LATINX PHILANTHROPY:

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

Appendices

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Appendix A: Methodology (Elaborated)

Philanthropy Panel Study (PPS)

The main findings of this report are based on the Indiana University Lilly Family School of Philanthropy's Philanthropy Panel Study (PPS). PPS is the generosity module of the longitudinal panel study of the University of Michigan's Panel Study of Income Dynamics (PSID). PSID was launched in 1968 and is the longest-running longitudinal survey of charitable giving among U.S. households. It is funded by the National Science Foundation. It offers a nationally representative sample for the U.S. general population, initially including more than 18,000 individuals and 5,000 households. In 1997, samples were updated to reflect the change in immigrant demographics. More specifically, two major changes were made: 1) the core sample was reduced, and 2) a refresher sample totaling 511 households was introduced to better reflect post 1968 immigration demographics. With acknowledgement of the changing immigration demographics in terms of size and composition, PSID introduced the 2017 immigrant sample. The main goal of these multiple changes is to provide a nationally representative sample; these changes do not oversample for any one specific subgroup. PSID data is publicly available to researchers.

The PPS dates to 2000. The study follows the same households over time, which allows researchers to examine changes in giving behavior within individuals, households, and families. Therefore, adult children who newly started their own families are also included in the PPS study, and families can be linked across generations. It also records information about donors' racial and ethnic backgrounds. Participants answer biennial surveys during odd years about giving behaviors in even years. For example, the 2003 wave of PPS was collected in 2003 about charitable giving in 2002. In each wave, the PPS surveys ask respondents various questions regarding charitable giving. Questions include whether they have donated to charitable and nonprofit organizations, how much they donated, and how they gave in the previous year. Donations include money, assets, property, or other goods and exclude political contributions.

Charitable organizations include both religious and secular organizations. Religious congregations include places of worship and other religious organizations. In this report, giving to religious congregations is referred to as religious giving. Secular organizations help communities and people in need, provide healthcare, education, youth services, arts, and culture, improve communities, provide international aid, preserve the environment, or engage in social advocacy. Giving to secular organizations is referred to as secular giving.

The surveys included in this report rely on self-reported data using standard, though limited racial and ethnic categories, and breakdowns to specific subregion that the respondents have cultural or ethnic ties to are often not available. In the PPS longitudinal sample, “other” refers only to the approximately 2 percent of respondents who self-identified as belonging to a different, unlisted racial/ethnic group.

General Social Survey (GSS)

We turn to the General Social Survey (GSS) to understand trust and its implications for giving trends. GSS is a cross-sectional survey focused on people's general social behaviors and opinions. Data on giving are gathered in two different ways. There are four waves that ask about giving incidence (2002, 2004, 2012, and 2014), two of which (2012 and 2014) ask about giving amounts. Each wave includes approximately 2,000 to 3,000 respondents.

A key strength of the GSS from other surveys is how it includes general attitudinal questions, including a wide array of questions about people's opinions on various social trends, political thoughts, values, and beliefs. These variables can provide useful measures of the role of beliefs and attitudes and their relationship to giving patterns.

The GSS has limited information on income and wealth. In addition, the GSS questions regarding giving are different from other surveys. Whereas other surveys ask about whether individuals give or not, the GSS only asks about frequency of giving.

The surveys included in this report rely on self-reported data using standard, though limited racial and ethnic categories, and breakdowns to specific subregion that the respondents have cultural or ethnic ties to are often not available. For GSS data, "other" includes individuals who identified as Asian, Native American or Alaskan Native, multiple races, and those who self-identified as belonging to other racial/ethnic groups. In the GSS longitudinal sample, approximately 5 percent of respondents fell within these groups.

Focus Groups

Focus groups involve a joint interview of multiple participants and offer researchers an opportunity to gain deeper insights into community-relevant issues.[1] To unearth Latinx perspectives on philanthropy, this study engaged in two focus groups, one year apart. Hispanics in Philanthropy (HIP) helped recruit participants. Due to the pandemic and to facilitate a national group, focus groups were conducted virtually. Participation included video, audio, and chat functions. Focus groups were recorded and transcribed with transcription software for analysis.

The first Latinx focus group was virtually conducted among 13 donors, philanthropic advisors, and nonprofit professionals across the country on March 23, 2021. Two topics guided the conversation: 1) giving of all donors and donors of color in response to racial equity, and 2) foundations' engagement, strategy adjustments, and critical opportunities for alignment in response to the movement for racial equity.

The second Latinx focus group was virtually conducted among 9 donors, philanthropic advisors, and nonprofit professionals across the country on March 10, 2022. Guiding topics included: 1) how participants view and understand Latinx philanthropy, 2) participants' own giving behaviors and motivations, and 3) participants' recommendations to reach Latinx donors.

Bank of America KnowledgePanel Study (BOA)

In this study, the findings about high net worth Latinx households are based on the *2021 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households* (BOA), which provides giving data for the year 2020.[2] The school ran additional analysis of the data to compare Latinx and non-Latinx high net worth trends.

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[1] Hesse-Biber, S. N. (2017). *The practice of qualitative research: Engaging students in the research process*. SAGE.

[2] Indiana University Lilly Family School of Philanthropy. (2021). *The 2021 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households.* https://hdl.handle.net/1805/26654

"The purpose of the *2021 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households* is to provide comprehensive information on the giving patterns, priorities, and attitudes of America's wealthiest households for the year 2020.

Since 2006, this study has been researched and written by the Indiana University Lilly Family School of Philanthropy at IUPUI in partnership with Bank of America. This research series is the most comprehensive and longest running of its kind, and is an important barometer for wealthy donors' charitable engagement and perspectives. The latest study once again offers valuable insights that help inform the strategies of nonprofit governing boards and professionals, charitable advisors, donors, and others interested in philanthropy and the nonprofit sector.

The 2021 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households is based on a nationally representative random sample of 1,626 wealthy U.S. households, including, for the third time, deeper analysis based on age, gender, sexual orientation, and ethnic identity. This expanded methodology enables further exploration of the philanthropic trends, strategies, and behaviors among the affluent population. Households with a net worth of $1 million or more (excluding the value of their primary home) and/or an annual household income of $200,000 or more qualified to participate in this year's survey. Average income and wealth levels of the participants in the study exceeded these threshold levels; the average income and wealth levels of study respondents was approximately $523,472 (median = $350,000) and $31.1 million (median = $2.0 million), respectively.

The questionnaire

The *2021 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households* asks about giving in 2020. The survey questions in the 2021 study included many that were modeled after those found in the Philanthropy Panel Study (PPS), which is a module of the Panel Study on Income Dynamics (PSID) conducted at the University of Michigan. PPS biennially assesses the giving and volunteering behavior of the typical American household. Questions about affluent donors' motivations for giving were modeled after questions asked in surveys for the Lilly Family School of Philanthropy's regional giving studies. This modeling is intended to provide comparable national averages on giving data among affluent and general population households.

Sampling methodology and data collection

The *2021 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households* was conducted using data obtained through the KnowledgePanel, which is a nationally representative, probability-based panel offering highly accurate samples for online research. The panel was first developed in 1999 by Knowledge Networks with panel members who are randomly selected, enabling results from the panel to statistically represent the U.S. population with a consistently higher degree of accuracy than results obtainable from volunteer opt-in panels (for comparisons of results from probability versus non-probability methods, see Yeager et al., 2011)"[3] [Methodology excerpt, pp. 114-115 in the *2021 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households*].

[3] Yeager, D. S., Krosnick, J. A., Chang, L., Javitz, H. S., Levendusky, M. S., Simpser, A., & Wang, R. (2011). Comparing the accuracy of RDD telephone surveys and internet surveys conducted with probability and non-probability samples. *Public Opinion Quarterly*, *75*(4), 709–747. https://doi.org/10.1093/poq/nfr020

Appendix B: Regression Results for Informal Giving

Table B1: Overall Giving

	(1)	(2)	(3)	(4)	(5)	(6)
	Incidence		As percentage of income		Log amount	
	All races	Latinx vs non-Latinx	All races	Latinx vs non-Latinx	All races	Latinx vs non-Latinx
(Omitted race group)	Other race	all non-Latinx	Other race	all non-Latinx	Other race	all non-Latinx
Asian	0.016		-0.005*		-0.060	
	(0.032)		(0.002)		(0.216)	
African American	-0.037		0.001		-0.146	
	(0.030)		(0.003)		(0.205)	
Latinx	-0.060**	-0.072***	-0.002	-0.003	-0.473**	-0.555***
	(0.029)	(0.013)	(0.002)	(0.002)	(0.195)	(0.088)
Native American	-0.008		0.007		-0.147	
	(0.037)		(0.007)		(0.246)	
White	0.028		0.003		0.196	
	(0.029)		(0.003)		(0.196)	
Current age	0.006***	0.006***	0.000***	0.000***	0.045***	0.045***
	(0.000)	(0.000)	(0.000)	(0.000)	(0.002)	(0.002)
Education: Base is less than high school						
High School	0.097***	0.101***	0.007***	0.007***	0.667***	0.695***
	(0.011)	(0.011)	(0.002)	(0.002)	(0.072)	(0.073)
Some college	0.189***	0.192***	0.010***	0.010***	1.392***	1.414***
	(0.011)	(0.011)	(0.001)	(0.001)	(0.077)	(0.078)
College	0.266***	0.274***	0.015***	0.014***	2.054***	2.098***
	(0.012)	(0.012)	(0.002)	(0.002)	(0.088)	(0.088)
Graduate degree	0.275***	0.282***	0.016***	0.016***	2.216***	2.254***
	(0.013)	(0.013)	(0.002)	(0.002)	(0.094)	(0.094)
Gender and marital status: Base is cohabited						
Single men	0.009	0.009	0.001	0.001	0.098	0.097
	(0.012)	(0.012)	(0.002)	(0.002)	(0.079)	(0.079)
Single women	0.104***	0.102***	0.005***	0.004***	0.672***	0.663***
	(0.011)	(0.011)	(0.001)	(0.001)	(0.071)	(0.071)

Married	0.167***	0.171***	0.006***	0.006***	1.421***	1.439***
	(0.009)	(0.009)	(0.001)	(0.001)	(0.060)	(0.061)
Number of children	0.001	-0.000	0.001**	0.001**	0.049***	0.042**
	(0.002)	(0.002)	(0.000)	(0.000)	(0.018)	(0.018)
No religion	-0.076***	-0.073***	-0.004***	-0.004***	-0.635***	-0.619***
	(0.010)	(0.010)	(0.001)	(0.001)	(0.065)	(0.066)
Immigrant family	-0.014	-0.012	0.001	0.000	-0.170**	-0.189***
	(0.010)	(0.009)	(0.003)	(0.003)	(0.073)	(0.066)
Currently working	0.026***	0.027***	-0.004***	-0.004***	0.075	0.075
	(0.007)	(0.007)	(0.001)	(0.001)	(0.049)	(0.050)
Retired	0.004	0.005	0.002	0.002	-0.141*	-0.132*
	(0.011)	(0.011)	(0.002)	(0.002)	(0.078)	(0.078)
Currently disabled	-0.062***	-0.063***	-0.009***	-0.009***	-0.524***	-0.524***
	(0.016)	(0.016)	(0.002)	(0.002)	(0.098)	(0.099)
Self-reported health status good	0.039***	0.040***	0.004***	0.004***	0.323***	0.330***
	(0.008)	(0.008)	(0.001)	(0.001)	(0.053)	(0.054)
Log real family income	0.051***	0.053***	-0.003***	-0.003***	0.404***	0.415***
	(0.002)	(0.002)	(0.001)	(0.001)	(0.019)	(0.019)
Wealth: Base is less than $50k						
$50,001-$199999	0.135***	0.140***	0.006***	0.006***	1.073***	1.097***
	(0.007)	(0.007)	(0.001)	(0.001)	(0.053)	(0.053)
$200000 +	0.153***	0.158***	0.011***	0.011***	1.606***	1.635***
	(0.008)	(0.008)	(0.002)	(0.002)	(0.062)	(0.062)
Constant	-0.542***	-0.552***	0.006	0.007	-5.173***	-5.187***
	(0.059)	(0.053)	(0.007)	(0.007)	(0.406)	(0.363)
Observations	108351	106960	108351	106960	108351	106960
R^2	0.291	0.289	0.056	0.055	0.373	0.372

Standard errors in parentheses and are clustered at individual level. State and year dummy variables included in regression but not displayed.
* $p < 0.10$, ** $p < 0.05$, *** $p < 0.01$

Source: PPS Data, IU Lilly Family School of Philanthropy

Table B2: Private Transfers

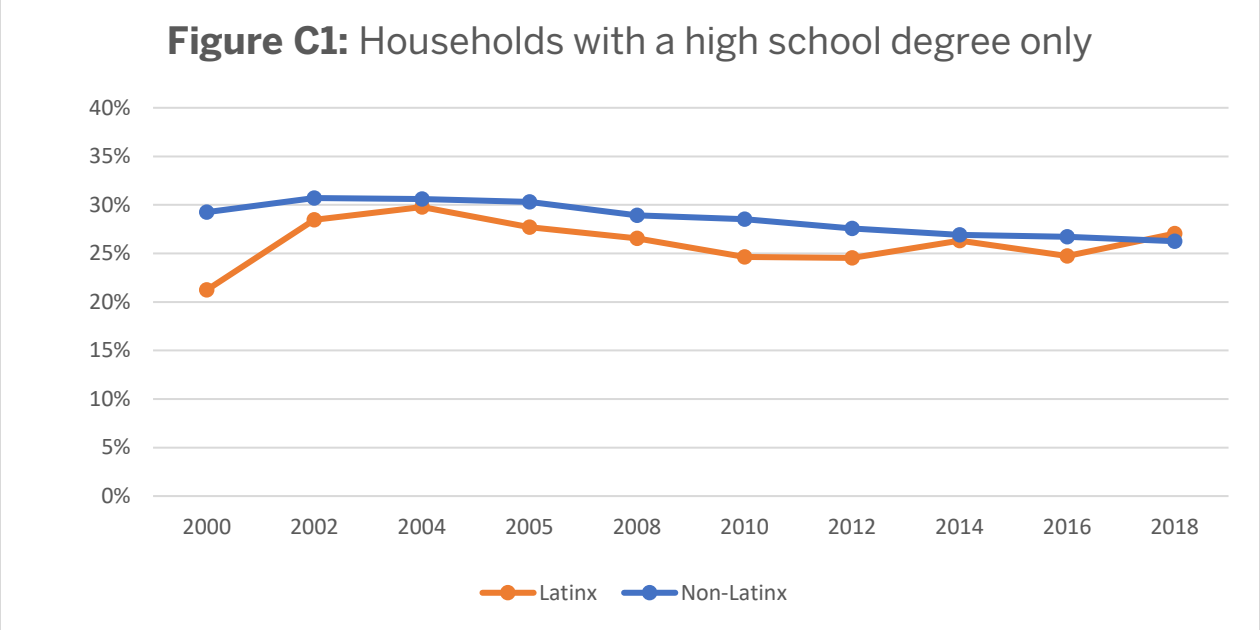
	(1)	(2)	(3)	(4)
	Incidence		Log amount	
	All races	Latinx vs non-Latinx	All races	Latinx vs non-Latinx
(Omitted race group)	Other race	all non-Latinx	Other race	all non-Latinx
Asian	-0.016		-0.051	
	(0.024)		(0.184)	
African American	0.041**		0.342**	
	(0.021)		(0.160)	
Latinx	0.044**	0.045***	0.313**	0.274***
	(0.020)	(0.011)	(0.151)	(0.077)
Native American	0.069**		0.516**	
	(0.030)		(0.235)	
White	-0.013		-0.039	
	(0.020)		(0.151)	
Current age	0.001***	0.000**	0.004***	0.003**
	(0.000)	(0.000)	(0.001)	(0.001)
Education: Base is less than high school				
High school	-0.006	-0.007	-0.035	-0.045
	(0.007)	(0.007)	(0.051)	(0.051)
Some college	0.014*	0.012	0.109*	0.097*
	(0.007)	(0.007)	(0.056)	(0.056)
College	0.003	-0.003	0.053	0.002
	(0.009)	(0.009)	(0.068)	(0.068)
Graduate degree	0.028***	0.023**	0.225***	0.188**
	(0.010)	(0.010)	(0.081)	(0.081)
Gender and marital status: Base is cohabited				
Single men	0.014	0.015	0.177**	0.180**
	(0.010)	(0.011)	(0.084)	(0.085)
Single women	-0.078***	-0.076***	-0.559***	-0.545***
	(0.008)	(0.008)	(0.062)	(0.063)
Married	-0.061***	-0.064***	-0.432***	-0.451***
	(0.008)	(0.008)	(0.058)	(0.058)
Number of children	-0.010***	-0.009***	-0.081***	-0.074***
	(0.002)	(0.002)	(0.013)	(0.013)

No religion	0.011	0.010	0.080	0.070
	(0.009)	(0.009)	(0.067)	(0.069)
Immigrant family	0.017**	0.013*	0.115*	0.086
	(0.008)	(0.007)	(0.062)	(0.058)
Currently working	0.009*	0.008	0.056	0.050
	(0.005)	(0.005)	(0.042)	(0.042)
Retired	-0.039***	-0.040***	-0.317***	-0.326***
	(0.008)	(0.008)	(0.058)	(0.058)
Currently disabled	-0.025**	-0.023*	-0.220***	-0.206**
	(0.012)	(0.012)	(0.085)	(0.087)
Self-reported health status good	-0.011*	-0.012**	-0.083*	-0.096**
	(0.006)	(0.006)	(0.043)	(0.044)
Log real family income	0.023***	0.022***	0.193***	0.187***
	(0.002)	(0.002)	(0.014)	(0.014)
Wealth: Base is less than $50k				
$50,001-$199999	0.014***	0.010*	0.089**	0.054
	(0.005)	(0.005)	(0.040)	(0.040)
$200000 +	0.042***	0.037***	0.357***	0.323***
	(0.007)	(0.007)	(0.053)	(0.053)
Constant	-0.003	0.008	-0.263	-0.145
	(0.042)	(0.037)	(0.336)	(0.302)
Observations	108143	106756	107350	105980
R^2	0.038	0.035	0.040	0.037

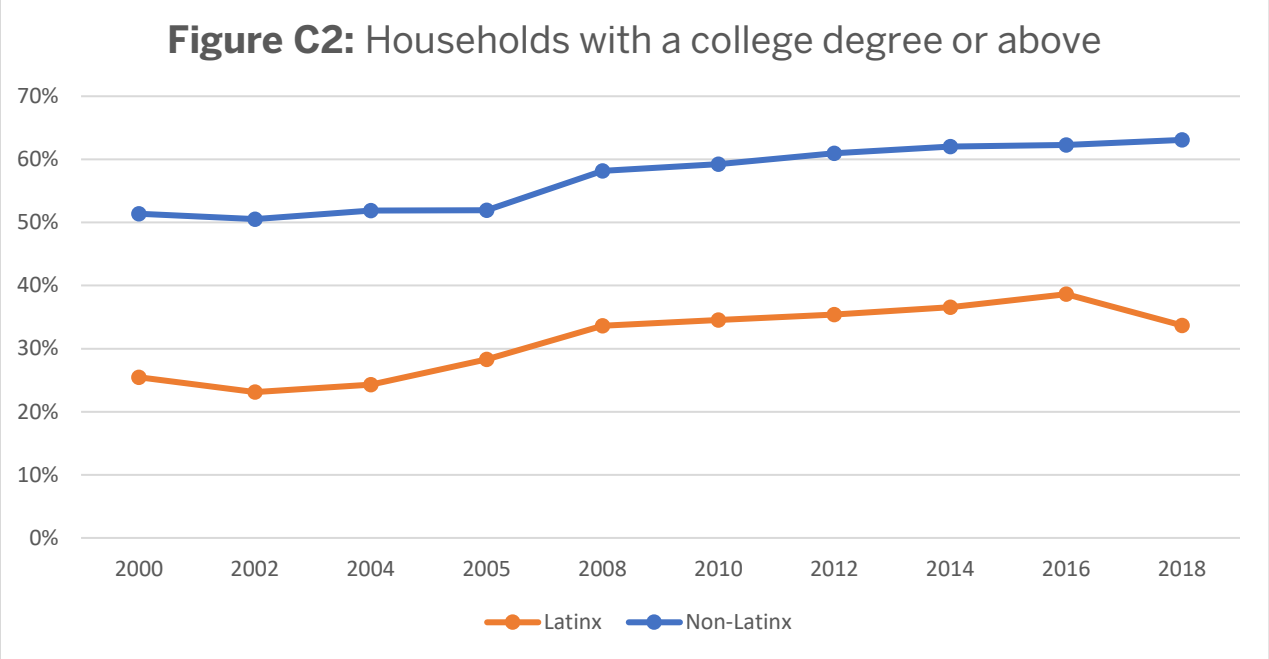
Standard errors in parentheses and are clustered at individual level. State and year dummy variables included in regression but not displayed.
* $p < 0.10$, ** $p < 0.05$, *** $p < 0.01$

Source: PPS Data, IU Lilly Family School of Philanthropy

Appendix C: Latinx and Non-Latinx Levels of Education



Source: PPS Data, IU Lilly Family School of Philanthropy
Note: Households that have some college education but did not attain a college degree are included here.



Source: PPS Data, IU Lilly Family School of Philanthropy

Appendix D: Latinx Household Giving Rates and Amounts by Immigrant Status, Length of U.S. Residency, and Language Preference

Table D1: Average Latinx Household Giving Rates and Amount Breakdown Data

		Overall rate	Amount	Religious rate	Amount	Secular rate	Amount	Private transfer rate	Amount
U.S.-born[4]	2000	66.88%	$1,838	46.81%	$1,132	56.32%	$706	12.91%	$663
	2002	68.27%	$1,758	46.34%	$1,098	57.52%	$660	12.89%	$808
	2004	67.49%	$1,922	46.13%	$1,171	57.41%	$751	14.59%	$814
	2006	66.02%	$1,858	43.14%	$1,135	56.62%	$723	14.43%	$1,862
	2008	65.94%	$1,822	42.14%	$1,046	57.15%	$776	14.53%	$736
	2010	61.51%	$1,702	38.18%	$971	52.32%	$731	12.25%	$654
	2012	59.31%	$1,614	36.67%	$959	50.57%	$655	11.95%	$653
	2014	56.02%	$1,535	34.20%	$868	47.96%	$667	11.18%	$703
	2016	53.52%	$1,589	32.23%	$910	45.16%	$678	10.08%	$659
	2018	51.34%	$1,395	30.23%	$838	43.30%	$557	10.88%	$836
Immigrant	2000	56.07%	$1,061	41.52%	$721	38.53%	$340	19.41%	$489
	2002	58.46%	$1,078	45.25%	$615	41.91%	$463	21.98%	$651
	2004	58.21%	$1,095	44.28%	$696	41.33%	$399	25.35%	$661
	2006	55.65%	$1,122	37.77%	$631	44.74%	$492	22.56%	$655
	2008	58.88%	$1,144	38.42%	$686	48.12%	$458	22.40%	$1,008
	2010	56.53%	$1,288	37.04%	$651	43.49%	$636	15.94%	$705
	2012	53.26%	$1,102	33.60%	$604	40.08%	$499	16.29%	$794
	2014	49.89%	$883	31.34%	$521	37.76%	$362	13.18%	$705
	2016	48.28%	$925	29.87%	$589	33.77%	$336	12.90%	$561
	2018	40.03%	$649	22.29%	$401	32.18%	$248	16.59%	$590
Recent immigrant[5]	2000	40.86%	$443	30.19%	$319	26.08%	$124	24.24%	$362
	2002	49.14%	$549	38.52%	$346	39.84%	$203	28.70%	$975
	2004	40.26%	$676	31.51%	$523	29.98%	$153	31.94%	$964
	2006	53.49%	$1,236	35.19%	$836	44.43%	$400	36.31%	$941
	2008	46.86%	$1,175	31.21%	$694	38.93%	$481	24.47%	$733
	2010	52.74%	$718	29.70%	$312	40.90%	$406	17.86%	$474
	2012	51.12%	$812	32.93%	$427	36.16%	$385	20.66%	$874
	2014	33.80%	$221	13.52%	$99	23.97%	$122	19.19%	$658

[4] U.S. born refers to a person born within the U.S. Immigrant refers to a person born outside the U.S.
[5] Recent immigrant refers to a person born outside the U.S. who resided in the U.S. 10 years or less.

	2016	48.10%	$402	28.48%	$175	26.25%	$227	14.88%	$328
	2018	50.04%	$556	19.33%	$398	43.06%	$159	26.76%	$1,078
Established immigrant[6]	2000	59.06%	$1,183	43.75%	$800	40.98%	$383	18.45%	$515
	2002	59.71%	$1,148	46.15%	$651	42.18%	$498	21.08%	$608
	2004	59.61%	$1,127	45.27%	$709	42.22%	$418	24.83%	$637
	2006	55.74%	$1,118	37.88%	$622	44.76%	$496	21.97%	$642
	2008	59.26%	$1,143	38.65%	$686	48.41%	$457	22.34%	$1,016
	2010	56.62%	$1,301	37.21%	$659	43.55%	$642	15.89%	$711
	2012	53.30%	$1,108	33.61%	$607	40.16%	$501	16.20%	$792
	2014	50.28%	$899	31.78%	$531	38.10%	$368	13.03%	$706
	2016	48.29%	$937	29.90%	$599	33.94%	$338	12.85%	$566
	2018	38.08%	$667	22.86%	$402	30.06%	$265	14.60%	$494
English[7]	2000	67.31%	$1,839	47.11%	$1,134	56.53%	$706	13.08%	$665
	2002	68.83%	$1,765	46.82%	$1,096	58.02%	$669	13.00%	$810
	2004	67.64%	$1,919	46.27%	$1,167	57.45%	$752	14.94%	$816
	2006	66.45%	$1,859	43.37%	$1,129	57.04%	$730	14.59%	$1,820
	2008	66.48%	$1,821	42.35%	$1,044	57.69%	$777	14.87%	$765
	2010	62.04%	$1,715	38.46%	$968	52.74%	$746	12.43%	$673
	2012	59.89%	$1,622	36.89%	$958	51.01%	$664	12.28%	$683
	2014	56.45%	$1,526	34.38%	$863	48.25%	$663	11.37%	$723
	2016	53.91%	$1,577	32.40%	$906	45.27%	$671	10.32%	$667
	2018	51.99%	$1,365	30.33%	$821	43.86%	$544	11.49%	$825
Other language	2000	34.86%	$378	28.74%	$319	17.90%	$59	19.53%	$290
	2002	38.90%	$458	33.31%	$348	19.85%	$110	25.28%	$516
	2004	45.53%	$421	38.68%	$362	25.63%	$58	25.61%	$463
	2006	34.24%	$389	26.45%	$303	21.97%	$86	26.36%	$549
	2008	36.74%	$434	28.90%	$352	23.81%	$81	21.86%	$546
	2010	36.55%	$465	28.06%	$345	22.22%	$120	15.39%	$243
	2012	31.46%	$273	24.45%	$200	16.27%	$73	13.11%	$214
	2014	30.89%	$278	23.11%	$216	17.14%	$63	10.76%	$177
	2016	28.73%	$268	21.05%	$244	13.15%	$24	9.76%	$177
	2018	17.26%	$128	11.13%	$87	10.83%	$41	15.34%	$440

Source: PPS Data, IU Lilly Family School of Philanthropy

[6] Established immigrant refers to people born outside the U.S. who resided in the U.S. for over 10 years.

[7] Each household selected a preferred language for completing the survey. In this report, "language preference" refers to a household's selected language for completing the survey.