating visibility and exposure for grantees was shared by others, demonstrating how giving circles can serve as scouts for underfunded and over-performing grassroots organizations for other donors.

The final statement received the highest positive rating, with 84% saying they believed their giving circle established connections with Latino-led organizations. Many platica members said they feel connected to their grantee organization beyond the grant cycle. Additionally, members shared they volunteered with their grantee organizations. This level of engagement was reflected on by members who shared that their grantees had expressed that they felt seen by their communities through the giving circle support, which led to a more authentic connection and sustained relationship between donors and grantee organizations.

Together, this section shows how giving circles can channel philanthropy that is strategic, based on trust, sustained by meaningful relationships with grantees, and with processes that minimize burdens on grantees. Findings also point to a more engaged donor base that goes beyond the donation to build relationships with organizations in their community and that is able to nimbly respond to emerging needs the organization may face—particularly in times of crises. While grants may seem small to more medium to large size organizations, the value in giving circle philanthropy can, perhaps more importantly, be that giving circles can serve as local scouts for organizations and can provide legitimacy to their grantees among a wider donor pool.

Wellbeing & Community

Introduction

The fourth, and final, findings section looks at the impact of giving circle participation on wellness. It is hard to separate the individual benefit of increased wellness from the communal benefit of increased social cohesion, as they are interconnected and interdependent in Latino communities. Nonetheless, efforts were made to try to disentangle the two where possible. At an individual level, findings presented look at reported levels of wellbeing and show how members define wellness. At the community level, findings look at how giving circles create an essential community and a space for cultural expression. Together these findings show that giving circles affect wellness levels for members through community, making it difficult to separate the benefits on an individual and community level, but making it clear that both benefit.

To date, no research on giving circles has looked at the link between giving circles and members' level of wellness. The interest in looking at this arose from hearing from members how giving circle participation had reduced their levels of isolation or increased their sense of belonging and community. Given that the network spans geographic community types and immigrant generations, it serves as a prime subject to look at how giving circles can affect members' wellness. Similarly, the diversity within the network can also make it an interesting case to study how identity-based collective giving can increase solidarity and community.

Because there was no previous research on the connection, the year 1 survey asked questions on health and social determinants of health to see if that was the thread where the connection could be seen. It did not show much, with the exception of one question that served as a clue that a wellness frame could be more fruitful. As a result, one of the main purposes of the platicas was to ask members to reflect on this connection and help the evaluation team reimagine the questions on wellness. This led to a revision of this portion of the survey for year 2, with platica participants helping to shape what would be asked. The feedback led to questions on what aspects of well-being members consider when thinking of wellness, what effect giving circle participation had on wellness, and an addition of an open-ended question on

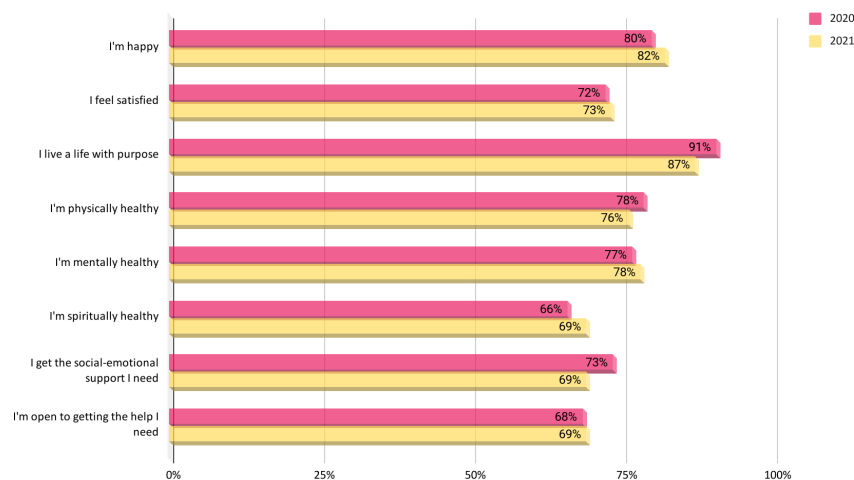
what relationship exists between the two. Given these changes, this section includes findings from the one question on wellness in year 1, along with reflections from the platicas and findings from wellness questions in year 2's survey.

Results

Individual Level

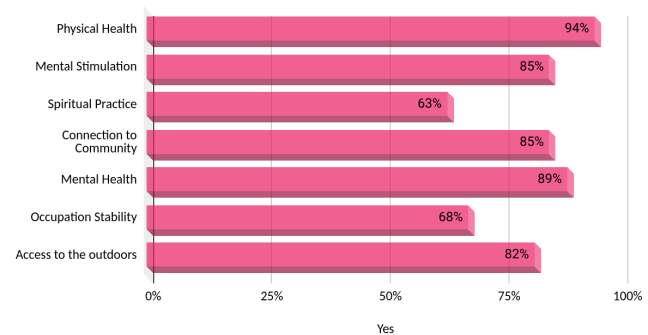
In year 1 and 2, members were asked to select all the statements that currently applied to them. The results can be seen in the chart below. Overall, members report high levels of wellbeing. When asked if participating in their giving circle had any effect on their wellness, 72% said that their giving circle had a positive effect on their wellness, with the remainder saying it had not. This is a strong relationship with none saying it had a negative effect.

Wellness Statements Selected both Years



Based on a review of Latino philanthropy (found in year 1's report) and the stories shared in the platicas, the evaluation team decided to add a question to year 2's survey that asked members to select from a range of statements which they considered to be part of their wellness. The findings from this question and the literature on Latino philanthropy show that belonging to their community and living their culture would have a positive impact on Latinos' level of wellness. Results for this question can be found in the chart on the right.

Aspects considered part of your wellness. Select all that apply.



A holistic framing of wellness was clear throughout the platicas with many stories shared focused on how their giving circle supported their wellness during the pandemic. For example, 'connection to community' was found in one member's story of how her fellow members and she had parked their cars in a circle to see one another and decide who they would fund. This

left her feeling better and led to another expression of wellness, 'access to the outdoors', with circle members going on hikes together once it was safe to be outside. Others spoke to the connection between participation and 'mental health' saying that the members who kept the circle active during the pandemic had lifted a weight off of their shoulders because it allowed them to engage at the level they were able to engage while still having the community.

The wellness aspect of 'mental health' came up a lot during the platicas. For example, one member said that being part of a group that was like her made her happy and that she left all her giving circle meetings feeling high on endorphins. Another member shared that 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. Finally, one member added that this positive effect on members' wellness was not a case of toxic positivity, but that they could experience the highs and lows with a group like them. Sharing, for example, that after the 2019 shooting in El Paso, the LGCN virtually held space together to mourn, cry, and even sing sad songs together.

Community Level

Through a review of Latino philanthropy (found in year 1's report) and stories shared during the platicas, it becomes clear that belonging to a community and cultural expression are linked to individual wellness levels. That said, this section looks at them as community level benefits as they need the many to feel the effects on the individual. The importance of community in survey findings and platica stories show how difficult it is to separate individual wellness from community strength. It also shows how community can affect so many aspects of wellness.

This section's findings focus on themes that emerged in the open-ended question on the link between participation and wellness given the strong thread of community across all themes. It also presents how community and cultural pride came up in stories shared during the platicas. Together these findings show the power of giving circles beyond the funding, by focusing on relationships. As seen in the top selected benefits from participation year-over-year, giving circles create personal and professional relationships with members and authentic relationships with grantees. These relationships show a strong correlation with members' sense of community, mental health, mental stimulation, spiritual wellness, and more.

When asked what reflections came to mind when they think of the effects their giving circle participation has had on their wellness, five themes emerged. The first theme can be linked to the wellness aspect 'connection to community'. Responses varied from: an increased sense of what was possible and who it was possible with through the connections made; to the joy of giving and being in one another's company; to the sense of belonging that reduces isolation, builds camaraderie, and is familiarly welcoming given the Latino culture behind it. Women, in particular, spoke of the importance of this sense of belonging and the sorority of Latinas they have found in one another. The second theme is linked to 'mental health' with members reporting that their giving circle showed them empathy and supported them through difficult times. Similarly, members reported their circles being a 'safe space' for them to talk about issues facing them as Latinos. The third theme is 'mental stimulation' with members reporting how much they valued learning through their circles, thinking about issues and solutions with one another, and listening to conversations that emerged. The fourth theme was around 'spirituality' with members sharing how their circle gave them purpose and how being part of the change they desired gave them hope. Finally, a large number of responses focused on the pandemic and were relatively equally split between those that felt a loss in not being able to be

in person and those that felt their circles' continuing to meet remotely had a positive effect on their mental health during the pandemic. Together, these themes show that members' sense of wellness is affected in multiple ways by their giving circle participation, particularly by their fellow members and grantee relationships.

These themes appeared in the platicas as well. For example, 'connection to community' came up frequently. One member shared that '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'. Another member said he joined after moving to a new city and in search of a community. He shared that together they support their community, but that being part of this circle also supports him by giving him a place where he belongs. The section on philanthropy benefits showed that some of the reasons for joining and staying engaged in their giving circle was to be part of a movement and community, underscoring the important role of being part of a Latino philanthropic community in both attracting and keeping members. This was reflected in the platicas where one member noted, 'I needed to find my community, so I could get to work on making change', and another said, 'people aren't coming together to be more civically engaged or to give, but to be together'.

Another important aspect of wellness is seen in community pride, best summarized by one members' use of a well-known Latino proverb, 'dime con quien andas, y te diré quien eres' meaning 'tell me with whom you socialize, and I'll tell you who you are'. This member said that her circle makes her feel Latina and gives her roots and 'spiritual purpose'—another wellness aspect. Similarly, another member said that 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. As we saw in the section on personal agency, when asked if their giving circle involvement had contributed to the following statements, 57% selected 'feeling more connected to the Latino community in the US' and 52% selected 'feeling more proud of the Latino culture in the US'. Feeling more connected to their Latino communities in the US after joining their giving circle can best be described as the development of relationships that can be key to immigrant communities and others at risk of isolation. This came up in platicas as the word, familia, with one member saying that she felt like a 'tia with all her sobrinos' in the circle. Many participants in the platicas spoke of their pride in seeing the power of coming together as Latinos and the change that it made possible.

Recommendations

Social Change

This evaluation shows how LGCN giving circles support members' in their efforts to become change agents in their communities in various ways. 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 nuance gained from the platicas and the pattern of about one-fifth of members selecting 'to create political change' shows that members understand social change to be wider than involvement in politics. Many platica participants spoke of how it helped them face racism in their families or in their 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 culture change strategies. For example, Power California recently released Cultural Strategy: An Introduction and Primer, captures the what, why, and how of Cultural Strategy.

This presents LCF with an opportunity to build the capacity of members around culture strategy and also to focus on conversation skills building around taboo or politically charged topics. This last point is important given that the most selected form of civic engagement, year-over-year, was 'talk to others about a social/political issue' and 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 the skills-building on conversations should 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 that can support members in affecting the issues they care about.

Philanthropy

This evaluation shows how LGCN giving circles impact individual levels of philanthropic activity and the community through strategic and community-led giving. By understanding why they join and stay engaged in their giving circle, it becomes clear what rationale they hold behind their giving. Members join 'to affect change in the Latino community' and they stay '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 skills 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 that relationships with grantees are authentic, seek to reduce the burden on grantees, and develop with an interest in meeting grantee needs. This presents LCF with an opportunity to build their skills in meeting these needs, as it already does in helping circles understand the importance of reducing the burden on grantees.

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 around

which organizations are receiving circle funding. This supports the power of giving circles in serving as scouts for their grantee organizations, attracting more funding and support.

Wellness

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 selected reason for joining their giving circle was 'to be part of the LGCN movement' and for staying was 'to be part of the greater giving circle movement'. This 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 when asked if their giving circle 'connected them with people who are positively changing their community'. Serving as the network convener, LCF has the opportunity to bring in changemakers that can engage the circles at the network level, as it does currently by bringing organizational leaders at the local level. This can create relationships for network members beyond those in their circles for those which 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 you need the many to influence the wellness of the one. But, it does show that 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 that 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.

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Appendices

Year 2 Survey

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. Which LGCN giving circle are you a member of?

- Bay Area Latino Giving Circle
- Central Coast Latino Giving Circle
- Central Valley Latino Giving Circle
- Cisco Conexion Latino Giving Circle
- Contra Costa Latinx Giving Circle
- Dropbox Latinx Giving Circle
- East Bay Latina Giving Circle
- KPLA Latinx Giving Circle
- Latinos in Tech Giving Circle
- LGBTQ Latinx Giving Circle
- Los Angeles Latino Giving Circle
- Orange County Latino Giving Circle
- Peninsula Latino Giving Circle
- Pleasanton Latino Giving Circle
- Sacramento Latino Giving Circle
- Santa Barbara Latino Giving Circle
- SF Latina Giving Circle
- South Bay Latino Giving Circle
- Stanislaus Latino Giving Circle
- Multiple giving circles

2. In what year, approximately, did you join your giving circle? _____

3. Choose the top three reasons you joined your 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. Has your involvement in your giving circle contributed to the following for you. (*please check **all** that apply.*)

- Feeling confident of actions I could take to positively change my community
- Connecting with people who are positively changing my community
- Understanding that my voice matters on social issues
- Feeling more connected to the Latino community in the United States
- Feeling more proud of the Latino culture in the United States
- Feeling less alone in the United States
- None of the above

5. Beyond funding provided by your giving circle, please select ways in which you have supported nonprofits in your community between 2020 and now. Select 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): _____

6. 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*): _____

7. 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:

- 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
- I have not experienced any of these benefits
- Other (*Please specify*): _____

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

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

In 2020 and the first half of 2021, I have...

- Volunteered for a political group and/or candidate
- Volunteered for an organization in my community
- Contributed money to a political group and/or candidate
- Contacted an elected official
- Spoken up within my place of employment
- Signed 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
- Took 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

9. If you were registered to vote in the United States, did you vote in the following elections?

	Yes	No	Prefer not to answer	Not applicable
U.S. 2014 elections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
U.S. 2016 elections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
U.S. 2018 elections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
U.S. 2020 elections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
California 2021 Governor Recall election	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. If you lived in the United States during a census count, in which of the following ways did you participate?

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

11. How has your involvement in your giving circle contributed to your civic engagement?

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 collective health.

12. How would you rate your current overall health?

1	2	3	4
Poor	Fair	Good	Excellent

13. 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

These questions are meant to capture how you define wellness and what role your giving circle had on your wellness, if any. In particular, we ask that as you answer these questions, you consider the timeframe of March 2020 to September 2021, as we know

that the compounding and multiple crises from 2020 and 2021 have had effects on our lives and wellness.

14. From the following, which do you consider to be parts of your wellness? Check all that apply.

- Physical Health
- Mental Stimulation
- Spiritual Practice
- Connection to Community
- Mental Health
- Occupation Stability
- Access to the outdoors

15. What effect, if any, has participating in your giving circle has had on your wellness?

- Positive effect on my wellness
- Negative effect on my wellness
- No effect on my wellness
- Prefer not to answer
- Other: _____

16. In 2020 and 2021, LCF and giving circles moved to all virtual settings and moved resources out into the community—given the multiple crises that took place. Did you feel supported by your circle in this time period?

- Yes
- No
- Not applicable
- Prefer not to answer

17. What reflections come to mind when you think of the effect of your circle participation and your wellness?

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

18. In what country were you born? _____

19. In what year were you born? _____

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

21. What immigrant generation are you in the U.S., relative to your ancestry?

- 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.

22. 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
- Multi-racial
- White
- Other *(Please specify)*: _____

23. How do you describe your gender identity? *(Please check all that apply)*

- Male
- Female
- Transgender male
- Transgender female
- Gender non-conforming
- Nonbinary*
- Other gender identity
- I prefer not to answer

24. Do you consider your sexual orientation to be:

- Heterosexual or straight
- Gay or lesbian
- Bisexual
- I prefer not to answer

25. Do you identify as having a disability as defined under the [Americans with Disabilities Act](#)?

- Yes, Cognitive
- Yes, Emotional

- Yes, Hearing
- Yes, Mental
- Yes, Physical
- Yes, Visual
- Yes, Other
- No
- I prefer not to answer

26. What is the highest completed education level you have attained?

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

27. 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)*: _____

28. What is your household income?

- 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 - \$400,000 a year
- \$400,001 - \$600,000 a year
- \$600,001 - \$800,000 a year
- \$800,001 - \$1,000,000 a year
- \$1,000,001 or more a year

29. What is your current marital status?

- Married
- Living with partner

- Widowed
- Divorced
- Separated
- Single

30. If you practice a religion, how important is religion in your life?

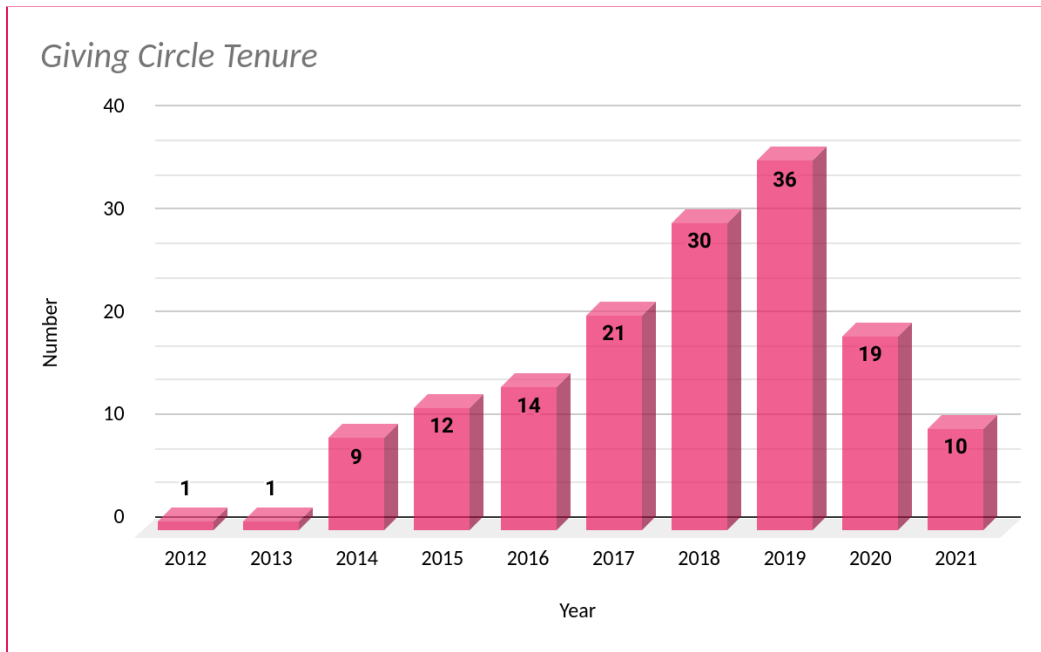
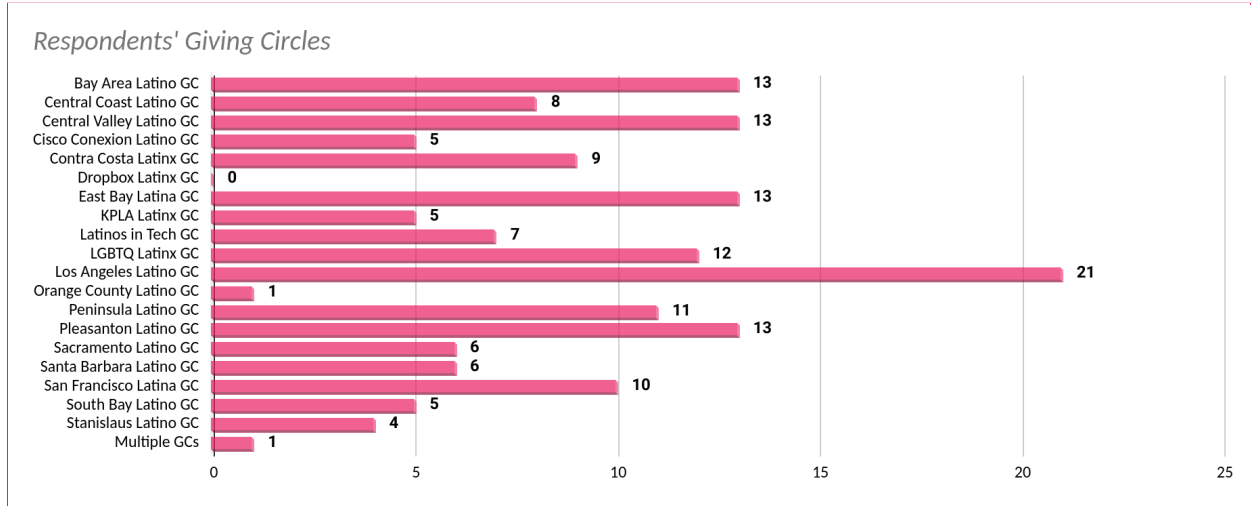
- Not at all important
- Not too important
- Somewhat important
- Very important
- Not applicable, I don't practice a religion

Thank you for your participation in the survey!

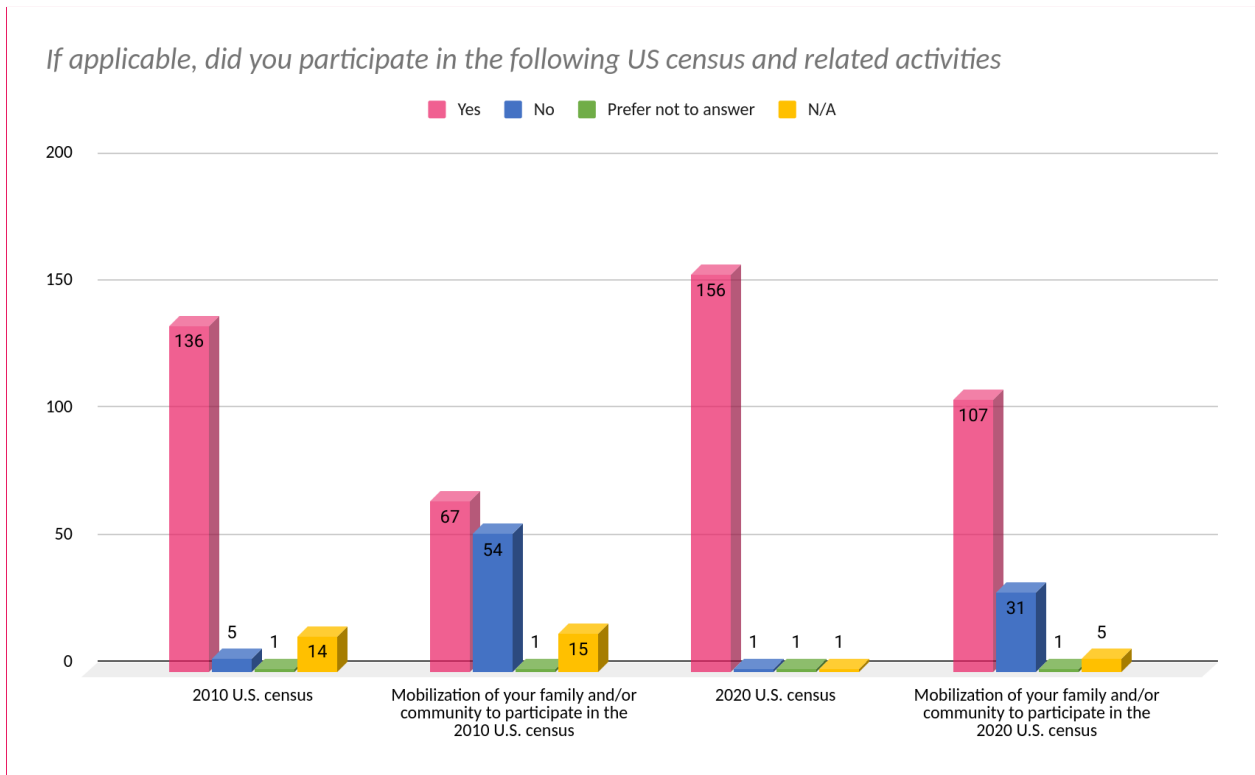
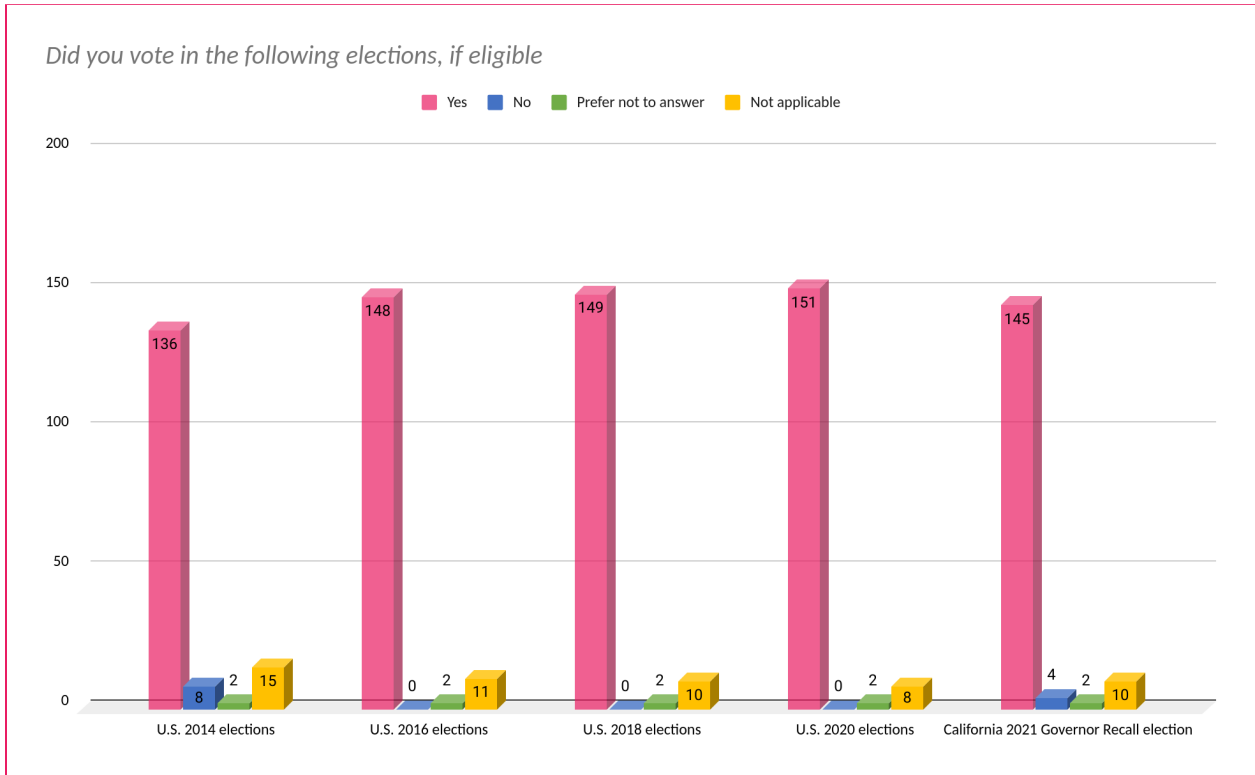
Charts from Year 2 Survey

The following charts show responses to questions from the survey in year 2 not presented in the narrative of the report.

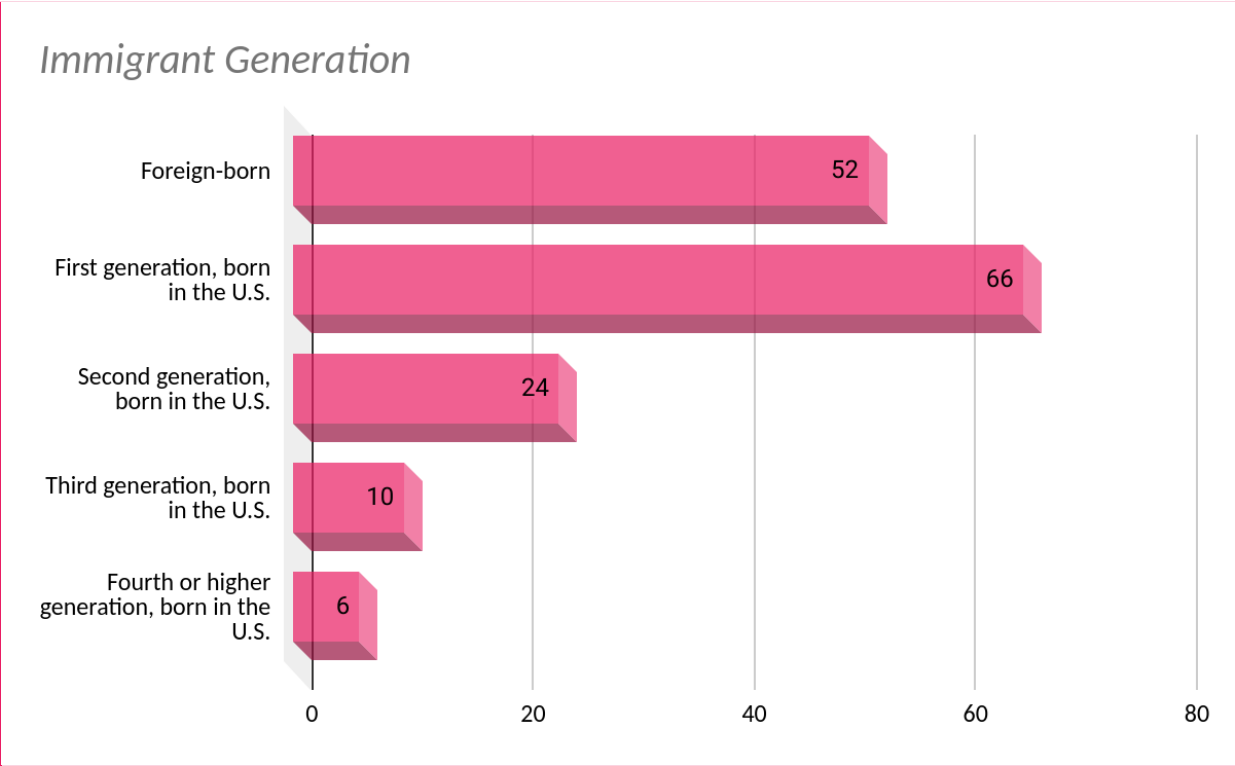
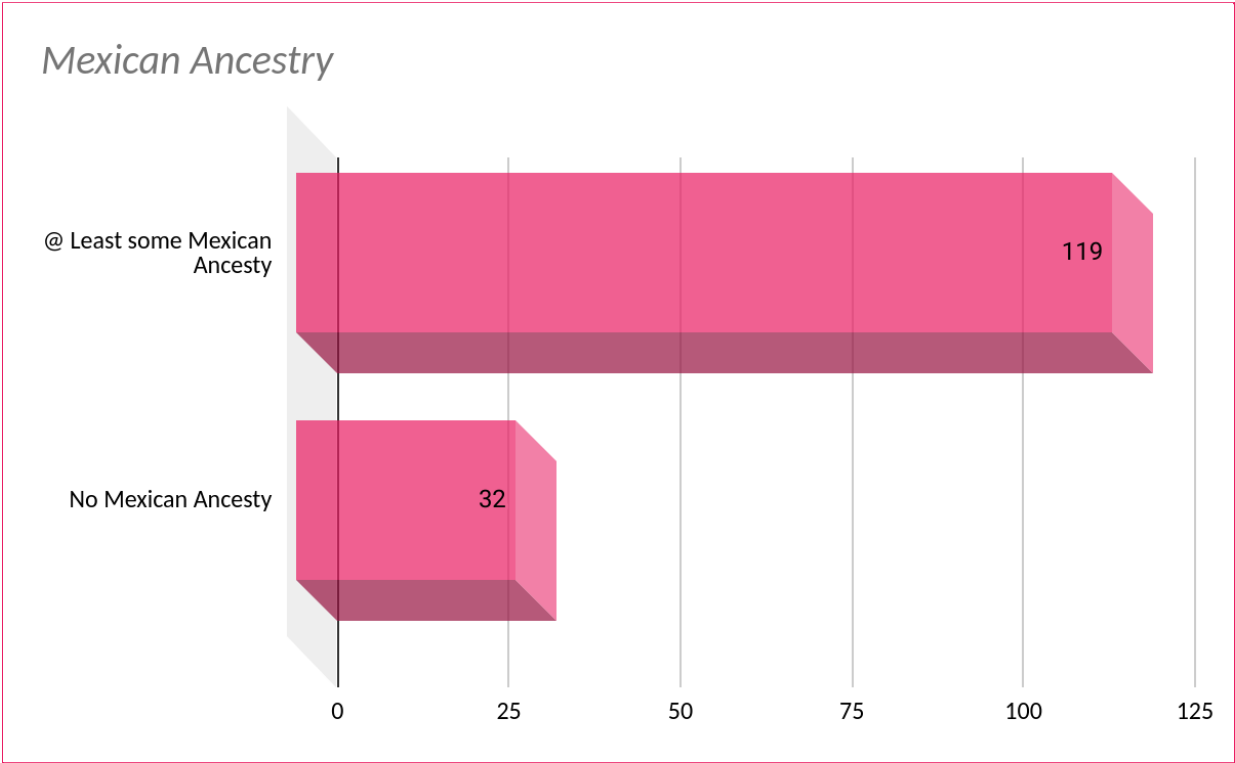
Giving Circle Information



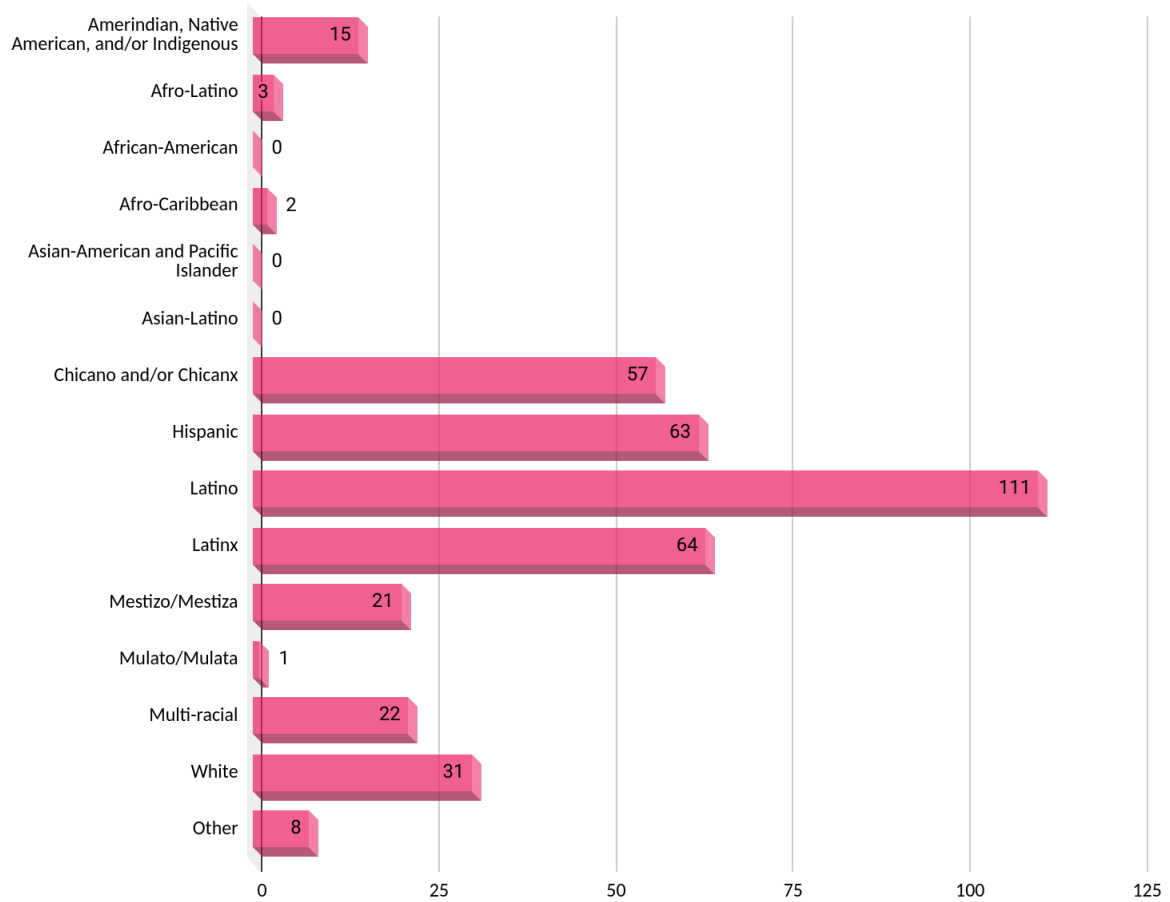
Voting & Census Participation



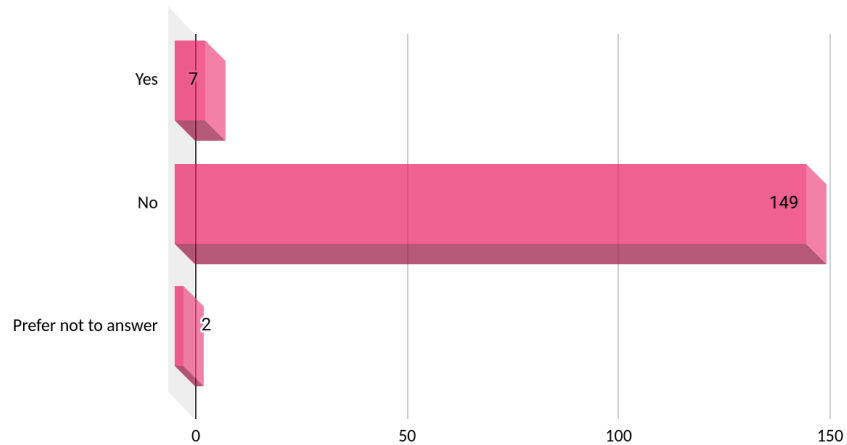
Demographics

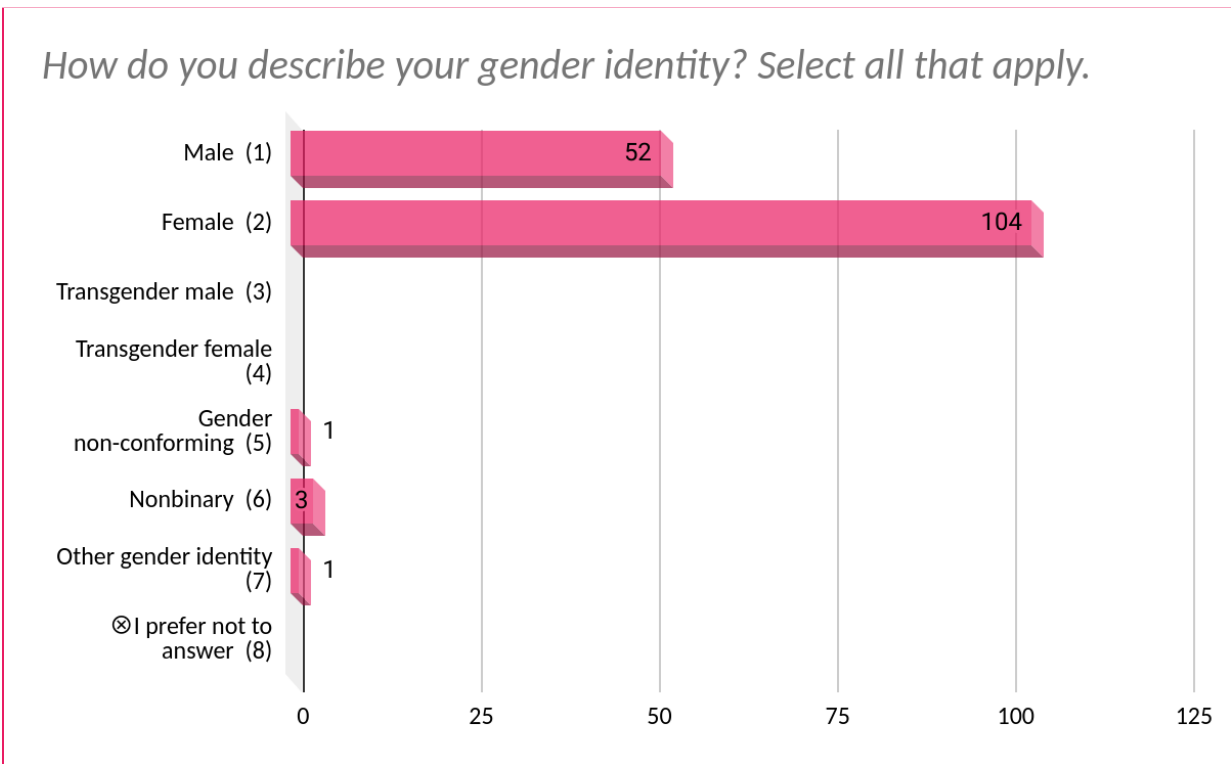
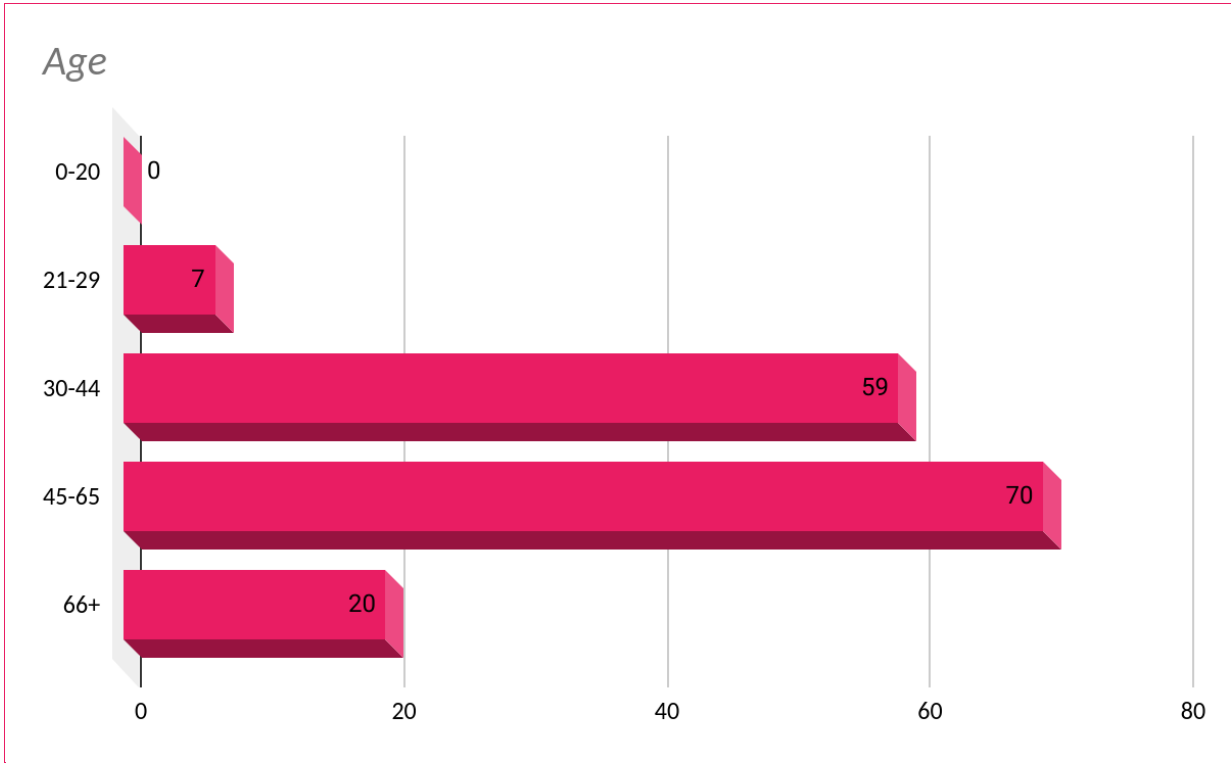


Race(s) or Ethnicity(ies) you identify with. Select all that apply.

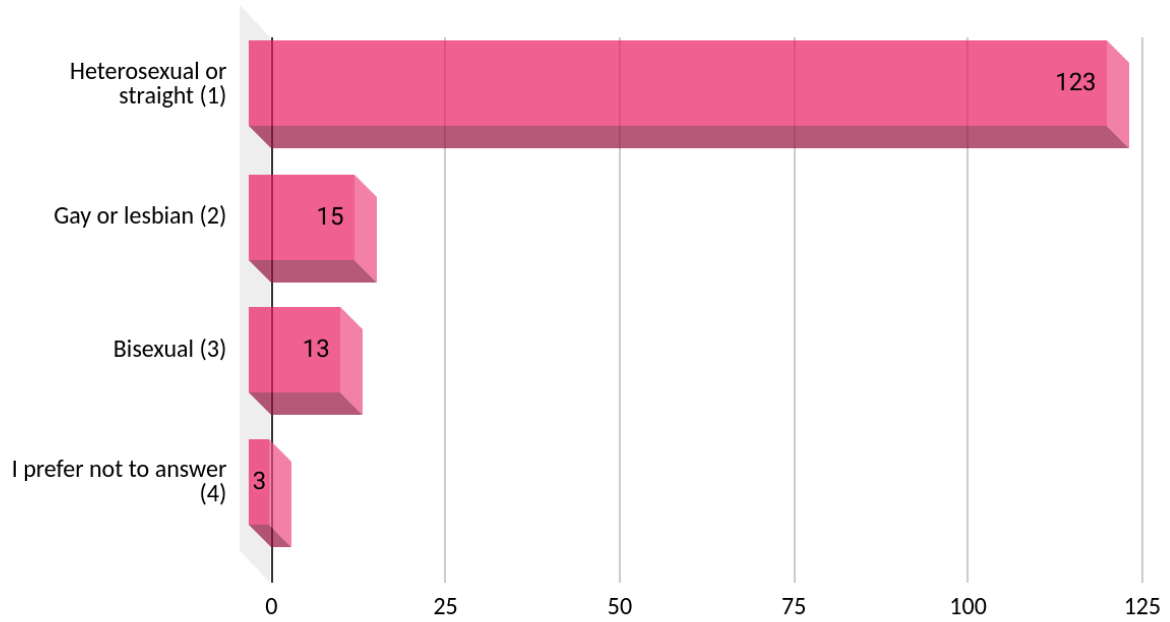


Disability Status

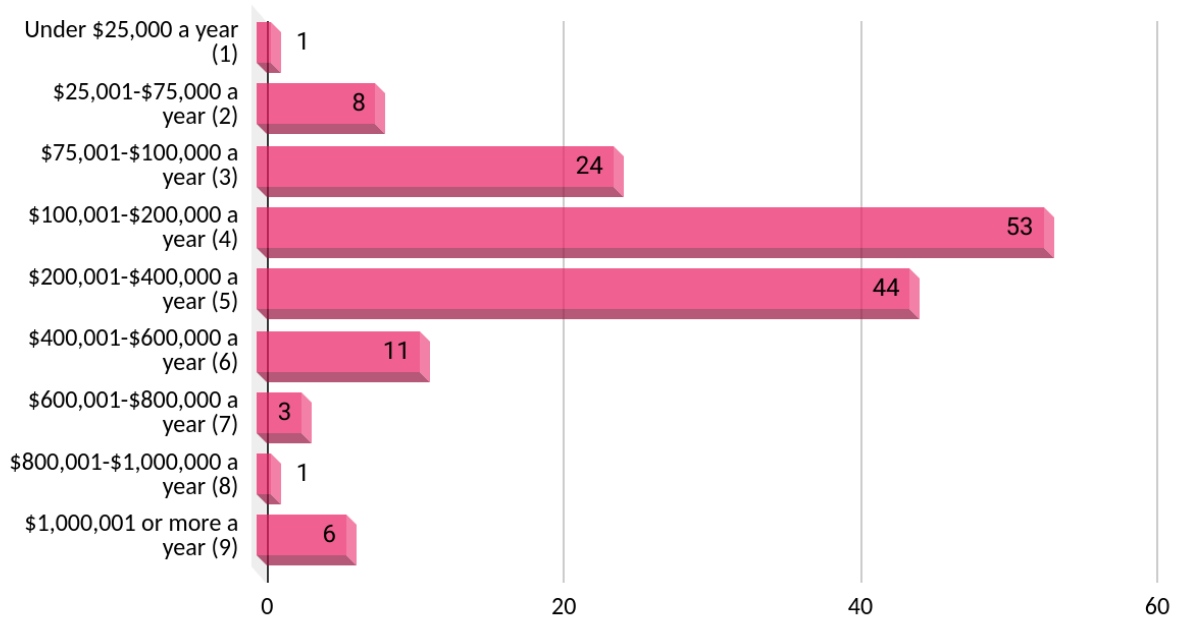




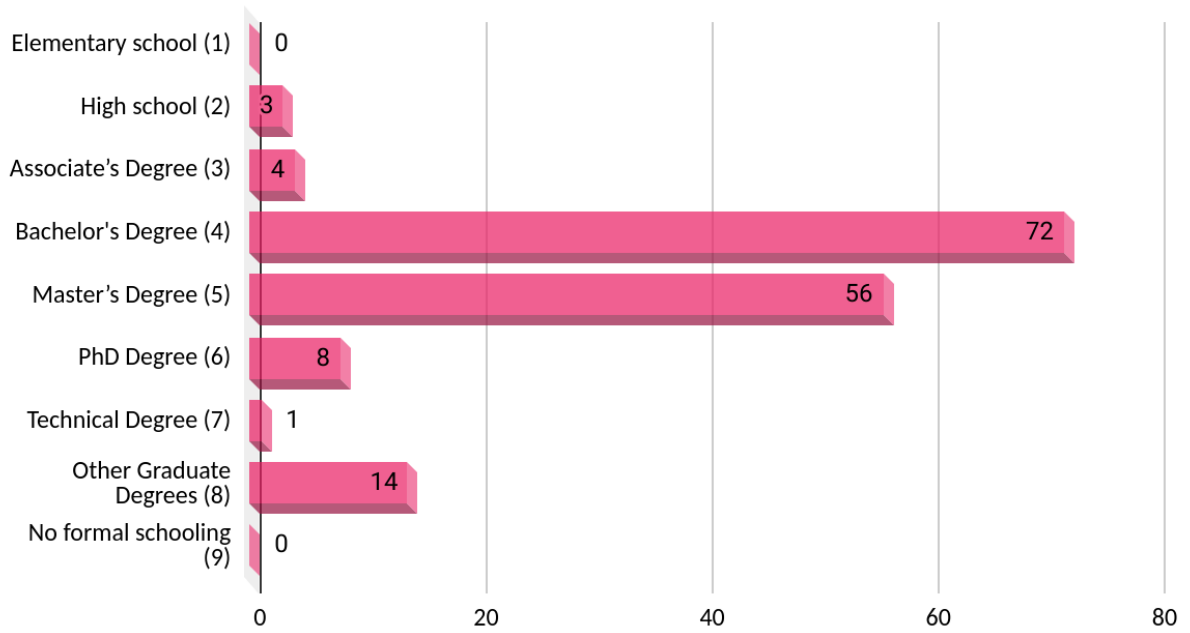
Sexual orientation. Select all that apply.



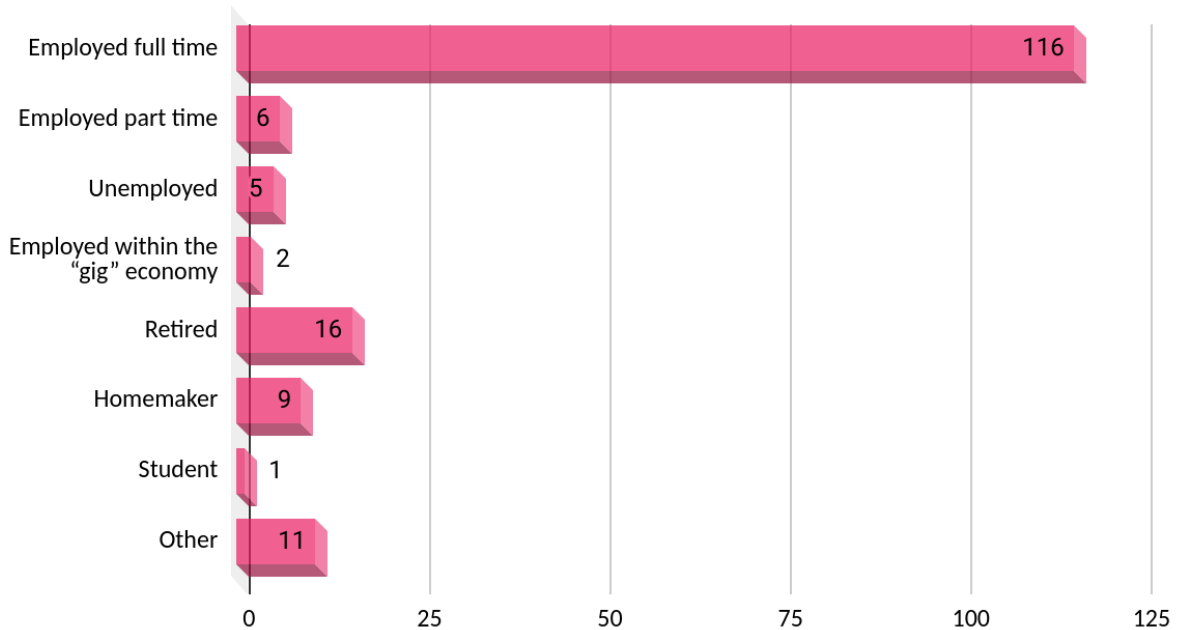
Household Income



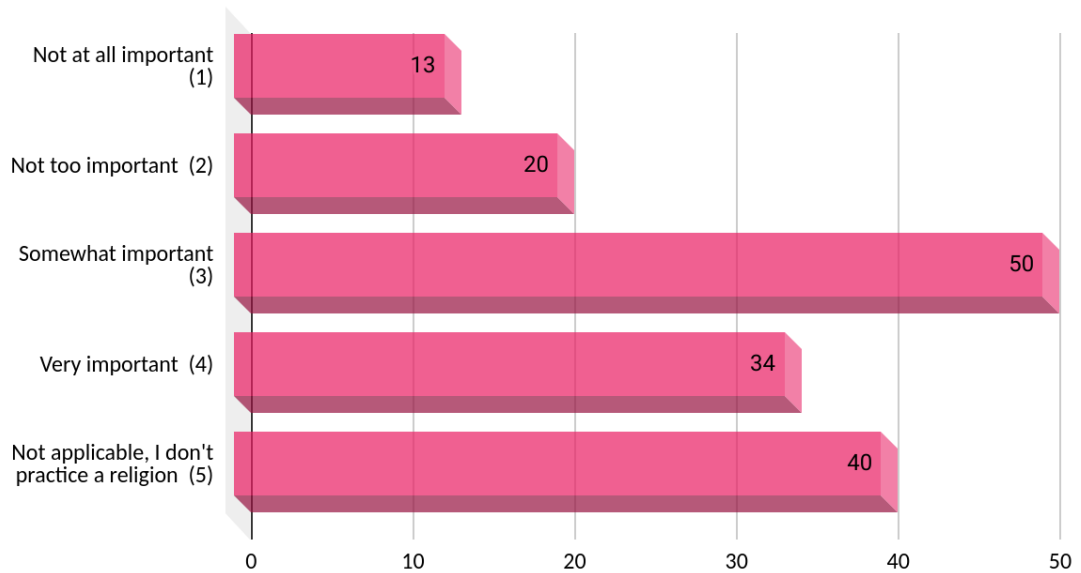
Education Level



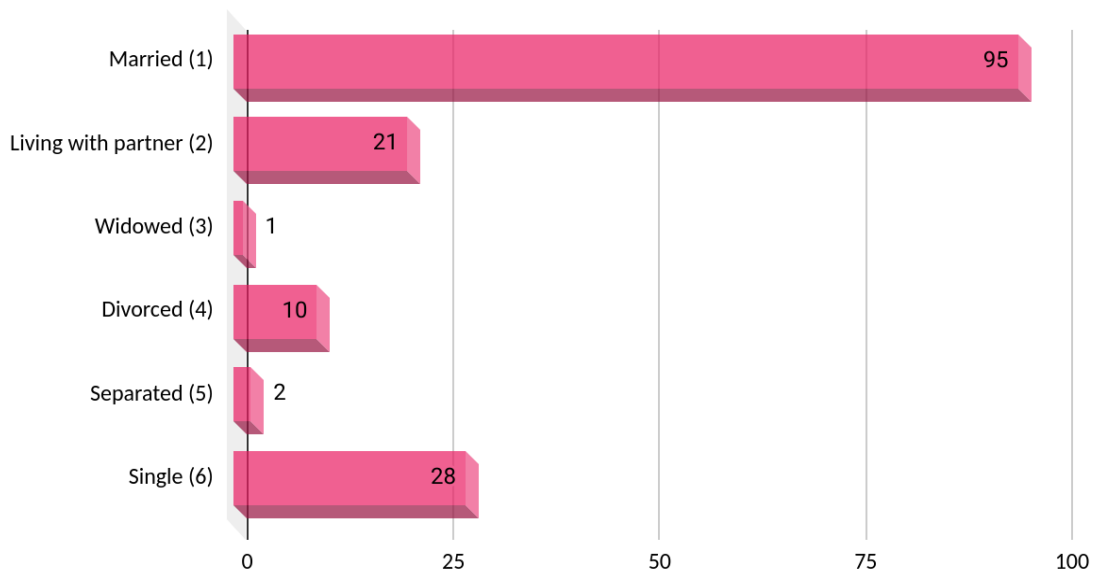
Employment Status. Select all that apply



If you practice a religion, how important is religion in your life?



Marital Status



Year 1 Report

Latino Giving Circle Network Evaluation (Year One)

Prepared for the
Latino Community Foundation

By, Adriana Loson-Ceballos, Audrey Jordan and Shiree Teng

Original Purpose & Design

The purpose of this evaluation is to better understand the impact of participation in the Latino Giving Circle Network (LGCN, “the network”) and the relationship between members and their broader community. The evaluation provides insights on the degree to which, and how, the Latino Community Foundation’s (LCF) LGCN is an instrument for Latinos in creating their desired social change and in their civic engagement. The evaluation specifically explores the relationship between membership in the group (their sense of belonging, social capital, philanthropy, and civic engagement) and their communities.

LCF’s strategy in providing support for giving circles—as well as expanding the reach and scale of giving circles’ impact within the philanthropic sector—can offer insights around how philanthropy can share power with that of this population. On this last note, it becomes particularly important when the goal is advancing Latino civic engagement efforts and inspiring more Latino philanthropy. LCF is poised to delve deeper into the core organizing principles of the network, document the key ingredients critical to scaling the movement, and identify the lessons that are transferable to other sectors. LCF is eager to document and share the transformative factors and strategies to engage Latino: as philanthropists, change agents, and leaders.

Importantly, the evaluation provides the first-ever Latino perspective on the growing giving circle phenomenon. There is limited peer-review literature on what people-power philanthropy processes looks like, especially within Latino communities. For more information on literature reviewed for this evaluation, please see Attachment 1: *Literature on Latino Philanthropy*.

Research Design

The research design of the first year of this evaluation includes two data collection methods, a survey questionnaire and research platicas (Fierros & Bernal, 2016). It uses critical race theory within an emancipatory research paradigm in order to center Latinos in all aspects of the design.

Survey

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 American academic journals. A review of non-Ethnic specific journals conducted a decade ago found that only 2% of peer-reviewed articles in the US have focused on Latino issues. And when they do receive attention, research has been on acculturation, academic achievement, and health behaviors of Latinos (Liang, 2009). This speaks volumes on how the data we seek as researchers can perpetuate harmful stereotypes; it also asks that we design the survey instrument for Latinos and that we focus on their resources and assets.

The challenges we considered in the survey's design include: racial diversity among Latino communities; resistance to providing information due to fear or mistrust; access to internet; and, language or communication barriers (Evans et al, 2008; Parker et al, 2015). The latter tends to require translation of the survey instrument, as 73% of US Latino people report speaking either only Spanish or both Spanish and English at home (Parker et al, 2015). Efforts to address these challenges and to center Latinos in the design include:

- Designing the demographics section of the survey to include federally recommended key data elements for Latinos.
- Utilizing survey design techniques, such as separating sensitive questions so as not to affect the answer to the second of the two questions, to overcome cultural tendencies of Latinos to reply in socially desirable ways when answering surveys¹.
- Incorporating questions to capture levels of acculturation or assimilation, such as the number of years in the US, where they are born, and if they are Mexican (Brown, 2015; Parker et al, 2015).

For more information on how each challenge was addressed, please see Attachment 2: *Data Collection Challenges when Studying Latinos*.

Data collection took place in the first quarter of 2020 through the survey questionnaire (see Attachment 3) which went out to n=476, all members of the network. We received n=232 responses, for a response rate of 49%. The *Findings* section of this report will present descriptive statistics to answer the following research questions:

1. Who joins Latino giving circles?
2. Why do members join Latino giving circles?
3. Why do members stay engaged in Latino giving circles?
4. What impact do Latino giving circle members think their philanthropy has?
5. What communal benefits come from being a Latino giving circle member?

¹ For example the gender and sexual orientation questions were asked well in advance to religious affiliation.

Platicas

Part 2 adds an essential dialogical component to the data analysis related to the evaluation's commitment to center and lift a racialized, possibly normative standard of what and how society should support and remove barriers for Latino philanthropy, answering the following research questions:

1. What is a Latino-centric definition of philanthropy?
2. How do giving circles demonstrate an expression of Latino philanthropy?

Chicano scholars have underscored the importance of collecting data in formats and settings that are naturally used by Latinos to share knowledge, and co-create meaning. The most common of these formats are called *platicas* and refer to informal conversations on the topic of study. This method fits with the purpose of emancipatory research principles and critical race theory that asks researchers to change the power dynamic between what is and is not knowledge.

The plan is to share a summary of the survey's findings and ask *platica* participants to reflect on the data and make sense of the findings. These *platicas* will be opportunities to jointly make meaning of the survey and Latino philanthropy, as well as to delve deeper into the link between their giving circle participation and their civic engagement. Selection of participants will be made in partnership with LCF staff and, contingent upon budget and availability, will take place via zoom. Invitations will be made for voluntary attendance at scheduled times, with the makeup of each *platica* depending on who is able to participate at the different times offered. Findings from the *platicas* will be summarized for LCF and be incorporated into the final evaluation report.

Findings

This evaluation set out to better understand the impact of participation in the Network and the relationship between members and their broader community. What is clear throughout the findings – from why they join to why they stay and beyond— is a yearning for community engagement among Latino philanthropists. A similar consistent theme is the interest of members in being part of something bigger—from civic engagement efforts to philanthropic movements and connections with local Latinos. Latinos like being Latinos and with Latinos, the importance of celebrating with their fellow Latinos is seen throughout the priorities, benefits, why they stay engaged. The joy of giving is clear.

There are promising findings around the impact of giving circle participation and members' level of civic engagement, confirming existing findings (Carboni & Eikenberry, 2018). While we knew that this was a positive relationship, we did not know if giving circles simply attracted more civically engaged people to begin with. Survey findings challenge this. Few say participation in their giving circle did not have an effect at all, yet there were different levels of affect reported, demonstrating at least a positive relationship between giving circle participation and increased civic engagement—regardless of how civically engaged they were before joining. It is interesting to see the type of civic engagement activities, more intimate forms of civic engagement, such as within extended families, friendship circles, and neighbors.

In terms of benefits from participation in giving circles, 83% said that after joining the giving circle they did not feel alone in the US (selecting “not at all” on the scale). Belonging comes through in the top 4 selected benefits. The top 4 selections for benefits show a pattern of members using their philanthropy to be part of collective change (civic engagement), to be connected to community leaders and members (social capital), to move funds towards social change (philanthropy), and to enjoy the act of collective giving (to belong).

Members demographics present a rich tapestry of identities, geographies, and more. Holistic framing of health was seen in their reported health behaviors, considering the mental and spiritual health along with the physical health. Social determinants of health were mostly positive, and when considered with demographics such as income and education show an expected effect on health outcomes. It would be interesting to see how this evolves when we survey again, having had 2020 in between the two surveys.

1. Latino Philanthropy

Understanding what attracts Latinos to giving circles can shed light on **what is at the heart of philanthropy among Latinos**. A look at the top three responses for why they join and stay shows many of the characteristics assumed among Latino philanthropy (For more information, please see Attachment 1: *Literature on Latino Philanthropy*). What is also clear is a yearning for community engagement among Latino philanthropists that can help those seeking to inspire philanthropy by and for Latinos.

Table 3: Ranked reasons for joining vs. staying engaged	
Reasons for Joining	Reasons for Staying Engaged
83% Affect change in local Latino community	76% Better support Latino-led organizations
70% Pool my resources	48% Be part of a greater giving circle movement
47% Be part of LGCN philanthropic movement	46% Connect with other giving circle members
30% Have fun while giving with Latino values and/or celebrate Latino culture	45% Network with other Latinos
20% Change how my Latino community is seen by those who are not part of it	26% Model giving for my children and/or other younger people
17% Change how my Latino community is seen by its members	16% Develop my leadership
17% Learn more about philanthropy	14% Participate in giving circle activities
16% Other	9% Feel better about myself
	4% Other

It is worth noting that in reasons for joining, “have fun while giving with Latino values and/or celebrate Latino culture” was selected by 30% of respondents, a trend which has Latino culture and its celebration as important in multiple questions. For example, in reasons for staying

engaged, 26% of respondents selected “modeling giving for my children and/or other young people” as one of their top 4. It is also worth noting that the top 3 reasons are about affecting change effectively and as part of something bigger. A trend that can be seen when asked why they stayed engaged.²

Better understanding giving circle members’ perceived impact from their philanthropy is also important data that can point to philanthropic motivations behind Latino philanthropy. Survey respondents were asked to share if their giving circle had an effect on:

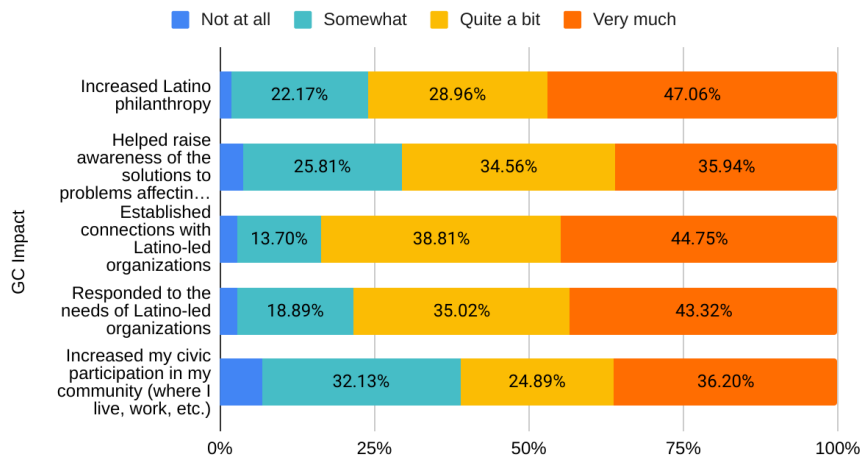
- Increasing Latino philanthropy;
- Raising awareness of the solutions to problems affecting Latino communities;
- Establishing connections between members and Latino-led nonprofits;
- Responding to the needs of Latino-led organizations; and,
- Increasing my civic participation.

The scale of the responses offered went from “not at all” to “very much”. In the chart below, it is interesting to see how the overwhelming responses show that participation in their giving circle had “very much” increased Latino philanthropy. Similarly, there is a positive correlation between giving circle participation and rating the impact their circle had as “very much” or “quite a bit” on: raising awareness of community solutions, connecting members to organizations and leaders, and responding to Latino-led nonprofits’ needs. Responses for increasing civic engagement are also worth noting because of the spread between “very much” and “somewhat”.³ The spread suggests different starting levels of civic engagement among those attracted to Latino giving circles, just as there are subsequently different levels of impact that a giving circle can have on these. **Few say participation in their giving circle did not have an effect at all, yet there were different levels of affect reported, demonstrating at least a positive relationship between giving circle participation and increased civic engagement—regardless of how civically engaged they were before joining.**

² **Interesting thread:** A commitment to and responsibility for their Latino community is clear among respondents as the most selected reasons to stay involved. Research to-date considers intrinsic versus extrinsic benefits as benefit categories for giving circle participation. This data suggests the need to consider an additional category of benefits: communal. These include benefits such as: stronger relationships with other Latinos, increased support for Latino leaders and Latino-led organizations, and a commitment to come together in their giving.

³Previous research by Julia Carboni and Angela Eikenberry (2018) found that giving circle participation can increase civic engagement among members, but were unsure if giving circles attracted more engaged people to begin with (more in the civic engagement section of the findings)

Rate the following statements about the impact of LGCN's giving circle



They also noted that after joining their giving circle they:

- Gave their money to support at least one nonprofit they care about and/or that affects their Latino community (37% “very much”, 31% “quite a bit”, 24% “somewhat”)
- Worked with others to address the social issues that matter to them and/or that affect their Latino community (33% “very much”, 27% “quite a bit”, 28% “somewhat”)
- Felt confident of actions they could take to positively change their community (32% “very much”, 36% “quite a bit”, and 25% “somewhat”).)
- Connected with people who are positively changing their community (45% “very much, 32% “quite a bit”, 19% “somewhat”).
- Understood that their voice matters on social issues (43% “very much”, 32% “quite a bit”, 21% “somewhat”)
- Have felt more connected to the Latino community in the US (38% “very much”, 35% “quite a bit”, and 22% “somewhat”)
- Have been more proud of the Latino culture in the US (49% “very much”, 26% “quite a bit”, and 20% “somewhat”).

While expanded in the section on social determinants of health findings, here we note that **83% of total respondents said that after joining their giving circle they have felt “not at all” alone in the US** (11% “somewhat”, 2% “quite a bit”, 4% “very much”)—**a sense of belonging clear among members**. Social determinants of health show the importance of community in our individual health outcomes. For Latinos, belonging to their community and living their culture is bound to have a positive impact on health. And responses within this survey show the yearning to be part of a Latino community driving why members join circles in the first place.

This highlights another area of potential collective or communal benefit to giving circle participation, the social benefits members receive. In the answers below, respondents were asked what benefits they received from participating in their giving circle. **These selections**

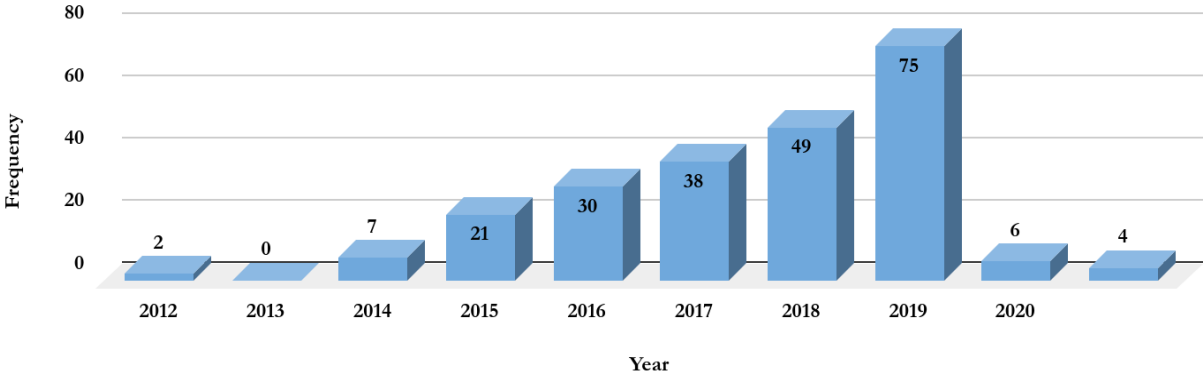
show a pattern of members using their philanthropy to be part of something bigger (civic engagement), to be connected to community leaders and members (social capital), to move funds towards social change (philanthropy), and to enjoy the act of collective giving (to belong). They point to a cultural benefit that is based on Latino values of family. For example, the survey offered 14 benefits they believed they received through their membership, one that was “none”, and one “other”. The top four selected are:

- 69% contribute to social change,
- 50% belong to a community,
- 46% form relationships with other LGCN members, and
- 37% enjoy the act of giving.

2. Civic Engagement

Previous research by Julia Carboni and Angela Eikenberry (2018) found a positive relationship between giving circle tenure and increased levels of civic engagement. They found that the longer you were a member, the more civically engaged you became—particularly male respondents. It was unclear if those who join are already civically active or not. **As previously mentioned, when we asked respondents to rate the impact their participation in their giving circle had on their level of civic engagement, we found nearly all showed a positive correlation but at different levels. This suggests that members’ perceptions of their own civic engagement level is not likely starting from the same baseline or the impact of giving circle participation on civic engagement would be found to be all over the place.** There are likely other variables at play such as sex, gender, income level, that point to trends. Future inferential statistical analysis will be better able to tease out the details of these trends. Similarly, Carboni and Eikenberry’s (2018) study found that giving circle tenure (or the length of time you’ve been in the giving circle) also had a positive relationship with increased civic participation. Responses to the LGCN survey included a balanced sample in giving circle tenure which will also allow us to compare Latino responses to national surveys on giving circles in subsequent analysis.

Year respondents joined giving circle



No previous research on giving circles has looked at the role that giving circle networks, like that hosted by the Latino Community Foundation, have on the level of impact a giving circle can have on members’ level of civic engagement. Are giving circle members within networked

circles more susceptible to the influence of giving circles on their civic engagement? To begin to fill this gap in knowledge, we included a question that asked what role did LCF play in increasing their confidence in engaging on socio-political topics of the day. None of the options received 75% or more, meaning respondents that selected “quite a bit” or “very much” did not make up 75% or more of the responses for each topic. However, 50% or more of respondents did select “quite a bit” or “very much” for the following:

- Voting in local and/or national elections (33% VM | 26% Q | 23% S | 13% N)
- Youth civic engagement (26% VM | 23% Q | 32% S | 16% N)
- Economic mobility for Latinos (25% VM | 29% Q | 29% S | 13% N)
- Immigration policies and/or role of ICE (23% VM | 30% Q | 28% S | 13% N)

The topic of “wealth inequality” stands out as different under this same criteria of being selected by at least 50% of respondents because most respondents selected “not at all” or “somewhat” (31% VM | 29% Q | 14% S | 20% N). Other topic that similarly stand out because of higher levels of “somewhat” and “not at all” are:

- LGBTQ+ issues (13% VM | 14% Q | 34% S | 30% N)
- Tech and the New Economy (16% VM | 19% Q | 33% S | 26% N)
- Housing issues (18% VM | 22% Q | 33% S | 22% N)

The census had a more even spread between “very much” and “somewhat” (28% VM | 22% Q | 33% S | 13% N). This is not surprising given LCF’s strong promotion of the census and regular communications of its importance to LGCN members.

This last point is important because it can show that responses to census and election motivation are likely to be influenced by social desirability factors, such as regular messaging from LCF to its members. For example, it may seem like the less desired answer to select that one does not intend to vote in the 2020 election. In this case, 93% said they intended to vote and none said they did not. As such, they should be taken in tandem with other questions, particularly because they do indicate that there is a high intention of civic engagement through the elections and census this year, and this was *before* COVID-19 hit. For example, 81% said they would be involved in census mobilization efforts and 94% saying they intended to complete the census.⁴ Similarly, 93% said they were registered to vote, 5% said they were not, and 2% said they would prefer not to say.

It is very interesting to see what civic engagement activities looked like among members of the network. Would they be leaning towards government forms of engagement, social normative ones such as where to spend money, or would they lean more towards grassroots cooperation and organizing for collective action. Responses show an impressive number of folks are running for office in the network (7 or 3%). But they also show additional forms of civic engagement that are more directly linked to Latino culture, values, and social norms. For example, when asked to select “all that apply” to what they have done in the past two years, “talked to others about a social and/or political issue” had the highest selection rate 84%. **Taken together with the**

⁴ Survey question for next year: how did Covid-19 affect your intentions to be involved in census mobilization efforts or voting intentions

responses to what role LCF plays in increasing their confidence to engage in political issues of the day, it underscores a more intimate form of civic engagement, such as within extended families, friendship circles, and neighbors. Additionally:

- 50% or more selected: signed a petition (65%), attended a public meeting (56%), made a monetary contribution to politics (55%), took part in a protest or march (54%), and aligned their spending with their values (51%).
- An even 50%: reported they did contact an elected official, and 49% saying they worked with others to solve a community problem.
- Less than 50% said they: volunteered for a political group and/or candidate (36%); shared a petition (34%); contacted the media (17%); or been a candidate for public office (3%).

3. Demographics

Demographics from survey data proved to be diverse and offer significant representation of Latino subgroup populations. Perhaps the least surprising is in terms of sex, 151 self-identify as female, 72 as male, or about 2/3rds female, 1/3rd male. This sex ratio is similar to that reported in the 2016 landscape survey of giving circles in the US (Bearman, Carboni, Eikenberry, & Franklin, 2017).⁵ In terms of sexuality, we received the lowest response rates of any survey question for a total of 191 or a response rate of 84%, when all other questions hovered above 90%, with most closer to 98%. Of those who did answer, 167 identify as heterosexual, 15 as gay or lesbian, 6 as bisexual. The race question was a “select all that apply” question to capture the diversity within Latinx populations often missed elsewhere. Because respondents could check more than one race, more rigorous statistical analyses are not possible along racial lines; however, the basic descriptive analyses provide valuable information. To further capture some of the diversity lost elsewhere, respondents were asked if they had some Mexican ancestry. Because of the large number of Latinos in the US with some Mexican ancestry, their experience can sway analysis of Latino survey responses. In our sample, and given the large number of Mexican Latinos in California, 66% (154) of respondents said they have some Mexican ancestry. The following is a table on which responses were selected for race.

Table 1 Racial and Ethnic Groupings (Multi-Select)		
Black		
• Afro-Latino	5	
• African American	1	
• Afro-Caribbean	1	
Native American		
• Native American or Indigenous	17	
Hispanic		
• Hispanic	88	
• Latin@	164	
• Latinx	73	
• Chican@	67	
Asian		
• Asian Latino	2	
• Asia American	0	
Multiracial		
• Mestiz@ ⁶	29	
• Mulat@	2	
• Multi	23	
White		
• White	32	

⁵ Bearman, J., Carboni, J., Eikenberry, A., & Franklin, J. (2017). The landscape of giving circles/collective giving groups in the US.

⁶ The “@” sign is used in Spanish short-hand to denote a or o ending for an inclusive male/female. I added it to these categories in the Data Set document and here for ease of reading.

Immigrant generation is also an important variable in Latino philanthropy. **It was interesting to find most of the network's membership is either foreign-born (33%) or first generation born in the US (41%).** Representation slows down in the second generation born in the US (11%), third generation (9%); fourth generation (5%). Latino migrants and vulnerable groups have historically come together in mutual aid and civic engagement. Having representation from those closer to the generation that emigrated can strengthen transnational community ties between home and host country. It may also suggest that the closer Latinos are to Latino culture, the more likely they are to get together to be philanthropic.⁷

In terms of household income range, 73% responses we received reported their household income as over \$100,000, of which 41% reported over \$200,000, of which 21% reported over \$300,000. The income responses show that while there are 9% responses at each extreme of the income ranges offered, the distribution becomes more normal with nearly 13% reporting an income of between \$25,001 - \$75,000 a year on one end and the same percentage making \$300,001-\$500,000. Interestingly, respondents did not seem to send remittances to Latin America (73% said they did not). Both income range, as well as philanthropic action versus direct aid, point to a middle-class movement of Latinos across the state. This will also likely be a factor in positive social determinants of health highlighted in the next section.

Findings for employment and age match what can be expected. For example, of the responses for age, 45% are between 30-44 years old and 37% between 45-64 years old. Similarly, 78% of responses selected being employed full-time. Marriage was also widely selected among 65% respondents. In terms of geography, we received statistically significant responses from urban communities (55%), suburban (38%), and rural (7%). The highest completed education level question can be seen in the table below, showing a highly educated network.

Table 2: Education Level (Multi-Select)	
Education Level	Frequency
High School	5%
Associates Degree	3%
Technical Degree ⁸	1%
Bachelor's Degree	42%
Master's Degree	37%
PhD Degree	5%

⁷ **Interesting thread:** The breakdown between Hispanic (88), Latin@ (164) and Latinx (73) is itself worth noting as a shift in self-identification that does not center our colonializer. There is a lot to unpack here, and contributions to research, such as Pew's research on the topic that has recently explored the acceptance level of "Latinx". There is both an immigration and generational divide on which terms we are looking to use to best capture a decolonized and gender-neutral and -inclusive term. This piqued my interest, when you throw in Chican@/Chicanx (67) and the high number of respondents with some Mexican ancestry (154), the former is an identity claimed by some of Mexican ancestry only in the US, usually along racial and class lines.

⁸ A technical degree is a lean academic program that focuses on quality over quantity as well as specialized knowledge over general training.

Other Graduate Degree ⁹	7%
Total	100%

Members within the Latino Giving Circle Network are diverse, they are educated, they have resources, and they are active family and community members within their Latino community. They are also closer to their Latino countries of origin but are giving locally through their giving circle (see Attachment 1: *Literature on Latino Philanthropy* for more information on the transnational nature of Latino philanthropy). This communal and local attention to issues facing the Latino community is likely to have a positive impact on social determinants of health. The next section focuses on those findings.

4. Social Determinants of Health

How would you rate your overall health? 0.9% Poor | 7% Fair | 55% Good | 38% Excellent

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

- 71% My neighbors get along
- 60% I trust my neighbors
- 56% My neighbors are willing to help each other
- 23% My neighbors take care of neighborhood kids
- 27% My neighbors get together
- 86% I feel safe in my neighborhood
- 72% I live near a park or playground
- 49% I use the park or playground in my neighborhood

They also seem like people who are doing well in a holistic framing of health, one which is prominent among Latinos. For example, **when we asked them to select from health statements all that apply, we see that 82% report being happy, 73% feel satisfied, 87% live with purpose, 76% are physically healthy, 78% mentally healthy, 69% spiritually healthy. Interestingly, this question was responded by all respondents.**

It appears that perceptions of health and wellbeing are correlated positively with participation in giving circles. A question for further exploration is the extent to which participation in giving circles is a perceived contributor to perceptions of health and wellbeing.

Recommendations

Recommendations based on the findings are presented for three different audiences: researchers, the philanthropic sector, and the Latino Community Foundation.

Researchers

Latinos will constitute the largest plurality in the US within the next 50 years (Allatson, 2015). Even today, the United States is the second largest Spanish speaking country (Allatson, 2015) and has the second largest population of Latinos in the world (Gonzalez, 2010). So, from a basic numbers standpoint, Latinos are just too big in number to continue to be ignored by researchers

⁹ For example, JD or MD

(Gonzalez, 2010). The absence of Latino philanthropy research is particularly problematic when considering that Latino purchasing power and billions in remittances sent home also demonstrate the capacity of Latinos to impact their communities through philanthropic investments (Campoamor & Diaz, 1999; Gonzalez, 2003). For example, between 2000-2015, while non-Latino purchasing power grew by 76%, Latino purchasing power grew by 167% (Neilson, 2016); and, while in 2016 American foundations granted \$500 million throughout LAC (Latinx Funders Dashboard), US-based Latinos sent \$74.3 billion in remittances to LAC (PEW, 2018).¹⁰

Philanthropic Sector

As long as researchers ignore Latino philanthropy, American philanthropy will continue to ignore Latino communities, despite the large number of Latino-serving nonprofits and high needs among Latinos (Gonzalez, 2003). For example, while Latino nonprofits began to grow in the 1960s and throughout the 1990s—from an average of 1-14 new registered nonprofits a year to 300 (Aranda, 2010), only one-percent of total U.S. foundation funding between 2000-2009 went to Latinos in the US, with 42-percent going to the Western part of the country. Furthermore, while over one billion dollars were invested in LAC between 2007-2009, less than half of it went to LAC nonprofits, most of it supported the environment, and one-fourth of it went to Mexico and Brazil (HIP, 2011). In 2019, HIP and Candid released the LATINX Funders dashboard¹¹ which found that these averages did not change much in more recent years.

Fundraisers also miss Latino donors, despite the fact that 63% of Latino households give to charity (Rolland, 2016). For example, even though 45% of Latino households are likely to be low-income, 18% of Latinos say they would give more if they were asked more often, compared to 9% of non-Latinos, and 21% do not know how to support nonprofits they care about compared to 10% of non-Latinos (Rovner, 2015). There is also a low number of 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 two-percent of CEO or President positions in philanthropy or nonprofits and eleven-percent of foundation Program Officer positions, were occupied by Latinos. Board diversity data is even less available, although a 2009 analysis found that Latinos make up 4% of foundation trustees (HIP, 2015).

Latino Community Foundation

The LGCN has three purposes: to increase philanthropic investment in Latino-led nonprofits and inspire Latino philanthropy, to build civic engagement among members, and to sustain the relationships necessary through building joy into giving through *familia*. While purpose 2 shows positive results, expanding your view of what constitutes civic engagement may help you

¹⁰ **Thought thread:** History is still unfolding before us, but we already see the disparate impact on Latino communities that is resulting from the profound impact of COVID-19, as well as a combination of man-made and natural disasters. In the past, times of great need have increased, not stifled mutual aid, but with the growth of infrastructure-supporting organizations, like LCF, will we have a growth in philanthropy by and for Latinos? There are an endless amount of questions that can be researched through the largest network of Latinx giving circles.

¹¹ **Based on the website:** The Latinx Funders Dashboard (<https://latinxfunders.org/>) is “an ongoing research project documenting the landscape of foundation funding in the Latinx community and track changes in its scale and priorities. It uses grants data to map the community issues addressed, funding strategies used, and regions served. For those considering Latinx-related grantmaking for the first time, this website offers an introduction to the field.”

capture other forms of community engagement often associated with the more intimate form of civic engagement reported by the network.

Similarly, “community” is big and if you continue to prioritize relationships with members, you can continue to nurture their need to build out their Latino community in the US. It seems like your members could benefit from more network wide connecting and LCF may be the host or convener in that regard. As we shift to virtual communities, employing a disability justice framework can ensure these spaces are accessible and inclusive to the diverse network. Members want to be part of LCF’s movement. As such, using social movement, organizing and network weaving skill sets will support its sustainability and growth.

Philanthropy is not how you’re reeling members in, but it is why they’re staying and that’s because you’re centering the joy and civic commitment to one another that is the core of power dynamics for Latino philanthropy. Your network is wealthier than you think, they are open to being asked, and they believe in your mission. Think long-term support of leadership within your network rather than short-term increased engagement and ask them for more money.

Attachments

Data Collection Challenges when Studying Latinos

Two components of Latinx identity are worth noting as challenges to capturing the diversity within Latinx communities: race and levels of acculturation or assimilation. For example, the racial diversity within the Latinx population of the US is often missed in demographic questions that do not list Hispanic as a race (Parker et al, 2015; Tienda & Mitchell, 2006; US Department of HHS, 2014). The Census Bureau itself has identified this as a challenge and criminal justice activists say the rate at which Latinos are incarcerated is lost due to survey design because of the multi-dimensional and multi-faceted nature of racial identity among this community (Brown, 2015, Tilsley & Matos, 2016). In the 2010 US census, “Hispanic” was considered a category under ethnic origin, not a race. However, 37-percent 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 multi-racial or other category, lowering the overall visibility of the community, let alone capturing the diversity within it. Levels of acculturation or assimilation are also difficult to capture in surveys of Latinx communities. Foreign-born and US-born Hispanics show differences in everything from opinions (Brown, 2015; Evans et al, 2008) to health outcomes (Tienda & Mitchell, 2006). To account for this, data tends 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). We have included questions to capture each of these variables in our survey.

Federal agencies have experimented with adding additional demographic questions when surveying Latinx communities, with the Office of Planning, Research, and Evaluation (US Department of HHS, 2014) identifying 10 additional data elements to consider when seeking to capture the diversity among Latinx populations. These are: Hispanic ancestry, personal and parental countries of birth, citizenship and/or legal residency status, time in the US, languages spoken at home and English proficiency, literacy level, and highest educational attainment. The demographics section of the survey designed for this study include questions that capture each of these data elements, with certain questions designed to be separate from others so as not to influence responses. For example, the gender and sexual orientation questions were asked well

in advance to religious affiliation. However, we did not include any that may have negatively affected the response rate because they were deemed sensitive (more below).

Ethical Considerations

The resistance to provide information because of fear or mistrust among Latinx respondents comes from a place of migratory vulnerability (Evans et al, 2008; Parker et al, 2015; US Department of HHS, 2014). Working with this population requires specific ethical considerations to be made when including certain types of questions. Beyond the required ethical considerations and planning necessary to obtain IRB approval, we 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 which is typical of Latinx people's understanding of the concept (Brown, 2015), including: mental, physical, and spiritual health. We 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). We also put health questions before social determinants of health behaviors, housing situation, and access to health care. Order appears to matter when asking these questions of Latinx populations, with poorer health reported by older Latinos when asked about socio-demographic and health-related characteristics before self-reported health status (Lee & Goldsetin, 2014).

Technology

Online surveys have weaknesses like any other form of data collection, including limits on the coverage and access (Brown et al, 2016; Neuman, 2014). This is particularly important when surveying Latinx communities. According to the Center for Disease Control and Prevention (CDC) (Blumberg, 2014) almost 60% of Latinx adults live in wireless telephone-only households (compared to: 40% of non-Hispanic White; 46% non-Hispanic Black). As such, we 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.

Translation

We found little consensus on what best practices were in the translation of the survey questionnaire. Instead, we 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 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:

1. Simple direct translation;
2. Translation with back translation; and,
3. Translation by committee.

Due to the lack of consensus 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, 2009). In other words, will Spanish-speaking respondents understand the question in the same way as English-speaking respondents (Brown, 2015)? There is no consensus around CCA methods and evidence for the best methods are lacking, although back translations are considered less and

less necessary in favor of equivalence. 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). As such, Adriana leaned into her professional experience having worked as a translator and simultaneous interpreter and translated the survey through a combination of all three previously mentioned processes to aim for a CCA translation of the survey.

Literature on Latino Philanthropy

Latino philanthropy may not be fully comparable to American philanthropy. Instead, Latino philanthropy exists beyond, through, in relationship, and despite American philanthropy and US interventions (Allston, 2014; Escobar, 2016). There is a need for a deterritorialized and decolonialized approach when studying Latino philanthropy, one that is rooted in pan-American culture, history, borders, faith, and language (Orozco, 2006). I reviewed literature from the US and Latin America and the Caribbean (LAC), in English and Spanish, being a researcher with native fluency in both. This limits my ability to look at any research in Portuguese, which I acknowledge is a limitation in this review. That said, I used two search phrases: “Latino philanthropy” and “filantropia latina”, and found some 100 pieces of research. I selected about 25 studies on individual, secular, and institutional philanthropy; excluding non-Latino philanthropy in the region, Latino university alumni research, and Latino corporate philanthropy.

Existing research on Latino philanthropy in the US can be traced back to a 1988 convening organized by the then new Hispanics in Philanthropy (HIP)¹² in California (Campoamor & Diaz 1999; Gonzalez, 2010; Pole *et al*, 2003; Ramos 1999). Initial research focused on how to raise funds for Latino nonprofits (Campoamor & Diaz 1999; Gonzalez, 2010; Pole *et al*, 2003; Ramos 1999). Research then sought to understand Latinos generosity in comparison to White counterparts (Campoamor & Diaz 1999; Gonzalez, 2010; Pole *et al*, 2003; Ramos 1999), and then considered what exists and how American society ignores, disincentivizes, and discourages Latino philanthropy (Martinez, 2017; Pole *et al*, 2003; Sanborn & Portocarrero, 2003). This research primarily used case studies and produced literature reviews from the first decade of research. The most researched topics include: LAC's history and US Latinos' history with philanthropy (Almaraz, 2014; Aranda, 2010; Gonzalez, 2003; Gonzalez, 2010; Pole *et al*, 2003; Sanborn & Portocarrero, 2003); why Latino philanthropy is easy to miss (Escobar, 2016; Gonzalez, 2003; Gonzalez, 2010; Orozco, 2006; Pole *et al*, 2003); and, general characteristics of Latino philanthropy (Aranda, 2010; Escobar, 2016; Gonzales 2003; Gonzales, 2010; Orozco, 2006; Pole *et al*, 2003).

The remainder of this section will begin with a summary of the history of Mexican philanthropy, beginning with a look at pre-Hispanic and Spanish Conquest Latino history, swapping in Spanish colonial influence with American settlerism and intervention, and concluding with the establishment of Latino funds and mutual aid societies. I then review reasons Latino philanthropy is ignored; and end with a look at what the literature says are characteristics of Latino philanthropy.

¹² A philanthropy serving organization seeking to support Latinos in the philanthropic sector and through philanthropy. Visit <https://hiponline.org/> for more information.

A History of Latino Philanthropy

The Mexican Center for Philanthropy (Centro Mexicano Para la Filantropía, CEMEFI) divides the history of Mexican philanthropy into four stages: Pre-Hispanic, Spanish Conquest (1521-1846), Mexican independence (1846-1968), and today's context (1968-Present) (Gonzalez, 2010). Many authors use similar timeframes when exploring LAC's history and US Latinos's history of philanthropy, but replace the period of Mexican independence with the period of nation-building between 1810-1840 when Spain and Portugal lost most of their colonies (Gonzalez, 2010). Instead, they add in: the United States-Mexico War's culminating Treaty of Guadalupe Hidalgo (1848) that cost Mexico half of its land and gave the US its first Latino minority (Aranda, 2010; Pole *et al*, 2003), the 1904 Jones' Act that gave Puerto Ricans American citizenship and brought on a continuous wave of Latino transplants (Gonzalez, 2010), and the wave of revolutions and civil wars within LAC between the 1950-1990 which brought foreign philanthropy into the region and caused diasporas to enter the US, such as Cubans, Dominicans, Guatemalans, and Salvadorians (Escobar, 2016; Gonzalez, 2010; Sanborn & Portocarrero, 2003; Sanborn, 2005). These foreign wars have created demographic and philanthropic shifts among Latinos in the United States that continue to cross national boundaries (Gonzalez, 2010).

Why Latino Philanthropy is easy to miss

There are a number of explanations why Latino philanthropy is often missed by academics, practitioners, and nonprofits (Campoamor & Diaz, 1999; Gonzalez, 2003; Ramos, 1999). An early hypothesis held that, until recently, Latino philanthropy was not as likely to be found because of the high levels of poverty among Latino communities (Gonzalez, 2003; Ramos, 1999). Others have subsequently posited that diaspora philanthropy takes time to evolve at a social level from overcoming adversity through mutual support, to giving beyond immediate circles as finances improve; and, ultimately, to mirroring elite philanthropy from the host country, while differentiating themselves by focusing their giving on their own community (Escobedo, 2016; Gonzalez, 2003; Orozco, 2006).

Another hypothesis that has been constant over the years is that because research on philanthropy has focused on elite American forms of philanthropy, it has excluded philanthropy models regular to Latino communities (Campoamor & Diaz, 1999; Gonzalez, 2003; Gonzalez, 2010; Pole *et al*, 2003; Ramos, 1999). For example, some of the more popular forms of philanthropy include community savings groups known as *cundinas* or *tandas* (Aranda, 2010) and hometown associations (HTAs) (Aranda, 2010; Gonzalez, 2010; Orozco, 2006). *Cundinas* are similar to and often considered a form of giving circles. There is little literature on *cundinas*, however, other than to note that they serve as informal community banks for a population hard to serve through traditional financial institutions (Aranda, 2010). HTAs, on the other hand, have been widely researched and will be explored later in the section on characteristics of Latino philanthropy.

Similarly, philanthropy and its role in society is understood differently within LAC as compared to the US (Gonzalez, 2003; Gonzalez, 2010; Sanborn and Portocarrero 2003; Sanborn 2005). I believe these different understandings of philanthropy's role in society is not as permanent or unchangeable as is assumed by researchers--in either direction. It also has not resulted in different forms of communal philanthropy and mutual aid that are also historic and prevalent among other marginalized groups in the US. In a similar vein, and while each LAC nation's experience with philanthropy is different, one generality that can be identified and is changing is

that throughout Latin America, philanthropy is not understood to include everything from elite acts of generosity to that of the mass population. Instead, it has been used to refer to institutional philanthropy, such as religious philanthropy, and elite philanthropy (Sanborn and Portocarrero, 2003). Furthermore, it is posited that because LAC governments are also responsible for funding programs that are funded through philanthropic support in the US, this is also a factor in the different understandings of philanthropy between LAC and the US (Gonzalez, 2003). Despite this argument's seeming validity, I believe the role of government in social support versus philanthropy is more a result of a difference in civil society's demands and relationship with LAC governments than it is a different understanding of what philanthropy is, as it is clear that there is both civic engagement and mutual support as constants among Latinos throughout our history in the US and in LAC.

Finally, one of the largest reasons why Latino philanthropy is missed in research is because most philanthropic data on Latino giving is self-reported and not socially-supported or investigated (Gonzalez, 2003). This results from both an American tax code that has disparate impact on Latinos, as well as a lack of dependence on tax benefits as an impetus to donate throughout LAC (Gonzalez, 2003; Gonzalez, 2010; Pole *et al*, 2003). In the case of the American 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 arguments highlight the many challenges in identifying, and thereby supporting or amplifying, Latino philanthropy. With an understanding of the long history of Latino philanthropy, the next section closes with characteristics of Latino philanthropy that emerge in the research.

Characteristics of Latino Philanthropy

The history of Latinx philanthropy must be understood to be affected by colonialism, foreign wars, and America's intervention and settler-colonialism in the Southwest. Together, these created demographic and philanthropic shifts among Latinos that continue to cross national borders and which underscore a transnational influence and root to Latinx philanthropy (Gonzalez, 2010). Another key characteristic is that of mutual aid. This characteristic is one of the only with pre-Hispanic references (Aranda, 2010; Gonzalez, 2010; Sanborn & Portocarrero, 2003; Sanborn, 2005) and alive in indigenous groups today (unpublished research for the C.S. Mott Foundation by indigenous researcher Marcela Tlapalhuitzilli, 2020). It continued despite religious and social control change in the focus and role of philanthropy during the colonial period (Almaraz, 2014; Pole *et al*, 2003; Sanborn & Portocarrero, 2003; Sanborn, 2005). And again in *mutualistas* that began to grow in number and location, as LAC went through many nation-building exercises after overthrowing the colonial powers (Almaraz, 2010; Aranda, 2010; Pole *et al*, 2003). It also continued through the structural barriers set up by the tax infrastructure in the US that forced organizations like these mutual aid ones to register as a nonprofit to survive.

A third characteristic of Latino philanthropy has roots in the civil protections and social capital that were organized through *mutualistas* organizations (Aranda, 2010; Gonzalez, 2010; Pole *et al*, 2003), and in the 1960s when Latino movements in the US infused the mutual aid organizations they founded with a commitment to the movement's aims (Pole *et al*, 2004). Meanwhile, civil wars in some Latino countries, dirty wars in others, and globally notorious natural disasters between 1940-1990 also led to a flourishing of civil society and social mobilization that linked

giving to the future of the country's vulnerable (Gonzalez, 2010; Sanborn & Portocarrero, 2003; Sanborn, 2005).

Literature on the characteristics of Latino philanthropy have added cultural elements, such as *Personalismo* and *Compadrazgo*. *Personalismo* is a pre-Hispanic social contract based on *confianza* (trust) and reciprocity (Aranda, 2010; Pole et al, 2003). Giving is directed to individuals within family and community circles, such as remittances (Pole et al, 2003; Gonzalez, 2003; Gonzalez, 2010). Donations occur based on how well they know the person requesting the funds (Aranda, 2010). *Compadrazgo*, similarly, is a relationship system based on god-parenthood roles where godparents are expected to support their godchildren's upward mobility and potential (Aranda, 2010). Other research has found that many Latinos tend to give spontaneously (Rovner, 2015) and after emergencies (Pole et al, 2003; Gonzalez, 2003; Ramos, 1999). Latino philanthropy also has a strong sense of cultural heritage, tradition, and family (Gonzalez, 2003; Gonzalez, 2010; Pole et al, 2003; Ramos, 1999). When Latinos give, their preference is to help other Latinos (Gonzalez, 2003; Gonzalez, 2010; Ramos, 1999). Finally, beyond culture, there are individual demographic factors that affect philanthropic giving, such as generation, national origin, length of time in the U.S., and class (Gonzalez, 2003). For example, a study on Shakira's and Ricky Martin's philanthropy found transnational aspirations and connections in LAC and which add a level of complexity to the notion that they are simply emulating American elite philanthropy. 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 American intervention in the Americas as it is to a pan-American Latino identity (Allatson, 2015).

Research on the forms Latino philanthropy takes focus most notably on Hometown Associations (HTAs) composed of people from the same town or village, and sometimes country, who 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; Gonzalez, 2010; Orozco, 2006). HTA members are more involved with their families in the US and in their country of origin, and visit their home country more often than non-HTA immigrants. While the exact number of HTA members is unknown, 8-percent of immigrants who send remittances are members of an HTA (Orozco, 2006). These numbers have attracted support from governments across LAC and intergovernmental development agencies who have established community programs that match funds sent home by HTAs. Research on HTAs among immigrants from urban centers demonstrate that other factors affect and may continue to affect the transnational nature of Latino philanthropy, such as age, length of time in the United States, and immigrant generation (Escobar, 2016). With a deeper understanding of the mutual aid expression Latino philanthropy can take, giving circles appear to be a natural offspring of the *mutualistas* organizations of the past, the HTA organizations and *cundinas* of the present, as well as the growth of the Latino funds established throughout the region.

LGCN Survey

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. Which LGCN giving circle are you a member of?
2. In what year, approximately, did you join your giving circle?

3. 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 celebrate culture
 - I wanted to change how my Latino community is seen by its members and/or those who are not part of the community
 - I wanted to be part of the LGCN philanthropic movement
 - I wanted to affect change in the local Latino community
 - Other (Please specify): _____

4. Rate the following statements based on your experience **after** joining your GC.

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

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

6. Beyond funding through your giving circle, in what other ways do you give time, talent, or resources to Latino-led nonprofits? (*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*): _____

7. What activities or learning opportunities are provided to you through the giving circle network? (*Please check all that apply*)

- Speakers or training on philanthropy
- Speakers or training on specific community issues
- Leadership training
- Site visits to nonprofits
- Civic engagement opportunities (e.g., volunteer at a voter registration drive)
- Meetings with nonprofit or community leaders
- Discussion about grantee recipients or community issues
- Networking opportunities
- Social activities or celebrations
- Policy advocacy and/or lobbying
- None of the above
- Other (*Please specify*): _____

8. 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
- Other (*Please specify*): _____

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

My giving circle has...

	Not at all	Somewhat	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"/>

10. 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 more 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 giving
- Increase self-confidence
- Learn about trust and values-based philanthropy
- Other (*Please specify*): _____
- I have not experienced any of these benefits

11. 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 U.S.	1	2	3	4
Have been more proud of the Latino culture in the U.S.	1	2	3	4
Have felt alone in the U.S.	1	2	3	4

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
- 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. Have you ever participated in LCF's Annual Policy Summit? *(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 collective 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. *(Please check all that apply)*

- 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
- African-American
- Afro-Latino
- Afro-Caribbean

- Asian
- Asian-Latino
- Black
- Chicano
- Chicanx
- Jewish
- Hispanic
- Latino
- Latinx
- Mestizo/Mestiza
- Mulato/Mulata
- Multiracial
- Native American
- Pacific Islander
- 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