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LIST OF ABBREVIATIONS

AFP  Association of Fundraising Professionals
CASE  Council for Advancement and Support of Education
IOS  Inclusion of Other in Self
IRS  Internal Revenue Service
MEIM-R  Multigroup Ethnic Identity Measure - Revised
PSID  Panel Survey of Income Dynamics
SASH  Short Acculturation Scale for Hispanics
SSI  Survey Sampling International
U.S.  United States
ACCULTURATION AND SELF-CATEGORIZATION AS PREDICTORS OF LATINO PHILANTHROPIC BEHAVIOR

By

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Chair: Kathleen S. Kelly
Major: Mass Communications

As the Latino population continues to grow and nonprofit organizations assume more critical social and economic development roles, the necessity to understand precepts of Latino giving have become increasingly urgent. Given a burgeoning minority presence in the United States (U.S.), fundraising professionals have begun to recognize the economic and social necessity to understand and access diverse donor publics to sustain and advance their organizations (Anft, 2001; Newman, 2002; Tokumura, 2001; Van Slyke, Ashley, & Johnson, 2007). Persistent demographic shifts resulting in increases in minority populations, particularly Hispanic, are challenging fundraising professionals to tailor outreach strategies based on the social and cultural values of donors (Blackbaud, 2015; Clolery, 2015; Ragusa, 2016). Yet there is a dearth of information about this potentially powerful donor force.

This study established a foundation for advancing academic clarity and urgently needed practitioner guidance around one undocumented area in philanthropic scholarship. This research assessed the impact of acculturation and social identity, specifically ethnic self-identification, on Latino giving and volunteering behavior.
Study results indicated that Latinos actively formally and informally give and volunteer, with the rate and amount of informal giving exceeding formal giving to organizations. Ethnic self-identification was linked to formal and informal giving and volunteering. Further Latinos who self-categorize as Latino had a sense of responsibility for and commitment and obligation to support Latino causes. Religion served as a cultural core for Latinos and was a motivating factor in giving and volunteering to religious and non-religious nonprofit organizations. Finally, Acculturation was not associated with giving and volunteering.
CHAPTER 1
PURPOSE OF THE STUDY

Ethnic and racial minorities currently represent 38% of the national population (U.S. Census Bureau, 2015) and are expected to total more than half of the population by 2045 (Berkshire, 2013). Given this burgeoning minority presence in the U.S., fundraising professionals have begun to recognize the economic and social necessity to understand and access diverse donor publics to sustain and expand their organizations (Anft, 2001; Newman, 2002a; Tokumura, 2001; Van Slyke, Ashley, & Johnson, 2007). To date, however, fundraising has not kept up with changes in national demographics with non-Latino Whites representing 75% of donors (Blackbaud, 2015), yet accounting for only 61% of the population (U.S. Census Bureau, 2015). From an ethnic perspective, those “who give to charity today is roughly the same as it was 25 years ago” (Hall, 2015, para. 2). Latinos are the largest minority group, yet represent only 11% of donors, despite possessing a buying power of $1.5 trillion (Center for American Progress, 2015). This buying power has grown more quickly and is larger than that of other minority groups (Weeks, 2014) and has also grown more quickly than that of the general population (Newman, 2002a).

Despite a well-documented presence and ability to give, charitable organizations rarely target the Latino donor segment (Sandoval, 2016), largely because there is a lack of basic information on the tendencies, interests, and influence of this group. Traditional fundraising techniques do not work with this demographic and culturally incompatible cultivation practices tend to result in diminished responses from Latinos (Carson, 1995). As such, nonprofits have failed to develop effective strategies to reach Latino donors (Newman, 2002a; Rivas-Vazquez, 1999; Sandoval, 2016), yet this is a demographic
that wants to be engaged (Blackbaud, 2015) and gives at levels equal to non-Latinos (Montalvo & Reid, 2010).

As the Latino population continues to grow and nonprofit organizations assume more critical social and economic development roles, the necessity to understand precepts of Latino giving have become increasingly urgent. The largest and most influential fundraising practitioner organizations recognized this emerging need, calling for increased diversity and inclusion. The Association of Fundraising Professionals (AFP), the Chronicle of Philanthropy, and the Council for Advancement and Support of Education (CASE) have issued clarion calls for systemic changes to internal and external governance and engagement. In addition to organizing and conducting large-scale conferences focusing on minority donor engagement, these organizations provide advice and tools to promote internal organizational diversity and outreach to diverse donors (AFP Foundation for Philanthropy, 2013; Stiffman, 2017; CASE, 2016). The challenge for members of these organizations and fundraisers, in general, is that Latino giving has traditionally and primarily occurred informally between personal networks, which is counter to U.S. models of formal giving to organizations, and that there is little understanding of variables and links that this giving provides in a U.S. context of philanthropy.

Additionally, a number of cultural factors bear considerable influence on Latino donor behavior (Rivaz-Vazquez, 1999). These factors affect how and why Latinos provide support, aspects that have been studied at a macro level through qualitative studies, but for which there exists very little confirming evidence and no effective theory.
This study explores the factors identified in research related to cultural integration or acculturation and ethnic identification as it relates to Latino philanthropy.

**Gaps in Research**

The nature and extent of ethnic diversity and the social importance of philanthropy necessitate scholarly attention to Latino behavior. To date, research on philanthropy has focused on the general population rather than specific ethnic and immigrant groups. Persistent demographic shifts resulting in increases in minority populations—particularly Latino—are challenging fundraising professionals to tailor outreach strategies based on the social and cultural values of donors (Blackbaud, 2015; Clolery, 2015; Ragusa, 2016). Yet there is a dearth of research about this potentially powerful and underrepresented donor group.

Existing limited scholarship on Latinos and philanthropy provides a general understanding largely based on qualitative research. Foundational research (Campoamor & Diaz, 1999; Cortes, 1995; Rivaz-Vazquez, 1999; Ramos, 1999) completed more than 18 years ago is still often cited, primarily due to a lack of more recent data. The qualitative research produced by these and other scholars (e.g., Gonzalez, 2003, Smith et al., 1999; Royce & Rodriguez, 1999; Solaun, 2007; Villa Parra, 1999) has yet to be quantitatively confirmed. Further, there is no central paradigm—or area of discourse—on this topic (Center on Philanthropy and Civil Society, 2003). Blackbaud (2015) completed a survey disaggregated by ethnicity that provides descriptive data on Latino donors; however, this research is not tailored to Latinos and is not informed by qualitative research in this area. Such studies do not consider the role of social and cultural traditions.
Similarly, there are studies that focus on aspects of philanthropy, such as volunteering, seeking to establish an understanding of behavior given social and cultural integration. For instance, studies were conducted of U.S.-born and immigrant African-Americans, Asians, and Latinos that analyze volunteering to organizations and the role of acculturation (Sundeen, Garcia, & Raskoff, 2009; Ramakrishnan & Viramontes, 2006). This study seeks to extend understanding of acculturation as applied to Latino donor behavior and participation in U.S. models of philanthropy.

In conclusion, there is well formulated research on Latino cultural tendencies, limited research on Latinos and philanthropy, and thorough research on acculturation and social identity shifts; however, there is no theoretical framework that explains the impact of their intersection nor has there been a national level quantitative research conducted on Latinos and philanthropy. This research seeks to fill that void and provide a foundation for further theory development.

**Relevance to Practitioners and Scholars**

There is a clear and present need to conduct research that characterizes the influence of culture and identity to Latino donor behavior. Fundraising practice and scholarship have focused on general native-country attributes for giving, ignoring socio-cultural impacts of living and integrating into the U.S. This study is the first to posit that Latino giving behavior occurs along a continuum aligned to acculturation and self-identification.

The continued emergence of ethnic minorities, including Latinos, has created an urgent need for nonprofit organizations to effectively cultivate relationships with these key stakeholders. Recognizing the urgency of this need, Emmett Carson, as cited in Blackbaud (2015, p. 3), who is the president and Chief Executive Office of the Silicon
Valley Community Foundation, asserted that “fundraising in the 21st century will require a differentiated approach tailored to the interests, values, and traditions of the many rather than a one-size-fits-all approach based on the interests, values, and traditions of white Americans” (Blackbaud 2015, p. 3). To succeed in the future, nonprofit organizations must develop relationships with Latinos, at once serving these constituents through programming and developing within the demographic a powerful donor base (Newman, 2002b). Further, as noted in Blackbaud (2015, p. 3), “America is in the midst of a dramatic cultural shift, but evidence suggests that organized philanthropy may be stuck in the past.”

Further, fundraising organizations and practitioner publications provide a general understanding of the characteristics and cultural aspects that influence Latino giving. Often these concepts are so broad that developing tailored outreach can be challenging. The researcher believes that the general nature of information diminishes an organization’s ability to create actionable strategies. Results of this study will help practitioners understand the evolution of Latino donor behavior and tailor cultivation strategies that increase participation and giving for this untapped donor base.

Within a communication context, given that fundraising is a discipline within public relations (Kelly, 1991; Kelly, 1998), it will be essential for public relations practitioners to understand how to engage the demographic and what to communicate in order to cultivate this constituent group. Sergio M. Gonzalez, Senior Vice President for University Advancement and External Affairs at the University of Miami, noted that while relationship building for major gifts is similar for Latinos and Whites, there is a need to further understand the influence and attributes of Latino giving; gaining insights to help
tailor strategies will provide timely support to alumni giving (L. Solaun, personal communication, November 29, 2016). The results of this study will support practitioners in developing culturally appropriate engagement strategies that recognize the role of acculturation and identity as influential factors to participation. This understanding will help serve and reach this public.

From an academic perspective, there is limited and largely qualitative scholarship on Latino philanthropic behavior. Scholarship has identified major themes that indicate a cultural basis for giving, often citing connections to countries or regions of origin (Abbe, 2000; Díaz, Jaladoni, Hammill, & Koob, 2001; Petty, 2002; Ramos, 1999; Rivas-Vázquez, 1999). Qualitative research encompasses nearly all of the scholarly research completed, with results aligned along similar themes. Although Chao (1999) posits that a continuum of immigrant giving could apply to Latinos, there are no conceptual frameworks focused on Latino giving. This study fills an urgent need to advance fundraising scholarship related to minority donors, providing a theoretical basis for Latino philanthropy in the U.S.

**Study Objective**

The purpose of this study is to provide academic clarity and urgently needed practitioner guidance around one undocumented area in philanthropic scholarship. This study will address the impact of the level of acculturation and social identity, specifically ethnic self-identification and adaptation, to Latino giving and provide a theoretical basis for Latino donor behavior.

At a scholarly level, this study seeks to begin to fill a void and contribute to fundraising research by exploring influence and practices of Latinos, providing a theoretical basis for participation in the U.S. model of philanthropy. At a practitioner
level, this study will provide fundraising with actionable insights that translate into effective cultivation with Latino constituents. As such, this study posits that, similar to what research has confirmed for volunteering, as immigrants transition from cultural practices from their countries of origin to a U.S. cultural context, adoption of the U.S. model of philanthropy—and thus participation in formal philanthropy—will occur.
CHAPTER 2
LITERATURE REVIEW

This study assesses the role of acculturation and identity on Latino giving, specifically addressing a person’s level of cultural integration and self-identity as expressed through adoption of formal philanthropic practices. As such, this analysis requires a comprehensive understanding of general aspects of philanthropy, including monetary giving and volunteering, Latino social and cultural elements that influence donor behavior, and acculturation theories that influence social identity and behavior.

Findings from the current research in these areas are individually significant. However, the conceptual basis derived from the combination of factors is central to this study. To this end, this literature review provides:

- An overview of U.S. philanthropy including fundraising to diverse donor bases and volunteering
- A comprehensive understanding of the current Latino demographic
- A broad understanding of elements of Latino social identity and beliefs and practices concerning philanthropy
- An analysis of acculturation and results of studies involving Latinos
- A theoretical framework under which to conduct this study.

An overview of these issues follows. Note that this study uses the term Latino as defined by Flores (2000) to refer to persons living in the U.S. whose origins are Spanish-speaking regions of Latin America and the Caribbean. Using a pan-ethnic term such as Latino homogenizes one diverse group, erasing social, cultural, geographic, and political experiences unique to countries of origin (Oboler, 1995).
Philanthropy

Philanthropy is described as "voluntary action for the common good" (Payton & Moody, 2008, p. 6). It is essential to the sustainability of democratic societies given that private giving is often necessary to address persisting social issues that remain unresolved by public (government) and for-profit (business) sectors. Andrew Carnegie recognized the role of donors and of those with means to provide for common good in 1889. As an early advocate of modern philanthropy, Carnegie noted in the seminal publication “Wealth”—also known as the Gospel of Wealth—that the foremost method for using excess wealth is to distribute funds in ways that maximize benefits to communities, and support (and provide access to resources necessary for) the betterment of others (Carnegie, 1889). Those who can give should be grateful for the ability to do so and should feel a duty to provide. Carnegie said, “the man who dies thus rich dies disgraced” (para. 24). This tenet of giving and sharing resources is central to this study.

Today, philanthropy is characterized by participation in the third (or nonprofit) sector, which the Internal Revenue Service (IRS) defines by organizational purpose across 29 categories described in the 501(c) section of Publication 557. With more than 1.41 million IRS-registered nonprofits as of 2013, the third sector generated more than $905 billion to the economy (or 5.4% of the U.S. gross domestic product) (McKeever, 2015). During periods of economic downturn, nonprofit organizations provide continued support by consuming reserves and pursuing lines of credit (“Nonprofits provide stability”, 2016).

Certain IRS nonprofit categories provide donors with tax deductions for contributions, such as charitable nonprofits organized under section 501(c)(3). This
category is the focus of this study. With 950,000 charitable nonprofits or 67% of all registered nonprofits, 501(c)(3) organizations comprise the most number of organizations of the IRS nonprofit categories (McKeever, 2015). Organizations registered under this category support religious, educational, charitable, health, scientific, literary, sports, public safety, and animal protection causes (Internal Revenue Service, 2016). Human services, education, and health organizations comprise 95.5% of all registered 501(c)(3) nonprofits (McKeever, 2015). These organizations rely on contributions and support from individuals and organizations for continued operation.

In 2017, donations to all U.S. charitable nonprofits exceeded $400 billion (GivingUSA, 2018) and volunteer support equaled 7.9 billion hours (provided by 25% of U.S. adults) valued at more than $184 billion (U.S. Census Bureau, 2017). Total donations to charitable organizations increased by 7.3%, giving to foundations experiencing the greatest increase at 15%; arts, culture, and humanities at 8.7%; and public service organizations at 7.8%.

Religion-related organizations comprise 6.2% of all charitable nonprofits (McKeever, 2015). Although the increase in religious giving was only 2.9%, the total giving to religious organizations was $127 billion, representing more than 30% of total giving for the year (GivingUSA, 2018).

**Fundraising**

Fundraising is a central function in a nonprofit organization, providing revenue for continued operation and fulfillment of its mission. Individual giving provides the largest funding stream, specifically generating 70% of total donations to charitable organizations (GivingUSA, 2018). While motivations for individual giving vary, there is an exchange factor that occurs in which organizations provide a benefit to donors which
may be intangible, such as “gratitude, respect, and social association” (Kelly, 1991, p. 197) in response to donations. Receiving in exchange for giving results in an imbalance that promotes giving more to receive more, which promotes allegiance and creates informed organizational advocates.

Enabling active donor participation in the organization is beneficial to relationship building (Burnett, 2002). Donors derive satisfaction in knowing that their contribution has contributed to the success of the organization and become supporters of an organization’s mission (Burnett, 2002). They extend the reach of the organization to the individual’s social networks, resulting in, at a minimum, increased awareness of the organization and optimally recruiting additional donors to provide sustained financial contributions or respond to specific situations.

Similar to business development in the private sector, there are distinct phases that occur in donor cultivation. The four-step donor cultivation cycle involves 1) identification and research, 2) cultivation (relationship building and nurturing in advance of the ask), 3) contribution solicitation, and 4) stewardship (relationship nurturing and recognition) (CASE, n.d.). Each phase builds upon the results of the previous. An organization would be expected to spend a majority (60%) of its fundraising efforts on developing and implementing cultivation strategies (the third step in the process) (CASE, n.d.). This focus on relationship building creates an environment that is less transactional and more connection or association related.

**Fundraising for Diverse Donor Bases**

Nonprofits have not traditionally focused on cultivating relationships with ethnically diverse donor bases (Newman, 2002b; Tokumura, 2001), ignoring more than 42.2 million foreign-born immigrants in the U.S. (Brown & Stepler, 2016). This 13% of
the population represents only first-generation immigrants and does not include children of foreign-born persons. Lack of interest in this population has been associated with the perception that these donor constituencies are viewed as recipients rather than providers of services (Newman, 2002b; Gonzalez, 2003) and a lack of understanding on how to reach these donors (Rivas-Vazquez, 1999). Research indicates that there is a general willingness among all minority groups to assist those in need and that income and religious affiliation is an indicator of giving (Clolery, 2015). Yet there is an urgency to understand the complexity of diversity and attitudes and beliefs towards providing community support and giving (Tokumura, 2001). In addition to understanding philanthropic inclinations, understanding cultural collateral—such as ethnicity, age, gender, educational level, and social position—of the individual is needed (Tokumura, 2001).

Newman (2002b) noted that challenges to engaging diverse donors are lack of cultural understanding, fear of embarrassment, and an uneasiness toward embracing the unfamiliar. Relationships can be easily and inadvertently destroyed by actions that reflect cultural misunderstanding (Tokumura, 2001). Conversely, showing an understanding of an individual’s cultural/ethnic background leads to the trust required for giving. Instead of addressing these challenges, fundraisers focus on the similar, specifically those of similar ethnic composition (Newman, 2002b). This affirms the need for diversity and inclusion in the fundraising profession given that trust occurs naturally between persons of similar backgrounds and values.

The need to identify and connect to donor needs and desires and understand financial, social, personal, and cultural characteristics of a donor is essential to
developing effective cultivation strategies (Barrett & Ware, 2002). Cultural traditions that characterize ethnic communities influence giving. Fundraisers must understand variations in values and philanthropy-related cultural sensitivities and adjust cultivation strategies to align to them (Newman, 2002b).

Although research in this area is limited, studies reveal the following:

- Ethnically diverse donors are interested in accessibility to an organization and return on commitments (Newman, 2002b).
- A key determinant to diverse donor participation in an organization is whether board members and employees reflect and represent their ethnicity (Newman, 2002b; Lehman, 2016). Inclusivity at an organizational level, through workforce diversification, is critical.
- Ethnically diverse donors may often give informally, do not follow U.S. models of philanthropy, and their support is not recorded (Wagner & Ryan, 2004).

**Religion and Philanthropy**

Religious and faith-based organizations generated more than an estimated $106 billion in 2013, approximately one-third of total giving (Philanthropy Roundtable, n.d.). More than an estimated 45 million volunteer hours or nearly half of the total hours donated are to religious or faith-based organizations (Office of Justice Programs, 2011).

Regardless of affiliation, persons who attend church twice per week are more likely to become donors (25% more) and volunteer (23% more) within the religious organizations to which they belong and to other community organizations than those who are not religious (Brooks, 2003). Given the role of religion for Latinos, this study will explore cultural religious influences on giving.
Volunteering

In 2015, approximately 62.6 million (or 24.9%) of Americans volunteered at least once during the year and together provided more than 7.9 billion hours of service at a value of $184 billion (Corporation for National & Community Service, 2016). These hours are those provided to a nonprofit organization (i.e., person to organization). Volunteers provide operationally critical support to the functioning of nonprofit organizations. For example, these hours were spent providing coaching, tutoring, teaching, counseling, administrative (office) support, professional services, mentoring, and collecting, preparing, and distributing food and clothes (Corporation for National & Community Service, 2016). More than 40% of charities rely on volunteer support (McKeever, 2015). The rate of informal (i.e., person to person) volunteering significantly exceeded formal volunteering. In 2013, 62.5% of those who volunteered also assisted others informally (Corporation for National & Community Service, 2016).

Although this study primarily focuses on giving aspects of philanthropy, volunteerism is addressed in the literature review and will be included in the survey, given the link between volunteerism and acculturation and that volunteerism has been found to lead to monetary giving and is critical for deepening Latino engagement. Latinos tend to volunteer with an organization first and then contribute monetarily to it. As such, it represents an important step for fostering Latino participation in charitable nonprofit giving (Ramos and Kasper, 2000; Ramos, 1999).

Immigrant volunteering studies have been conducted to evaluate the possible impact of participation on acculturation (Sundeen, Garcia, & Raskoff, 2009; Jang, Wang, & Yoshioka, 2016). Jang et al. (2016) found that informal volunteering is independent of acculturation but that there is a correlation with formal volunteering...
among Korean Americans. Wilson and Musick (1997) developed an integrated theory of volunteering that posits that service provides participants with the ability to develop social capital, human capital, and cultural capital. A 2009 study on immigrant volunteerism showed that developing social connections and networks (i.e., social capital) is a strong motivator for immigrant volunteering, followed by a desire to gain experience to facilitate entry into labor markets (i.e., to develop human capital) and to help assimilate linguistically and culturally (i.e., to build cultural capital) (Handy & Greenspan, 2009). Similarly, a 2007 study noted the opportunity that volunteering provides to Latino immigrants in terms of human capital development, specifically leadership skills (Hernandez, et al., 2007). There is also a link between volunteering and contributing to charitable organizations. Wagner and Hall-Russell’s (1999) research indicated that 60% of Latinos cited volunteering in an organization as the second most important factor in becoming a donor.

The U.S. Latino Community

Persons of Spanish-speaking ancestry from more than 20 countries in Latin America and the Caribbean comprise the U.S. Latino community. The term Latino coalesces cultures from each of these countries into a common descriptive identity (Cortes, 2002). Given distinct cultural, social, and political traditions, this population is at once comprised of characteristics unique to each country but also share common features.

Examples of these social similarities include a bicultural identity (i.e., a dual alignment to one’s original cultural identity and an American cultural narrative), shared geographic association, and a tendency towards vertical collectivism (e.g., recognition of power distance and deference for authority [Trinadis, 2002]). Recognizing cultural
attributes of Latinos is integral to this study, given its potential implication for acculturation and philanthropic behavior.

Current Status

The largest minority in the U.S., according to the Pew Research Center, Latinos comprised 17% of the total population, or 55 million people, in 2014 (Cabrales, 2013; Stepler & Brown, 2016). The Latino population is expected to reach 27% of the population by 2045. Despite declines in growth rates from 2007 to 2014, Latinos still account for more than half of the national population growth (Krogstad, 2016). According to Pew Research Center research, an increasing majority of Latinos (65% as compared to 60% in 2005 [Lopez & Patten, 2015]) were born in the U.S. while foreign-born rates declined from 40% to 35% from 2000 to 2013 (Lopez & Patten, 2015). These data are pertinent to this study as the level of acculturation expressed through adoption of formal philanthropic practices may be affected by age at the time of emigration and amount of time in the adopted country. Level of adaptation or acculturation may be influenced by birth place and is a key variable in this study as the ethnic identity aspect of social integration may influence giving behavior.

The sheer volume of this growing demographic brings formidable social and economic impacts. Latino wealth, estimated at $1.5 trillion (Center for American Progress, 2015) is a potent economic force that is increasing at a higher rate than that for persons with African-American and Asian ancestry (Weeks, 2014). A 2014 multicultural economic study conducted by the University of Georgia found that buying power of Latinos has increased at a faster rate than both that of non-Latinos and overall buying power (Weeks, 2014).
According to the Pew Latino Center’s Statistical Portrait of Latinos in the U.S. (2014), the greatest numbers of Latinos are Mexican or of Mexican descent (64%) followed by Puerto Ricans (9.6%), Cubans (3.7%), Dominicans (3.2%), and Guatemalans (2.4%) (“Statistical Portrait,” 2014). The largest populations of Latinos live in California, Texas, Florida, New York, and Illinois (Stepler & Brown, 2016). These states have Latino populations that exceed 1 million. Cities with the largest Latino share of the overall percentage of the population are Miami (with persons of Cuban origin comprising the largest Latino group) and San Antonio (with persons of Mexican origin comprising the largest Latino group) (Brown & Lopez, 2013).

Of the current 55 million Latinos in the U.S. approximately 62% speak English at least very well, leaving roughly nearly two in five persons speaking English less than very well (“Statistical portrait,” 2014). However, this is a diminishing challenge given that the rate has decreased 8% (from 46% to 38%) in the past 10 years (“Statistical portrait,” 2004). A majority (61%) of all Latinos report speaking only English or speaking English very well (“Statistical portrait,” 2014). The issue of multiculturalism and assimilation has been studied with respect to Spanish language ability and cultural adaptation (Chong & Baez, 2005; Gutiérrez, 2005; Hernández-Truyol, 1998). Studies indicate that a degree of cultural adaptation occurs with immigrants, creating varying levels of cultural and linguistic variances and beliefs from either one culture or the other or a hybrid of the two. Language as a factor in acculturation will be addressed later in this literature review and assessed as part of this study.

There have been marked improvements in participation in secondary and post-secondary education for this demographic. Despite significant decreases in the past 25
years (from 32% to 10.6%), Latino youth have the highest rates of high school dropouts in the country (National Center for Education Statistics, 2014). Although post-secondary enrollment rates rose to 35% in 2014 (a 13% increase since 1993), the four-year degree completion rate for Latinos is 15%—the lowest among all ethnicities. This may be causally related to the fact that 48% of Latinos who participate in post-secondary education attend a two-year school or community college (Krogstad & Fry, 2016).

Poverty rates for Latinos have decreased by 2% to 23.5% (DeNavas-Walt & Proctor, 2014). Although this is a statistically significant decrease, the rate remains significantly higher than for non-Latino Whites, which is 9.6% (DeNavas-Walt & Proctor, 2014). Latinos have the second lowest median household income, following the African-American demographic, of $42,200. Reported Latino personal earnings show that 42% receive less than $20,000 per year and 40% make from $20,000 to $49,999 per year, with median earnings reported at $25,100 (“Statistical portrait,” 2014). The personal earning rate of less than $20,000 per year decreased from 49% in 2005 to 42% in 2014, a marked improvement (“Statistical portrait,” 2014; “Statistical portrait,” 2005). These data demonstrate that income and education levels continue to improve for this demographic.

Social Identity

Several cultural attributes underpin Latino social identity. There is a shared sense of identity that is expressed through beliefs that link the numerous Latino nationalities. These cultural traits which permeate Latino identity include recognition for the importance of family, role of religion, collectivist social nature, warm sense of one-to-one interaction and support (or personalismo [formal friendliness]), preference for
pleasant interactions (or *simpatía* [kindness]), and respect for hierarchy (Chong & Baez, 2005).

Family and tradition form the core and most-valued aspects of the Latino social network. However, religion and religious practices also hold prominence for this demographic (Clutter & Nieto, 2004) with 82% of Latinos claiming a religious affiliation (Pew Research Center, 2014). From a philanthropic perspective, religions serve as “frontline institutions providing social welfare assistance to immigrant communities” and is directly linked to civic participation (Hernandez et al., 2007, p. 5). Churches serve as the core for Latino community and provide social capital to participants (Wilson, 2008). Interestingly, approximately 35% of Latinos have changed religions, a factor significantly higher than for non-Latinos (Pew Forum on Religion and Public Life, 2008), possibly as part the cultural integration. There is a strong shared sense of identity among Latinos, regardless of nationality, that forms the basis for the sense of community.

One aspect of Latino’s social identity that impacts behavior is the collective cultural construct to which they ascribe. Collectivism emphasizes the needs of the community over the needs of the individual (the latter of which is a dominant U.S. social construct), giving precedence to the common good and an obligation to support the community (Kim et al., 1994). Social priorities for persons from collectivist cultures are the welfare of the group and interdependence (Kim et al., 1994).

Dávila (2001) believes that Latino identity in the U.S. is informed by the perception promulgated by marketing and public relations agencies. In order to sell to this market segment in the interest of profit, the Latino demographic is portrayed as one homogenous group, ignoring differentiating among other key cultural, geographic, and
political differences. Dávila further posits that the archetype is developed based on U.S. and Latin American intellectuals and combines traditional characteristics (such as value for family, religion, and tradition) with U.S. characteristics (such as brand loyal, conservative, and eats a lot).

**Perspectives on Philanthropy**

Philanthropy is embedded in Latino culture (Arrom, 2005; Peinado-Vara, 2006; Sanborn, 2005). The concept of providing mutual support dates back to colonial periods in Latin America with the tradition of informal giving has held a prominent role in Latino culture for more than 500 years (Ramos, 1999; Petty, 2002). Collective support occurs between networks of family and friends to satisfy immediate and often spontaneous needs (Abbe, 2000; Díaz, Jaladoni, Hammill, & Koob, 2001; Rivas-Vázquez, 1999). A person’s social network forms the primary social and economic support framework. Sanborn (2005) noted that the theme of reciprocity and communities caring for themselves is a common cultural theme.

Religion has served an important role in promoting philanthropy given the dominance and role of the Roman Catholic Church since colonization (Arrom, 2005; Logsdon, Thomas, & van Buren, 2006; Sanborn, 2005). Members of families and those in close social circles have provided the basis for charity, along with the Catholic Church, which often also provided support and received donations. The church served as the primary social service provider (Hernandez et al., 2007; Wilson, 2008).

With population shifts from rural areas to urban centers in Latin America in the late 1800s, voluntary organizations (i.e., mutual aid societies) or *mutualistas* developed (Center on Philanthropy and Civil Society, 2003). *Mutualistas* provided social services and labor and social justice support (Cabrales, 2013). Emigration fostered development
of these organizations in the U.S. to provide member advocacy related to, among other topics, labor issues, civil rights, health facilities, women’s issues, social welfare, and legal assistance (Center on Philanthropy and Civil Society, 2003).

Gallegos and O’Neill (1991) are credited with conducting seminal research on Latinos and philanthropy, specifically Puerto Ricans and Mexicans. The goal of their research was to identify additional possible funding opportunities to support Latino communities and to be used by nonprofit organizations. Hodgkinson and Weitzman (1992) soon thereafter conducted research on minority giving and volunteering focusing on African Americans, Latinos, and immigrants for Gallup and Independent Sector in 1992. Results of the study indicated that ethnic giving is at a significantly lower rate than the national average. This study has been the subject of much criticism, holding that the results are inaccurate due to biases in design of the survey instrument as it does not include the type(s) of giving often practiced by Latinos (Center on Philanthropy and Civil Society, 2003). These early studies showed that Latinos lack a tradition of formal charitable giving and that Latino giving lags behind that of other U.S. groups (Center on Philanthropy and Civil Society, 2003).

A number of studies, including those conducted by Independent Sector that focused on formal giving, indicated that Latinos give at lower levels than state and national averages (Hodgkinson & Weitzman, 1992). However, O’Neill and Roberts (2000) provided quantitative research indicating that when controlling for income and education, there is no statistical difference in giving levels. In conclusion, quantitative studies provided mixed results in terms of identifying ethnic differences in rates of
participation in philanthropic activities. Latino philanthropic behavior forms a basis for 
research and is the dependent variable in this study.

A 2003 study of communication outreach by community foundations to Latino 
publics in Florida found that nonprofit organizations did not directly engage with or solicit 
funds from this demographic (Hall & Solaun, 2003). While Latinos may be recipients of 
benefits from grants and programs, organizations are not intentionally seeking to 
communicate with them. As such, organized philanthropy is a developing concept for 
Latinos (Ramos, 1999).

**Giving Practices**

Eleven percent of donors in the U.S. are Latino (Blackbaud, 2015). Latino donor 
priorities are religious organizations, charities supporting children and health care 
(respectively), social service organizations, and animal rescue or support organizations 
(Blackbaud, 2015). The composition of Latino donors is: 30% are Millennials; 33% are 
Generation X; 30% are Baby Boomers; and 7% are Matures. Forty-five percent of 
Latino donors are lower or middle income (with household incomes below $50,000 per 
year) (Blackbaud, 2015). Latino donors are prone to spontaneous giving (when 
emotional pulls occur), do not plan in advance, and are not asked as often as other 
donors for donations and are interested in nonprofits communicating with them 
(Blackbaud, 2015).

Latinos are not well served by current nonprofit marketing efforts, are strongly 
committed to children’s causes, and comprise the youngest donors (Blackbaud, 2015). 
Most Latinos (55%) prefer that fundraising requests be made in English versus 17% 
who say they prefer Spanish, and another 17% who say that they do not have a 
preference (Blackbaud, 2015). Non-U.S. born Latinos have a greater preference for
requests in Spanish (37%) versus 31% who said English. Latinos (23%) more than non-Latinos (18%) make purchases from vendors who request a donation when a sale is made. They also give online and in response to mail appeals at lower rates than non-Latinos (Blackbaud, 2015).

Continued connections to and support for family and friends in countries of origin, a distrust for organizations, social/cultural characteristics (ethnic identity), and historical tradition of informal giving form the basis for Latino giving (Rivas-Vazquez, 1999). This informal giving is perceived as an expectation rather than a philanthropic action, underpinned by religious precepts introduced during colonialism. Many Latino immigrants remain closely connected to and supportive of family and friends in their countries of origin. Remittances to these native country social networks often comprise the principal area for giving (Anft, 2002; Center on Philanthropy and Civil Society, 2003; Pardoe, 2006). The World Bank estimates that remittances increased by 6.3% and reached $72 billion by the end of 2016 (World Bank, 2016). From a philanthropic perspective, remittances continue the tradition of informal giving and are not counted as philanthropic giving.

Although the U.S. Latino community is comprised of persons from more than 20 countries, there are shared values threaded throughout the demographic that contribute to a sense of community and shared sense of responsibility for the same. Latino giving supports key traditions, is largely informal and incurring between a person’s social network, and not to established charitable organizations, a departure from traditional U.S. models of giving (Abbe, 2000; Geough, 2002; Rivas-Vazquez, 1999).
Key attributes and motivators

A critical element of this study involves the analysis of specific social and cultural elements that affect Latino philanthropy. These characteristics inspire giving that differentiates and inform what can be considered a U.S. Latino model for giving.

**Informal.** Informal support from social networks is essential to Latino immigrant groups (Hernández-Plaza, Pozo, & Alonzo-Morillejo, 2004). Monetary and volunteer support is informal and non-institutional and commonly occurs through social networks (Abbe, 2000; Díaz et al., 2001; Rivas-Vázquez, 1999). These networks provide a basis for social and productive exchange (Wong & Song, 2006) and are not measured in studies of philanthropic giving. As such, the expectation for and commitment to providing support to family, friends, and community generally forms a platform for Latino giving. Latinos do not perceive this as philanthropy. This tradition of giving is innate and culturally and socially accepted and expected (Solaun, 2007). Informal giving unto itself has not been effectively studied or measured (Rivas-Vázquez, 1999) and occurs outside of the nonprofit sector. Further, lack of support for organized philanthropy results in Latino giving being largely unmeasured (Rivas-Vázquez, 1999). For this reason, there is little information on rates of giving and whether levels of informal giving are reduced by second generation and beyond immigrants.

**Selective.** Latinos seek to give primarily to churches, health organizations, and social service organizations (Blackbaud, 2015). A sense of connection to the gift (through, for example, support to community service organizations) is important to Latinos (Rivas-Vázquez, 1999), given a tendency to maintain ethnic loyalty exhibited by this groups (Padilla, 2006). This sense of connection is linked to the Latino
characteristic of collectivism. Collectivists understand that they are part of a network and place value on the group rather than the individual (Triandis & Suh, 2002).

**Religion.** Religion for Latinos is at once spiritual and cultural. It comprises a key motivator for participating in philanthropy, largely due to the role of church and church-associated organizations in providing educational, social, and health care services to Latinos (Wagner & Hall-Russell, 1999). A recent survey concluded that 45% of Latino donors name religious organizations as their primary beneficiaries of their giving (Blackbaud, 2015). This coincides with Wagner and Hall-Russell (1999) research indicating that the third most important reason for giving is because clergy asked them to. Latinos give most to religious organizations (Blackbaud, 2015).

A 2007 study of secondary datasets documents the relationship between religion and Latino volunteerism. It noted that religion encourages civic engagement among Latinos. In fact, Latinos who are religious also actively provide 54% of all non-church-based volunteering (Hernandez et al., 2007). Latino church attendance stimulates community involvement (Verba, Schlozman, & Brady, 1995).

Historically, the church, through its missions, became the center for communities. Within the confines of missions, farms, agricultural cooperatives, housing, schools for children and educating adults, and government centers were located (Gonzalez, 2011). Monks and missionaries also support capacity building by transferred agriculture skills and knowledge and promoted Spanish culture, customs and language (Gonzalez, 2011). Colonizers viewed the goals of acquiring land and converting new Christians of equal value and importance, particularly given Pope Alexander’s mandate to propagate Catholicism. Priests travelled with explorers on every expedition (Gonzalez, 2011).
Further, the concept of giving for community support and social welfare was introduced with the 10% tithe for missions which applied to everyone. This amount exceeded the 5% required for the colonizing Spanish government which was only required from the elite (Gonzalez, 2011).

**Personal and trust based.** Trust and personal connection are essential elements in Latino giving (Abbe, 2000; Cabrales, 2011; Rivas-Vazquez, 1999). Connection to the person or cause, and respect for the person soliciting for the cause forms cannot be overstated. Seventy-two percent of Latino donors stated that the primary reason for giving is because they knew the person who was asking very well (Wagner & Hall-Russell, 1999). The respect for and sincerity of the person soliciting from the potential Latino donor is more important than the institution to which the funds will be appropriated (Abbe, 2000; Ramos, 2000; Rivas-Vázquez, 1999). Trust is garnered largely through an immediate personal connection.

Trust and respect for solicitors is also a priority for general donor audiences (Abbe, 2000; Ramos, 2000; Rivas-Vázquez, 1999). In a recent survey of 21,000 donors, 26% of respondents stated that they seek information about charities from persons that they trust (Stiffman, 2016). This rate is likely largely exceeded by Latinos. Respect serves a role with the general donor public was also valued by respondents to a 2015 survey, noting that respect for the person asking inspires giving (Stiffman, 2016).

**Spontaneous.** A key characteristic of Latino giving is that it occurs spontaneously when there is an emergency/crisis or when there is an emotional lure (Blackbaud, 2015). The tendency is to respond to a crisis rather than provide operational (long-term)
support (Newman, 2002a). Instant decisions rather than advanced planning describe the timing for this donor group (Blackbaud, 2015).

**Theoretical Framework**

Acculturation and social identity theories from psychology provide a theoretical basis for this study. Acculturation theories provide a basis for ethnic cultural dimension impacts on giving behavior while social identity theories, including self-categorization theories, provide a basis for understanding the impact of directional personal behavior change and biases for ingroup or outgroup customs of participation in philanthropy.

This section provides an overview of acculturation and identity and theories related to the process of adaptation and perception of self. Additionally, aspects related to directional adaptation, internal process that impact behavior, and psychological aspects of selectivity are related to this study.

**Acculturation**

Acculturation, simply stated, is the term used to describe the process of adapting to a new cultural environment (Berry, 1997; Trimble, 2003). First identified and defined by J.W. Powell (a geologist) in 1880, the concept and process has received generous scholarly attention. The recognized foundation for acculturation studies build upon early research conducted by sociologists and anthropologists. Sociologists Robert Park and Ernest Burgess from the University of Chicago addressed acculturation in the seminal *Introduction to the Science of Sociology* (1921), describing the process as unidirectional and progressing through three stage model of contact, accommodation, and assimilation (Persons, 1987). Interaction resulting from contact necessitate individuals having to allow for ways in which to minimize conflict and assimilate into the primary culture (Padilla & Perez, 2003). Anthropologists Redfield, Linton, and Herskovits (1936)
would later build upon this three-stage conceptualization and explain the accommodate stage further by qualifying it as persons from different cultures being in constant contact which results in changes to cultural practices of any one or all groups. This posits that the impacts are bidirectional. The continuous and direct contact aspect of the Redfield, Linton, and Herskovits (1936) research is recognized as a key aspect of acculturation. The degree to which acculturation occurs depends on the immigrant’s engagement with, and response to, a new environment (Moon & Choi, 2012).

Over time, the acculturation process, which was initially conceptualized as linear, unidimensional, and resulting in complete internalization, was recast as bidimensional and nonlinear process (Berry, 1980; Chun, Organista, & Marin, 2033; Sundeen, Garcia, and Raskoff, 2009; Suarez-Orozco, 2001) in which individuals concurrently exist in at least two dimensions and in which there is selective adaptation (Social Science Research Council, 1954). This latter psychological aspect of selectivity (introduced by the Social Science Research Council) includes values, personality, and integration that are part of the accommodation stage. Prior to this research, disaggregating and selection of cultural aspects or practices was not articulated. Original values or practices are not necessarily lost, but new ones are integrated (Sundeen, Garcia, & Raskoff, 2009) and the impacts are at an individual (or psychological) and societal (or sociological) level. The changes that occur as a result of acculturation may impact beliefs and behaviors (Trimble, 2003). This study will assess these factors in relation to shifting tendencies from native country and culturally based towards U.S. models of giving. This study will not address the societal impact of acculturation.
Scholars from the field of psychology asserted that acculturation impacts behavior, personal traits, and norms (Teske & Nelson, 1974), particularly from a health perspective (Cuellar, Arnold, & Maldonado, 1995; Rogler, Cortes, & Malgady, 1991). Of the numerous studies identifying constructs of acculturation (Chun, Organista, & Marin, 2003; Dalisay, 2012; Kim, 1977; Padilla, 1980; Padilla & Perez, 2003; Phinney, 2003; Redfield, Linton, & Herskovitz, 1936.; Ryder, Alden, & Paulhus, 2000; Teske & Nelson, 1974), psychologist John Berry (1980; 1997) is credited with defining modern acculturation—meaning that which occurs in multicultural societies and has multiple outcomes. His work addresses minority groups and language. Berry’s theory posits that there are four models of acculturation:

- **Integration** occurs when an immigrant retains aspects of the culture of origin but fully participates in the society in which they currently exist; this is considered the result of acculturation.

- **Assimilation** involves an immigrant rejecting the original cultural identity and embracing other cultures.

- **Segregation** occurs when an immigrant avoids other cultures.

- **Marginalization** consists of rejecting one’s culture of origin and society in which they currently exist.

Studies have linked acculturation and immigrant volunteering with several ethnic minorities (including Latinos), noting that increased levels of acculturation result in increases in volunteering with formal organizations (Sundeen, Garcia, & Raskoff, 2009; Ramakrishnan & Viramontes, 2006).

Education is a key variable in acculturation. Studies have shown that an increased sense of belonging is forged by academic achievement (Berry, 1997; Fuligni et al., 2005). The process of acculturation involves two critical components: social (cultural) adaptation and ethnic identity (Moon & Choi, 2012). Immigrants adapt to the
cultural environments of their adopted countries, which result in shifts to their original social constructs (Berry, 2003). Ethnic identity is the alignment of oneself with a group based on ancestry (Moon & Choi, 2012). Group affiliation with which one identifies (ethnic identity) shifts during the process of acculturation (Moon & Choi, 2012; Phinney, 2003). These two aspects are discussed further in the following sections.

**Social (Socio-cultural) Adaptation and Giving**

Adaptations are the changes that occur as an individual integrates into an adopted culture. This occurs during acculturation and involves adjusting or accommodating to an external difference between cultures (Berry, 2003). Social adaptation occurs within the context of daily life in the new culture (Berry, 2003), and is characterized (among other aspects) by the tendency to interact with persons in in-group networks or to extend to others outside of the group (Moon & Choi, 2012). Knowledge of the new culture, amount of contact, and positive perspectives between the native and new culture impact the level of social adaptation (Ward, 1996).

Research from a study of 748 Korean immigrants in California shows that social adaptation influences mainstream giving (Moon & Choi, 2012). Results from this study indicate that the greater the social interaction with persons outside of their ethnic group, the greater the tendency to adopt U.S. models of giving. However, lower levels of social adaptation is not a predictor of giving within an ethnically traditional context (Moon & Choi, 2012). As such, social capital gained from this interaction influences philanthropic behavior.

**Ethnic Identity**

Ethnic identity is the label that a person assigns to oneself or the group with which one aligns (Moon & Choi, 2012). In addition to this self-identification, it also
represents “feelings of belongingness and commitment to a group, a sense of shared
values, and attitudes toward one’s own ethnic group” (Phinney, Horenczyk, Liebkind, &
Vedder, 2001, p. 496), when becoming part of an ethnically different environment
(Fuligni, Witkow, & Garcia, 2005). A person’s ethnic identity shifts during the
acculturative process (Trimble, 2003). Typically, when an individual experiences
negative attitudes expressed by the host society towards them (the group), ethnic
identity will range from strong pride in ethnic heritage to rejection of ethnic identity
(Phinney, Horenczyk, Liebkind, & Vedder, 2001).

Within the context of this research, acculturation will serve as an independent
variable to gauge the role of acculturation on Latino philanthropic behavior and examine
the interplay between current social and cultural influence. This study posits that, similar
to what research has confirmed for volunteering, as immigrants transition from cultural
practices from their countries of origin to a U.S. cultural context, adoption of the U.S.
model of philanthropy (and thus participation in formal philanthropy) will occur. Previous
Latino fundraising scholars have posited that a person’s ethnic identity contributes
values and beliefs that impact giving behavior. As such, the factors noted as Hispanic
preferences for giving are considered moderating variables.

Social Identity Theory

Social psychologist Henri Tajfel and John Turner (1979) developed social identity
theory to explain the basis for a person’s behavior given group membership and
intergroup interactions. Person’s identify themselves with a group, which is defined as
“a collection of individuals who perceive themselves to be members of the same social
category” and who share a “common definition of themselves” (Tajfel & Turner, 1986, p. 15). A person recognizes that they belong to a social category (or group) (Hogg and
Abrams, 1988), based on characteristics that resonate with them; this categorical affiliation impacts attitudes and behavior (Beauchamp & Dunlop, 2014). This theory posits that a person’s alignment or affiliation with a group comprises part of a person’s notion of self. The identification provides self-esteem and security (Tajfel & Turner, 1986; Leonardelli & Toh, 2015), and aligning to a group provides a sense of self-worth (Beauchamp, & Dunlop, 2014). Ingroups are those groups with which a person perceives belonging, while outgroups are those groups with which one does not identify. There may be multiple identities attributed one person, and personal behavior may vary depending on their group participation (Tajfel & Turner, 1979). Also, persons will favor the ingroup to the neglect or expense of the outgroup (Tajfel & Turner, 1986).

The social context can influence a person’s behavior with one of his or her ingroups (Tajfel & Turner, 1986). Persons identify with features of a category (Leonardelli & Toh, 2015). The greater a person aligns with features of that category, the greater the tendency to consider oneself as part of that group. Features may be ethnic, spatial, physical features, vocal, behavioral, belief oriented (ideological), or related to overall disposition (Leonardelli & Toh, 2015). Although there are wide ranging features, for this study ethnic self-categorization is the feature of focus. Features comprise categories but can also form a category. For instance, blue-eyed persons are a feature that comprises a category, but nationality would comprise many features (such as spatial [place of birth], vocal [language use], and belief structure [cultural characteristics]).

There are processes that lead one to an ingroup or outgroup identity, specifically: social categorization and social comparison (Hogg and Abrahams, 1988). Social
categorization is the first step in which one aligns with a category (for instance student, Latino or Democrat). The category helps one define behavior appropriate to the group and helps one understand aspects of oneself. Comparing one’s ingroup with outgroups occurs during social comparison. Self-esteem is closely linked to one perceiving an ingroup more favorable over an outgroup. This study explores one aspect of social categorization, specifically self-categorization, to assess whether there is an impact to Latino philanthropic behavior based on personal alignment.

**Self-Categorization**

A person’s social schema, which includes all of a person’s social identities, is structured in a person’s memory; these identities uniquely or in combination impact behavior (Forehand, Desphande, & Reed, 2002; Markus, 1977). When these identities are triggered by identity-oriented stimuli, activated identity salience occurs (Farhand, Desphande, & Reed, 2002). There are a number of different criteria that could stimulate identity salience which can be short- or long-term. This study assesses several Latino cultural attributes as moderating variables with the mediating role of identity activation on philanthropic behavior.

Derived from social identity theory, self-categorization theory is a person’s self-perception and alignment with one group and conversely different from members of groups with which they do not align (Oakes, Haslam, & Reynolds, 1999). A person’s alignment with a group may fluctuate over time and is influenced by context.

This study will assess Latino’s social identification (specifically ethnic self-categorization) as a variable influencing giving and volunteering. For instance, it could be posited that a Latino donor whose social identity is aligned with the Latino demographic would be more likely to support organizations or efforts that aid this group
(their ingroup) and participate in informal giving. The act of self-categorization directly leads to favoring the ingroup (Tajfel & Turner, 1986), and an activation of aspects of that identity (known as salience) (Stets & Burke, 2000). Identity salience tendencies towards the ingroup is persistent in intergroup relations (Tajfel & Turner, 1986). A certain behavior is expected of them due to group affiliation (Tajfel & Turner, 1986).

**Study Proposition and Hypotheses**

Persistent demographic shifts resulting in increases in minority populations, particularly Latino, are challenging fundraising professionals to tailor outreach strategies based on the social and cultural values of donors (Blackbaud, 2015; Clolery, 2015; Ragusa, 2016). The primary challenge to developing these strategies is that there is a dearth of information and understanding about this underrepresented donor force upon which to base strategies.

This study posits that philanthropic behavior is influenced by cultural and identity transitions. Cultural practices from countries of origin shift to a U.S. context, resulting in adoptions of the U.S. models of philanthropy. As such, Latino social identification, specifically ethnic self-categorization, and social integration through acculturation are variables influencing perception and participation in philanthropy. Figure 2-1 shows the conceptual proposition of this study. Latino source identity is moderated by various individual experience and cultural factors that mediate an activation identity salience response, resulting in ingroup or outgroup bias towards philanthropic behavior.
Seven hypotheses form the basis for this research. Hypotheses 1 and 2 assess the association between acculturation theory on Latino philanthropic giving and volunteering behavior:

- **Hypothesis 1**: Latinos with a higher level of social adaptation to American culture are more likely to give formally.
- **Hypothesis 2**: Latinos with a higher level of social adaptation to American culture are more likely to volunteer for charitable nonprofits.

Three hypotheses test aspects of social identity and self-categorization theory. Hypotheses 3 through 5 assess the association between identity and Latino philanthropic giving and alignment with group causes:

- **Hypothesis 3**: Latinos who self-categorize or ethnically identify with their country of origin or ancestry are more likely to give informally.
- **Hypothesis 4**: Latinos who self-categorize or ethnically identify with their country of origin or ancestry are more likely to donate to Latino causes.
- **Hypothesis 5**: Latinos who visually self-categorize as being part of the Latino community are more likely to give informally.
The last two hypotheses seek to explore association between cultural influence, including religion, on Latino adoption of U.S. models of giving:

- Hypothesis 6: Latinos with a higher level of social integration to American culture are more likely to give formally.
- Hypothesis 7: Latinos who are religious are more likely to give formally.
CHAPTER 3
METHODOLOGY

This section describes the selected research method and anticipated aspects of the study design, including the research instrument, sampling, and measurement. Scholarship addressing Latinos and philanthropy is based on qualitative research.

Given this lack of quantitative data and the need for generalizable information, the researcher determined that survey research would best address the study goals. Applying this quantitative research method, allowed for the analysis of relationships between key study variable assessing the roles of acculturation and identity as applied to Latino donor behavior and participation in U.S. models of philanthropy and volunteerism.

Unforeseen Challenges to Data Collection

A key limitation was securing a survey sample and obtaining unbiased information. Non-response and response bias are key concerns. The political and social landscape has shifted from the initial conception of this topic to the present. Since the 2016 election and subsequent inauguration of President Donald J. Trump, the anti-immigrant rhetoric and actions are causing fear and apprehension in the Latino community. For instance, the city of Philadelphia cancelled the annual Cinco de Mayo festival in Chicago due to concerns that it will serve as a target for ICE deportation enforcement actions (Selk, 2017). The mayor (Mayor Jim Kenny) cancelled the event because, due to the chilling effect resulting from the political climate, residents are not comfortable in participating in public celebrations (Selk). There is also a reluctance to disclose personal information (Mummolo, 2017). The chair of the Indiana Latino Institute board, Charles Garcia said, as cited in Albritton (2017), that “under the current
presidential administration—I mean it was in TIME magazine this week—there’s a fear factor that’s out into the population” (Albritton, 2017, para. 7).

The researcher was concerned that it would be difficult to not only obtain willing survey participants but to collect meaningful data, given reluctance to disclose personal much less involving information on spending, country of origin, Spanish language proficiency, and religious beliefs. The promise of anonymity alone will sufficiently not help allay fears. There is already a general (innate) mistrust of government and formal organizations among Latinos (Rivas-Vazquez, 1999). The Pew Research Center recognized that Latinos refuse to answer survey questions at higher rates largely due to distrust of government (Brown, 2015). Without a personal or trusted connection, it would be challenging to obtain data. To reduce bias to the greatest degree possible, these aspects were considered and addressed in developing the research methodology. A trusted, third-party organization, Research Now/Survey Sampling International (SSI), a company that specializes in collecting data from sample populations, facilitated data collection by distributing the questionnaire to one of its panels.

In reviewing the data set provided by SSI, it appears that there was a reluctance to provide some personal information, which may have been perceived as providing distinguishing features. Without a basis to compare this data against similar, the degree to which the bias may have influenced data quality is not known.

**Study Design**

Survey research is a quantitative research method that is often used in social science research and allows a researcher to determine whether there are relationships between variables (Rossi, Wright, & Anderson, 2013). Using a systematic approach to obtain data from individuals, the survey research method was conducted to assess
relationships between independent variables of ethnic self-categorization and acculturation and the dependent variables of U.S. models of philanthropy. This research method is most often used in public relations and provides for data collection from a geographically dispersed population (Stacks, 2017; Blair, Czaja, & Blair, 2014).

Additionally, given that largely qualitative research has been completed on the topic of Latinos and philanthropy, this quantitative research method is duly appropriate.

This section addresses the target population, sampling, measurement, questionnaire design and translation, and survey administration.

**Definitions**

In this research, formal giving is defined as providing monetary or in-kind donations (such as clothes, furniture, or food) directly to a charitable nonprofit organization. Informal giving is defined as giving monetary or in-kind donations directly to a needy friend or relative or directly to needy persons other than in one’s immediate family.

Formal volunteering is defined as donating one’s time in support of the mission of an organization. This could include serving on a committee, participating in or helping with an event or religious services, or providing professional expertise to the organization. By contrast, informal volunteerism is time that is donated to assist others directly (Jang, Wang, & Yoshioka, 2016).

**Population and Sample**

The population for this study is persons who are 18 years of age or older of Latino descent living in the U.S. The three largest Latino subgroups were the focus of this survey, specifically persons from or whose ancestors are from Mexico, Puerto Rico,
and Cuba. Survey respondents were based in one of the following eight population centers with the greatest percentages of Latinos from the three target subgroups:

- Miami, Florida
- New York City, New York
- Los Angeles, California
- Houston, Texas
- Dallas, Texas
- San Antonio, Texas
- Orlando, Florida
- Chicago, Illinois

Research Now/SSI, a firm specializing in collecting digital research data for academic and nonacademic studies, was used to secure an online purposive sample for this study. Participants were directed to an online questionnaire available in English and Spanish. A total of 1,859 survey responses were received from October 23, 2018 through November 1, 2018. Of those responses 173 did not consent, leaving 1,686 surveys of whom 463 were screened from participating because their countries of origin were not Cuba, Mexico, or Puerto Rico. As such, a total of 1,123 completed surveys was analyzed to provide a sample with a 99% confidence interval.

**Measurement**

Theories and documented research on acculturation, ethnic categorization and identity, and philanthropy provide a basis for the scales used in this study. The scales and questions used in the survey instrument align to theories and research that measure the independent variables of acculturation, self-categorization aspects of social identity, and ethnic identity, and dependent variables of giving and volunteering.

The widely used scales measure aspects related to identity salience and orientation, key factors that influence behavior. Information on the theoretical basis and scales, and their application follows.


**Acculturation (Independent Variable)**

One of the four models of acculturation developed by Berry (1980, 1997) forms the theoretical basis for the study of this variable. Specifically, the integration model which posits that an immigrant at once retains and adopts aspects of their native and host cultures but fully participate in the host cultures.

For hypotheses 1, 2, and 6, the SASH acculturation scale that integrates key aspects of acculturation measurement was used to assess the independent variable of level of adaptation. Latino acculturation has traditionally been measured by language preference and use, which has been associated with ethnic loyalty (Marin et al., 1987), interactions with others, and media use (Franco, 1983; Padilla, 1980). Media consumption (radio, television, and Internet) and English language proficiency are recognized indicators of acculturation (Shoemaker et. al., 1985). Stilling (1997) noted that consuming English language television has been linked to higher levels of acculturation. Further, research has shown that immigrants use English language media to learn about American culture (Dalisay, 2012), and that access to American media aligns to the adoption of aspects of American culture (Kim, 1977; Kim, 1988).

To determine levels of acculturation of Latino survey participants and considering aforementioned measures used to assess acculturation, the SASH, developed by Marin, Sabogal, VanOss Marin, Otero-Sabogal, and Perez-Stable (1987), in Spanish and English was used. This 12-item scale measures level of acculturation based on key dimensions of media and language use and social interaction along a continuum (Marin, Sabogal, VanOss Marin, Otero-Sabogal, & Perez-Stable, 1987). The SASH scale has been applied in more than 90 studies with respondents from a variety of Latino publics, including studies by Archuleta (2015), Cuellar, Arnold, and Maldonado (1995), and
Smart and Smart (1995). The scale has been applied to studies with the same key Latino subgroups as are the focus of this study, specifically Mexican, Puerto Rican, and Cuban samples. The reliability and validity of the SASH scale has been repeatedly confirmed (Marin, Sabogal, VanOss Marin, Otero-Sabogal, & Perez-Stable, 1987; Hamilton et al., 2009; Ellison, Jandorf & Duhamel, 2011). Key features of this scale are that it applies to multiple Latino subgroups, provides bilingual versions, is brief, and assesses multiple attributes (Wallace, Pomery, Latimer, Martinez, & Salovey, 2010).

A five-item Likert-like scale, where 1 represents only Spanish and 5 represents only English, was used for the first eight of the total 12 questions. Mean scores of all 12 items were calculated to derive acculturation scores, where an average of 3 or higher represents higher levels of acculturation (Hamilton et. al, 2009). In addition to calculating total mean scores, the scores for each of the three subfactors included in the scale, specifically related to language preference, media use, and social interaction were also derived prior to analysis. Of the 12-question scale, the first five questions (1 through 5) focus on language preference and the next three questions (5 through 8) address language use. The first eight questions integrated into the survey questionnaire in English and Spanish follow:

1. In general, what language(s) do you read and speak?
   ¿Por lo general, qué idioma(s) leé y habla usted?

2. What was the language(s) you used as a child?
   ¿Cuál fué el idioma(s) que habló cuando era niño(a)?

3. What languages do you usually speak at home?
   ¿Por lo general, en qué idioma(s) habla en su casa?

4. In which language(s) do you usually think?
¿Por lo general, en qué idioma(s) piensa?

5. What language(s) do you usually speak with your friends?
   ¿Por lo general, en qué idioma(s) habla con sus amigos(as)?

6. In what language(s) are the TV programs you usually watch?
   ¿Por lo general, en qué idioma(s) son los programas de televisión que usted ve?

7. In what language(s) are the radio programs you usually listen to?
   ¿Por lo general, en qué idioma(s) son los programas de radio que usted escucha?

8. In general, in what language(s) are the movies, TV, and radio programs you prefer to watch and listen to?
   ¿Por lo general, en qué idioma(s) prefiere oir y ver películas y programas de radio y televisión?

There are four additional questions (9 through 12), which focus on social interactions. A 5-point Likert-like scale, where 1 represents All Latinos/Hispanics and 5 represents All Americans, was used. These questions follow.

9. Your close friends are:
   Sus amigos y amigas más cercanos son:

10. You prefer going to social gatherings/parties at which the people are:
    Usted prefiere ir a reuniones sociales/fiestas en las cuales las personas son:

11. The persons you visit or who visit you are:
    Las personas que usted visita o que le visitan son:

12. If you could choose your children's friends, you would want them to be:
Si usted pudiera escoger los amigos(as) de sus hijos(as), quisiera que ellos(as) fueran

**Self-Categorization and Ethnic Identity (Independent Variables)**

Two scales derived from social identity theory are used to measure the independent variable of self-categorization and ethnic identity, specifically the Multigroup Ethnic Identity Measure–Revised (MEIM-R) and the Inclusion of Other in Self (IOS) scales. Social identity theory posits that individual behavior reflects an individual’s participation as part of a larger societal unit (Tajfel & Turner, 1986). Self-categorization (through self-perception) serves a critical role in defining alignment with one group (Oakes, Haslam, & Reynolds, 1999). The act of self-categorization directly leads to favoring the groups to which individuals believe they belong (ingroup) (Tajfel & Turner, 1986), and an activation of aspects of that identity (known as salience) (Stets & Burke, 2000). This means that overarching societal structures such as groups, organizations, cultures, and most important, individuals’ identification with these collective units guide internal behavior. Social identity considered within the context of self-categorization forms the theoretical basis for assessing whether an ingroup or outgroup association impacts Latino giving and volunteering.

For hypotheses 3, 4, and 5, an identity scale, specifically the MEIM-R, identifying self-perception of ingroup or outgroup status and two closed ended questions, related to self-perception of ethnicity and visual categorization (Inclusion of Other in Self [IOS] scale), will be used to measure these independent variables. Using graphic images and text provides a broader degree of analysis of this topic.

The measure of visual self-categorization is adapted from the IOS scale, developed by Aron, Aron, and Smollan (1992), and is shown in Figure 2-2. This visual
scale is recognized as an “effective measure of closeness” (Aron & Fraley, 1999, p. 142) and has been used in studies to measure perceived identity (Forsythe & Ledbetter, 2015; Ledbetter & Beck, 2014; Schubert & Otten, 2002; Woosnam & Aleshinloye, 2013). This scale has been used in conjunction with other ethnic identity scales with high levels of convergent validity; scale reliability and validity of the scale has been repeatedly confirmed (Aron, Aron, & Smollen, 1992; Dincer, Eksi, & Aron, 2018; Dibble, Levine, & Park, 2012; Gacther, Starmer, & Tufano, 2015).

Figure 2-2. Assessment of self-group overlap—self-categorization scale

This IOS scale identifies the overlap of self, ingroup, and outgroup through a one-item measure comprised of seven pictures. These pictures show two circles, one representing the self and the other the group, that are increasingly closer to each until they overlap, signifying shared group membership and non-membership. Respondents
will be asked to visually identify the spatial dimension that most closely aligns to their feelings of closeness in terms of a relationship with the Latino group. The images show two circles, one indicating the person (self) and the other indicating the Latino community. The figure displays a range of closeness and embeddedness from the person to the Latino community. The first image shows the greatest distance from the self to the community while subsequent images show increasing levels of closeness, until there is partial overlap beginning at the fourth image which extends to full immersion of self in the community. The IOS scale is scored using a 7-point Likert scale.

In addition to the IOS scale, the MEIM-R scale is used to measure ethnic group (identity) alignment. The MEIM-R developed by Phinney and Ong (2007) consists of six items, with three items each addressing two areas: exploration of ethnic identity and commitment to ethnic identity. A 5-point Likert scale ranging from (1) strongly disagree to (5) strongly agree is used to measure responses, with higher scores relating to stronger ethnic identity. Similar to the SASH, scores are calculated by computing the means of all six item values for a composite score and calculating individual subfactors. Studies have confirmed reliability and validity of the MEIM-R for use among various ethnic groups, including Latinos (Brown et al., 2014; Shakawa, Butler, & Shapiro, 2015; Musso, Moscardino, & Inguglia, 2017). Regarding reliability, the scale has produced Cronbach’s alphas ranging from .76 to .91 for the two subscales and .81 to .92 for the overall scale (Brown et al., 2014; Phinney & Ong, 2007; Yoon, 2011).

Prior to asking respondents the MEIM-R questions, the scale requires asking one question related to identity. The survey instrument asks respondents to respond to one, closed-ended question that asks them to identify their ethnic background (e.g., Mexican,
Mexican-American). Although an open-ended question is permitted, Billet (2016) notes the effectiveness of asking respondents to select their ethnic membership by providing labels.

The six MEIM-R questions included in the survey questionnaire follow.

1. I have spent time trying to find out more about my ethnic group, such as its history, traditions, and customs.

   He dedicado tiempo para averiguar más acerca de mi grupo étnico, como la historia, tradiciones, y costumbres

2. I have a strong sense of belonging to my own ethnic group.

   Me siento muy identificado con el grupo étnico al que pertenezco.

3. I understand pretty well what my ethnic group membership means to me.

   Tengo una idea clara de lo que mi grupo étnico significa para mí.

4. I think a lot about how my life will be affected by my ethnic group membership.

   Pienso mucho en lo que significa pertenecer a mi propio grupo étnico.

5. I have often talked to other people to learn more about my ethnic background.

   Para aprender más acerca de mis raíces étnicas, he hablado con otros acerca de mi grupo étnico

6. I feel a strong attachment towards my own ethnic group.

   Siento un gran afecto hacia mi grupo étnico.

**Philanthropic Behavior (Dependent Variables)**

The Identification Theory of Charitable Giving (Schervish & Havens, 1997) and the Panel Study of Income Dynamics (PSID) (University of Michigan, 2017) provide a
basis for the examination of dependent variables. These studies align with survey questions addressing formal and informal giving and volunteering variables in this study.

In the Identification Theory of Philanthropy, Schervish and Havens (1997) define five variables linked to philanthropic giving and volunteering, three of which are integrated into the survey questions addressing Hypotheses 4. The specific theoretical constructs that apply to this research are: communities of participation, frameworks of consciousness, and direct requests. Community of participation related questions focused on informal giving and membership and participation with religious organizations. Framework of consciousness related questions addressed formal and informal giving and volunteering related to community responsibility and religious beliefs or commitments. Direct requests related questions centered around requests from charitable or religious organizations or known persons.

The Panel Study of Income Dynamics (PSID) (University of Michigan, 2017) provide a basis for the examination of dependent variables in this study. The philanthropic module of the PSID forms the basis for open-ended survey instrument questions related to formal giving and volunteering to religious and nonreligious charitable organizations. The PSID is a longitudinal national survey that has been conducted since 1968, including sampling from the three largest population Latino groups as of 1997. The philanthropic module has been conducted biennially since 2001.

Studies, including the PSID, U.S. Census Bureau (2007), Sundeen, Garcia, and Raskoff (2009), and Taniguchi and Marshall (2014), have assessed volunteering as a dependent variable by asking respondents in an open-ended question format the amount of volunteer hours they have provided. Time provides a ratio measurement scale for volunteering. In this study, respondents were asked to fill in the approximate
number of hours they had volunteered in the past year to both nonreligious charitable organizations and to churches and religious organizations in two separate questions. Although volunteering is measured as a dependent variable in this study, the primary focus of this research is on giving.

Similarly, informal and formal philanthropy were measured by dollars provided, also a ratio measurement scale. Respondents were asked approximately how much money they had given in the past year to three groups: 1) all charitable organizations, 2) solely religious charitable organizations, and 3) family and friends (the first two groups representing formal philanthropy and the third group representing informal philanthropy).

Returning briefly to independent variables, eight questions measuring demographics that the literature suggests are relevant to philanthropy were included in the questionnaire. For example, respondents were asked their age, their gender, and their highest level of education. In total, the questionnaire consisted of 42 open- and closed-ended questions.

**Questionnaire Design and Translation**

Survey instrument design for Latino respondents should be tailored to address inherent distrust and cultural variances. To address these issues, Brown (2015) recommended including an introductory statement in the questionnaire that addresses and confirms confidentiality and anonymity of responses and providing the instrument in Spanish and English. These cultural considerations have been integrated into the questionnaire. Additionally, screening questions were added to ensure that respondents were from ethnic backgrounds appropriate for this study.
To prevent errors resulting from lack of English comprehension of the questionnaire, a challenge noted by Vega-López (2014), the survey questionnaire was provided in English and Spanish. Survey respondents are alerted to the language options at the onset in the informed consent page. There were two methods by which survey respondents could access the questionnaire in Spanish: 1) Qualtrics automatically detects the default language used, and if Spanish, will provide the informed consent and questionnaire in Spanish or 2) by having the survey respondent click on the language drop down on the informed consent screen and select Spanish. The survey instrument reflects the same intended meaning in both languages.

While Latinos share a common culture, there are Spanish language differences based on country of origin. The goal when translating surveys is to attain three types of equivalence: semantic (where words in the target language articulate the same meaning as used in the source language), normative (where text reflect social differences across cultures), and conceptual (where different words may be used to explain the concept) (Behling & Law, 2000). Using fewer numbers of possible responses and nonverbal scales improves achieving linguistic equivalence (Douglas & Craig, 2007). The survey design aligns with this best practice.

Translating survey questionnaires is typically undertaken using one of two methods: one-way direct translation or back-translation (McKay et al., 1994). Errors in developing dual language surveys result from implementing poor translation procedures, incorrectly translating content, and including content that reflects a lack of cultural appropriateness (Harkness & Schoua-Glusberg, 1998). To reduce the possibility of error from these issues for this study, the one-way direct translation process was followed, adhering to guidelines recommended by Hendricson et al. (1989). The
guidelines specify that the researcher employ translators who are aware of language variations used by persons to be surveyed, involve more than one translator in the process, and consider content not merely translate literally (Hendricson et al.).

The five-step Translate, Review, Adjudicate, Pretest, and Document (TRAPD) model of survey translation was applied to this study (Harkness, Van de Vijer, & Moher, 2003).

1. Translate. A certified professional translator specializing in the English-Spanish language pair and direction whose country of origin is Mexico was used to complete the initial questionnaire translation.

2. Review. After completing the initial translation, professional translators specializing in the English-Spanish language pair and direction whose countries or areas of origin are Cuba and Puerto Rico reviewed the translation against the English version of the questionnaire. Written edits and comments were provided by each reviewer.

3. Adjudicate. Review comments related to terminology were discussed with translators. Where word use issues were noted, a more appropriate term was suggested and vetted by all translators. Once all translators agreed on the appropriateness of use of a term, the change was considered approved and revisions to the questionnaire were made. Spanish language variations by country were thoroughly considered when translating and reviewing the questionnaire.

4. Pretest. The translation was pretested for comprehension and clarity by persons whose countries of origin coincided with survey respondents. The pretest participants were asked to provide feedback on their understanding of questions.

5. Document. Comments received from the pretest were addressed and the final Spanish language of the questionnaire was completed.

Survey instrument testing for validity is recommended using face, content, and construct testing (Hunt & Bhopal, 2004). To test for face validity, reviewers evaluated, completed, and back translated the Spanish questionnaire, as recommended by Douglas and Craig (2007).
Survey Administration

The questionnaire was developed, pilot tested, and issued using Qualtrics software. The survey was self-administered in an online environment. Online surveys provide access to groups with specific characteristics who may be difficult to reach due to geographic dispersion (Garton, Haythornwaite, & Wellman, 1999; Wellman, 1997; Wright, 2005) and allows for quicker data collection (Wright, 2005; Stacks, 2017), both of which are critical elements to this national study.

Prior to administering the survey, a pilot test of the questionnaire was conducted with 50 participants. Preliminary pilot test data were obtained and evaluated, resulting in slight modifications to screening questions and logic. Once finalized, the questionnaire was distributed to Research Now/SSI panel members from October 24, 2018 through November 2, 2018.
CHAPTER 4
RESULTS

This chapter describes the results of analytic procedures completed in SPSS for this study. The following sections describe the sample based on self-reported demographic information, discuss the procedures used for cleaning the data, and provide the results of hypothesis testing related to the influence of acculturation and ethnic identity to philanthropic behavior of Latinos living in the U.S.

This section is divided into two parts, providing a description of results by variable and conducting analyses to test study hypotheses. A discussion of hypothesis testing and results by hypothesis is also provided.

**Descriptive Statistics of Demographic Information**

Of the 1,123 survey respondents, 63% (N=703) were female and 37% (N=420) were male, with only 8% (N=90) selecting the Spanish version of the questionnaire. The majority of respondents (54% or N=609) were of Mexican descent while the remaining respondents were from Puerto Rico (32% or N=358) or Cuba (14% or N=156), aligning with the general distribution by nationality of origin found in the U.S. The mean age of respondents was 36 years of age (SD=14.66).

In terms of education, a majority (62% or N=702) reported having completed undergraduate or graduate degrees, while 33% (N=369) noted having completed high school. A majority of respondents (78% or N=878) were born in the U.S.; the mean age of arrival to the U.S. for the 22% (N=245) who were not born in the U.S. is 14 years old. Religious services are regularly attended by 43% (N=490) of respondents.

The mean annual household income was the $50,000 to $74,999 category, with 21% (N=238) of respondents in the $0 to $24,999 income category, 28% (N=319) of
respondents aligning with the $25,000 to $49,000 income category, 20% (N=224) of respondents with the $50,000 to $74,999 income category, 13% (N=146) of respondents with the $75,000 to $99,999 income category, and 18% (N=202) reporting income that exceeds $100,000 annually. Nearly half of the 1,123 respondents (49% or 557) reported an annual household income of $0 to $49,999. A summary of key sample characteristics is presented in Table 4-1.

<table>
<thead>
<tr>
<th>Demographic</th>
<th>Mean</th>
<th>SD</th>
<th>Minimum</th>
<th>Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td>36</td>
<td>14.66</td>
<td>18</td>
<td>81</td>
</tr>
<tr>
<td>Completed education</td>
<td>2.71</td>
<td>.75</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Annual income</td>
<td>3.01</td>
<td>1.89</td>
<td>1</td>
<td>9</td>
</tr>
<tr>
<td>Participation in religion</td>
<td>1.56</td>
<td>.49</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Born in the U.S.</td>
<td>1.22</td>
<td>.41</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Years living in the U.S.</td>
<td>31.63</td>
<td>15.78</td>
<td>0</td>
<td>81</td>
</tr>
<tr>
<td>Age at immigration</td>
<td>14.29</td>
<td>11.27</td>
<td>0</td>
<td>58</td>
</tr>
</tbody>
</table>

**Data Review and Preliminary Analysis**

Once data collection was completed in Qualtrics, the survey data file was exported to an SPSS file. In SPSS and prior to analyzing the data, the researcher reviewed and, where necessary, revised the values, measures, and labels to facilitate statistical analysis. In addition, the researcher reviewed the entries provided by all survey respondents and, where necessary, corrected obvious data entry errors, such as including a year of birth instead of number of years old when asked for age.

To prepare for data analysis, composite mean scores for the 12-item SASH and 6-item MEIM-R scales were calculated and new variables for each were added to the SPSS file. The researcher also calculated composite scores for each data point for the three individual SASH subfactors, which assess language preference, media use, and social interaction, and the two MEIM-R subfactors related to identity exploration and commitment. One additional process was completed involving dichotomizing results of
the SASH scale to indicate high, specifically 3 or greater, and low, specifically 2.99 or less, levels of composite SASH acculturation scores.

To determine the appropriate statistical analyses to conduct, the researcher conducted a test for normality for dependent variable data for giving and volunteering using the Shapiro-Wilk test. Results of the test showed that there is statistical significance \( p < .001 \), indicating a non-normal distribution. As such, nonparametric statistical procedures should be completed. The researcher also analyzed the skewness (which refers to the distribution of the data) and kurtosis (an indicator of the peak in the distribution) of the data (Pallant, 2013). Results showed a positive skew, meaning that data points are clustered to the left at low values, and positive kurtosis, meaning that there are marked peaks in the data. The histograms from the Shapiro-Wilk analysis visually confirmed the skewness and kurtosis. The researcher reviewed the outliers in the dataset and determined that it was not feasible to remove outliers.

Prior to determining the calculations to complete, the researcher assessed whether to transform the data to allow for more robust parametric data analysis. Transforming data to a normal distribution can produce misleading results. If the population’s distribution is not known and assumptions cannot be made about the population, nonparametric tests allow the sample to be analyzed without inadvertently distorting the underlying data (Tyler, 2017; Hoskins, 2018).

Transforming data to fit into a statistical model can be “a complex way of distorting both the data and the truth” (Wheeler, 2009, para 27). For these reasons, this analysis used nonparametric statistical procedures, since quantitative research on this population related to this topic has not been previously conducted, the data collected
had a non-normal distribution, and no reliable data exists to indicate even distribution about the population from which the sample was drawn, so no assumptions could be made about the population.

Given the nonparametric results emerging from the test of normality, the researcher transformed the continuous dependent variables related to giving and volunteering using SPSS’ variable binning procedure to produce ordinal level data for use in the Spearman rank sum analysis. This analysis has been applied on studies involving the SASH scale (Ciampa et al., 2013). Studies have used the SASH composite score as ordinal, such as Helfgott (2004), Lora, Lewis, Eskridge, Stanek-Krogstrand, & Travnicek (2011) and Nielson and Waldemar (2016), and continuous, such as Kypuros (2014) D’Anna Hernandez et al. (2012), variables. This study uses the score as an ordinal level of measurement, as it is most often applied. One-tailed analyses were conducted, given the directional assumption of the hypotheses.

**Descriptive Statistics of Variables**

This section describes the sample characteristics and basic features, such as mean and standard deviation, of the data collected. Summaries are provided for each study variable and scale component and subcomponent.

The information presented in this section also highlight potential relationships that may exist between variables. Later in this chapter, the data are analyzed inferentially to determine whether associations between them exist.

**Philanthropic Behavior**

Seven questions solicited information regarding the respondent’s philanthropic giving and volunteering. Respondents were asked to indicate the total individual and combined amounts in dollars given annually to charitable and religious organizations.
The sample total Latino formal giving mean is $384.31 ($SD=1,054) in the past year and Latino total volunteering mean in the past year is 28.64 hours ($SD=108). A summary of the descriptive statistics for Latino philanthropic behavior is presented in Table 4-2.

Table 4-2. Descriptive statistics of Latino philanthropic behavior for all survey respondents

<table>
<thead>
<tr>
<th>Information</th>
<th>Mean</th>
<th>SD</th>
<th>Minimum</th>
<th>Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal giving (total)</td>
<td>$384.31</td>
<td>1,054.42</td>
<td>.00</td>
<td>$15,000.00</td>
</tr>
<tr>
<td>Formal giving (charitable)</td>
<td>$205.22</td>
<td>711.63</td>
<td>.00</td>
<td>$10,000.00</td>
</tr>
<tr>
<td>Formal giving (religious)</td>
<td>$262.16</td>
<td>901.07</td>
<td>.00</td>
<td>$10,000.00</td>
</tr>
<tr>
<td>Informal giving</td>
<td>$478.43</td>
<td>1,689.64</td>
<td>.00</td>
<td>$25,500.00</td>
</tr>
<tr>
<td>Volunteering (total)</td>
<td>28.64</td>
<td>108.68</td>
<td>.00</td>
<td>1,200.00</td>
</tr>
<tr>
<td>Volunteering (charitable)</td>
<td>21.25</td>
<td>99.56</td>
<td>.00</td>
<td>1,986.00</td>
</tr>
<tr>
<td>Volunteering (religious)</td>
<td>23.85</td>
<td>107.64</td>
<td>.00</td>
<td>1,986.00</td>
</tr>
</tbody>
</table>

Of Latino participants who gave, the total giving and charitable giving means of $539.78 and $362.35 were greater than the current national average of $326 annual giving average for recurring donors (NP Source, 2018). Giving to religious organizations was higher than to charitable organizations, but the largest mean of $726.05 resulted from informal giving to friends and family. A summary of giving levels and amounts for sample respondents who participated in philanthropy is presented in Table 4-3.

The sums of the charitable and religious formal giving are larger than the total formal giving measured, indicating that there may be response bias (such as respondent reluctance to discloser personal financial information or rushing through the survey) or confusion in the measurement. Formal giving to charitable organizations and formal giving to religious organizations values are used in the analysis of this data to provide a more complete, disaggregated assessment of formal giving. Giving data by country generally aligns with the sample distribution percentages. Table 4-4 presents formal and informal giving data by country of origin and percent contribution.
Table 4-3. Descriptive statistics of sample of Latino donors who gave

<table>
<thead>
<tr>
<th>Variable</th>
<th>Mean giving in dollars</th>
<th>Number of sample participants who give</th>
<th>Percent of sample participants who give</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal giving (total)</td>
<td>$539.78</td>
<td>Yes 724 No 399</td>
<td>Yes 64% No 36%</td>
</tr>
<tr>
<td>Formal giving (charitable)</td>
<td>$362.35</td>
<td>Yes 636 No 487</td>
<td>Yes 57% No 43%</td>
</tr>
<tr>
<td>Formal giving (religious)</td>
<td>$491.50</td>
<td>Yes 595 No 528</td>
<td>Yes 53% No 47%</td>
</tr>
<tr>
<td>Informal giving</td>
<td>$726.05</td>
<td>Yes 740 No 383</td>
<td>Yes 66% No 34%</td>
</tr>
</tbody>
</table>

Table 4-4. Descriptive statistics of sample of Latino donors

<table>
<thead>
<tr>
<th>Information</th>
<th>Country of origin of Latino donors</th>
<th>Percent of sample from each country</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Cuba</td>
<td>Mexico</td>
</tr>
<tr>
<td>Formal giving (total)</td>
<td>110</td>
<td>390</td>
</tr>
<tr>
<td>Formal giving (charitable)</td>
<td>96</td>
<td>343</td>
</tr>
<tr>
<td>Formal giving (religious)</td>
<td>89</td>
<td>333</td>
</tr>
<tr>
<td>Informal giving</td>
<td>95</td>
<td>421</td>
</tr>
</tbody>
</table>

Of Latino participants who volunteered, the means of total combined charitable and religious volunteering and volunteering for religious causes or organizations, 60 hours and 57 hours, were greater than the current national average of 52 hours per year (NP Source, 2018). The annual mean hours of volunteering with charitable organizations is equal to the current national average. A summary of volunteering levels and amounts for sample respondents who participated in philanthropy is presented in Table 4-5.
Similar to responses to formal giving, the sums of the charitable and religious volunteering hours are larger than the total individual hours measured for each type of organization, indicating that there may be response bias (such as respondent reluctance to disclose personal financial information or rushing through the survey) or confusion with the measurement. Volunteering to charitable organizations and volunteering to religious organizations values are used in the analysis of this data to provide a more complete, disaggregated assessment of volunteering behavior.

**Motivations for Philanthropic Behavior**

Six questions on the survey focused on three variables (specifically communities of participation, frameworks of consciousness, and direct requests) identified by Schervish and Havens (1997) that are linked to philanthropic giving and volunteering. A 7-point Likert scale ranging from strongly disagree to strongly agree was used. Community of participation related questions focused on informal giving and membership and participation with religious organizations. Framework of consciousness related questions addressed formal and informal giving and volunteering related to community responsibility and religious beliefs or commitments. Means for responses to the six questions ranged from 4.03 to 4.91, which lies in the neither agree nor disagree
to somewhat agree range. A summary of the descriptive statistics for motivations for Latino philanthropic behavior is presented in Table 4-6.

Table 4-6. Descriptive statistics of motivations for Latino philanthropic behavior

<table>
<thead>
<tr>
<th>Question Statement</th>
<th>Mean</th>
<th>SD</th>
<th>Minimum</th>
<th>Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receiving a request from a personal or work friend motivates me to give or volunteer to a charitable organization</td>
<td>4.11</td>
<td>1.72</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>Charitable organization make our communities better places to live</td>
<td>4.91</td>
<td>1.54</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>I prefer to give money to family, friends, or neighbors rather than charitable organizations</td>
<td>4.12</td>
<td>1.65</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>It is my responsibility to support charitable organizations that impact the Latino/Hispanic community.</td>
<td>4.31</td>
<td>1.62</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>I am socially obligated to help Latinos/Hispanics.</td>
<td>4.17</td>
<td>1.72</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>My religion motivates me to help Latinos/Hispanics.</td>
<td>4.03</td>
<td>1.79</td>
<td>1</td>
<td>7</td>
</tr>
</tbody>
</table>

Acculturation

The SASH scale was used to measure acculturation levels of Latino survey participants. The mean 5-point Likert SASH score, composed of the results of the 12 items comprising the scale, was calculated. Additionally, means for each of the three subfactors relating to language, media use, and social interaction were also identified. The language and media use items ask respondents about their language preferences. The SASH identifies those with mean scores of 2.99 or less as being less acculturated than those with score of 3.00 and higher. The mean for the composite score is 3.10
(SD=.70), which is one tenth of a percent above the indicator for higher acculturation. The SASH composite score was dichotomized to identify low and high levels of acculturation. Of the 1,123 survey respondents, 46% (N=515) scored as having low levels of acculturation for a composite score of 2.99 or less, while 54% (N=608) indicated having high levels of acculturation for a composite score of 3.00 or more.

The mean of the social interaction subfactor is the only element whose mean is in the less acculturated range. These items ask respondents to identify preferences for socializing on a 5-point Likert scale, ranging from a preference to engage with 1) All Latinos/Hispanics to 5) All Americans. A summary of the descriptive statistics for the SASH scale of acculturation is presented in Table 4-7.

<table>
<thead>
<tr>
<th>Information</th>
<th>Mean</th>
<th>SD</th>
<th>Minimum</th>
<th>Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td>SASH composite score</td>
<td>3.10</td>
<td>.70</td>
<td>.00</td>
<td>5.00</td>
</tr>
<tr>
<td>SASH language subfactor</td>
<td>3.53</td>
<td>.97</td>
<td>.00</td>
<td>5.00</td>
</tr>
<tr>
<td>SASH media use subfactor</td>
<td>3.84</td>
<td>.97</td>
<td>.00</td>
<td>5.00</td>
</tr>
<tr>
<td>SASH social interaction subfactor</td>
<td>2.91</td>
<td>.80</td>
<td>.00</td>
<td>5.00</td>
</tr>
</tbody>
</table>

Results of the individual questions comprising the SASH scale follow. Descriptive statistics for the SASH scale of acculturation are presented in Table 4-8. The language and media use subfactors rate a respondent’s preference from only Spanish, which is given a score of 1, to only English, which is allocated a score of 5. A mean score of 3 indicates that the respondent’s language preference is both Spanish and English equally. A mean score of 3.5 indicates that the respondent’s preferred language lies between both measures of equally preferring Spanish and English and preferring English over Spanish.
Table 4-8. Descriptive statistics of the SASH acculturation scale subfactors

<table>
<thead>
<tr>
<th>Information</th>
<th>Mean</th>
<th>SD</th>
<th>Minimum</th>
<th>Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Language use subfactor</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>In general, in what language(s) do you read and speak?</td>
<td>3.55</td>
<td>.976</td>
<td>.00</td>
<td>5.00</td>
</tr>
<tr>
<td>What was the language(s) you used as a child?</td>
<td>3.14</td>
<td>1.323</td>
<td>.00</td>
<td>5.00</td>
</tr>
<tr>
<td>What language(s) do you usually speak at home?</td>
<td>3.48</td>
<td>1.149</td>
<td>.00</td>
<td>5.00</td>
</tr>
<tr>
<td>In which language(s) do you usually think?</td>
<td>3.76</td>
<td>1.137</td>
<td>.00</td>
<td>5.00</td>
</tr>
<tr>
<td>What language(s) do you usually speak with your friends?</td>
<td>3.76</td>
<td>1.072</td>
<td>.00</td>
<td>5.00</td>
</tr>
<tr>
<td><strong>Media use subfactor</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>In what language(s) are the TV programs you usually watch?</td>
<td>3.88</td>
<td>1.048</td>
<td>.00</td>
<td>5.00</td>
</tr>
<tr>
<td>In what language(s) are the radio programs you usually listen to?</td>
<td>3.74</td>
<td>1.116</td>
<td>.00</td>
<td>5.00</td>
</tr>
<tr>
<td>In general, in what language(s) are the movies, TV, and radio programs you prefer to watch and listen to?</td>
<td>3.94</td>
<td>1.028</td>
<td>.00</td>
<td>5.00</td>
</tr>
<tr>
<td><strong>Social interaction subfactor</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Your close friends are:</td>
<td>2.83</td>
<td>1.046</td>
<td>.00</td>
<td>5.00</td>
</tr>
<tr>
<td>You prefer going to social gatherings/parties at which the people are:</td>
<td>3.01</td>
<td>.892</td>
<td>.00</td>
<td>5.00</td>
</tr>
<tr>
<td>The persons you visit or who visit you are:</td>
<td>2.80</td>
<td>1.058</td>
<td>.00</td>
<td>5.00</td>
</tr>
<tr>
<td>If you could choose your children’s friends, you would want them to be:</td>
<td>3.06</td>
<td>.862</td>
<td>.00</td>
<td>5.00</td>
</tr>
</tbody>
</table>
**Ethnic Self-identification**

Ethnic self-categorization directly leads to favoring the group to which a person believes they belong, which Tajfel & Turner (1986) refer to as the ingroup. This self-identification activates aspects of that identity (known as salience) (Stets & Burke, 2000). This study seeks to understand whether the self-categorization as Latino influences persons of Cuban, Mexican, and Puerto Rican descent to give and volunteer using U.S. models of philanthropy.

The MEIM-R scale assesses ethnic identification using six items which are rated using a 5-point Likert scale ranging from 1) strongly disagree to 5) strongly agree. Prior to asking respondents the questions, the scale requires that respondents identify their ethnicity. As such, a closed-ended question asking respondents to describe their ethnicity was included. Approximately 62% (N=701) of survey respondents continue to solely identify with their countries of origin, while 38% (N=422) partially or fully self-identify as American. The frequency of respondent’s identification by country is provided in Table 4-9.

| Table 4-9. Descriptive statistics of the ethnic self-identification by country of origin |
|-------------------------------------|--------|--------|
| **Country Selected** | **Number (N)** | **Percent** |
| Cuban | 104 | 9.3 |
| Mexican | 366 | 32.6 |
| Puerto Rican | 231 | 20.6 |
| Cuban-American | 29 | 2.6 |
| Mexican-American or Chicano | 164 | 14.6 |
| Puerto-Rican-American | 91 | 8.1 |
| American | 80 | 7.1 |
| Other | 58 | 5.2 |

In addition to the MEIM-R scale, the IOS visual scale provides another indicator of self-identification. In this scale, respondents are asked to visually identify their
position within Latino society from seven possible options showing distance from the
person to the group through the person situated within the group. The mean IOS scale
results indicate that the majority of respondents self-identify as being a part of or within
the Latino ethnic group, with 69.5% (N=785) selecting options 4, 5, 6, or 7 which show
the person within the group. The results of the IOS scale are shown in Figure 4-1. A
summary of the descriptive statistics for the MEIM-R and IOS scale of acculturation is
presented in Table 4-10.

![Diagram showing the percentage of respondents for each position within the Latino society]

**Figure 4-1. Results of the IOS scale visual identification alignment**

<table>
<thead>
<tr>
<th>Information</th>
<th>MEIM-R</th>
<th>IOS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Information</strong></td>
<td>Mean</td>
<td>SD</td>
</tr>
<tr>
<td>MEIM-R</td>
<td>3.48</td>
<td>.82</td>
</tr>
<tr>
<td>IOS</td>
<td>4.82</td>
<td>2.09</td>
</tr>
</tbody>
</table>
The MEIM-R scale provides an objective assessment of a person’s attachment to their ethnic background, from 1) strongly disagree to 5) strongly agree. Descriptive statistics for the MEIM-R scale items are presented in Table 4-11.

Table 4-11. Descriptive statistics of the MEIM-R scale items

<table>
<thead>
<tr>
<th>Information</th>
<th>Mean</th>
<th>SD</th>
<th>Minimum</th>
<th>Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have spent time trying to find out more about my ethnic group, such as its history, traditions, and customs.</td>
<td>3.38</td>
<td>1.11</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>I have a strong sense of belonging to my own ethnic group.</td>
<td>3.54</td>
<td>1.00</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>I understand pretty well what my ethnic group membership means to me.</td>
<td>3.66</td>
<td>.99</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>I think a lot about how my life will be affected by my ethnic group membership.</td>
<td>3.31</td>
<td>1.05</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>I have often talked to other people to learn more about my ethnic group.</td>
<td>3.42</td>
<td>1.08</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>I feel a strong attachment towards my ethnic group.</td>
<td>3.60</td>
<td>1.04</td>
<td>1</td>
<td>5</td>
</tr>
</tbody>
</table>

**Inferential Statistics**

Analyses of the association between study variables are presented in this section. There is a tendency for large sample sizes to skew results towards significance, with small changes reflecting significance (Lantz, 2013). As such, the pitfall is that researchers rely on $p$-values to confirm hypotheses that may have little if any practical significance (Lin, M., H. C. Lucas, and G. Shmueli, 2013).
Often cited research (Sullivan & Feinn, 2012) emphasizes the importance of interpreting effect size in analyses of large samples, since the $p$ value may indicate statistical significance with very little to meaningless effects. The analysis provided in this section applies these guidelines, as noted by Pallant (2013) and Field (2009), when assessing correlation coefficients: Small equals .10 to .29; medium equals .30 to .49; and large equals .50 to 1.0. Coefficients less than .10 are recognized as negligible.

Seven hypotheses form the basis for inferential analysis of the data. Hypotheses 1 and 2 assess the association between acculturation theory on Latino philanthropic giving and volunteering behavior. Hypotheses 3, 4, and 5 address the relationship between ethnic identification and Latino giving and support. Hypotheses 6 and 7 address the association between religion and one area of acculturation related to social integration and religion with formal giving.

**Data Analysis for Acculturation and Philanthropy**

The first two hypotheses address the association between a Latino U.S. resident’s level of acculturation and formal giving and volunteering with charitable and religious organizations. Tests of the relationship between these variables is provided in this section.

The SASH scale forms the basis for analysis of acculturation. This variable is assessed using a composite score composed of language preference, media use, and social interaction factors.

**Formal Giving**

Hypothesis 1 posits that Latinos with higher levels of social adaptation to American culture are more likely to give formally. To assess the association between Latino acculturation and formal giving, the Spearman rank sum test was applied to test
the relationship. Results of the Spearman’s rank sum test between the SASH acculturation scores and three dependent variables addressing formal giving to charitable and religious organizations are provided in Table 4-12.

<table>
<thead>
<tr>
<th>SASH Composite Score</th>
<th>Correlation Coefficient</th>
<th>Sig. (1-tailed)</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Formal giving to charitable organizations</td>
<td>Formal giving to religious organizations</td>
<td></td>
</tr>
<tr>
<td></td>
<td>-.071</td>
<td>-.127</td>
<td>1123</td>
</tr>
<tr>
<td></td>
<td>.009</td>
<td>.000</td>
<td>1123</td>
</tr>
</tbody>
</table>

Results of the test indicate that there is some statistical significance between the key variables. There is a negligible negative relationship between acculturation and formal giving to charitable organizations (Spearman’s rho=-.07, p <.01), and a small negative relationship between acculturation and formal giving to religious organizations (Spearman’s rho=-.12, p <.001).

While results indicate that there is a relationship between acculturation and total giving to charitable and religious organizations, the association is negative, and the strength of the association is negligible. This means that as a Latino becomes more adapted to a host environment, giving to charitable organizations decreases.

The relationship between acculturation and formal giving to religious organizations is also negative but with a slightly larger (but still considered small) effect. This means that as Latinos acculturate and continue to adapt to host environments, the amount of giving to religious organizations decreases for a small percentage of the population. The hypothesis posited that as persons acculturate, giving increases; the findings reflect that there is small association between the variables and that giving
decreases. Since there is no positive association between these two variables, Hypothesis 1 is not supported.

**Volunteering**

Hypothesis 2 posits that Latinos with higher levels of social adaptation to American culture are more likely to volunteer with charitable organizations. To assess the association between Latino acculturation and volunteering for charitable organizations, the Spearman rank sum test was applied to test the relationship. Results of the Spearman’s rank sum test between the SASH acculturation scores and volunteering with charitable organizations are provided in Table 4-13.

<table>
<thead>
<tr>
<th>SASH Composite Score</th>
<th>Volunteering with charitable organizations</th>
<th>Volunteering with religious organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Correlation Coefficient</td>
<td>-.104</td>
<td>-.127</td>
</tr>
<tr>
<td>Sig. (1-tailed)</td>
<td>.000</td>
<td>.000</td>
</tr>
<tr>
<td>N</td>
<td>1123</td>
<td>1123</td>
</tr>
</tbody>
</table>

Results of the test indicate that there is statistical significance between the key variables. There is a small, negative association between acculturation and volunteering with charitable organizations (Spearman’s rho=-.10, p <.001), and a small negative association between acculturation and volunteering with religious organizations (Spearman’s rho=-.12, p <.001). This means that as Latinos further adapt to the host environment, volunteering decreases. Since there is no positive association between these variables, Hypothesis 2 is not supported.

**Data Analysis for Ethnic Self-identification and Ingroup Support**

Hypothesis 3 posits that Latinos who ethnically identify with their country of origin or ancestry are more likely to give informally to friends or family. To assess the
association between Latinos who self-categorize or ethnically identify with their country of origin or ancestry and informal giving, the Spearman rank sum test was applied to test for the association. Results of the Spearman’s rank sum test between the MEIM-R composite score and variables assessing informal giving to friends and family and preferences to do so are provided in Table 4-14.

Table 4-14. Ethnic self-categorization and informal giving correlation results

<table>
<thead>
<tr>
<th>MEIM-R</th>
<th>Informal giving</th>
<th>Preference to give informally</th>
</tr>
</thead>
<tbody>
<tr>
<td>Correlation Coefficient</td>
<td>.108</td>
<td>.209</td>
</tr>
<tr>
<td>Sig. (1-tailed)</td>
<td>.001</td>
<td>.000</td>
</tr>
<tr>
<td>N</td>
<td>1123</td>
<td>1123</td>
</tr>
</tbody>
</table>

Results of the test indicate that there is statistical significance between the key variables. There is a small, positive relationship between ethnic self-categorization and actual informal giving (Spearman’s rho=.10, p <.01) and slightly stronger but still small, positive ethnic self-categorization and preference for informal giving (Spearman’s rho=.20, p <.001). The results confirm that there is an association between self-identifying with a country of origin and informal giving and an association between this self-identification and preference for informal giving. This means that a person who identifies with their country of origin, has a preference for and tends to give informally. Given this ingroup preference for giving, Hypothesis 3 is supported.

Hypothesis 4 posits that Latinos who self-categorize or ethnically identify with their country of origin or ancestry are more likely to donate to Latino causes. To assess the association between Latinos who self-categorize or ethnically identify with their country of origin or ancestry and giving to Latino causes, the Spearman rank sum test was applied to test for the association. Results of the Spearman's rank sum test
between MEIM-R scale scores and questions based on Schervich and Haven’s (1997) Theory of Charitable Giving applied to Latinos are provided in Table 4-15.

**Table 4-15. Ethnic self-categorization and Latino community support**

<table>
<thead>
<tr>
<th>MEIM-R</th>
<th>Social obligation to help Latinos</th>
<th>Support charitable organizations that help Latinos</th>
</tr>
</thead>
<tbody>
<tr>
<td>Correlation Coefficient</td>
<td>.510</td>
<td>.520</td>
</tr>
<tr>
<td>Sig. (1-tailed)</td>
<td>.000</td>
<td>.000</td>
</tr>
<tr>
<td>N</td>
<td>1123</td>
<td>1123</td>
</tr>
</tbody>
</table>

Results of the test indicate that there is statistical significance between the key variables. There are large, positive associations between ethnic self-categorization and a sense of obligation and support to help the ingroup (Spearman’s rho=.510, \( p < .001 \) and Spearman’s rho=.520, \( p < .001 \), respectively). The greater the identification with country of origin or ingroup, the greater the sense of obligation and commitment to supporting ingroup causes. Given this positive association, Hypothesis 4 is supported.

There is a small positive association between ethnic self-identification and volunteering to charitable organizations (Spearman’s rho = .225, \( p < .001 \)) and ethnic self-identification and volunteering to religious organizations (Spearman’s rho = .183).

There are higher and medium correlations coefficients related to ethnic self-identification and formal giving, ranging from Spearman’s rho=.225 to .230, as shown in Table 4-16.

**Table 4-16. Ethnic self-categorization and formal giving correlation results**

<table>
<thead>
<tr>
<th>MEIM-R</th>
<th>Formal giving to charitable organizations</th>
<th>Formal giving to religious organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Correlation Coefficient</td>
<td>.230</td>
<td>.225</td>
</tr>
<tr>
<td>Sig. (1-tailed)</td>
<td>.001</td>
<td>.001</td>
</tr>
<tr>
<td>N</td>
<td>1123</td>
<td>1123</td>
</tr>
</tbody>
</table>
Hypothesis 5 addresses Latino visual self-categorization with country of origin and informal giving. To assess the association between Latinos who visually self-categorize with their country of origin or ancestry and informal giving, the Spearman rank sum test was applied to test for the association. Results of the Spearman’s rank sum test between the IOS scale scores and variables assessing informal giving and related preferences for informal giving are provided in Table 4-17.

Table 4-17. Visual ethnic self-categorization and informal giving

<table>
<thead>
<tr>
<th>IOS</th>
<th>Correlation Coefficient</th>
<th>Informal giving</th>
<th>Preference to give informally</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>.068</td>
<td>-.003</td>
<td></td>
</tr>
<tr>
<td>Sig. (1-tailed)</td>
<td>.023</td>
<td>.922</td>
<td></td>
</tr>
<tr>
<td>N</td>
<td>1123</td>
<td>1123</td>
<td></td>
</tr>
</tbody>
</table>

There is a positive, negligible relationship between the visual ethnic self-identification and informal giving (Spearman’s rho=.068, p <.05). There is no statistical significance between identification of self and preference for informal giving (Spearman’s rho=-.033, p >.05). Given the lack of association between visual self-identification and preferences for ingroup philanthropy, Hypothesis 5 is not supported.

**Data Analysis for Social Integration and Religion**

Hypothesis 6 posits that Latinos with a higher level of social integration to American culture are more likely to follow U.S. models of formal giving. Social integration is a SASH scale subfactor which asks respondents to identify the persons with whom they prefer to engage socially at parties or gathering and as friends. Results of the Spearman’s rank sum test based on IOS scale scores and variables assessing informal giving and related preferences for informal giving are provided in Table 4-18.
While there is statistical significance related to social interaction and formal giving (Spearman’s rho=.06, \(p<.05\)), there is negligible strength of correlation. There is no statistical significance related to formal giving to religious organizations. Given this lack of significance and strength of association, Hypothesis 6 is not supported.

Religion serves a prominent role in Latino culture. Hypothesis 7 posits that Latinos who participate in religion are more likely to follow U.S. models of formal giving. This hypothesis seeks to identify if being religious motivates individuals to give is associated with actual engagement in formal giving and volunteering. Results of the Spearman rank sum correlation test are presented in Table 4-19.

<table>
<thead>
<tr>
<th>Table 4-18. Social interaction and formal giving correlation results</th>
</tr>
</thead>
<tbody>
<tr>
<td>SASH social interaction subfactor</td>
</tr>
<tr>
<td>----------------------------------</td>
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<tr>
<td>SASH social interaction subfactor</td>
</tr>
<tr>
<td>SASH social interaction subfactor</td>
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</tbody>
</table>

Results of the Spearman rank sum calculations indicate that there is a small, positive association between religious motivation and giving to charitable organizations (Spearman’s rho=.227; \(p<.000\)). There are medium, positive associations between
religious motivation and giving (Spearman’s rho=.362; p<.000) and volunteering (Spearman’s rho=.357; p<.000) with religious organizations. An individual who is religiously motivated to give tends to support charitable and religious organizations through giving and volunteering. There is a positive association between the belief and the behavior. For this reason, Hypothesis 7 is supported.

**Additional Analysis**

Volunteering and giving have been linked in previous studies of non-Latino persons. Results of the Spearman’s rank sum test between volunteering and giving are provided in Table 4-20.

**Table 4-20. Volunteering and giving correlation results**

<table>
<thead>
<tr>
<th></th>
<th>Volunteering with charitable organizations</th>
<th>Volunteering with religious organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal giving to charitable organizations</td>
<td>Correlation Coefficient Sig. (1-tailed) N</td>
<td>.540 .000 1123</td>
</tr>
<tr>
<td>Formal giving to religious organizations</td>
<td>Correlation Coefficient Sig. (1-tailed) N</td>
<td>.436 .000 1123</td>
</tr>
</tbody>
</table>

Results of the test confirm an association between these variables. Volunteering with charitable and religious organizations is positively linked to giving. The strengths of this association are significant at medium to large levels, with Spearman rho coefficients ranging from .302 to .505.

Previous studies have indicated that income levels influence giving. This association was confirmed by this study. There is a medium, positive relationship between total giving to religious and charitable organizations and annual income.
(Spearman’s rho=.304; p<.001) and a small, positive relationship between giving to
religious organizations and annual income (Spearman’s rho=.247; p<.001). There is a
small, positive relationship between total volunteering to nonreligious charitable
organizations and income (Spearman’s rho = .225; p<.001), indicating that as income
increases so do the tendency to volunteer.

There are small, positive relationships between level of schooling completed and
giving to nonreligious charitable organizations (Spearman’s rho = .238; p<.001) and
religious organizations (Spearman’s rho = .174; p<.001). There are small, positive
relationships between level of schooling completed and volunteering with nonreligious
charitable (Spearman’s rho = .196; p<.001) and religious (Spearman’s rho = .145;
p<.001) organizations.
CHAPTER 5
DISCUSSION

This chapter provides an interpretation of results presented in Chapter 4 and conclusions related to the study’s hypotheses. Results of the Spearman rank sum focus on the strength of the correlation coefficient in determining practical significance.

As the first national quantitative study conducted on Latinos and philanthropy, there are study results that will be applicable and useful in further exploring this subject. This chapter provides key lessons derived from this study which can be applied in future research.

Research Frame

The literature review identifies key factors comprising Latino cultural identity, including a strong sense of shared identity, the centrality of religion, dual cultural alignment, and a collectivist orientation. The potential impact of immigrant transitions from the cultural practices of their country of origin or ancestry to a U.S. cultural context and the adoption of the U.S. model of philanthropy are critical to understanding new donors.

The influence of the external environment and internal identity alignment and commitment that occur during adaptation may result in belief shifts that impact behavior. This research specifically addresses the impact of the level of acculturation and social identity, specifically ethnic self-identification, on Latino giving and volunteering behavior.

Latino Philanthropic Behavior

Previous research indicates that a distrust for organizations, social/cultural characteristics (ethnic identity), and a tradition of informal giving form the basis for
Latino giving (Rivas-Vazquez, 1999). This research confirms that Latinos support charitable and religious organizations due to an interest in supporting the community. Latinos in the U.S. are continuing the tradition of informal giving and have a sense of responsibility for helping other Latinos. Survey respondents report giving in larger amounts informally rather formally. Informal giving amounts in this study exceed all forms of formal giving, with informal giving surpassing formal giving to charitable organizations by 200% and formal giving to religious organizations by 148%.

Latinos also formally give to organized philanthropy, indicating support for and social engagement with host country institutions. In fact, donations to charitable and religious organizations are greater in value as compared to current NP Source (2018) estimates for non-Latino giving.

Religion serves a prominent role in Latino culture. Churches continue to serve as a focal point of interest for the Latino community, with nearly half of survey respondents report regularly attending religious services. Religion has a direct impact on Latino giving. Survey respondents indicated that religion serves as a motivating factor for Latino giving to both charitable and religious organizations. This belief is supported by behavior, with Latinos giving to and volunteering with religious organizations at higher rates than with non-religious charitable organizations.

There is a link between total giving to religious and charitable organizations and annual income, but a weak link between giving exclusively to religious organizations and annual income. This indicates that although a donor’s giving amount to charitable organizations may fluctuate given income availability, giving to religious organizations in
independent of income. This reinforces the significant cultural role that religion occupies in Latino culture.

**Volunteering**

Latino giving is complemented by volunteering with charitable and religious organizations. Volunteerism is often a point of entry for immigrants and provides social capital to participants. There is a strong positive link between Latino volunteering and formal giving to charitable and religious organizations.

This finding aligns with previous studies on non-Latinos which show that there is a correlation between volunteering and contributing to charitable organizations (Jang et al., 2016). In fact, Latinos have indicated that volunteering is an important factor in becoming a donor (Wagner and Hall-Russell, 1999). This study found a significant association between religion as motivation and volunteering with religious organizations.

**Acculturation and Philanthropic Behavior**

Study results fail to show that increased levels of acculturation are linked to increased Latino formal giving and volunteering. The negligible and negative association means that there is no practical significance to the findings. There is a lack of association between total acculturation level, based on language preference, media use, and social interaction factors, and these key elements of philanthropy. This finding as it relates to volunteering conflicts with prior research on other ethnicities in which a correlation between acculturation and volunteering was found (Jang et al., 2016).

An analysis of the subfactors of the acculturation scale indicate that Latino’s communication with others and media consumption is preferred in English while the preference for social interactions is more with Latinos than non-Latinos. An overview of the three acculturation subfactors follow.
Language preference – The mean SASH language subfactors score indicates that respondents speak both languages equally if not English better than Spanish, which coincides with recent Pew Research Center rates that ascertain that 68% of Latinos are English speaking or bilingual (Pew Research Center, 2017). This is confirmed by the preferences of 92% of respondents to complete the survey in English.

Media use – The mean subfactor score for media use was the highest of all three subfactors, indicating a strong preference for media consumption in English. Scholars have determined that exposure to mass media promotes a person’s shift from collectivism to individualism (Triandis, 1990), resulting in value shifts from the source collectivist Latino culture to the host individualistic culture found in the U.S. (Triandis et al., 1986).

Social interaction – The social interaction subfactor was the only acculturation criteria whose mean score indicated low acculturation.

Given that the social interaction subfactor score indicated lower levels of acculturation, a test of the association between this subfactor and preference for and actual informal giving was completed to determine if there is a link between adaptation and this inherently Latino philanthropic characteristic. Results indicate independence between these variables.

Latino acculturation in the U.S. includes the transition from adopting identity aspects of an individualistic society, as opposed to typical Latino collectivist cultural construct. Whereas Latino collectivism emphasizes the needs of the community over those of the individual (the dominant U.S. social construct) and the obligation to support it (Kim et al., 1994), Increased acculturation may imbue aspects of individualism,
resulting in greater separation or independence from the ingroup and self-reliance (Kapoor, Comadena, & Blue, 1996; Triandis, 1990). Whereas the prediction that acculturation would influence Latino behavior towards formal philanthropic participation, other variables, such as the transition from a collectivist to individualist culture, may provide a counter influence.

**Ethnic Self-identification and Philanthropy**

The study explored the influence of self-perceptions of identity on Latino philanthropic giving and alignment with group causes. Elements of ethnic identity are posited to be potential triggers for participation in the traditionally Latino practice of informal giving. As such, relationship between ethnic identity and self-categorization with country of origin or ancestry and Latino cultural characteristics of informal giving and community support are assessed.

The majority (62% or N=701) of survey respondents solely identify with their countries of origin while the remaining (38% or N=422) survey respondents partially or fully self-identify as American. There are links between self-identifying with a country of origin and preference for and actual informal giving, and also formal giving. As such, persons who ethnically identify with Latinos have a greater tendency to formally and informally give. This presents an opportunity for charitable organizations to cultivate relationships with persons who are known to identify as Latino. For instance, members or persons participating in Latino associations or social or cultural groups.

Ethnic self-identification is linked with a commitment to supporting Latino interests. Latinos who self-categorize or ethnically identify with their country of origin or ancestry are more likely to donate to Latino causes. There is a significant and positive
association between ethnic self-identification and a sense of obligation and preference to support charitable organizations that assist Latinos.

This research also confirms that Latinos believe themselves to be responsible for and are committed to supporting causes that help Latinos, and agree that charitable organizations should use funds where most needed. As such, ingroup identification relates to support for ingroup causes. However, the link between self-identification with county of origin and informal giving are so weak that they are of no practical significance.

The research instrument included a visual scale to assess ethnic group affiliation and informal giving. The scale has been used in studies to measure perceived identity (Forsythe & Ledbetter, 2015; Ledbetter & Beck, 2014; Schubert & Otten, 2002; Woosnam & Aleshinloye, 2013). The study indicates that there does not exist a relationship between visual identification of self and preference for informal giving.

**Activated Identity Determines Latino Philanthropic Behavior**

This study identifies potential key determinants for a future theory of Latino philanthropy. Based on survey results, acculturation does not serve a critical role, but ethnic self-identification is linked to alignment with ingroup and outgroup practices.

There are also elements that appear to activate ingroup or outgroup behavior, as demonstrated by this study. Figure 5-1 presents the elements identified in the survey as associated with Latino philanthropic behavior.
Limitations of the Study

Although the results of this study provide a foundation for future research, elements of its implementation negatively affected the outcome. The following limitations are noted.

1. Response bias resulted from data collection method used. The data collection method used did not allow for personal connection or a trusted person to facilitate data collection. Panel participants were compensated by a data collection company. Latino trust and willingness to discuss personal details and behavior rests on having a connection or trusting the person requesting the information. This, combined with an anti-Latino political situation, may have resulted in skewed responses. For instance, roughly half (N=245) of the total persons (N=506) who claimed that they were not born in the U.S. provided their age of arrival into the U.S. In conclusion, using panels in early stages of Latino research is not recommended.
2. Conducting a national study on Latinos may not be the most effective method by which to study the preferences of multi-segment comprised publics. Instead, studies that focus on geographically distinct or small communities may provide insights that help isolate subgroup preferences.

3. Conducting research on known groups or organizations will help increase trust in the research method and reduce possible response bias. The researcher should engage with the sample or engage directly with a third party who is trusted by sample participants.

**Recommendations to Practitioners**

Given the association between ethnic self-identification and support of Latino causes, nonprofit organizations should cultivate and solicit restricted gifts from Latinos for projects explicitly linked to the community or ingroup causes. As the organization’s relationship with this donor base matures, unrestricted giving will emerge.

An organization’s cultivation strategies should consider Latino’s sense of obligation and commitment to supporting community causes. Organizations should work through Latino peers to motivate other potential Latino donors, triggering the shared value of ingroup responsibility.

**Future Research**

As stated throughout this document, the study reported here is the first-ever quantitative research study on Latino philanthropy. To the best of the author’s knowledge, all previous research focusing on Latino philanthropy has used qualitative research methods, such as in-depth interviews and focus groups – or presented no empirical data (i.e., were essays based on subjective opinions).
This foundational quantitative study on Latino philanthropy provides an initial basis for analyses of elements of ethnic self-identification that impact Latino interest in specific fundraising areas, such as annual giving, major gifts, and planned giving. Further quantitative research into these segments of fundraising will provide insights into donor cultivation strategies and will provide a basis for understanding giving and volunteering tendencies against which data sets may align.

The SASH scale used in this study contains dated communication elements and fails to include often-used ones. As such, the scale used to measure acculturation should be updated or a new scale should be created to reflect media use and elements of language use to include online interaction and text messaging.

Research that applies and tests how organizations can cultivate relationships with donors by emphasizing Latino responsibility and commitment to shared causes would provide scholarly and practitioner-valued data.
Department of Journalism and Mass Communications  
University of Florida  

Dear Latino/Hispanic participant,  

I am a graduate student at the University of Florida. As part of the requirements to obtain my doctoral degree, I am conducting an online survey of Latinos/Hispanics living in the U.S. You are invited to take part in this research survey about philanthropy, specifically giving and volunteering to charitable and religious organizations. The research involves answering a number of questions which should take approximately 15 minutes.

Your participation is voluntary and there are no known risks associated with the survey. You are free to withdraw your participation from this study at any time and you may skip any question you do not want to answer. If you do not want to continue, you can simply leave this website.

Your responses will be kept anonymous and not connected to any identifying information, and digital data will be stored in secure computer files and only the researchers will have access to the information collected online. Although there's always a small risk that online data could be compromised, our survey host (Qualtrics) uses encryption and other methods to protect your information. There are no anticipated risks to you as a participant in this survey. In exchange for your participation in this survey, you will receive compensation as indicated by the survey host, RN SSI.

If you have any questions regarding this study, please feel free to contact me, Leticia Solaun at Isolaun@ufl.edu or Dr. Kathleen Kelly at kskelly@jou.ufl.edu. For information regarding your rights as a research participant, contact the University of Florida Institutional Research Board 02 office, University of Florida, box 112250, Gainesville, FL 32611, at 352-392-0433 or irb2@ufl.edu.

Thank you so much for your help! We appreciate your participation.

By clicking the “I consent, begin the survey” button and beginning this survey, you acknowledge that you are of Latino/Hispanic descent and at least 18 years of age or older, have read this information, and consent to participate in this survey.

There are two versions of the questionnaire available, one in English and one in Spanish. If you would like the Spanish version, select Spanish from the dropdown menu at the top right corner of the first screen of the survey.
Q1. Are you of Latino/Hispanic origin and from Cuba, Mexico, or Puerto Rico?

A. Yes
B. No

Q2. What is your family’s Latino/Hispanic country of origin?

A. Cuba
B. Mexico
C. Puerto Rico

In this section, we would like to know about your donations of money to organizations and/or other persons. Charitable organizations include religious or nonprofit organizations that help those in need or serve public interests. They may be local, community organizations, such as food banks or animal welfare groups, or national organizations, such as the Catholic Charities, the United Way or the American Red Cross.

Q3. In the past year, approximately how many requests for a contribution have you received from a charitable organization?

☐ 0 requests
☐ 1 to 4 requests
☐ 5 to 9 requests
☐ More than 9 requests

Q4. In the past year, approximately how much money in total have you given to religious and nonreligious charitable organizations?

$___________

Q5. In the past year, approximately how much money have you given to nonreligious charitable organizations (such as local food banks, American Cancer Society, National Council of La Raza, Salvation Army, Cuban American National Foundation, Fundación Comunitaria de Puerto Rico)?

$___________

Q6. In the past year, approximately how much money have you given to a church or religious organization?

$___________

Q7. In the past year, approximately how much money have you given to friends or relatives?

$___________
The following statements address beliefs related to giving and volunteering. Using the scale provided, please indicate the extent to which you agree or disagree with each statement.

<table>
<thead>
<tr>
<th>Questions</th>
<th>Answers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q8. Receiving a request from a personal or work friend motivates me to give or volunteer to a charitable organization.</td>
<td></td>
</tr>
<tr>
<td>Q9. Charitable organizations make our communities better places to live.</td>
<td></td>
</tr>
<tr>
<td>Q10. I prefer to give money to family, friends, or neighbors rather than to charitable organizations.</td>
<td></td>
</tr>
<tr>
<td>Q11. It is my responsibility to support charitable organizations that impact the Latino/Hispanic community.</td>
<td></td>
</tr>
<tr>
<td>Q12. I am socially obligated to help Latinos/Hispanics.</td>
<td></td>
</tr>
</tbody>
</table>
Questions | Answers
---|---
| Strongly disagree | Disagree | Somewhat disagree | Neither agree nor disagree | Somewhat agree | Agree | Strongly agree
Q13. My religion motivates me to help Latinos/Hispanics.
Q14. I prefer to have to specify how my donation of money will be used by a charitable organization.
Q15. Charitable organizations should use my donation where it is needed most.

The next set of questions address volunteering. Volunteering is spending time doing unpaid work for a charitable organization, not just belonging to it. Volunteers can be involved in many ways such as coaching or helping at school, delivering or serving food, and organizing events.

Q16. In the past year, approximately how much time have you volunteered in total to religious and nonreligious charitable organizations?

___________ Hours

Q17. In the past year, approximately how much time have you volunteered to nonreligious charitable organizations (such as local food banks, American Cancer Society, National Council of La Raza, Salvation Army, Cuban American National Foundation, Fundación Comunitaria de Puerto Rico)?

___________ Hours

Q18. In the past year, approximately how much time have you volunteered to a church or religious organization?

___________ Hours
Language use and preferences for social interactions vary among Latinos/Hispanics living in the U.S. Using the scales provided, please indicate your preferences related to language, media use, and interpersonal interactions.

<table>
<thead>
<tr>
<th>Questions</th>
<th>Answers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q19. In general, in what language(s) do you read and speak?</td>
<td>Only Spanish (1)</td>
</tr>
<tr>
<td>Q20. What was the language(s) you used as a child?</td>
<td>Spanish better than English (2)</td>
</tr>
<tr>
<td>Q21. In what language(s) do you usually speak at home?</td>
<td>Both equally (3)</td>
</tr>
<tr>
<td>Q22. In which language(s) do you usually think?</td>
<td>English better than Spanish (4)</td>
</tr>
<tr>
<td>Q23. In what language(s) do you usually speak with your friends?</td>
<td>Only English (5)</td>
</tr>
<tr>
<td>Q24. In what language(s) are the TV programs you usually watch?</td>
<td></td>
</tr>
<tr>
<td>Q25. In what language(s) are the radio programs you usually listen to?</td>
<td></td>
</tr>
<tr>
<td>Q26. In general, in what language(s) are the movies, TV, and radio programs you prefer to watch and listen to?</td>
<td></td>
</tr>
<tr>
<td>Q27. Your close friends are:</td>
<td></td>
</tr>
</tbody>
</table>
Persons in the U.S. come from many different countries and cultures. These questions are about your ethnic group and how you feel about it.

Q31. Select the term that best describes your ethnicity.

A. Cuban
B. Mexican
C. Puerto Rican
D. Cuban-American
E. Mexican-American or Chicano
F. Puerto-Rican-American
G. American
H. Other, specify: ________
Using the scale provided, please indicate to what extent you agree or disagree with the following statements.

<table>
<thead>
<tr>
<th>Questions</th>
<th>Answers</th>
<th>Disagree</th>
<th>Neither agree nor disagree</th>
<th>Agree</th>
<th>Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q32. I have spent time trying to find out more about my ethnic group, such as its history, traditions, and customs.</td>
<td>Strongly disagree</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q33. I have a strong sense of belonging to my own ethnic group.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q34. I understand pretty well what my ethnic group membership means to me.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q35. I have often done things that will help me understand my ethnic background better.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q36. I have often talked to other people to learn more about my ethnic group.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q37. I feel a strong attachment towards my ethnic group.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Q38. Select the one image from those below that best describes how you perceive yourself in relation to the Latino/Hispanic community.

Demographics

Q39. Were you born in the U.S.?

☐ Yes
☐ No
☐ Prefer not to answer

Q39a. If No, how old were you when you came to the U.S.?

_____ Years

Q40. How many years have you lived in the U.S.?

_____ Years
Q41. How old are you?
_____ Years

Q42. What is your gender?
   A. Male
   B. Female

Q43. Select the highest level of schooling that you have completed.
   A. Less than a high school diploma
   B. High school or equivalent (such as GED)
   C. College/university
   D. Graduate school

Q44. Do you regularly attend religious services?
   A. Yes
   B. No
   Q44a. If yes, on average, how many times per month________

Q45. What is the total annual income of your household?
   A. 0 to $24,999
   B. $25,000 to $49,999
   C. $50,000 to $74,999
   D. $75,000 to $99,999
   E. $100,000 to $124,999
   F. $125,000 to $149,999
   G. $150,000 to $174,999
   H. $175,000 to $199,999
   I. $200,000 and above
CUESTIONARIO (ESPAÑOL)

Escuela de Periodismo y Comunicación
Universidad de Florida

Estimado(a) participante latino(a)/hispano(a):

Soy estudiante de posgrado en la Universidad de Florida. Como parte de los requisitos para obtener mi título de doctorado, estoy llevando a cabo un cuestionario en línea de latinos/hispanos viviendo en los Estados Unidos. Le invito a tomar parte en esta encuesta de investigación sobre filantropía, específicamente sobre donación y voluntariado a organizaciones benéficas y religiosas. La investigación implica contestar algunas preguntas que le tomarán alrededor de 15 minutos.

Su participación es voluntaria y no hay ningún riesgo conocido asociado con esta encuesta. Siéntase en libertad de cancelar su participación y puede omitir cualquier pregunta que no desee contestar en este estudio en cualquier momento. Si no desea continuar, solo tiene que abandonar este sitio web.

Sus respuestas serán anónimas y no se relacionarán con ninguna información que pudiera identificarle, y la información digital se guardará en archivos digitales seguros y solamente los investigadores tendrán acceso a la información recopilada en línea. Aunque siempre hay un pequeño riesgo de que los datos en línea podrían verse comprometidos, el anfitrión de nuestra encuesta (Qualtrics) utiliza cifrado y otros métodos para proteger toda la información. No hay riesgos previstos para usted como participante en esta encuesta. A cambio de su participación en esta encuesta, usted recibirá una remuneración, según lo indique el anfitrión de la encuesta, RN SSI.

Si tiene alguna pregunta con respecto a este estudio, por favor siéntase libre de ponerse en contacto conmigo, Leticia Solaun, en lsolaun@ufl.edu o a con la Dra. Kathleen Kelly en kskelly@jou.ufl.edu. Para más información sobre sus derechos como participante en la investigación, póngase en contacto con la Junta de Revisión Institucional (Oficina 2) de la Universidad de Florida, Universidad de Florida, Box 112250, Gainesville, FL 32611, en el 352-392-0433 o en irb2@ufl.edu.

¡Muchas gracias por su ayuda! Agradecemos su participación.

Al oprimir el botón “Estoy de acuerdo, iniciar la encuesta” y comenzar esta encuesta, usted acepta y reconoce ser de ascendencia latina/hispana y tener 18 años o más, que ha leído esta información y otorga su consentimiento para participar en esta encuesta.

Hay dos versiones disponibles de este cuestionario, una en inglés y otra en español. Si quiere la versión en español, seleccione español en la esquina superior derecha de la primera pantalla de la encuesta.
P1. ¿Es usted de origen latino/hispano y de Cuba, México o Puerto Rico?

Si contestó Sí, vaya a la P2.
Si contestó No, muchas gracias por su tiempo. Puede abandonar la encuesta en este punto.

P2. ¿Cuál es el país latino/hispano de origen de su familia?

A. Cuba  
B. México  
C. Puerto Rico  
D. Otro

En esta sección, nos gustaría saber sobre sus donaciones monetarias a organizaciones y/u otras personas. Las organizaciones benéficas incluyen organizaciones religiosas y sin fines de lucro que ayudan a quienes lo necesitan o que sirven a intereses públicos. Bien pueden ser locales, organizaciones comunitarias, tales como bancos de comida o grupos de bienestar animal, u organizaciones nacionales tales como Catholic Charities, United Way o la Cruz Roja Americana.

P3. Durante el año pasado, ¿aproximadamente cuántas solicitudes de donaciones recibió de organizaciones benéficas?

A. □ 0 solicitudes  
B. □ 1 a 4 solicitudes  
C. □ 5 a 9 solicitudes  
D. □ Más de 9 solicitudes

P4. Durante el año pasado, ¿aproximadamente cuánto dinero donó usted en total a organizaciones benéficas religiosas y no religiosas?

$___________

P5. Durante el año pasado, ¿aproximadamente cuánto dinero donó usted a organizaciones benéfica no religiosas (tales como bancos de comida locales, la Sociedad Americana Contra el Cáncer, Unidos US anteriormente conocido como el Consejo Nacional de La Raza, Ejército de Salvación, Fundación Nacional Cubano Americana, Fundación Comunitaria de Puerto Rico)?

$___________

P6. Durante el año pasado, ¿aproximadamente cuánto dinero donó usted a una iglesia u organización religiosa?

$___________

P7. Durante el año pasado, ¿aproximadamente cuánto dinero donó usted a amigos o parientes?
Las siguientes afirmaciones tratan sobre creencias relacionadas con donaciones. Usando la escala que se proporciona, por favor indique en qué medida está de acuerdo o en desacuerdo con cada afirmación.

<table>
<thead>
<tr>
<th>Preguntas</th>
<th>Totalmente en desacuerdo</th>
<th>En desacuerdo</th>
<th>Parcialmente en desacuerdo</th>
<th>Ni de acuerdo ni en desacuerdo</th>
<th>Parcialmente de acuerdo</th>
<th>De acuerdo</th>
<th>Totalmente de acuerdo</th>
</tr>
</thead>
<tbody>
<tr>
<td>P8. Recibir una solicitud de un amigo personal o del trabajo me motiva a donar o a ser voluntario(a) para una organización benéfica.</td>
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<tr>
<td>P9. Las organizaciones benéficas hacen de nuestras comunidades mejores lugares para vivir.</td>
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<tr>
<td>P10. Yo prefiero dar mi dinero a la familia, amigos o vecinos en lugar de a organizaciones benéficas.</td>
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<tr>
<td>P11. Es mi responsabilidad apoyar a organizaciones benéficas que tienen un impacto en la</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>
La siguiente serie de preguntas trata sobre el voluntariado. Hacer voluntariado es pasar tiempo haciendo trabajo no renumerado para una organización benéfica, no solo pertenecer a esta. Los voluntarios pueden involucrarse de muchas maneras, tales como enseñar o ayudar en la escuela, distribuir o servir alimentos y organizar eventos.

P16. Durante el año pasado, ¿aproximadamente cuántas horas en total fue voluntario(a) en organizaciones benéficas religiosas y no religiosas?

___________

P17. Durante el año pasado, ¿aproximadamente cuántas horas fue voluntario(a) en organizaciones de beneficencia no religiosas (tales como bancos de comida locales, la Sociedad Americana Contra el Cáncer, Unidos US antes conocido como el Consejo Nacional de La Raza, Ejército de Salvación, Fundación Nacional Cubano Americana, Fundación Comunitaria de Puerto Rico)?
P18. Durante el año pasado, ¿aproximadamente cuántas horas fue voluntario(a) en una iglesia u organización religiosa?

___________

El uso y preferencia de idioma para interacciones sociales varía entre los latinos/hispanos que viven en los Estados Unidos. Usando la escala que se proporciona, indique por favor sus preferencias con respecto al idioma, uso de medios de comunicación e interacciones personales.

<table>
<thead>
<tr>
<th>Preguntas</th>
<th>Solo español (1)</th>
<th>Español mejor que inglés (2)</th>
<th>Ambos por igual (3)</th>
<th>Inglés mejor que español (4)</th>
<th>Solo inglés (5)</th>
</tr>
</thead>
</table>

P19. ¿Por lo general, en qué idioma(s) lee y habla usted?
P20. ¿Qué idioma(s) usaba en su niñez?
P21. ¿Por lo general, en qué idioma(s) habla en su casa?
P22. ¿Por lo general, en qué idioma(s) piensa?
P23. ¿Por lo general, en qué idioma(s) habla con sus amigos(as)?
P24. ¿Por lo general, en qué idioma(s) están los programas de televisión que usted ve?
P25. ¿Por lo general, en qué idioma(s) están los programas de radio que usted escucha?
P26. ¿Por lo general, en qué idioma(s) prefiere oír y ver películas y programas de radio y televisión?
Las personas en Estados Unidos vienen de muchos países y culturas diferentes. Estas preguntas son acerca de su grupo étnico y cómo se siente usted al respecto.

P31. Seleccione el término que mejor describa su etnicidad.

A. Cubana
B. Mexicana
C. Puertorriqueña
D. Cubana-americana
E. Mexicana-americana o chicana
F. Puertorriqueña-americana
G. Americana
H. Otra, especifique: _______
Usando la escala que se proporciona, indique por favor en qué medida está de acuerdo o en desacuerdo con las siguientes afirmaciones:

<table>
<thead>
<tr>
<th>Preguntas</th>
<th>Totalmente en desacuerdo</th>
<th>En desacuerdo</th>
<th>Ni de acuerdo ni en desacuerdo</th>
<th>De acuerdo</th>
<th>Totalmente de acuerdo</th>
</tr>
</thead>
<tbody>
<tr>
<td>P32. He dedicado tiempo para averiguar más acerca de mi grupo étnico, como su historia, tradiciones y costumbres</td>
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<tr>
<td>P33. Tengo un fuerte sentido de pertenencia a mi grupo étnico.</td>
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</tr>
<tr>
<td>P34. Tengo una idea clara de lo que para mí significa pertenecer a mi grupo étnico.</td>
<td></td>
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</tr>
<tr>
<td>P35. Pienso mucho en qué efectos tiene en mi vida el pertenecer a mi grupo étnico.</td>
<td></td>
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</tr>
<tr>
<td>P36. A menudo he hablado con otras personas para aprender más acerca de mi grupo étnico.</td>
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<tr>
<td>P37. Tengo un fuerte apego hacia mi grupo étnico.</td>
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</tbody>
</table>
P38. De las imágenes mostradas a continuación, seleccione la que mejor describa cómo se percibe usted en relación con la comunidad latina/hispana.

Demografía

P39. ¿Nació usted en los Estados Unidos?
   A. Sí
   B. No

P39a. Si respondió No, ¿qué edad tenía cuando llegó a los Estados Unidos?
   _____ Años

P40. ¿Por cuántos años ha vivido usted en los Estados Unidos?
   _____ Años

P41. ¿Qué edad tiene?
______ Años

P42. ¿Cuál es su sexo?
   A. Masculino
   B. Femenino

P43. Seleccione el máximo grado de estudios completado.
   C. Menos que un diploma de secundaria
   D. Diploma de secundaria o equivalente (tal como GED)
   E. Educación postsecundaria/universidad
   F. Posgrado

P44. ¿Suele asistir a los servicios religiosos?
   A) Sí
   B) No

P44a. Si respondió Sí, ¿cuántas veces al mes en promedio? _________

P45. ¿Cuál es el ingreso total anual de su hogar?
   G. 0 a $24,999
   H. $25,000 a $49,999
   I. $50,000 a $74,999
   J. $75,000 a $99,999
   K. $100,000 a $124,999
   L. $125,000 a $149,999
   M. $150,000 a $174,999
   N. $175,000 a $199,999
   O. $200,000 o más
LIST OF REFERENCES


Suarez-Orozco, M. (2001). Everything you ever wanted to know about assimilation but were afraid to ask. In R. Hunt (Ed.), Personalities and cultures (pp. 56-76). New York: Natural History Press.


BIOGRAPHICAL SKETCH

Leticia Solaun has more than 25 years of experience working in more than 40 countries developing, implementing, and leading communications and community involvement programs for transportation (port and highway projects); community development; environmental; renewable and extractive energy; textile; supply chain; water sanitation and hygiene; and wastewater projects. Her work includes identifying and measuring socio-economic/social indicators and metrics (such as land and resource use, social and cultural well-being, community infrastructure and services, population and demographics, community health, and employment and economy).

Ms. Solaun brings specialized expertise working on high-profile, technically complex, geographically complicated and expansive, and politically sensitive national and international projects involving activist participation and coordination with multiple stakeholders including government agencies, NGOs, media outlets, and stakeholders. She designs, implements, and evaluates social impact assessments, protections for vulnerable populations, and engagement programs compliant with international best practices (IFC/World Bank Performance Standards and Equator Principles).

She has developed and delivered communication and social impact assessment training and presentations at national and international conferences including multiple U.S. Environmental Protection Agency Community Involvement and Training Conferences, the International Conference on Sustainable Development, the International Association for Impact Assessment, and for local, national, and multinational clients. Ms. Solaun holds a master’s and doctoral degree in mass communication with a specialization in public relations from the University of Florida.