

**Inspiring the generous sharing
of time, talent and financial resources
among the Mexico-born adult population
residing in the United States:
Possible strategies for U.S. churches**

A capstone project presented
at St. Mary's University of Minnesota
in partial fulfillment
of the requirements for the degree of
Master of Arts in Philanthropy and Development

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ABSTRACT

The present work seeks to propose strategies and best practices for U.S. churches in inspiring the generous sharing of time, talent and financial resources by the Mexico-born adult population residing in the U.S. Through a summation of the demographics and cultural characteristics of the Mexico-born population residing in the U.S. and a review of the literature pertaining to philanthropy among the U.S. Hispanic population, the author, a Roman Catholic priest serving the undocumented, Mexico-born population of Central Texas, elucidates various possible strategies through which the ministers of U.S. churches, regardless of denomination, might be able to more effectively reap the benefits of an increased sharing of time, talent and financial resources by the Mexico-born persons they serve.

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Printed in the United States of America

ISBN 979-8-78-810397-6

ACKNOWLEDGEMENTS

I extend my deepest appreciation to the following persons:

To the many dedicated and generous persons who comprise the community of Cristo Rey Catholic Church, "*Tu Casa*," in Austin, Texas, for allowing me to serve as their pastor and affording me the context in which to explore how best to inspire the generous sharing of time, talent and treasure within the context of Spanish-speaking immigrant populations.

To the Board of Advisors and Board of Directors of San Juan Diego Catholic High School, "The School That Works!" in Austin, Texas, for their support of me while serving as President of their school community, for providing me the first environment in which I began to learn of philanthropy and development, and for encouraging me in my pursuit of a Master of Arts in Philanthropy and Development from St. Mary's University in Minnesota.

To the Most Reverend Gregory M. Aymond, the Archbishop of New Orleans, who, while serving as the Bishop of Austin, Texas, made possible my ministries at San Juan Diego Catholic High School, "The School That Works!" and Cristo Rey Catholic Church, "*Tu Casa*," and who supported me during formative years of learning and growth.

To Peter and Colleen de Keratry of Petrus Development, L.L.C., who provided invaluable counsel and assistance in philanthropy and development, and who first encouraged me to pursue the Master of Arts in Philanthropy and Development at St. Mary's University of Minnesota.

To Dr. Gary Kelsey, Director of the Graduate Program in Philanthropy and Development at St. Mary's University of Minnesota, for patiently guiding the redaction of the present work.

To Dr. Mark Green, Professor of Leadership Studies at Our Lady of the Lake University, for his magnanimous generosity in affording me the time to write the present work, as well as my capstone for the Master of Science in Organizational Leadership and Ethics at St. Edward's University in Austin, Texas, during two semesters in which I might have been writing the dissertation for my Doctor of Philosophy in Leadership Studies from our Lady of the Lake University in San Antonio, Texas.

To the parish staff of Cristo Rey Catholic Church, "*Tu Casa*," in Austin, Texas, whose tireless efforts to motivate others to generously share of their time, talent and treasure continually inspire me, and whose assistance enabled me to find the necessary time to write the present work. Due to their great dedication, I can do no less than thank them by

name: Rev. Facundo Medina Blanco, whose arrival and sharing in priestly ministry freed me to dedicate the necessary time to completing this work; Sr. Elizabeth Villanueva, F.M.A. and Sr. M. Guadalupe Medina, F.M.A., for their role of prayerful support; Sr. María Rodríguez, F.M.A., for her enthusiasm and constant inquiry into the progress made on the present work; Hermilo Jaimes, for his coordination of innumerable details, which allowed me to focus on the present work; Michele Rodríguez, for her smooth and efficient administration of our parish office in my absence during the writing of this work; Benito Guerrero, Jr., for his assistance with myriad details and for his helping to guard my time, so as to see the present work to completion; and Ángeles Godínez, for her invaluable role at the “front lines” of our parish office in shielding me from possible distractions that may have hindered the completion of the present work. I would also be remiss if I failed to acknowledge Sr. Mary Gloria Mar, F.M.A., Director of VIDES+USA, for her words of encouragement, and Sr. María Becerril, for her gestures of care and attentiveness during the writing of the present work.

To Rev. Román Burgos, T.O.R. of St. Francis of Assisi Catholic Church in Waco, Texas, for his great hospitality, and for providing a space to which I could escape to write the present work.

To my parents and grandparents, who shared with me a seminal education in philanthropy and development, and who continue to serve as examples of the generous sharing of oneself.

To the innumerable persons who have supported and encouraged me throughout the years, and who enjoy my greatest esteem and most heartfelt gratitude for their role in assisting me in the completion of the present work and in the earning of the Master of Arts in Philanthropy and Development from St. Mary’s University of Minnesota.

CHAPTER ONE

Introduction

Purpose

The present research was undertaken for the purpose of exploring existent strategies and best practices for inspiring the generous sharing of time, talent and financial resources among the Mexico-born adult population residing in the United States, particularly within the context of the Roman Catholic Church. Equipped with such knowledge, those who work with and minister to this population will better understand how to more effectively encourage the generosity of those persons who comprise this demographic.

Research Question

What are the most effective strategies and best practices for inspiring the generous sharing of time, talent and financial resources among Mexico-born adults presently residing in the United States?

Background

According the U.S. Census (2000), the Hispanic population of the United States has grown 58% since 1990. Newman (2002a) notes that this growth is largely fueled by high immigration and fertility rates. The Pew Hispanic Center (2010) states that 68% of U.S. Hispanics self-identify as Roman Catholic, and that Hispanics presently comprise 35% of the Roman Catholic Church in the U.S. Hispanics also account for 71% of the growth of the U.S. Catholic Church since 1960. Such rapid growth in a single population segment presents particular challenges for Catholic communities, as they seek to provide expanded ministerial services with very limited budgets.

Though a number of affluent Catholic communities employ fund development professionals with such titles as Director of Stewardship and Development, very few U.S. Catholic communities that serve the Hispanic and Spanish-speaking immigrant populations count on the assistance of fund development professionals. Rather, the task of inspiring the generous sharing of time, talent and financial resources often falls to the ordained clergy, the Roman Catholic priests who lead these local communities of faith. Though they undoubtedly do the best they can, often with no formal training or extensive counsel in fund development, such faith leaders would greatly benefit from knowledge

of the strategies and best practices for inspiring the generous sharing of time, talent and financial resources within the Mexico-born adult population presently residing in the U.S. A heightened sense of philanthropy within local communities of faith would likely afford such communities greater resources, such that they might be able to expand their ministries and accomplish the dreams they possess.

Significance

Through its exploration of strategies and best practices for inspiring the generous sharing of time, talent and financial resources among the Mexico-born adult population residing in the United States, the present research contributes to the body of knowledge on stewardship and development within Hispanic Catholic contexts in the following way: because there are very few works regarding this topic and very few persons within the fund development profession who work specifically with Mexico-born adults residing in the U.S., the present work seeks to bring together from varying sources the strategies and best practices that might enable persons—professionals and non-professionals alike—to more effectively engage this community with respect to the generous sharing of its time, talent and financial resources. It is hoped that this research will serve as a resource for persons who lead communities of faith (regardless of their denomination) that are largely comprised of members of the Mexico-born adult population residing in the U.S.

Definition of Terms

Mexico-born adults residing in the U.S. – Persons born in the United States of Mexico (referred to in this work as Mexico) who have migrated to the United States of America (referred to in this work as the U.S.). This population is characterized by varying citizenship statuses and lengths of residency in the United States, education and language skills, profession and occupation, and cultural knowledge of both their natal and host countries.

Hispanic – From the Latin *Hispanicus* (“pertaining to Spain or the Iberian peninsula”), this is the term most often used by such government and church organizations as the U.S. Census Bureau and the Roman Catholic Church to designate those individuals who originate or descend from Spanish-speaking and/or Latin-American nations and who presently reside in the U.S. Such persons are characterized by the unique *mestizaje*, or ethnic blending, which first occurred when Spanish explorers encountered the indigenous persons of the Americas in the

fifteenth and sixteenth centuries. Hispanic is the very heterogeneous “umbrella” term, into which many Mexico-born immigrants are often placed. As Royce and Rodriguez (1999) note, “the label Hispanic includes people whose families have lived in the border states longer than their Anglo neighbors, people whose arrival occurred only days ago, and everything in between” (p. 26).

Philanthropy – From the Greek roots *φίλος* (“love of”) and *ανθρωπος* (“humankind”), this term is often used to describe benevolent acts and efforts to benefit human welfare. The definition of the Merriam-Webster’s Collegiate Dictionary (10th edition) of the term as “goodwill to fellowmen; especially active effort to promote human welfare,” allows for a larger vision of philanthropy than the mere sharing of financial resources. Within the context of many churches, including the Roman Catholic Church, the concept of philanthropy is most often expressed in the language of “stewardship,” which is rooted in biblical tradition and is most popularly summarized as the generous sharing of “time, talent and treasure.”

Parish – Within the Roman Catholic Church, this term designates the local faith community with which one affiliates oneself.

Culture – This term, referred to by Hofstede and Hofstede (2005) as the “software of the mind,” is often used to designate the traits or patterns of human knowledge, belief and behavior which are shared by groups of persons in a certain time and place and are transmitted from generation to generation. Culture envelopes such shared attributes of persons as attitudes, values, conventions, goals and practices.

Additional Materials Presented

To help determine the relevance and value of the materials presented for this study, an Annotated Bibliography (see Appendix A) has been provided for several primary reference sources.

CHAPTER TWO

Literature Review

Introduction

A review of the related literature is best presented under the following headings:

1. The recognition of diverse populations within philanthropy and development;
2. Demographics of the Mexico-born immigrant population residing in the U.S.;
3. Characteristics of the Mexico-born immigrant population residing in the U.S.; and
4. Philanthropic patterns of the Mexico-born adult population residing in the U.S.

Each topic is summarized below, and an analysis across topics is presented in the chapter summary.

Literature related to the recognition of diversity within philanthropy and development

Many authors have examined the great diversity that results from cultural differences and that has been acknowledged within philanthropy and development during recent decades. A review of extant literature yields the following insights.

Understanding cultural differences in philanthropy and development

For over two hundred years, the field of anthropology has documented the differences between various races, cultures and peoples. Kottak (1974), for instance, offers a comprehensive exploration of the great diversity of persons throughout the world, noting how societal norms and cultural traditions impact the behavior of individuals and groups. Citing Kottak's research, Carson (1995) advances that "the idea that fundraisers may need to communicate differently with different racial and ethnic groups because of their varying cultural traditions is new and may require something more than business as usual" (p. 99). Echoing his (1989) own previous research, Carson maintains that fundraisers must recognize that "racial and ethnic groups...increasingly represent the donor and customer base for nonprofit organizations in the future" (Carson, 1995, p. 100). Carson, it is noted, was a pioneer in

suggesting in a previous (1993) work that race and ethnicity are important variables in determining the attitudes toward giving and volunteering by persons of varying races and ethnicities.

Nearly ten years later, the Association of Fundraising Professionals' 2002 Think Tank convened to consider whether professional fundraisers in the U.S. are prepared to meet the challenges raised within philanthropy and development as a result of increasing cultural diversity. Hedgepeth (2002) shares,

The reality, we concluded, is that most professional fundraisers are not prepared for the new world of philanthropy....Most fundraisers struggle to find the hours and energy to meet their goals. They are left with precious little time and strength to engage, understand, and take advantage of the cultural, social, economic, and philosophical changes shaping their future and the future of their profession (p. 107).

Hedgepeth thus explores the shifting cultural horizon of philanthropy, noting the importance of not neglecting prospective donors due to perceptions regarding economic capacity, age, or gender. In the words of Fogal (2002), Hedgepeth challenges fundraising professionals "to become boundary spanners characterized by uncommon professional skills that are supported by keen self-awareness and multicultural literacy" (p. 6).

Adamson (2006) more recently notes that "philanthropy has a penchant for a 'one size fits all' approach...with funders often favouring a single intervention strategy that must work for every project or community" (p. 40). Thus, she advocates for culturally-appropriate grantmaking with culturally appropriate indicators of success. In essence, she urges fundraising professionals and grantmakers to be "philanthropologists...part philanthropists and part anthropologists" (p. 41).

Fogal (2002) shares the conclusions reached by the senior director of education of the Association of Fundraising Professionals on diversity within philanthropy and development. This senior director notes,

Diversity is related to significant experiences in our lives that make us different from each other. Part of being a successful fundraising professional is getting to know these experiences in people's lives, which requires knowing them on more than a superficial level....We must connect with donors in ways that respect their culture (p. 7).

*Differences in patterns of giving
as a result of Hispanic cultural or national origins*

In a three-year research project focusing on the development and implementation of fundraising training in seven U.S. Hispanic church and parachurch organizations, Wagner and Hall-Russell (1999) found that all participants in their study disagreed with the statement, "There are no significant differences in traditions of giving and stewardship as a result of Hispanic cultural or national origins" (p. 99). Qualitatively, these authors advance, "there was a strong perception that Hispanics give in ways different from mainline U.S. culture" (p. 99). One respondent, for instance, shares, "There are issues of language, culture, and life experiences for Hispanics that must be considered" (p. 100). Another adds, "Each ethnic group (from twenty-three [Latin American] countries has a different way of thinking about giving. They are only similar in terms of giving to the church" (p. 100).

*Lack of research regarding
philanthropic values and giving patterns among Latinos*

In an essay on the relationship of religion and philanthropy among the Hispanic persons of the U.S., Miranda (1999) remarks, "it comes as no surprise that information about the philanthropic values and patterns of giving of Hispanics is...limited" (p. 60). Until the publication by Hamilton and Ilchman (1995a and 1995b) of a two-volume study on the impact of ethnicity, nationality and religion on philanthropy, little information was available on the philanthropic values and giving patterns of many non-majority persons and groups. In the second volume of the study, Cortés (1995) challenges, "We need more information on Latino traditions of giving, disincentives to Latino philanthropy, and institutional arrangements that might foster philanthropy" (p. 23). Similarly, citing an anecdote concerning Martin Buber, Miranda (1999) writes, "it behooves the philanthropic community to know the 'deepest thing' about Hispanics in order to know more about their philanthropic values and participation....The fact remains that few studies have been conducted on the giving patterns of a growing Hispanic population" (p. 60).

*The inclusion of Latinos
in the fundraising programs of charitable organizations*

Newman (2002a) makes the case for including members of the Latino population in fundraising programs of charitable organizations for two reasons: (1) the U.S. population is becoming increasingly diverse, and (2) the income of such minority groups as Latinos is significant and growing. She warns,

If a nonprofit organization is going to thrive in the twenty-first century, it must not only recognize and serve diverse cultures but also raise substantial portions of its monies from them. It cannot continue to exclude ethnically and racially diverse prospective donors, who represent 30 percent of the United States population (p. 3).

The author urges the creation of a development plan that is appropriate to the population(s) it wishes to serve, including the 12.5 percent of the U.S. population that is "Spanish, Hispanic or Latino." She also shares that the 58 percent growth rate experienced by the U.S. Hispanic population between 1990 and 2000 is "linked significantly to recent immigrants and their children" (p. 4). According to Perry (2006), Hispanics account for half of the population growth in the U.S. between 2000 and 2004.

Writing on the financial capacity of the Latino community, Calixto (2003) notes that only five years ago the purchasing power of the 35.3 million persons who comprise the Latino market, estimated at that time at \$450 billion, was projected to annually increase at a faster rate than all other ethnic groups. He also cites a report by the Thomas Rivera Policy Institute that claims that the Latino middle class increased 80 percent during the previous 20 years, and that the discretionary income of the Latino community nearly doubled to \$72 billion, from 1990 to 2000. More recently, Perry (2006) estimates that Mexican immigrants residing in the U.S. comprise the world's largest remittance market, with \$20 billion being sent by them to their families and hometowns in Mexico during 2005. She also shares the results of a study by the Hispanic Foundation that Latino households give an average of 3.9 percent of their income to charity, which is equal to giving by Caucasians and double that of the Asian community.

Various authors cite specific examples of the impact of immigrant communities with respect to philanthropy and development. Perry (2006), for instance, shares the story of a Mexico-born immigrant who works in an auto repair shop near Los Angeles, California, and who

raised over \$70,000 in eighteen months by soliciting gifts from other immigrants from his hometown in Mexico. She also shares that there exist more than 600 such “‘hometown associations’...that raise millions of dollars each year through raffles, dances, beauty pageants, and other activities to help build facilities or pay for social programs in Mexico” (paragraph 3). Known as clubs de oriundos, which might loosely be translated as clubs of persons hailing from the same place, such groups unite people to work together toward a common goal. At the time in which Perry penned her article, one group of 200 families presently residing in North Carolina was actively working to raise the necessary funds to build a nursing home and retirement center in their native town of Mezquital, in the Mexican state of Durango.

In an article in the *Chronicle of Philanthropy*, Greene (2002) shares of the “diaspora philanthropy” of Mexico-born immigrants residing in the U.S. He references the president of one federation of immigrants from the state of Zacatecas in central Mexico, who shares that “one million Mexican-Americans in [the Chicago] metropolitan area are financing the purchase of buses and ambulances and the construction of schools, roads, bridges, and water and electric systems back in their native regions in Mexico” (paragraph 14). He continues, “Much of the money is raised at dances, festivals, rodeos, and other events that also reinforce a sense of cultural identity among those who participate....Raising money for a common cause helps to cement those social bonds” (paragraph 17). Perry (2006) concludes that there is a “huge untapped resource” among Spanish-speaking immigrant populations, and she invokes the words of the executive director of the Hispanic Foundation of Silicon Valley: “Latinos say that they are not asked....People make the assumption that we can’t give” (paragraph 43).

Royce & Rodriguez (1999) suggest that if we remove our “‘expert’ blinders” so as “to listen with the ear of our hearts to the stories of Hispanics” (p. 9), we will discover the *dadivoso* (or especially generous) spirit of the persons of the Latino community who willingly and often eagerly share of their time, talent and financial resources. Similarly, Hedgepeth (2002) exhorts fundraising professionals not only to become more inclusive, but to “create a platform for...listening to the stories of the philanthropic spirit” as it presently exists within such contexts as the Latino community (p. 117).

Harkening to Figueroa Deck’s (1992) image of Hispanics as a “bridge” people, and Elizondo’s (1992) observation that as a young Latino, “I lived in two worlds and two worlds lived in me” (p. 26), Royce and Rodriguez (1999) note that with “one foot in the Third World and

another in the First...we as Hispanics know both worlds as perhaps few others do" (p. 13). This is likely true of most Mexico-born immigrants residing in the U.S. Greene (2002) shares the words of one Mexico-born immigrant who, after 38 years in the U.S., says, "I'm proud to be here, but my heart is also in Mexico" (paragraph 18). The author advances that one of the strengths of diaspora philanthropy is that of "bridging conflicts...since donors often have strong connections to both their original homelands and the countries they have made their new home" (paragraph 44). He concludes with the words of the senior vice president of the Ford Foundation, who shares, "Given the porous nature of borders these days, and that capital and labor flows don't respect borders, it's only natural that diaspora philanthropy is one of a grab bag of new models of philanthropy....It's actually quite exciting" (paragraph 45).

*Literature related to the demographics
of the Mexico-born adult population residing in the United States*

Many authors have defined or attempted to define the demographics of the Mexico-born adult population presently residing in the U.S. Research on this subject offers the following perspectives.

The classification of Mexico-born persons in the U.S.

Ethnically, the U.S. Bureau of the Census places members of the Mexico-born population residing in the U.S. within the broader ethnic category of "Hispanic" persons. Wagner and Figueroa Deck (1999) write that the term "Hispanic" is used to denote "persons in the United States who were born in Spanish-speaking Latin American countries or in Spain, or who can trace their ancestry to those countries" (p. 1). They note that the words "Hispanic" and "Latino" are often used interchangeably, though neither adequately designates all persons of Spanish or Latin American descent who reside in the U.S.

Though the Hispanic population comprised 12.5 percent of the U.S. population in 2000, the Forum of Regional Associations of Grantmakers (2003) shares that this segment is projected to comprise as much as 25 percent of the U.S. population by 2050. The persons comprising this group, according to Royce and Rodriguez (1999), "identify themselves with the term Hispanic, but also with dozens of other terms, such as Latino, Hispano, Mexicano, Cubano, Puertorriqueño, Salvadoreño, Chicano, and all the hyphenated variations, to list just a few" (p. 11). However, as Carson (1995) expresses, "broad racial and ethnic categories such as...Latino mask significant difference in culture that exist between

subgroups. For example, the Chinese and Japanese have very different cultures, as do Puerto Ricans and Mexicans" (p. 100). Indeed, as Wagner and Figueroa Deck (1999) caution, "Because of the vast diversity in the Hispanic population groups in the United States—which represent twenty-one countries—it is difficult to generalize characteristics" (p. 2). Citing the research of anthropologists like Hannerz (1992) who wonder if distinct cultures can exist in a global multi-culture, Carson (1995) concludes, "one has to raise the issue of whether there are still distinctive cultures such that one can make any useful generalizations at all" (p. 101).

In a recent article in the *Chronicle of Philanthropy*, Quotah (2008) further specifies, "The Hispanic presence in the United States includes not only a variety of nationalities but also subgroups with cultural, racial, religious, linguistic, ethnic, and socioeconomic differences" (p. 1). In distinguishing the characteristics of various Latino immigrant populations for clinicians, Weisman, Feldman, Rosenberg, Gruman, Chamorro and Belozersky (2005) agree, stating that "Latino immigrants are a very heterogeneous group, varying in racial makeup, socioeconomic background, level of education, English language proficiency, and country of origin" (paragraph 8).

Similarly, when speaking of Mexico-born immigrants residing in the U.S., a binational study by the Mexican Ministry of Foreign Affairs and the U.S. Commission on Immigration Reform (2007) warns in an extended discourse that

it is not possible to talk of a 'homogenous' Mexico-born population in the United States. It is highly diverse, varying in terms of permanence of residence, legal status, and education and skills. It is made up of persons who stay from only a few hours to a few days to a few years, to those who reside permanently. It also includes persons with different legal statuses: (1) legal temporary visitors; (2) legal permanent residents, otherwise known as legal immigrants; (3) naturalized United States citizens; and (4) unauthorized migrants, including individuals who enter without permission, through the use of fraudulent documents, or with permission but who violate the terms of their visas. Legal status shapes the environment in which the migrant makes decisions when searching for a job, deciding where to live, and investing in schooling and English language skills. These legal status groups are often dissimilar (p. 6).

This binational study also divides Mexico-born adults residing in the U.S. into two categories: (1) sojourners, who consider Mexico to be their place of primary residence, and (2) settlers, who consider the U.S. to be their permanent residence. These two designations of sojourners and settlers notwithstanding, one must be cautious about the titles applied to any subgroup of Mexico-born immigrants. As Ruesga (1999) shares, "To lump these diverse communities together under a single name...suggests a uniformity among groups that may not exist" (paragraph 14).

*Perceptions and stereotypes
regarding the Mexico-born immigrant population*

The Forum of Regional Associations of Grantmakers (2003) admonishes, "Gross generalizations about groups with whom you are less familiar are dangerous, no matter how well intentioned. They can perpetuate stereotypes and unrealistic expectations....It is useful to realize that many individuals from the diverse communities discussed here would find it insulting that the philanthropic field would 'lump' them together" (paragraph 15). More specifically, Calixto (2003) warns, "In trying to understand why Latinos are unique, nonprofits often mistake Latino stereotypes for facts. This is never a good idea" (paragraph 3).

Royce and Rodriguez (1999) state the importance of being aware of the stereotypes and perceptions by which various ethnic groups are perceived, "regardless of how ill-founded those perceptions may be" (p. 12). They continue by detailing the various reasons for which "Hispanics do not hold favored status among minorities in the United States" (p. 12), including the perceived threats felt as a result of continued immigration and higher birthrates. Suggesting that the gathering of data can "reduce fear of the unknown, of making a mistake, or appearing foolish," The Forum of Regional Associations of Grantmakers (2003) concludes, "keep in mind that individuals are individuals" (paragraph 16).

The economics of immigration

The one feature which all Mexico-born adults residing in the U.S. have in common is that they have immigrated from their natal culture to the host nation in which they now reside. They are immigrants. In order to better understand Mexico-born immigrants, then, it is helpful to understand the economics which drive immigration.

Bustamante, Jasso, Taylor and Trigueros Legarreta (1998b) expose the neoclassical economic theories that posit that individuals place themselves in jobs and labor markets where the expected earnings are highest. If such theories hold true, increased immigration from Mexico to the U.S. will occur in any of the three following scenarios: (1) if there is perceived to be an increase in wages and/or employment for Mexican migrants in the U.S., (2) if there is perceived to be a decrease in employment or wages in the places of origin of Mexican migrants, or (3) if there is perceived to be lessened cost or risk associated with entering the U.S. and finding employment. Decisions regarding immigration may also be influenced by such factors as the individual's satisfaction or "utility" in either country, proximity to family members, and family income risk. These authors suggest that the selectivity (or likelihood) of immigrating to the U.S. is explained by: (1) the economic returns which might accrue in one's home land based on the individual's characteristics (e.g., education, sex, age); (2) the economic returns which might accrue in the U.S. based on the same characteristics; (3) the economic returns which might accrue in competing markets; and (4) the effects of such characteristics on the costs (e.g., risks and financial investments) of migration.

The benefit of "migration networks" is thus illuminated, since the presence of family members or other persons in the U.S. who might assist with housing and employment in the U.S., as well as the financing of crossing the border, helps to justify the costs and risks of migrating. Such migration networks elucidate why several immigrants from the same place of origin often settle in the same place of destination in the U.S. In Central Texas, for instance, the majority of Mexico-born immigrants come from the three Central Mexico states of Guanajuato, San Luis Potosí and Mexico State.

Bustamante *et al.* (1998b) share that neoclassical economic theories predict that migration selects individuals on a wide array of characteristics, including gender, age, household size, and wealth. They note, for instance, that though 60 to 70% of Mexico-to-U.S. migrants are male, the economic returns of migration for Mexican women have increased during the past two decades in such markets as light manufacturing and service (e.g., child care and housecleaning). Immigrants from Mexico to the U.S. are typically young, with first-time migrants often being in their teens. The households in Mexico which have family members in the U.S. tend to be larger than average, such that other family members in Mexico can assume the duties of those who have departed for the U.S. Because these households also have a higher-

than-average income, it may be possible that there is a minimum wealth threshold, below which families are not willing to assume the costs and risks entailed with immigration.

The economic selectivity of immigration declines relative to the establishment of migration networks in the U.S., since such networks “provide information to prospective migrants and offer direct assistance that lowers the material and psychic costs and risks associated with (especially unauthorized) migration across borders” (Bustamante *et al.*, 1998b, p. 79). Bustamante *et al.* (1998a) note the leveling effect of migration networks, stating, “The spread of ‘migration networks’ may make migration a self-perpetuating process less selective of individual characteristics; as a result, the characteristics of migrants and non-migrants may become more similar to each other over time” (p. 14). Later in their work, these authors state even more strongly, “U.S. immigration law virtually enshrines migration networks, given that the majority of non-refugee visas are allotted to relatives” (p. 52).

*Immigrant populations as a reflection
of the populations from which they come*

Bustamante *et al.* (1998a) note the way in which immigrant populations generally reflect the characteristics of the larger populations from which they are drawn. If an immigrant population is randomly drawn from an increasingly aging population, for instance, the average age of immigrants from that population will likely increase.

Differences from other immigrant populations

The Mexico-born immigrant population presently residing in the U.S. is markedly distinct from other present and past immigrant populations. Royce and Rodriguez (1999) note that nineteenth-century European immigrants to the U.S. were

leaving unhappy situations; many were so-called white ethnics. By and large, these immigrants were only too happy to cut their ties with the old country and become part of the larger U.S. society. They came when land and jobs were plentiful, applied themselves, and were embraced by the resident population (p. 11).

In contrast, Royce and Rodriguez (1999) cite three ways in which immigrants from Latin America are distinct from many other immigrant populations: (1) due to the geographical proximity of their home

countries to the U.S., their ties to those countries are much tighter, (2) there is a constant influx of these immigrants, which facilitates the maintaining of one's culture, and (3) like Roman Catholic Irish immigrants of the nineteenth century, they have suffered from a largely negative reception.

Similarly, Smith *et al.* (1999) write that there exists "an ocean of difference" between Mexico-born immigrants and immigrants from other nations. They conclude, "Mexico and the United States share an 1,800-mile border. Also, unlike Canada, Mexico has long been a much poorer country than the United States. The desire for a better life, and the proximity of the United States, have long been major forces behind Mexican emigration to its northern neighbor" (p. 29).

The Mexico-born population within the U.S.

The 2000 census enumerated 35.3 million Latinos residing in the U.S. The Mexican Ministry of Foreign Affairs and the U.S. Commission on Immigration Reform (2007) later co-published a report estimating that 7.0 to 7.3 million Mexico-born persons resided in the U.S. in 1996. Subtracting the number of legal residents from the number of total foreign born, they estimated that 4.7 to 4.9 million were legal residents, while 2.3 to 2.4 million did not possess legal authorization for residing in the U.S. Their report admits that this population may be "underenumerated," due to the difficulty of finding all countable persons. A recent article in the Los Angeles Times (February 11, 2010) suggests that 10.8 million undocumented persons resided in the U.S. in 2009.

The demographics of Mexico-born immigrants residing in the U.S.

The report published by the Mexican Ministry of Foreign Affairs & U.S. Commission on Immigration Reform (2007) emphasizes that it is difficult to bring together the numerous data sources in the U.S. and Mexico to accurately capture the characteristics of Mexico-born immigrants in the U.S. The report, however, includes three broad conclusions: (1) that Mexico-born immigrants differ systematically along the fundamental dimensions of legal status (from unauthorized entrants to naturalized citizens) and migration pattern (from short-term visitors to sojourners to settlers); (2) that Mexico-born immigrants have low skill levels relative to the U.S. population and other immigrant groups, thus resulting in lower incomes and higher rates of poverty; and (3) that the Mexico-born immigrant population is becoming increasingly diverse,

and that such forces as supply, demand and network factors shape migration flow. Table 1 offers an overview of demographic data from the report.

Table 1

Characteristics of the Mexico-born population residing in the U.S.

	Mex. pop.	Soj.	Settl.	Natur.	US pop
Median age (in years)	25	28-32	30	42	33
Male proportion	49%	73-94%	55%	54%	49%
Married men	83%	56-85%	59%	76%	56%
Married women	72%	43-66%	61%	80%	57%
Median years of schooling	5	6	8	--	--
Less than 5 years of schooling	46%	39%	28%	24%	3%
Less than 12 years of schooling	90%	91-99%	76%	67%	28%
12 or more years of schooling	10%	1-9%	24%	33%	72%
Do not speak English well	--	93%	71%	57%	6%

Table 2 presents data from the same report on labor force characteristics, income and poverty.

Table 2

Labor force, income and poverty data

from the Mexico-born population in the U.S.

	Mex. pop.	Soj.	Settl.	Natur.	US pop
Total partic. in labor force	51%	83%	70%	69%	65%
Male partic. in labor force	75%	91%	85%	82%	75%
Female partic. in labor force	29%	58%	50%	53%	59%
Unemployment rate	4%	6-11%	11%	9%	6%
Employed in agriculture	22%	47-53%	13%	10%	3%
Employed in construction	28%	25-26%	37%	36%	25%
Employed in service industry	50%	23-26%	51%	54%	72%
Individual earnings (per yr)	--	\$12,480	\$14,138	\$16,553	\$24,408
Household income (per yr)	\$8,880	--	\$27,120	\$28,210	\$38,940
Poverty rate	36%	--	27%	25%	13%

These data leads to the following conclusions: (1) that Mexico-born sojourners in the U.S. tend to be young males with little schooling and who work in agriculture; (2) that settlers and permanent residents begin

to more closely resemble the U.S. population as a whole (even if differences between the Mexico-born population and the U.S. population persist); and (3) legal immigrants tend to be better educated.

Places of origin of Mexico-born immigrants residing in the U.S.

The report published by the Mexican Ministry of Foreign Affairs & U.S. Commission on Immigration Reform (2007) shares that 70% of immigrants come from ten of thirty-one states that comprise 50% of the population of Mexico: Guanajuato, Michoacán, Jalisco, Durango, Zacatecas, Mexico State, Mexico City, Chihuahua, Tamaulipas and Guerrero. More specifically, the report shares research by Bustamante, Jasso, Taylor and Trigueros Legarreta (1998a), which divides Mexico into six geographical regions and reports the percentages of Mexico-born immigrants in the U.S. from each area: 38% of immigrants come from the west-central core states of Guanajuato, Michoacán, Jalisco and Colima; 21% of immigrants come from the northern border states of Baja California, Baja California Sur, Sonora, Chihuahua, Coahuila, Nuevo León and Tamaulipas; 22% of immigrants come from the land between the two regions above, from the states of Sinaloa, Durango, Nayarit, Zacatecas, San Luis Potosí and Aguascalientes; 9% of immigrants come from the interior states of Mexico State, Mexico City, Querétaro, Hidalgo and Tlaxcala; 8% of immigrants come from the southern states of Oaxaca, Guerrero, Puebla and Morelos; and 2% of immigrants come from the southeastern states of Veracruz, Tabasco, Chiapas, Campeche, Yucatán and Quintana Roo.

Bustamante *et al.* (1998a) share that a 1992 survey of Mexico residents revealed that 9.7% of the population of the state of Zacatecas had resided at one time in the U.S. Similarly, 8.3% of the residents of Durango, 8.2% of the residents of Michoacán, and 6.5% of the residents of Jalisco claimed to have resided in the U.S. in the past. 59% of Mexico-born immigrants residing in the U.S. come from rural areas (defined as places with populations with less than 20,000 people), a number which has fallen as an increased number of immigrants come from urban areas.

Mexico-born immigrant destinations in the U.S.

The report published by the Mexican Ministry of Foreign Affairs & U.S. Commission on Immigration Reform (2007) notes how historical, geographical and labor-market factors have influenced the destination of Mexico-born immigrants in the U.S. The 1990 U.S. Census indicates that whereas only 45% of all immigrant populations to the United States

reside in California, Texas and Illinois, 85% of Mexico-born immigrants residing in the U.S. can be found in these three states. California is the single most popular destination among Mexico-born immigrants, hosting 50% of all Mexico-born immigrants in the U.S. Los Angeles is the single most popular destination city for Mexico-born immigrants (for 6.2 to 7.9% of Mexico-born immigrants), followed by San Antonio, the south Texas Rio Grande Valley, Houston, Dallas-Fort Worth, El Paso, Fresno and Phoenix. The report notes the increasing diversity of destinations for Mexico-born immigrants, such that an increase in this population can be noted in such states as Florida, Arizona, New Mexico and North Carolina.

Characteristics of migrant-sending households in Mexico

Bustamente *et al.* (1998a) state that “migration networks, or access to family contacts in the United States, are almost universally found to be the most important single household variable influencing migration and one of the households’ most important economic and social assets” (p. 53). They share that making a first trip to the U.S. is positively correlated with such factors as landlessness and having a father with U.S. migration experience. Interestingly, however, these factors are not related to the likelihood of making a return trip to the U.S., as this is influenced more by migration networks and an individual’s migratory experience.

Bustamante *et al.* (1998a) cite the research of the 1983 Michoacán Project, which suggested that Mexico-born immigrants to the U.S. tend to hail from larger families, with 9.1 household members who are 13 years or older, as compared to non-Mexico-to-U.S. migrants who come from households with an average of 8.0 members who are 13 years or older. The Michoacán Project also correlated migration to the U.S. with above-average landholding (7 hectares per household, compared with 5 hectares for non-Mexico-to-U.S. households) and wealth (an average household income of 3,470 pesos, compared with 2,190 for non-Mexico-to-U.S. households). When controlling for household income and wealth, though, the study concluded that “migrants were significantly more likely to come from households that were ‘relatively deprived’ within their village reference group” (Bustamante *et al.*, 1998a, p. 54). Table 3 presents data from the Michoacán Project on the characteristics of migrant-sending households (both of undocumented and documented immigrants) in contrast with non-migrant-sending households in Mexico.

Table 3

Differences in migrant-sending
and non-migrant-sending households in Mexico

	Undoc.	Doc.	Non -sending
Average family size	11.0	12.0	10.7
Secondary schooling in family	86%	84%	76%
Family members having migrated	5.6	7.3	3.4
Land owned (in hectares)	1.9	2.4	1.4
Value of animal herds (in pesos)	5,309	8,781	4,148

Interestingly, Bustamante *et al.* (1998a) also cite a positive correlation between migration and the accumulation of livestock.

Gender of Mexico-born immigrants residing in the U.S.

Bustamante *et al.* (1998a) cite data on immigrants apprehended by the INS, concluding that 92% of apprehended immigrants at that time were male, 90% were younger than 40 years old, and 62% were single. Bustamante *et al.* (1998a) cite studies in which 83.9% of Mexico-born immigrants in the U.S. in 1978-1979 were found to be male, while 89.1% were found to be male in 1984. These authors share that though "traditional sojourner flows were dominated by young, solo males...there is a trend toward more female migrants, and women dominate among new legal immigrants" (p. 32). They note that at the time of one survey, 21.8% of Mexican persons who had resided at one point in the U.S. were women, and that 23.9% of those who had resided in the U.S. during the past five years were women, such that the female share of Mexico-born immigrants to the U.S. may be increasing. The percentage of Mexico-born migrants who are women is inversely related to age, such that while 51.5% of Mexico-born immigrants younger than 12 are women, 30.7% of Mexico-born immigrants ages 15-19 are women, and only 12.3% of immigrants ages 45-49 are women. Of the six areas enumerated by Bustamante *et al.* (1998a), women comprise 26.9% of immigrants from the northern border states, 20.3% of immigrants from the five states in and surrounding the Valley of Mexico, 20.2% of immigrants from the six central states (*viz.*, Sinaloa, Durango, Nayarit, Zacatecas, San Luis Potosí and Aguascalientes), 19% of immigrants from the region with greatest out-migration (*viz.*, Guanajuato, Michoacán, Jalisco and Colima), and 16.5% of immigrants from the southern states. Interestingly, the 1990 U.S. Census places the female share of Mexico-

born immigrants at 44.9%, a fact which Bustamante *et al.* (1998a) relegate to the fact that “the Census and CPS [the Current Population Survey] capture more relatively settled immigrant families, in which the gender balance is close to 50-50, while [other surveys] focus on circular migrants, who by all accounts appear to be predominantly male” (p. 34).

Age of Mexico-born immigrants residing in the U.S.

Bustamante *et al.* (1998a) suggest that most data sources since 1990 have yielded a median age for Mexico-born immigrants residing in the U.S. in the range of 29 to 33 years old. This median age is younger than non-migrants in Mexico, younger than other immigrant populations in the U.S., and younger than the U.S. population at large. The median age of unauthorized migrants deported to Mexico is 25.4 years (Bustamante *et al.*, 1998a, p. 34). Interestingly, migrants from urban areas of Mexico tend to be younger, with a median age of 26.8 years for men and 23.3 years for women, compared with the median age of men (32.5 years) and women (30.2 years) from rural Mexico. When looking at regional characteristics, a difference of only 1.8 years separates the lowest mean age of immigrants (25.1 years for immigrants from the southern states) from the highest mean age of Mexico-born migrants (26.9 years in the six central states). According to the 1990 U.S. Census, 71.4% of Mexico-born immigrants find themselves in the prime working-age groups between 20 and 54, compared with only 50.4% of the U.S. population. Among deported migrants and Mexico-born immigrants alike, the median age of females is slightly higher, 1.3 to 1.7 years respectively.

Marital status and fertility of Mexico-born immigrants residing in the U.S.

Bustamante *et al.* (1998a) share that 65.5% of Mexico-born immigrants residing in the U.S. are either married or live in a committed relationship outside of marriage. Significant differences exist between sexes, with 68.6% of men being married and 54.3% of women being married. Whereas only 2.4% of men have been separated, divorced or widowed, 14.8% of women have been so.

Bustamante *et al.* (1998a) also note that Mexico-born women in the U.S. have a higher fertility rate, with fertility being negatively correlated with the recency of arrival. Table 4 contains relative data on the fertility of Mexico-born women residing in the U.S.

Table 4

Average children born per Mexico-born woman in U.S.,
compared with U.S. women

	Mexico-born	U.S.-born
Children per woman (ages 15-24)	.63	.30
Children per woman (ages 25-34)	2.13	1.33
Children per woman (ages 35-44)	3.29	1.96

Legal status of Mexico-born immigrants residing in the U.S.

The legal presence of Mexico-born immigrants in the U.S. continues to increase. Bustamante *et al.* (1998a) share that 160,000 Mexicans became legal immigrants during FY 1996, with all but 5,300 being classified as family-based admissions. Additionally, the future consequences of the Immigration Reform and Control Act of 1987-1988 could be considerable, with as many as 3 million eventual family-based admissions.

The illegal presence of Mexico-born immigrants is more difficult to track. This number has typically been ascertained based on apprehensions. During FY 1995, for instance, Bustamante *et al.* (1998a) share that 1.3 million apprehensions of unauthorized Mexican migrants were recorded. The challenge with such data is that some persons are apprehended more than once during any given year, while many others are never apprehended. These authors cite the "serious overstatement" of the 1990 U.S. Census that 1 million Mexico-born persons residing in the U.S. are naturalized citizens (p. 52).

Education of Mexico-born immigrants residing in the U.S.

Bustamante *et al.* (1998a) note that most immigrant populations in the U.S. tend to have a much greater educational background than the persons in the countries from which they originate. Guatemalan immigrants to the U.S., for instance, average nine years of schooling, whereas the average education in Guatemala is around three years. The Mexico-born immigrant population in the U.S. is singular in having an educational level which closely resembles the larger educational level of Mexico. Borjas (1991) cites that whereas the average person in Mexico has 6.1 years of formal schooling, the average education of Mexico-born immigrants in the U.S. is 6.5 years. Bustamante *et al.* (1998a) note that Mexico-born immigrants in the U.S. have significantly lower levels of education than non-immigrants in Mexico. They speculate that this is

related to the high economic returns for schooling within Mexico. Interestingly, a report published by the Mexican Ministry of Foreign Affairs & U.S. Commission on Immigration Reform (2007) advances that while the average schooling among Mexico-born immigrants increased from 4.1 to 5.8 years from 1983 to 1993, the average schooling among non-migrants decreased from 4.5 to 4.3 years during that same period.

According to the 1980 U.S. Census, Mexico-born men residing in the U.S. possessed an educational level six years below that of the average U.S. man (compared with 3.6 fewer years of schooling for Guatemalan men, and 1.2 to 2.7 more years of schooling for Argentinian, Brazilian and Canadian men). The 1990 U.S. Census reveals that 75% of the Mexico-born persons in the U.S. lack a high school diploma, compared with 18% of the U.S. population. 2.1% of Mexico-born persons in the U.S. possess a college degree, compared with 13.1% of the U.S. population. Bustamante *et al.* (1998a) cite the long, porous border between the U.S. and Mexico and the extensive networks leading to low-skilled U.S. jobs as possible explanations for such data points. College completion rates among legal Mexico-born persons in the U.S. (particularly those who possess employment-based visas) approach those of the native-born U.S. population.

English language skills of Mexico-born immigrants residing in the U.S.

The 1990 U.S. Census indicates that 71% of Mexico-born persons report that they do not speak English “very well.” As expected, Bustamante *et al.* (1998a) advance that English proficiency is positively correlated to length of residency in the U.S. and legal status. Table 5 sets forth data on the English proficiency skills of Mexico-born immigrants in the U.S., contrasting the language skills of those with authorized entry with those who entered the U.S. at least once without authorization.

Table 5
English proficiency skills among Mexico-born adults

	All Mexico-born U.S. residents	Authorized	Unauth.
Speak English “very well”	9.1%	12.9%	5.6%
Speak English “fairly well”	9.7%	16.7%	5.6%
Speak English “average or so-so”	32.9%	26.2%	38.1%
Speak English “not very well”	17.9%	13.2%	21.4%
Speak English “not well at all”	30.3%	30.9%	29.3%

Skills and occupations of Mexico-born adults residing in the U.S.

Bustamante *et al.* (1998a) plainly state, "Work is a primary motivation for migrating to the United States" (p. 57). The report co-published by the Mexican Ministry of Foreign Affairs and the U.S. Commission on Immigration Reform (2007) similarly reports, "Work is the single most important attraction in the U.S." (p. 22). Lucas (2007) concurs, saying, "Virtually all of the assembled evidence indicates that the gap in earnings opportunities for migrants between their home country and their overseas destination is a significant and important factor in driving migration flows" (p. 13). Because the economic rewards of working in the U.S. are highest for those with fewer educational and work skills, Bustamante *et al.* (1998a) advance that "the selectivity of international migration strongly favors low skilled persons" (p. 77). They report a 95% employment rate for Mexico-born men residing in the U.S., and a 63% rate for Mexico-born women. They also share data from 1977 to 1994 that reveals that the largest sector of workers constantly remained operators, fabricators and laborers, which comprise 54 to 57% of those employed in the U.S. Likewise, the 1990 U.S. Census reports that 58% of Mexico-born immigrants (16 to 64 years) in the U.S. are employed in manufacturing, services and construction, and that such persons are more likely to work in construction (10.4%, compared with 6.2% of the U.S. population) and in manufacturing (26.6%, compared with 17.7% of the U.S. population). Likely due to the seasonal nature of agriculture, the length of one's stay in the U.S. is negatively correlated with working in agriculture. Mexico-born women, however, primarily work in domestic services (33.9%) and industrial jobs (28.7%). In only 48% of researched cases did the migrant's previous work experience coincide with his/her present work experience in the U.S.

In the report by the Mexican Ministry of Foreign Affairs and the U.S. Commission on Immigration Reform (2007), one million Mexico-born migrants claim to work in the U.S. without possessing residence in the U.S. The report concludes that the future trend of employment vis-à-vis the Mexico-born immigrant is unknown in light of U.S. Homeland Security measures, the desire to move two to three million U.S. adults from welfare rolls, and the desire to create jobs for a rapidly growing domestic labor force. Regardless, the report concludes, "Mexican-born workers [are] significant components of the U.S. food processing, construction, service and manufacturing labor forces" (p. 26).

Household income by Mexico-born immigrants in the U.S.

Fundraising professionals might be tempted to facilely dismiss the relatively low incomes generated by members of the Mexico-born adult population residing in the U.S. In their study, Bustamante *et al.* (1998a) compare trends in 1987 and 1991. While the number of hours worked by documented Mexico-born adults shows a slight decrease for both sexes, the mean hourly wage rose 13.6% and the median annual earnings per individual increased 43.3% to \$12,091. During that same time, the median family income increased 28.5% to \$19,112. Table 6 contains the data from their study.

Table 6
The income of documented Mexico-born adults
residing in the U.S. in 1987 and 1991

	1987	1991
Weekly hours worked by men	44	41
Weekly hours worked by women	40	37
Total hours worked by men and women	43	40
Mean hourly wage	\$7.14	\$8.11
Median annual individual income	\$8,435	\$12,091
Median annual household income	\$14,875	\$19,112

Of particular note, Bustamante *et al.* (1998a) found that Mexico-born women legally residing in the U.S. earn 1.4 times more than their U.S.-born counterparts. These authors also share that data limitations make it difficult to ascertain the differences in income between authorized and non-authorized entrants. Table 7 contains data from the 1990 U.S. Census and 1996 Current Population Survey data regarding the mean and median incomes of households with Mexico-born heads, versus households with native-born heads. One will readily note that while the mean and median incomes of households with U.S.-born heads increased, the mean and median incomes of households with Mexico-born heads decreased.

Table 7
1990 U.S. Census data & 1996 CPS data
on mean and median household income

	Mean income	Med. income
Households with a Mexico-born head (1990)	\$27,122	\$21,926
Households with a Mexico-born head (1996)	\$26,481	\$20,601
Households with a U.S.-born head (1990)	\$38,453	\$30,056
Households with a U.S.-born head (1996)	\$44,938	\$34,076

Similarly, Weisman *et al.* (2005) note that while the poverty rate among elderly people in the U.S. has continually decreased since 1992, it has remained stable for elderly immigrants. Their study correlates the subsequent financial strain among elderly immigrants to greater depression, lower self-esteem and less functional mobility.

Remittances by Mexico-born immigrants residing in the U.S.

In a recent work, Pozo (2007) notes that “remittances, the earnings that immigrant workers send back home in cash and in kind, are an important by-product of migration” (p. 1). VanWey (2007) shares the conservative World Bank estimate that \$167 billion were remitted worldwide in 2005, a considerable income for migrant-sending countries.

Bustamante *et al.* (1998a) share data on the family remittances made by Mexico-born immigrants in the U.S. Table 8 contains this data.

Table 8
Remittances made by Mexico-born immigrants
residing in the U.S. in 1987 and 1991

	1987	1991
Mean annual family remittance	\$1,304	\$783
Percent of families remitting	66%	51%

The 1987 mean remittance of \$1,304 by Mexico-born adults is the highest remittance by any U.S. immigrant population, and compares with mean remittances of \$1,144 to Central America, \$930 to other western hemisphere countries, and \$874 to eastern hemisphere countries. Bustamante *et al.* (1998a) cite research stating that Mexico-born heads of households returning to Mexico carried with them an average of \$1,392

in savings, while non-heads of households carried with them an average of \$858 in savings.

The report published by the Mexican Ministry of Foreign Affairs and the U.S. Commission on Immigration Reform (2007) reveals a negative correlation between time in the U.S. and remittances to Mexico, and shares that between \$2.5 million and \$3.9 million was remitted from the U.S. to Mexico in 1995. The report estimates that for every U.S. dollar sent to Mexico, the gross national product of that nation increases \$2.90, and that as many as one-third of return migrants neither send remittances nor take money home with them upon their return. Particularly for persons working in agriculture, says the report, remittances are "cyclical, unstable, and unequal" (p. 35). In contrast, persons with previous migration experience and/or established networks can often anticipate and channel savings to their families in Mexico.

Okonkwo Osili and Du (2005) write that "the contribution of time, goods, and money in less formal and more personal ways has been an important part of the U.S. immigration experience" (p. 91). They share that an immigrant's family ties and social networks may influence his/her remittance behavior, and that such "informal giving appears relatively persistent over time. Specifically, immigrants with ten to fifteen years of U.S. experience continue to have higher incidence and levels of private transfers" (p. 93), though such levels, the authors note, tend to decrease .05% each year that a person resides in the U.S.

Amuedo-Dorantes (2007) suggests that remittance patterns might be strongly influenced by the answers to the following questions:

What percentage of emigrants from these economies enter illegally into the United States? What percentage rely on smugglers to help them cross the border? How much do migrants pay, on average, for the smugglers' services? Has the cost significantly increased during the past decade? Finally, how many trips do legal and unauthorized migrants in each of these countries make to the United States, on average? (p. 75).

The author continues by advancing that countries with a higher proportion of unauthorized immigrants in the U.S. will likely receive larger remittance flows, since "after all, unauthorized immigrants are exposed to higher income risks and, as such, may be more likely to remit money back home as an insurance mechanism in case the migration experience turns out to be unsuccessful" (pp. 75-76). She also hypothesizes that the debt incurred for smuggling services influences remittance behavior, as well as the frequency of trips back home, by which monies can be personally carried home.

In her study of 6,392 Latin American immigrants in the U.S., Amuedo-Dorantes (2007) found that 4,350 (or 68%) entered without authorization. 75% of those who entered without authorization used smuggling services. Likely due to the proximity of Mexico to the U.S., the percentage of Mexico-born immigrants who enter without authorization (71%) is more than double that of any other Latin American nation, while the percentage of Mexico-born migrants who use smuggling services (75%) is lower than any other nation (ranging from 81% among Nicaraguan migrants, to 91% among Costa Rican migrants to the U.S.). Interestingly, Mexico-born migrants without authorization of entry make only slightly fewer border crossings than those who cross legally, with an average of 2.22 border crossings per solo undocumented person, 2.77 border crossings per person accompanied by a smuggler, and 3.52 border crossings per legal Mexico-born entrant. She concludes, “Therefore, we would expect unauthorized immigrants to remit more money to their families than legal immigrants, who can more easily return home and bring money back to their families in person” (p. 78).

In Amuedo-Dorantes’ (2007) study, 5,703 Latin American immigrants (or 89%) shared their remittance patterns. 70% reported sending money home on a monthly basis. Table 9 reveals that Mexico-born immigrants send 41% of their income to their home country.

Table 9
Remittance patterns for various Latin American nations

	% of migrants remitting	Avg. amount	% of income
Costa Rica	69%	\$492.91	55%
Mexico	71%	\$300.43	41%
Nicaragua	61%	\$223.18	22%
Dominican Republic	67%	\$179.18	16%
Peru	46%	\$376.55	16%
Haiti	74%	\$284.56	13%

Amuedo-Dorantes (2007) identifies four motives for remittances: (1) altruism with respect to the needs of household members back home, (2) the repayment of family members and friends for having financed one’s trip to the U.S., (3) investment in assets with the intent of earning an economic return, and (4) coinsurance of self and family members against economic shocks. She presents data which confirms her hypothesis that a higher percentage of unauthorized entrants (75%) make remittances

than authorized entrants (64%), though the percentage of total income remitted by both groups is comparable. According to her study, the variable of individual level of education attained has no effect on the likelihood of remitting or the percent of income remitted.

The dynamic nature of the above demographics

Bustamante *et al.* (1998a) conclude their essay on the characteristics of Mexican migrants in the U.S. with the following caution:

Characteristics of Mexican migrants are not static, however: they change over time. Some of these changes appear to be long term. For example, there is evidence that schooling levels of Mexican migrants are increasing over time, that migrants' origins and destinations are increasingly urban, and, overall, that characteristics of Mexican migrants may be increasingly heterogeneous. These partly reflect changes in the population at large in Mexico from which migrants are drawn but may also reflect long-term changes in the selectivity of migration, including the influence of migration networks....Because migration is dynamic and conditions in both the United States and Mexico change, understanding Mexican migration to the United States requires continual monitoring (pp. 68-69).

Thus, though it appears that immigration is becoming less selective with time, one should be wary of believing that the Mexico-born adult population residing in the U.S. is homogenous and easily characterized. Bustamante *et al.* (1998a) summarize, "full comprehension of the migration phenomenon must consider the migrants' legacy for their families and for their places of origin and destination" (p. 69).

*Literature related to characteristics
of the Mexico-born adult population residing in the United States*

Many authors have defined or attempted to define the characteristics of the Mexico-born immigrant population presently residing in the United States. Research on this subject offers the following perspectives.

*Commonalities among the Mexico-born immigrant population
residing in the U.S.*

In a discourse on targeting Hispanic Americans for fundraising purposes, Nichols (1990) suggests that despite the diversity of the Hispanic market, various shared characteristics can be identified, including a respect for the past, a highly developed sense of community,

a shared language, and a strong sense of family. Table 10 contains her enumeration of commonalities among U.S. Hispanics.

Table 10

Shared Characteristics of Hispanic Americans, per Nichols (1990)

-
- Hispanics tend to be Spanish-speaking
 - Between 80% and 90% of Hispanics are Roman Catholic
 - Hispanics are extremely brand loyal
 - They are Outer-Directed, and spend more on national brands and popular brands than the general population
 - They are very family oriented
 - Hispanics put great emphasis on the importance of higher education
 - The family and the community come first
 - Major purchasing decisions tend to be made by the man in the household
 - There is strong geographical clustering
-

Using terms elaborated elsewhere in her work, Nichols shares the following extended observation.

Because the majority of Hispanics will be immigrants, often from the Needs-Driven categories, and grateful to the United States for making movement out of that category possible, many may be attracted to the Outer-Directed path at first. These men and women will consider it an obligation to support organizations that encouraged their growth, and will want to pave the way for others following in their path. Newly arrived at their positions in life, these potential supporters will be looking for direction. As do all Outer-Directeds, minority donors will conduct their lives in response to signals, real or imagined, from others. As their lives broaden to include support of charities, they will respond to peer pressure and a desire to be part of the “in” group. Newly-arrived Belongers, though unable to make gifts of wealth, are good prospects for annual gifts to education. They may also provide a new source of volunteers. Hispanics who reach Achiever status can be encouraged to make larger gifts by including them in special events and offering them the chance to belong to donor clubs—with visible mementos and recognition vehicles (p. 58).

Similarly, Wagner and Figueroa Deck (1999) seek to elucidate the commonalities shared by Hispanics with respect to philanthropy. Table

11 contains a summary of those values widely shared by Hispanics vis-à-vis philanthropy and fundraising.

Table 11

Shared Values of Hispanics per Wagner & Figueroa Deck (1999)

-
- *Familialismo* (significance of family). Father and mother figures are very strong. Interdependence is valued over independence. The centrality of family is paramount in Hispanic culture. Support from family, including extended family, is sought for child rearing, personal problems, and economic assistance.
 - *Personalismo* (good character). Personal rapport and mutual respect are highly important.
 - *Espiritualidad* (spirituality). Spiritual values are emphasized, and material satisfaction may be sacrificed for spiritual goods.
 - *Fatalismo* (fatalism). The sense that life is beyond one's control, and unfortunate events are God's will. Hispanics often assume passive roles in dealing with negative situations, thus reducing despair, guilt, and a sense of personal failure.
 - *Colectivismo* (collectivism). High levels of personal interdependence, conformity and sacrifice for the welfare of the group.
 - *Confianza* (trust). Critical in interpersonal relationships, this is earned over long periods of time and during times of crisis.
 - *Orgullo* (pride, dignity). Pride in one's heritage, family, name and reputation.
 - *Respeto* (respect). Evident in the Spanish language's distinction between formal and informal address. Many Hispanics consider respect to be of the utmost importance in their lives.
 - *Simpatía* (congeniality). Conflict and confrontation are to be avoided.
-

Royce and Rodriguez (1999) state that their own interviews with Hispanics throughout the United States surfaced such words and phrases as *personalismo* (personalism), *familia* (family), *confianza* (trust), *la importancia de la palabra* (the importance of one's word), *el valor de la persona* (the intrinsic worth of each person), *servicio* (service), *obligación* (obligation), and giving back. They note that all such words and phrases are rooted in relationship, and they cite Goizueta (1995) who advances that "for U.S. Hispanics, the entire cosmos...is an intrinsically

relational reality where...each member is necessarily related to every other member" (p. 50).

Royce and Rodriguez (1999) claim that this relationality extends into religion and spirituality, such that Hispanics experience an "intensely personal sense of relationship...to religion" (p. 14). They share, "Hispanic spirituality is incarnational, assuming a personal relationship between the individual and God, Christ, the Virgin and the saints" (p. 14).

The value of personal relationships

Based on their research, Royce and Rodriguez (1999) state that "the value of personal relationships, of making connections through people you know, and conversely of the web of obligations this entails seems to be common across the different Hispanic groups (such as Mexican Americans, Puerto Ricans, and Cuban Americans)" (p. 15). Though they fail to offer specifics, these authors claim that this importance diminishes "among the younger generations in many instances and among the foreign born as opposed to the native born" (p. 15). They advance that this personalism impacts giving, since for Hispanics, "there needs to be an intimacy about giving so that people feel a personal connection to the cause or to the persons soliciting funds. Who is involved is almost as important as what the cause is. This is why testimonials are so important and so effective" (p. 15).

Trust is named by Royce and Rodriguez (1999) as the key principle in Hispanic relationships and is said to extend "to include religious figures" (p. 15). They share that Hispanics have an expansive circle of persons in whom they trust, including family, *compadres* (fictive kinship between parents and the godparents of their children), close friends and family friends. "Outside that circle, trust rapidly diminishes," however, such that Hispanics are "suspicious of organizations outside their personal network" (p. 15).

The value of service

Royce and Rodriguez (1999) share that "the notion of service is deeply embedded in the older Hispanic population. It derives from a sense of obligation, reciprocity, and the need to give back, and its source is both religious and secular" (p. 16). They cite that the phrase *tiempo, talento y tesoro* (time, talent and treasure) was often cited in their interviews as a way in which service and giving are manifested among Spanish-speaking populations. Table 12 contains the perspectives on service

offered by various individuals who participated in the research of Royce and Rodriguez.

Table 12
 Perspectives on Service by Participants
 in the Research of Royce and Rodriguez (1999)

- “We have been very blessed, so we give back to the community.”
 - “People give to give back.”
 - “It’s our charitable work.”
 - “God gives you everything, so you should give back.”
 - “Hispanics have a profound religious conviction to give as it has been given to you; when you give to the Lord, the Lord will always be faithful to you.”
-

Royce and Rodriguez share that the perceptions of many Hispanics toward giving and service are learned from their parents. They state, “Their parents taught them the importance of giving by having their children give a favorite toy to a less fortunate child, or they gave a tenth of the money they earned to the church because they said it was the Lord’s. Many of these families had very little themselves, but like the widow and her mite, they gave what they had” (p. 17).

According to the research of Royce and Rodriguez (1999), Hispanics readily serve their faith communities. These authors write, “Service to the church, whether Evangelical or Catholic, is a prominent value among Hispanics of all national origins” (p. 17). They share the perspective of some interviewees who suggested that “the Catholic Church would have to close its doors were it not for the Guadalupanas and others who serve the church in many and different ways” (p. 17). In their interviews of Hispanics in an Episcopalian congregation in California, they found that

parishioners spoke about their service—cooking meals, organizing saints’ days, directing Bible study, taking turns meeting with the youth group—as if these activities were simply things one did for God as part of one’s faith. They didn’t think of this as extraordinary service and they seemed surprised that anyone would want to comment on it. Getting credit or recognition, rather than being a motivating factor, was an embarrassment (pp. 17-18).

The value of dignity

Royce and Rodriguez (1999) point out the value within Hispanic cultures of honoring the dignity of all persons. They note possible consequences of this value, including the keeping of one's word, helping in quiet and noncompetitive ways, a reticence or unwillingness to claim credit, a hesitation to put oneself forward, and difficulty with rejection. Concerning the latter, they write, "Hispanics do not call to find out why a [funding] proposal has been unsuccessful. The Hispanic culture...tends to be more personal. A rejection is regarded as a threat to one's dignity. The possibility of rejection keeps many Hispanics from asking" (p. 20). Though failing to elaborate, these authors also note that this value has "a deep religious resonance" (p. 20).

The primacy of family

The primary place of the family in the life of the Mexico-born immigrant is cited by various authors. Joseph (1995) asserts that

the most basic of Latino values is the primacy of the familial relationship. Grandparents, parents' siblings, and the latter's children, termed *primos hermanos*, are all considered close relatives; and indeed, there seems to be a great deal of social interaction with such persons throughout life (pp. 171-172).

He notes that Latino persons tend to recreate with and economically support such members of extended family, since they descend from "a 'kin-based' society and the most lasting, deepest ties are between 'kin-related' members" (p. 172).

Smith *et al.* (1999) agree with this assessment. They share that "the concept of familia, or family, is central to understanding Mexican giving patterns...both [among] recent immigrants and those whose families had been here [in the U.S.] for many generations" (p. 29). Like Joseph (1995), they note the extended nature of the familia and the way in which one provides to members of extended family "food and lodging, care in times of sickness, money and goods in times of needs, and a variety of other services" (p. 29). One woman interviewed by Smith *et al.* points to the collectivist nature of the Latino culture when she opines, "It is the sense of familia that proves to be the primary difference from mainstream American culture. There is more giving done within the community and the family. The focal point of the culture is less on me, myself, and I. You help the group versus the individual" (p. 30). Another interviewee, pointing to the inclusion of extended family in Latino cultures, shares,

"Family is family, kin by marriage or blood. This immediate and extended family idea is a silly American notion" (p. 50).

Within the Latino context, the family network is extended even further to include fictive kin. Smith *et al.* (1999) note the importance of *compadrazgo*, the Latin American Catholic tradition of ritual kinship, by which families are extended to include all the *padrinos* (or godparents) of their children. These *padrinos* result from a number of Catholic traditions and sacraments, including baptisms, First Communion, Confirmations, quinceañeras, and weddings. They explain,

Compadrazgo, or copaternity, is an example of what anthropologists call fictive kinship. Fictive kinship strengthens and expands the safety net of la familia through the recruitment of new members into the family or by further securing existing family bonds when cousins, aunts, uncles or other relatives become *padrinos* (godparents)....Ideally, *compadrazgo* is a relation that engenders eternal ties of loyalty, trust, affection, respect, and mutual assistance (p. 34).

Interestingly, there is no English equivalent of the Spanish words *compadre* or *comadre*, the titles used by parents when referring respectively to the male and female godparents of their children, and vice versa. Of further note, Smith *et al.* (1999) found that many Protestant respondents to their study also practice this Catholic tradition of *compadrazgo*.

One result of the collectivist focus on and respect for family within the Latino context is expressed in *el deber de los hijos*, the expectation that Latino children will care for their parents in old age. Interestingly, Smith *et al.* (1999) note, "a few respondents, though well educated, well paid, middle-aged professionals, indicated that they had no significant retirement savings. Their extra money went to support their parents and other family members, and they expected the same from their children when they were older" (p. 30). Weisman *et al.* (2005) further warn that for Latino immigrant elders, "receiving care from outside the family network may be inconsistent with cultural expectations and can be viewed as embarrassing or even disgraceful" (paragraph 27).

Another interesting cultural characteristic related to family is the openness of Latino parents to allowing their adult children to live at home. Noting the difference with mainstream American culture, one interviewee participating in the study of Smith *et al.* (1999) shares, "You do not get kicked out at 18. It's okay if you are 30 and still living at home" (p. 31). The study by Smith *et al.* concludes, "Mexican families give aid in

the form of housing beyond what is considered common in the United States. This is a great drain on the finances of those supplying meals and various services for other family members as well as care for elderly parents. This open-door policy is advanced to the extended family as well" (p. 31). Many anecdotes from interviewees serve to emphasize the way in which "extended families are often as welcome as nuclear family members" (p. 31). One challenge noted by these authors is the fact that many Latino children, feeling the pressure to support their families, drop out of school. For adults, the pressure to support extended families also results in expensive and dangerous trips across the U.S.-Mexico border, working for less than minimum wage, and resorting to "living in cars or buses, under bridges, and even in packing crates or the infamous coffin-size 'caves' dug into hillsides in Monterey and San Diego counties" (p. 32).

The role of religion

It is often said that the New World was conquered by the cross and the sword (McKennie Goodpasture, 1989), and the Spanish missionary project of forming gente de razón, persons of reason capable of being good subjects to the Spanish crown, resulted in a nation which, for centuries, was largely Roman Catholic by religion. Wagner and Figueroa Deck (1999) note that "Catholicism is no longer automatically the Christian community of choice" among Hispanics, and they share "the general estimate...that Hispanics are leaving the Catholic church at a rate of sixty thousand a year" (p. 4). These authors suggest that many immigrants who leave the Catholic Church "remain unchurched" or that "[because] more recent immigrants have the view that Latin America is Catholic and North America is Protestant, therefore, there is a tendency to identify with Protestantism in their new homeland" (p. 4). They further claim that "when they become Protestants, Hispanics often join Evangelical or Pentecostal denominations and are frequently shunned by other Hispanics who continue to adhere to the Catholic culture as part of their heritage" (p. 4). In the U.S., Joseph (1995) warns that "despite the common stereotype that Hispanic equals Catholic, there has always been a minority of Hispanics who were not raised in the Catholic tradition" (p. 174). He shares that though 15% of U.S. Hispanics self-identified as Protestant in 1980, that number had grown to 20% by 1988.

Citing growth in Pentecostal evangelical churches serving the Hispanic community, Joseph (1995) notes that such churches "are more likely to have Hispanic clergy and more likely to be perceived as a

resource broker between the immigrants and mainstream society” (p. 174). He also references the scholarship of a Roman Catholic priest and theologian, Allen Figueroa Deck, who indicates that Protestant seminaries in the U.S. contain three times more Hispanic persons preparing for ministry than Roman Catholic seminaries. Interestingly, Joseph notes that

unlike the Europeans whose clergy emigrated with the people, the clergy serving Hispanic Catholics are frequently from other groups in the American society. As a result, they tend to be much more concerned with ritual, theology, and worship than with how the considerable resources of the Catholic Church can be used to provide basic services to meet basic human needs (p. 175).

*Literature related to the philanthropic patterns
of the Mexico-born adult population residing in the United States*

Though there exists a “lack of quantitative sources on patterns of giving among U.S. immigrants” (Okonkwo, Osili & Du, 2005), many authors have attempted to elucidate the giving patterns of Hispanics and Latinos in the U.S. By extension, and with an appropriate knowledge of the population, one might be able to deduce the giving patterns of Mexico-born adults residing in the U.S. Research on this subject offers the following perspectives.

Implications for philanthropy of the distinction of Hispanic groups

In an exploration of the effects of Hispanic identity on fundraising, Cortés (2002) labels as unhelpful the widespread use of the term “Hispanic,” which has risen in popularity since the U.S. Census Bureau’s employment of the term in the 1970’s to designate all persons of Spanish-speaking ancestry. He clarifies,

The term lumps very different cultural groups into one statistical category. People whose families have lived in the American Southwest since the seventeenth century are thrown together with recent immigrants from every country in Latin America, each with its own distinctive cultures and traditions (p. 46).

Cortés continues by forwarding that “Hispanic” may not be the best name for the collective identity felt by persons of Spanish-speaking ancestry. Rather, he points to the many “specific cultural group identities

that take precedence over the recently invented pan-Hispanic or pan-Latino identity” (p. 46). He states that Latinos are more likely to identify themselves by their land of origin, thus labeling themselves as Mexican (mexicano), Puerto Rican (puertorriqueño or boricua), Cuban (cubano), Salvadoran (salvadoreño), etc. He further specifies that Latino immigrants born outside the U.S. will often identify themselves by the specific region, state or municipality from which they come. Cortés concludes, “Rather than overgeneralize about Latinos, experienced fundraisers will want to learn more about each prospect’s own chosen identity, interests and concerns” (p. 47).

Lack of understanding of philanthropy by Hispanics

Citing a study of the Hispanic population of Chicago, Wagner and Figueroa Deck (1999) note that the concept of philanthropy is not well understood by Hispanics and that many people do not view their giving as philanthropic. Newman (2002b) similarly shares that respondents to her research study “often told us that there were no traditions of philanthropy [in their families or communities]... However, when we asked about how friends help each other or share their good fortune, the responses were robust and filled with specific examples of giving and volunteering at all levels of the income spectrum” (p. 14). She continues,

Many individuals do not consider the money or the help they give to extended family or to members of their churches or other voluntary associations as philanthropy or even as charitable giving. They view this type of giving as their responsibility as members of the community or as an obligation to give back for the good of the community as a whole (pp. 14-15).

Wagner and Figueroa Deck (1999) note that the sharing of in-kind service (volunteering) is common, but that the sharing of financial resources tends to be informal, sporadic and uneven. Newman (2002b) likewise states that “immigrants have a strong tradition of helping others in informal yet direct ways” (p. 14). Further, while giving to relatives and the church is common, the idea of giving to non-church institutions is novel, and few structures are found for helping members of the Hispanic community to understand the value and importance of organized philanthropy. The following subsections are organized around the themes of Wagner and Figueroa Deck’s (1999) study.

Lack of involvement in formal philanthropy by immigrants

Joseph (1995) notes that immigrants arrive in the U.S. with their own traditions of giving which they learned in their countries of origin and which may differ from the giving patterns of the native-born population. Okonkwo, Osili & Du (2005) further suggest that recent immigrants may have lower levels of involvement with charitable organizations in the U.S. due to their residential segregation and social networks. These authors also maintain that “although there is likely to be a great deal of heterogeneity within immigrant populations, the contribution of time, goods, and money in less formal and more personal ways has been an important part of the U.S. immigrant experience” (p. 91). As an example of this, they cite O’Neil and Roberts’ (2000) research regarding the high number of private transfers among immigrant households. These authors speculate that the family ties and social networks that immigrants possess may cause them to channel their financial resources toward family members and organizations outside the U.S. Newman (2002b) further advances that such acts, though likely not considered as formal philanthropy by those who perform them, may be considered part of one’s social obligation to one’s family and social networks.

Okonkwo, Osili and Du (2005) suggest that charitable giving by immigrants falls within the larger study of the economic and social adaptation of immigrants in the U.S. They suggest that the rate of adaptation and assimilation into U.S. culture in all aspects, including philanthropy, “will depend on the immigrant’s country-of-origin experience. Specifically, the degree of similarity between philanthropic institutions in the country of origin and the host country may affect the rate of assimilation in charitable giving” (pp. 91-92). They cite research that suggests there may exist a great deal of heterogeneity between immigrant groups based on ethnicity and country of origin (Duleep & Regents, 1997), and that Latin American immigrants may assimilate at a slower rate than previous generations of European immigrants (Borjas, 1994). Not surprisingly, they also suggest that length of stay in the U.S. is negatively correlated to participation in private transfers and is positively correlated to participation in charitable giving in the host country.

Volunteerism

Wagner and Figueroa Deck (1999) advance that an “essential element lacking in Hispanic philanthropy is that Hispanics are not seen as potential volunteers....They are not invited to participate in meaningful

ways in philanthropy" (p. 6). Nichols (1990) suggests that "the initial key to winning Hispanic loyalty [to nonprofit organizations] may be to attract them as volunteers" (p. 58). As an example of an organization that has attempted to eliminate barriers to the recruitment of Hispanic volunteers, she notes the American Red Cross' development of "Hispanic Outreach Guidelines" that encourage volunteer recruiters to be sensitive "to the different economic and educational backgrounds of Hispanics coming into the United States" (p. 58).

Mesch *et al.* (2002) shares the results of four research teams, which indicate that "racial differences in giving and volunteering disappear after controls for education, income, occupational status, and being asked" (p. 67). Wilson (2000), however, suggests that race makes a difference in the kind of volunteer work that people do, the number of hours volunteered, the motives for volunteering, and the influence that church and/or community have over an individual. An Independent Sector report (1998) states that giving and volunteering among the Hispanic community is predicted by socioeconomic status, place of birth, and the ability of organizations to respond to the needs of the Hispanic community. In an article in the *Chronicle of Philanthropy*, Wallace (2003) shares the results of a survey by the American Association of Retired Persons, which suggests that 43% of Hispanic adults (ages 45 and older) engage in formal volunteer efforts, compared with 52% of the Caucasian population and 49% of the African-American population.

Quotah (2008) shares that "efforts to recruit Hispanic volunteers often run up against a cultural divide. American charities often find that Hispanics, especially those newer to the United States, are unfamiliar with many nonprofit organizations and their work, may not understand the importance of volunteering to groups that serve a broad range of people, and may even undervalue their own ability to make a difference" (paragraph 9). He writes, "well-established organizations, like the Boy Scouts and Big Brothers Big Sisters, have found that while they may be household names among Hispanics who have been in the United States for many generations, they may have little name recognition among newly-arrived immigrants from Latin America" (paragraph 31). He continues, "In addition to not knowing the organizations, new immigrants may not immediately understand what they do" (paragraph 34). Citing the need for organizations to show an interest in the Hispanic community, Calixto (2003) adds, "showing a link to the Latino community is not always mandatory in recruiting Latinos, but it provides more incentive for a prospect with an interest in Latino affairs" (p. 17).

Quotah (2008) quotes the director of Hispanic mentoring for Big Brothers Big Sisters in saying, "The American tradition of formal volunteering may seem unfamiliar to some Hispanics....Volunteering in Latin America refers to what wealthy people do, donating to charity....The everyday stuff that we call volunteering here is really 'helping' in the vernacular of immigrant Hispanics" (paragraphs 35-36).

Self-perceptions must also be taken into account, says Quotah, in convincing immigrants that they can make a difference. He cites the words of one volunteer coordinator who shares, "We're very careful to never say we need volunteers to teach the children, ...[since for Spanish-speaking adults from rural areas] teachers are held in such high respect as learned individuals, that [such adults] would never see themselves at that level" (Quotah, 2008, paragraph 43).

Quotah (2008) also notes that Hispanics bring to their volunteer duties a knowledge of culture and the Spanish language, and he cites the words of one Junior Achievement volunteer support specialist who says, "Most of my volunteers who are Hispanic are either immigrants or they have faced a language barrier, so they have had hands-on experience with what the students are facing" (paragraph 14). Quotah continues, "With Hispanic students from struggling immigrant families...[this volunteer specialist] says, 'You don't talk about vacation as being a want—these kids don't know vacation, or home computers. They probably just want a soccer ball, which their parents can't afford. Bringing in a Hispanic volunteer makes it a safe environment for Latino students to talk and ask questions because they feel [the volunteer is] one of them'" (paragraph 17). He cites the words of a professor of education who is involved in the recruitment of Hispanic children and families for 4-H youth development programs: "We really have to think about volunteerism in a different way, depending on how long Latinos have been in this country....The more acculturated they are, the more used they are to our American ways" (paragraph 30).

Giving to family

A popular saying among Spanish-speaking persons expresses the generosity of the culture: "*Mi casa es su casa*" (My home is your home). Wagner and Figueroa Deck (1999) advance that "this phrase appears to exemplify the practice of philanthropy in action among Hispanic groups in the United States, regardless of country of origin. Generosity of spirit is prevalent and has existed for generations, but it has received little attention" (p. 7).

Generosity among the Hispanic culture is most often expressed within family, among friends, and toward those perceived to be in great need. Newman (2002b) observes,

A U.S. [immigrant] family sends a portion of its monthly earnings to its native country to support other family members. An aunt pays for her nephew's college tuition. A cousin takes a newly arrived family member into her home while he finds a job and saves to move on his own. These are all examples of informal giving that occur in diverse communities, yet they are not measured in studies of philanthropic giving (p. 14).

Perry (2006) agrees that "helping people in need is 'very much ingrained' in Hispanic culture" (paragraph 47), and that much of the philanthropy practiced by the Hispanic persons she studied was "informal and personal, ...such as giving money to friends and relatives or directly to homeless people, or donating clothes or food to people in need" (paragraph 49). In an article in the *Chronicle of Philanthropy*, Wallace (2003) shares the results of a survey by the American Association of Retired Persons, that suggests that Hispanic and African-American adults (ages 45 and older) have a higher rate of informal giving (43%) than Caucasian adults (36%).

Much of the informal giving that takes place among immigrant communities is done through remittances, or money transfers, to a person's native country. Pettey (2002) notes that though the primary impetus for remittances has historically been to support family members, there is increasing documentation to suggest that such monies are also directed to other needs as well. Remittances are popular, according to Pettey, because "family customs in immigrant families stress interdependence with the extended family unit" (p. 36). Citing the scholarship of Menez (1980) among the Filipino community, she shares that "within the nuclear and extended family, a complex system of mutual obligation ensures that all family members will be fully supported" (pp. 38-39).

Smith *et al.* (1999) report that "sharing within the family is of prime importance to Guatemalans" (p. 50). The researchers conclude that the family networks of Guatemalan immigrants are so efficient and comprehensive, that many Guatemalans rarely give outside of their immediate family. One woman who participated in their study shared, "The best always goes back to the family, where our strongest ties are, and there isn't much left for anyone else. Giving to friends is discouraged

because then there is less left for the family. Giving to strangers is laughable" (p. 50). The researchers note, "Restrictions on giving outside the family ensure that all available resources and emotional energy are directed inward, toward the family" (p. 50). Not surprisingly, many of these resources are directed to helping members of extended family who have recently arrived in this nation. Smith *et al.* (1999) write that "much of the assistance from Salvadorans goes to those trying to emigrate to the United States and to those who recently had done so" (p. 72). They also note that much family support is given through remittances, or money transfers, and other gifts (including household items) to family members who are still in one's home land. One Guatemalan immigrant shared, "I was brought up with a sense of responsibility toward all those I'd left behind [in Guatemala]. They weren't memories but living people and even while I was in this country, they were still my family and my obligation. I sent home money" (p. 54).

There is a sense among Latino immigrants that one will be taken care of by family members and close friends during times of need. As one Salvadoran immigrant in the study by Smith *et al.* (1999) noted, "Our relatives don't ask us for help. We just do it. We have to care for our own. Giving is vital to expand your circle of family and friends" (p. 70). Many such immigrants expect to support their parents with money, food and shelter as long as they are alive. Smith *et al.* note that such attitudes change over time, particularly over two to three generations, such that "the longer Salvadorans have been in the United States, the more independent they become" (p. 70).

Smith *et al.* (1999) share, "For its members, the extended family is a form of insurance against a multiplicity of maladies. It gives support for the elderly and housing, food, and transportation to family members in need" (p. 54). They note that one's extended family is further enlarged through *compadrazgo*, the Latin American Catholic tradition of ritual kinship, through which others become *padrinos* (godparents or *compadres*). Family celebrations such as weddings and other sacraments are times of great generosity among various Latino communities. Smith *et al.* (1999) write, "A great amount of giving occurs at these events, primarily in the form of gifts from relatives and friends" (p. 34). They continue,

Compadrazgo, or copaternity, is an example of what anthropologists call fictive kinship. Fictive kinship strengthens and expands the safety net of *la familia* through the recruitment of new members into the family or by further

securing existing family bonds when cousins, aunts, uncles or other relatives become *padrinos* (godparents). It is important to choose *padrinos* well because they are required to play an important role in the lives of their ahijado, or godchild. *Compadres* (co-parents) are expected to help provide for their ahijado's sacred and secular needs throughout his or her life, including accepting responsibility for the child should the parents die. Ideally, *compadrazgo* is a relation that engenders eternal ties of loyalty, trust, affection, respect, and mutual assistance (p. 34).

These authors later add, "Though a large portion of a padrino's responsibility is financial, such service is considered an honor and is often important in cementing friendships and family ties" (p. 36).

Giving to church

Wagner and Figueroa Deck (1999) state that "religion...strongly defines Hispanic philanthropy characteristics" (p. 4). Okonkwo, Osili and Du (2005) found the impact of immigrant status on religious giving to be insignificant, though they do state that the levels of giving are lower among immigrant communities. Miranda (1999) likewise concurs: "Hispanics have a rich religious heritage, even though they are low in their giving" (p. 61). He concludes:

Among mainline Protestants, [Hispanic] church attendance is the same, and in the case of Evangelicals, better than other Americans. Among Catholics, their church attendance and involvement is low. The fact is that Hispanic giving patterns and conduct are not only below par but have gone untapped (p. 61).

Miranda (1999) speaks to the indifference of many Catholic and Protestant churches toward involving Hispanics, whom he refers to as "essentially the religious serfs of a European colonial church" (p. 63). He details:

This condition of indifference has historical, ethical, and ecclesiastical antecedents first in Latin America during the period of Roman Catholic colonialism and more recently in North America. The establishment of structures of dependence, with their long and serious impact on the Hispanic church, took place during the initial contacts

between the church and the existing pre-Columbian cultures (p. 62).

With an air of condemnation, Miranda writes of a “history of spiritual neglect,” saying, “the fact is that the churches did not serve Hispanic immigrants; [rather, the immigrants] were on their own” (p. 63). In Miranda’s estimation, “patronizing missionary attitudes, inadequate clergy, and insensitive ecclesiastical leadership have led to a duality within the church, an institutional church and a folk church, an institutional religion and a popular religion” (p. 64).

In an extended treatise on giving among persons of Mexican descent, Smith *et al.* (1999) write that “for many Mexicans, the church, most often the Catholic church, is the prime beneficiary of giving outside the family and extended family” (p. 39). This is perhaps surprising in light of the above information regarding the passivity and indifference of many churches. The qualitative research of Smith *et al.* (1999) reveals that “large portions of time and money are given to the church for the upkeep of the church structure, the maintenance of various parish programs, charitable drives, [and] the weekly collection” (p. 39) They share, “even people who do not attend [church services] regularly give to the church” (p. 40). These authors explain:

Respondents gave many examples of church-related giving. The most common was the weekly collection. Most respondents who reported giving within the church said they gave money to the weekly collection. Many also reported giving money to the second as well as the first collection. (In a typical American Catholic parish, the first collection benefits parish programs and the second collection benefits charities and programs outside the parish)” (p. 40).

The importance of giving to one’s church, according to Smith *et al.*, is instilled by parents in their children at a very young age. As one male respondent to their study reported, “Growing, you always gave to the church. My father made sure the whole family put money in the basket....In my family, church was the only place you gave consistently and at holidays. Hispanics will give much of their extra money to the church even if they hardly ever go to church” (p. 40).

Smith *et al.* (1999) note that many Mexican families in the U.S. send their children to Catholic schools. They note that both parents and children invest a large amount of volunteer time in such schools, and that the values cultivated by such schools positively impact the philanthropic habits of children.

Smith *et al.* (1999) note that much giving by Mexicans “is either devotional or directed toward various celebrations” (p. 36). They cite the example that “the giving that occurs at *Posadas* [the celebrations during the nine days preceding Christmas] is primarily devotional in nature” (p. 37). In an extended treatise, these authors also note the importance of religious festivals among the Mexico-born population residing in the U.S. They write:

Religious festivals are perhaps the best example of how religious giving merges the devotional and communal aspects of the Catholic faith. Festivals are held in celebration of a holy day and participants are reminded through prayers and rituals of the religious significance of their fiesta. Staging and paying for the celebration is a communal effort and serves both to reinforce communal bonds and provide a day of relaxation and joy (p. 41).

These authors write that fiestas, carnivals, raffles, dances, king and queen contests, and other fundraising events are common among the Mexico-born population residing in the U.S.

Smith *et al.* (1999) share that “a wide variety of giving customs are associated with *santos* [saints], all dependent on one’s degree of devotion. People donate large amounts of time and money celebrating...saints’ feast days” (p. 44). Detailing the celebration of saints’ days by Mexico-born persons in the U.S., Smith *et al.* (1999) reveal:

Some [people] prepare or provide food and entertainment for the festival. Others give or raise money to finance it. These festivals are also a time when believers make *mandas* (commands); that is, they commit themselves to some form of devotional behavior that can range from prayer to donating money or time to a cause with which the saint is associated. A person who made a *manda* to Saint Francis of Assisi, for example, might volunteer at an animal shelter (p. 44).

These authors share that Mexico-born Catholics also make *promesas* (promises) to saints. Such promises, offered in exchange for the saint’s intercession, often take the form of a pilgrimage to the shrine of the saint, at which a person would leave, among other things, money. Interestingly, Smith *et al.* (1999) share that although both men and women often assist with the preparations of saints’ festivities in Mexico (typically through *mayordomías* and often involving such details as raising funds, decorating the church, ordering fireworks, contracting bands and dancers, and preparing food and costumes), “women play a

much greater, often almost exclusive, role in the care of santos in the United States" (p. 45). They cite the Catholic Church's celebration of Our Lady of Guadalupe as an example of a saint's feast day around which many people rally.

Smith *et al.* (1999) write of the considerable amount of time and money invested by Mexico-born persons residing in the U.S. in order to be able to host retreats for others. Additionally, these authors write of the important "difference a priest can make within a community" (p. 43), and interestingly, they share, "Some parishes are more responsive to the needs of the community. These parishes in turn engender a greater degree of giving from their members" (p. 43).

As part of their qualitative research, Smith *et al.* (1999) also surveyed the philanthropic attitudes of Guatemalan and El Salvadoran persons residing in the U.S. They found that, as is the case with the Mexico-born population, the church (primarily the Catholic Church) is a focal point for giving within the Guatemalan and Salvadoran communities. Saints are also important to these two Central American populations. Of note, one Guatemalan man respondent to the study opined:

There is no such thing as charity in religion. No one gives away something for nothing, certainly no poor *milpero* [farmer, peasant] is going to give away his hard-earned, hard-won money to the church for nothing in return. You must stop treating it like that. People give their money to a saint firmly believing that the saint will benefit or will repay them in some [prayed for] way, usually by guaranteeing the health of the family and their friends, or success in a business venture, blessings for children or some other desire. The person and the saint are actually conducting a business, exchanging service for money (p. 60).

In another extended conversation on the importance of saints to Roman Catholic immigrants from Guatemala residing in the U.S., a man shared:

There is a lot involved. It is where most of the monetary support is given, one of the only times that people donate money and jewelry and gold and jade and *guipiles* [textiles] is in support of [the saints]....The saints, they have powers. Each of them has their own, and people reward their saints accordingly for a good year or the prosperity of the upcoming year. If a *milagro* [miracle] is necessary, people may give to the Virgin [Mary] in the hopes that she will discuss it with her son

[Jesus] on their behalf. Few ask God directly. Fear and piety and prestige motivate people. When the festivals come, people give all they have to the street procession, to their best, most favored [saints]. They have nothing like it in the United States. That is why the churches here don't make as much money, no *Semana Santa* [Holy Week] (p. 61).

Giving to non-church organizations

In their study, Royce and Rodriguez (1999) found few formal philanthropic institutions exist among the Latino community, outside of organized religion. Rather, they point to the highly personalized, informal and non-institutional ways in which Latinos tend to give. Okonkwo, Osili and Du (2005) concur, stating that "immigrants appear significantly less likely to give to nonreligious institutions" (p. 96). Interestingly, though, these authors share that immigrants are 4% more likely to give to international charities. Of note, they observe, "immigrants from Central America and Mexico are significantly more likely to participate in charitable giving than...European immigrants" (p. 98). They also conclude that "immigrant assimilation in charitable giving occurs rapidly, with implications for building social cohesion at the community and national levels" (p. 102). The research of Rivas-Vázquez (1999) reveals that many Latinos have an interest in helping people and organizations with which they identify, either based on geography, ethnicity, or need. Cortés (2002) summarizes this research, stating, "Latino donors want to give in ways benefiting their own cultural group, however broadly or narrowly they might define it" (p. 47).

Cortés (2002) reports that there exist "mixed answers" to questions of Latino giving (p. 47). He cites the Independent Sector's biennial Survey of Giving and Volunteering, which shares that 53 percent of Latino households give to charity, compared with 72 percent of all U.S. households. The survey also reveals that Latinos give a smaller percentage of their household income to charity. In contrast, O'Neil and Roberts (2000) found in a study of Latino immigrants residing in the San Francisco Bay area, that there existed no significant differences in frequency of giving or amounts given when controlling for income, education and immigrant status. De la Garza and Lu (1999) also found that when controlling for income, education, immigrant status, and trust in organizations, that there are no statistically significant differences between U.S.-born Mexican Americans and Anglos born in the U.S.

Interestingly, these authors advance that Latinos are more likely than Anglos to trust formal organizations.

The Hispanic community has not traditionally been viewed as a high-potential audience for fund development efforts. Wagner and Figueroa Deck (1999) share the perspective of Charles Rodriguez, the former vice president for advancement and external relations for the Hispanic Association of Colleges and Universities, who noted, "We [Hispanics] are thought of as the busboys or the people who do the yardwork" (p. 5). Hodgkinson and Weitzman (1992) advance that while 72 percent of all households give to charity, only 53% of Hispanic households do so. These figures are much lower among households of immigrants. De la Garza (1995) shares that 31% of Mexican households, 29% of Puerto Rican households, and 27% of Cuban households give to nonprofit organizations. Likely referring more appropriately to Spanish-speaking immigrant communities (rather than English-speaking Hispanic persons), Wagner and Figueroa Deck (1999) maintain that "the language gap, cultural obstacles, and concern about the cost of translating fundraising appeals...has caused many charities to shy away from soliciting Hispanic donors." Wagner and Figueroa Deck (1999) advance that "the average Hispanic household receives only fifteen to twenty solicitations per year, compared with households of other ethnic groups, which receive considerably more solicitations" (p. 6). Further, Wagner and Figueroa Deck (1999) maintain that though their gifts tend to be smaller in size, the Hispanic community tends to give more consistently and to manifest greater long-term fidelity to organizations. Ramos and Kasper (1996) further note that "Latinos are largely newcomers to U.S. philanthropy, and their trajectory for growth in the field is limited by relatively low levels of wealth and income and by a relative dearth of institutional vehicles through which to capture and leverage available community giving resources in ways that are culturally acceptable" (p. 22).

The poverty of many Latin American nations has engendered notions of philanthropy that differ greatly from North American models. One woman who participated in the research of Smith *et al.* (1999) notes that in many parts of Latin America, "people are very hospitable and kind; they want you to eat with them and so on. People are poor and can't really give money. There is not really an infrastructure for formal giving. People are very caring and giving" (p. 56). Another respondent to the study adds, "People gave each other many things, food [and] clothes, [and] made toys and candies to give to each other, especially during religious days" (p. 56). Still another respondent gives another

perspective, sharing that her mother would never give away food because doing so “would have been to take it from the mouths of her own seven children, to give away clothes would have left them all bare” (p. 56). Still another says that though his father was generous in sharing his time, he did “not share...much of anything [material]—mostly, I think, because he was saddled with the responsibility of providing for all of us” (p. 56).

For many Latin American immigrants in the U.S., Smith *et al.* (1999) maintain, “communal support networks supplement or even supplant familial networks” (p. 73). These authors contrast the collectivity of Latin American nations with the individualism of the United States. One respondent in the study by Smith *et al.* (1999) notes this collectivist spirit: “This is something that I think is common with all Latinos. Since we were kids we were taught to share” (p. 75). Smith *et al.* advance that another result of this collectivist spirit is that the people of Latin America are more open with and trusting of one another. If a person has needs, s/he will express them. Their personal experience of poverty also compels them to help those in need. As one woman shared, “My parents took in two children. They were not related to us, or friends or anything. They just needed help. One lived with us for one year, and the other for about five years. The children were from a really poor family who could not support them....It was pretty customary that people would do things like this to help out others” (p. 76).

Joseph (1995) maintains that the philanthropic giving of many Mexican Americans began through mutual aid societies that met the needs of the ill and deceased. The first such societies, he suggests, were the *cofradías* or *confraternidades* (or lay brotherhoods) brought by the Spanish to New Mexico, which “cared for the sick and needy, supervised burials, and rendered other resources of charity and assistance” (p. 176). The resulting *mutualistias* (or mutual aid societies) were “the basic institution around which early American life in New Mexico and Colorado was organized” (p. 176). Examples include the Cofraternity of Brothers of Our Father Jesus of Nazareth founded in 1598 to care for society members during times of sickness or distress, the Alianza Hispano Americana (Hispanic American Alliance) founded in 1894 to fight for the material and economic rights of Mexican Americans, and the Sociedad Progresista Mexicana (Mexican Progressive Society) founded in 1911 to protect its members from paupers’ funerals. The author attributes to such mutual aid societies the formation of the first Mexican American labor unions, and the formation of such nonprofit, voluntary organizations as the National Council of La Raza and the Mexican

American Legal Defense Fund. Among the Puerto Rican community, three types of mutual aid societies arose: the first addressing migrant needs, the second focused on representing Puerto Ricans before the non-Hispanic community, and a third centered on special-interest groups. The Cuban community, in contrast, originated philanthropic efforts that were insular in nature and confined to benefiting the Cuban community.

Many immigrants continue to feel deeply connected to their homelands, sending much money and gifts to family and friends in their places of origin. Persons from the same hometown organize giving among themselves. As one man participating in the research of Smith *et al.* (1999) noted,

There are many people organizing by themselves. If they are from the same hometown they are sending back aid: material and economic. For example, there is a community from a small town call Entupica, located in the eastern part of El Salvador. In Washington, D.C., ...there are a lot of people from this small town. So these people organized by themselves in the early eighties. They were trying to build streets, parks, clinics, and libraries for the town. They also would send money for a specific family of the town, or for children...Even if they do not plan to return, they are thinking how to improve or rebuild their hometown (pp. 77-78).

Smith *et al.* (1999) address the mutual expectations with respect to giving among the Guatemalan community. They share the perspective of one respondent from their research,

To me, traditional giving practices relate back to the Indian Mayan way of life. Spanish people do not give something for nothing. Giving is usually mutual, which is not to say equal, but generally reciprocal. If I help you, I expect that when the time comes, you will help me. If we are friends, I will help you any way I can and hope that when the time comes you will have the *voluntad* [good will] to help me—not as a return or payback, but because you care for me (p. 50).

Another Guatemalan respondent shared, “No, it is not that we expected to be paid back, but it would have been unheard of to assist and care for someone and not have it returned when we in turn needed help” (p. 50).

Anonymity is also important to many Latino communities. One Guatemalan respondent to the research of Smith *et al.* (1999) shared, “We [Guatemalans] have many ways of spreading the wealth around, but

when we just want to give something away we donate underhandedly, anonymously, so the person's pride is intact" (p. 50).

Literature related to approaches and best practices for inspiring a culture of philanthropy among the Mexico-born immigrant population and other similar Spanish-speaking immigrant populations residing in the United States

Those who minister within the Roman Catholic Church in the U.S., as well as other fund development professionals, would do well to be familiar with time-tested approaches and best practices for inspiring a culture of philanthropy among the immigrant communities they might wish to reach. As Newman (2002a) maintains, "ethnic-specific and mainstream organizations will [do well to] develop skills and techniques to attract the support of diverse donors, help them continue their traditions of giving and sharing, and share new ways to achieve their charitable dreams" (p. 20). Indeed, she goes so far as to claim that "the vitality of local communities depends on our willingness and ability to create philanthropic strategies attractive to new and diverse populations" (p. 20). Research on this subject offers the following perspectives.

Be cautious in overgeneralizing

Wagner (2003) cautions, "generalizations about groups can be dangerous, even if one's intentions are good" (p. 238). Cortés (2002) warns that "rather than overgeneralize about Latinos, experienced fundraisers will want to learn more about each prospect's own chosen identity, interests and concerns" (p. 47). In a three-year study focusing on the development and implementation of fundraising training in seven U.S. Hispanic church and parachurch organizations, Wagner and Hall-Russell (1999) similarly found that "many of the respondents warned of the danger of lumping the responses of differing Hispanic groups into one category" (p. 97).

The need for new models

New models will likely be necessary to cultivate a culture of philanthropy among various populations, including the Mexico-born immigrant population residing in the U.S. Newman (2002b) maintains that the traditional "donor pyramid model of giving" often employed in professional fund development "does not provide for the element of

time: length of time in the United States, amount of time of financial stability and wealth, the lifetime experiences of prospective donors, time of life for the donor and the donor's children, and the donor's number of years of familiarity with the nonprofit organization" (p. 17). She cites Lorraine Cortés-Vásquez of The Hispanic Federation who maintains, "The pyramid model will never work in Latino communities...because the model is nearly flat in our community. Most people will give small amounts for at least another generation. For us, volume is the answer, not large gifts" (p. 17).

According to Newman (2002b), the "continuum of philanthropy" developed for use among Asian American communities also resonates with the Latino immigrant community. According to this model, immigrants move along a continuum from surviving to helping to investing, based on increasing cultural, social and financial stability. In the first phase, survival, giving is often an informal, direct, immediate and highly personal response to known recipients, including family, voluntary associations, faith-based organizations, and mutual aid societies. Remittances and aid to family and friends largely comprise giving in this stage. In the second phase, helping, giving is often a compassionate and personal response to those less fortunate, motivated by a desire to "give back" and/or to support various projects. Giving during this stage is often ethnic-specific, and is directed to family and voluntary associations, ethnic organizations, community causes, faith-based organizations, and nonprofit organizations. Only in the third stage, when one enjoys increased cultural, social and financial stability, does giving become pan-ethnic, formal, long-term and planned, with persons investing in a "preferred future" (Newman, 2002b, p. 20).

This continuum might be substantiated by the likes of Medland (2007) who writes of the revitalization of a Maryland church community through its attention to the concrete needs of recently-arrived, undocumented persons with few English language skills, great social service needs, and the necessity to be educated about such matters of survival as their rights and the legal system of the U.S. Such persons would likely so focus themselves on the details of survival in (and assimilation into) their host culture, and on the needs of their families and friends in their homelands, that they would likely little consider magnanimous philanthropic contributions to many institutions in their host country.

Cultural differences significant to philanthropy

In an essay on the relationship of religion and philanthropy among the U.S. Hispanic population, Miranda (1999) outlines various cultural factors that may affect philanthropy among Hispanic peoples. Many of these distinguishing factors, he argues, can be traced to the colonialization of the Americas. Whereas the predominant religion (viz., Protestantism) and philanthropic values of the U.S. descended from northern Europe, the Catholic religion and its values were carried to the New World from Southern Europe. Miranda details the contrasts:

Most Hispanics are Catholic and exhibit more of an outdoor culture, being process-oriented and intuitive. Protestants, in contrast, demonstrate an indoor culture, being goal-oriented and having a more rational mentality. The ancestors of today’s Protestants brought with them core values centering around the individual, precision, truth, autonomy, and self-confidence, whereas one hundred years before the Mayflower landed at Plymouth Rock, the Hispanic culture was already practicing communal, relational, courteous, honorable, and hierarchical values (p. 66).

Table 13 presents Miranda’s delineation of differences between “the Hispanic way” and “the American way.”

Table 13
Miranda’s delineation of “the Hispanic way” & “the American way”

The Hispanic way	The American way
Emphasizes the collective	Emphasizes the individual
Withholds the negative	Expresses both positive & negative
Prefers the use of a 3 rd party	Considers use of 3 rd party as cowardly
Best places: private, casual	Best place: anywhere
Best timing: well chosen	Best timing: the sooner, the better
Measures words	Thinks out loud; expresses gut feelings
Group responsibility	Individual responsibility
Believes in agreement	Believes in a contract

Table 14 lists the ways in which Miranda (1999) distinguishes between Hispanic and Anglo styles of communication.

Table 14
Differences in styles of communication, according to Miranda (1999)

The Hispanic way	The American way
Metaphors convey truth	Language is direct & focused on facts
Indirect communication & in passive voice	Communication is direct & in active voice
Known for oratory & flowery speech	Known for “bottom line,” “getting to point”

In light of the above factors, Table 15 includes Miranda’s (1999) detailing of the implications that such differing views might have for philanthropy.

Table 15
Implications of “The Hispanic way” and “The American way” for giving practices

The Hispanic way	The American way
Social exchange	Economic transaction
Ceremonial religion	Civic religion
Relational attitude	Rational attitude
Need-driven	Budget-driven
Spontaneous efforts	Organized efforts
Short-term mode	Long-term mode
Crisis-oriented	Planned
Need to persuade	Need to convince
Single-level	Multilevel
A matter of ability	A matter of will
Motivated by community	Motivated by competition

Miranda (1999) advances that “an understanding of these cultural differences is necessary for any agency—philanthropic agencies and agents included—that wants to relate to and engage the Hispanic community in North America” (p. 68).

In a three-year study focusing on the development and implementation of fundraising training in seven U.S. Hispanic church

and parachurch organizations, Wagner and Hall-Russell (1999) collected data that confirms the above analysis of Miranda. Table 16 contains various responses they received to the question: "What differences exist in philanthropy and fundraising between Hispanics and Anglos?"

Table 16

What differences exist in philanthropy
and fundraising between Hispanics and Anglos?

- "Hispanics are suspicious of people they don't know. So a first approach to cultivate a relationship is difficult. They prefer personal introductions."
 - "The broader community has fewer problems approaching organizations. Hispanics have initial reluctance to go outside of their arena. They will work inside their communities, then go out to support larger Hispanic projects."
 - "Anglos are more fact-, statistic-, or task-oriented, whereas Hispanics are more oriented to a cause or personal relation motivation."
 - "The Anglos articulate their tradition of giving by keeping statistics and records. Hispanics are now in the learning stages of articulating their traditions and keeping accurate records."
-

Make giving intimate

Goizueta (1995) notes that Hispanics are a deeply relational people. He writes, "for U.S. Hispanics, the entire cosmos—including the earth below and the heavens above—is an intrinsically relational reality where...each member is necessarily related to every other member" (p. 50). Royce and Rodriguez (1999) note that "traditional philanthropy understands the importance of establishing connections but has to work against dominant cultural assumptions of the self-sufficient individual" (p. 28). This is less the case among Hispanic, and particularly among Mexico-born, persons. Perhaps for this reason, Newman (2002a) maintains that "Latinos [must] feel an intimacy about giving, a personal connection to the cause or to the individual soliciting funds" (p. 19). In a three-year study focusing on the development and implementation of fundraising training in seven U.S. Hispanic church and parachurch organizations, Wagner and Hall-Russell (1999) similarly found respondents to their study sharing such insights as "there has to be a lot

of personal touch involved” and “more time must be spent creating interpersonal relationships” (p. 98).

Giving as a response to crisis, rather than to ongoing operations

Newman (2002a) states that “perhaps because the government and the Catholic church provide nearly all social and health services in Central and South American countries” (p. 19), Latinos will be more apt to respond to crises than to contribute to ongoing operations.

Challenges with recognition and pledging

While most formulated fundraising strategies build upon people’s desire for recognition, Royce and Rodriguez (1999) note that “recognition, for many in the Hispanic community, is often unwelcome” (p. 18). They point to the belief among many Hispanics that one’s giving is a matter between an individual and his/her God. This belief, the authors claim, has manifested itself in a “problem of support for the [Catholic] church and its programs” (p. 18).

Royce and Rodriguez (1999) further maintain,

pledging is problematic at best. As one individual [in our study] commented, ‘People are reluctant to make a pledge for a certain amount because circumstances might prevent them from meeting it and then they would have broken their word’ Pledging also makes it impossible to remain anonymous, which runs counter to the natural reticence as well as to the belief that God is the ultimate judge of the appropriateness of one’s gifts (p. 18).

Tithing

In their study of Mexican Americans, Cuban Americans and Puerto Ricans, Royce and Rodriguez (1999) note the great difference that exists between the Catholic Church and Evangelical churches with respect to tithing. They write, “tithing is expected in evangelical churches and reinforced with scriptural reference” (p. 18). Among Evangelicals, these authors maintain, one’s appropriate response to tithing is, “I am fortunate—I get to keep 90 percent” (p. 19), and those who do not tithe are viewed as lacking in faith, conviction, morality and/or responsibility. These authors conclude:

For Evangelicals, giving is part of being a faithful follower of Christ. Evangelical churches use scripture regularly as a basis for explaining the importance of tithing. The centrality of tithing sets Evangelical churches apart from most Roman Catholic churches. Another difference, remarked on by both Evangelicals and Catholics, is that there is a greater sense of ownership and therefore participation in the Evangelical denominations” (pp. 27-28).

These same authors characterize giving in Catholic churches in the following way:

In contrast, much of the giving in Catholic parishes [in the study] was described as *pro bono* gifts of time or materials. The concept of tithing is not reinforced in sermons or by reference to scripture. The attitude that what you give is between you and God seems to prevail; pledge envelopes and personal checks are rare. It is difficult to plan a church budget in the absence of a pledge component....A criticism voiced by several individuals was that there is no sense of ownership. This would certainly contribute to the difficulty of fundraising” (pp. 19-20).

Wagner and Hall-Russell (1999) echo this language when they write:

The Catholic Church experiences problems in support for the church because of the view that giving is between the individual and God. Therefore, family needs come first; obligations outside family are kept to a minimum. Much giving is *pro bono*. Tithing is often not reinforced by sermons or reference to scripture. Pledges and personal checks are rare, so it’s hard to have goals for raising money in the church. The church doesn’t belong to the congregation, so there is no sense of ownership. Catholics defer to the authority of the priest. Only recently are Catholic laity actually involved (pp. 90-91).

Discipleship and spiritual vitality

Miranda (1999) advances that the two most influential factors on Hispanic religious giving patterns are discipleship and spiritual vitality. Discipleship, “one of the marks of faithful stewardship,” he says, is the commitment that stems from such religious activities as praying, reading scripture, and interacting with other believers. Discipleship is the

Christian socialization or enculturation that derives from formation, education and instruction. Formation, for Miranda, “involves the means by which people are incorporated into the life of the church and shaped (enculturated) into the community’s understanding of the Christian faith, that is, Christian stewardship” (p. 70). Miranda says that such “apprenticeship” in the faith includes all aspects of Westerhoff’s (1978) sevenfold model for Christian formation: participation in rituals, environment, interrelated experiences, observed behavior, role models, organization, and use of language. Education, he says, is “the process that involves those humanizing elements which give people the awareness and ability to become subjects in the world of philanthropy....It helps to free people from their historical conditioning, to reinforce and affirm those cultural and spiritual traits conducive to an actual and healthy nurturance and development of their moral and spiritual responsibilities of Christian living” (p. 70). Instruction includes the acquisition and transmission of knowledge and skills of stewardship principles.

According to Miranda (1999), Christian stewardship will also be influenced by spiritual vitality, which, he clarifies, “is not the interiorization of abstract truths or even of an unpersonal ‘spirit,’ but rather the externalization of the spirit in the form of actions” (p. 71). He points to church attendance as one means by which beliefs and philanthropic habits are reinforced. He also cites the theology of Villafane (1993), who incites Hispanics to challenge their religious institutions to emphasize the heart over the mind, and ardor over order. Miranda also shares, “Hispanics have a deep sense of the mystical. An increasing number of Hispanics identify with the form of the church that speaks to their soul (is mystical) and makes them ‘feel at home’” (p. 72). With respect to those cultivating a culture of philanthropy among Hispanic persons, he says,

those making the largest gains among Hispanics do so because they appeal to Hispanic ideology and spirituality....They offer the empowerment and ownership that Hispanics have historically sought in their institutions and a sense of community not available in the more traditional churches. They provide a powerful process of formation that includes the elements of incorporation, enculturation, and transformation. More importantly, they offer opportunities to self-govern, self-promote, and self-support” (p. 72).

*Recommendations for fundraisers
working with Hispanic causes and donors*

In their three-year study focusing on the development and implementation of fundraising training in seven U.S. Hispanic church and parachurch organizations, Wagner and Hall-Russell (1999) asked the participants in their study what advice they might offer to professional fundraisers who work with Hispanic causes and donors. Table 17 offers a sampling of responses by study participants.

Table 17

Advice to Wagner & Hall-Russell

for fundraisers working with Hispanic donors

- "Know the community, know the issues, know the language, be in a teacher mode, and don't take anything for granted."
 - "Consideration and patience have to be exhibited as a result of the historical neglect by dominant institutions of the Hispanic community. A sudden rediscovery of Hispanics cannot easily undo years of neglect. Be prepared to answer questions like, 'Why are we now a target when we weren't before?'"
 - "Hispanics are always willing to help. You have to be sincere with them. You have to earn their trust because too many people have tried to use them."
 - "It takes a lot of time and personal investment to lay the ground work for successful fundraising. I am still trying to work out a fundraising structure that would be effective in the Hispanic world."
 - "Listen to the reasons behind established practices before proposing new ones."
-

CHAPTER THREE

Conclusions & Recommendations

Based on the preceding review, synthesis and evaluation of available literature, it is possible to draw conclusions and make recommendations. This chapter documents the evaluation of the literature review, presenting various possible strategies for the pastors and ministers of U.S. churches who seek to inspire the more generous sharing of time, talent and financial resources among the Mexico-born adult population residing in the U.S.

Conclusions

The unique nature of Mexico-born persons in the U.S.

Mexico-born persons comprise a unique population within the U.S. They have migrated from their natal culture and presently live within a host culture. They are immigrants. Their children, second-generation immigrants, will likely be raised between the two cultures, speaking the language of the natal culture at home and speaking the language of the host culture with friends and at school. Their grandchildren, third-generation immigrants, will likely possess less remnants of the natal culture (such as language and traditions) and will be largely assimilated into mainstream U.S. culture.

Whereas the host culture will largely influence the manner in which their grandchildren will view the sharing of their time, talent and financial resources, the perspectives of Mexico-born persons will largely be influenced by their experiences in their natal culture (viz., Mexico). Thus, if, for whatever reason, a person was accustomed to placing his/her pocket change into the collection basket in Mexico, s/he will likely be tempted to do the same in the U.S. If his/her parents instilled in him/her the value of being active in and serving the church, s/he will likely carry this value with him/her into the host culture. In this respect, it is important to remember Hofstede's (2005) notion of culture as the "software of the mind" with which a person is "programmed." Such programming in any respect is often not easily changed.

Pastors and ministers will do well to recall Figueroa Deck's (1992) image of Mexico-born persons in the U.S. as "bridge" people. Elizondo's (1992) words apply to them: they live in two worlds (viz., in both their natal and host cultures), and two worlds live in them. They know both

the poverty of the third world and the prosperity of the first world. (Royce & Rodriguez, 1999). They are proud to be in America, but their hearts are also in Mexico (Greene, 2002).

It is also important to recall the various warnings concerning stereotypes and/or “lumping” together Mexico-born persons with other Hispanic groups. Indeed, a Mexico-born adult struggling to exist within a newly-adopted host culture would possess many overt differences from a Hispanic person of Mexican-American descent whose family has resided in the U.S. for some generations (Wagner & Hall Russell, 1999). For this reason, a Mexico-born adult will more likely identify him/herself as *mexicano* or as having originated from his/her state and/or city, rather than self-identify as a member of the pan-ethnic “Hispanic” race.

Pastors and ministers must thus be aware that they are called “to become boundary spanners characterized by uncommon professional skills that are supported by keen self-awareness and multicultural literacy” (Fogal, 2002, p. 6) and that they “may need to communicate differently” with this population (Carson, 1995, p. 99). As Fogal (2002) warns, pastors and ministers will do well to remember that “we must...respect their culture” (p. 7).

The diversity of Mexico-born persons

The Mexico-born population in the U.S. is hardly homogeneous. Rather, it is comprised of persons of varying citizenship statuses, lengths of residence in the U.S., education, English language skills, profession and occupation, and knowledge in both the natal and host cultures.

With respect to citizenship status, for instance, it might be presumed that a person possessing undocumented status will be hesitant to share his/her name and/or address with institutions, including churches. The pastor or minister will thus have the dual challenge of assuring such a person that any information shared with the faith community will be kept confidential, while educating him/her to the benefits of registering oneself in a faith community, particularly if, in the future, one may need proof of residence in the U.S. as part of acquiring U.S. citizenship. Certainly, if gifts are to be recorded by the faith community, it will be important to tie those gifts to the personal information offered by the donor. One should not expect an undocumented person to naturally desire to give a gift that will be so recorded. Thus, with undocumented persons, data may often have to be collected in non-obtrusive and creative ways.

With respect to length of residence in the U.S., it might be presumed that a correlation will be found to exist between length of residence in the U.S. and financial resources. Presumably, the longer one has resided in the U.S., the more opportunity s/he will have had to establish various resources. Additionally, if s/he, like many others, entered the U.S. with the help of smuggling services (*viz.*, “coyotes”), s/he may be burdened with the repayment to family and friends for such services during his/her initial months and years of residence.

A correlation may also exist between hoped-for length of residence in the host culture and investment in the same. If such investment is expressed through one’s sharing of time, talent and/or financial resources, it may also be found that those who have established themselves in this nation (by having secured a place to live, employment, etc.) will likely be in a better position to pursue the fulfillment of higher-order, spiritual needs. Presumably, it will be easier to involve a person in a faith community if s/he has arrived at some level of comfort within the host culture and with the faith community. Regardless, pastors and ministers will do well to remember that the Mexico-born adults in their faith communities are likely comprised by a mix of naturalized U.S. citizens, legal permanent residents, legal temporary visitors, and persons who entered the U.S. without authorization, and that one’s legal status often shapes his/her decisions (Mexican Ministry of Foreign Affairs and the U.S. Commission on Immigration Reform, 2007). Over the long term, it is more likely that settlers (those who consider the U.S. to be their permanent residence) will invest themselves in their new host culture than sojourners (those who consider Mexico to still be their place of primary residence).

With respect to education, because the average Mexico-born sojourner and settler in the U.S. respectively have six to eight years of formal schooling, pastors and ministers will do well to communicate in such a way that persons of that educational level can easily understand. They should, for instance, be aware that two of every five sojourners enjoys less than five years of formal schooling, and that only 1 to 9% of the same enjoy the equivalent of a high school education. Though education is correlated with citizenship status, it is helpful to remember that even for Mexico-born naturalized U.S. citizens, three of every ten such persons have not completed the equivalent of high school studies.

With respect to English language skills, pastors and ministers will want to be sensitive to the fact that Spanish is the language of the natal culture of Mexico-born adults. English-only materials will not be understood and/or will be interpreted as alienating by some 57% of

naturalized citizens, 71% of settlers and 93% of sojourners. Hence, all materials should be bilingual (English/Spanish) or in Spanish. The former affords monolingual persons of both languages the opportunity to learn the language in which they are less proficient, and the latter is a strong statement concerning a faith community's commitment to ministering to Spanish-speaking persons.

With respect to profession and occupation, it is important to remember that many Mexico-born adults in the U.S. work in low-skilled positions, and possess an excessive respect for such "educated" persons as clergy, teachers and lawyers. Thus, it is important for pastors and ministers to attempt to relate to them at their level. An appreciation for their occupations can also be fostered by faith communities through such celebrations as Día de los Albañiles (May 3, a day to honor construction workers in Mexico) or César Chávez Day in the U.S. (March 31, a special day for farm workers), and/or through such religious occasions as la fiesta de San José Obrero (March 18, the feast of St. Joseph the carpenter, the patron of laborers) and/or the feast days of any number of patron saints for cooks, farm workers, housekeepers, etc.

With respect to cultural knowledge, it would be extremely important for pastors and ministers to understand the cultural "programming" of the people they serve. If they minister to Mexico-born persons, for instance, it would be important to understand the cultural characteristics of Mexico, including attitudes, values, beliefs and behaviors.

Persons in need of support and assistance

Despite any possible differences, Mexico-born adults will likely feel comfortable with other Mexico-born adults. They share a common culture, race, ethnicity, language, and, in many cases, religion. Though "strangers" in a foreign land, they are peers with one another. They will likely cluster geographically. They will also often look for direction from persons within their host culture. Nichols (1990) reminds us that they are "looking for direction... [and they] will conduct their lives in response to signals, real or imagined, from others" (p. 58).

Pastors and ministers will do well to read the "signals" of the Mexico-born community as well. Medland (2007) shares of how one Maryland church community was revived through its focus on the concrete, non-religious needs of recently-arrived, Mexico-born persons in the U.S. Smith *et al.* (1999) similarly advance, "Some parishes are more responsive to the needs of the community. These parishes in turn engender a greater degree of giving from their members" (p. 43). Joseph (1995) suggests that

pastors and ministers may be wise to concern themselves more with providing basic services and meeting basic human needs, than with ritual, theology and worship. He also suggests that a congregation may be better served by having a pastor or minister who seems more similar to the Mexico-born persons s/he serves since s/he will be “more likely to be perceived as a resource broker between the immigrants and mainstream society” (p. 174).

The importance of feeling “at home”

Home and family are important guiding images in the Mexican culture. Royce and Rodriguez (1999) speak of the largely negative reception with which many Mexico-born adults in the U.S. have been greeted. Pastors and ministers will do well to help Mexico-born members of their congregations to feel at home and among family. This may pose a special challenge considering that 73% to 94% of Mexico-born sojourners are male, 56% to 85% are married, and that their median age is between 28 and 32. The church-going population of Mexico is not primarily characterized by young people, or by men. Further, this is a hardworking population. Among Mexico-born men, 91% of sojourners, 85% of settlers and 82% of naturalized citizens participate in the U.S. labor force. Interestingly, it seems that many Mexico-born persons will feel more “at home” with folk or popular expressions of religion, rather than with institutional churches.

The expectation that family comes first

Mexico-born persons are characterized by a high degree of familismo. Their families are very important to them. Philanthropically, it should be expected, then, that their primary expression of generosity will occur within the family. Their giving is thus more personal and informal. It might be surmised that if such persons feel “at home” within their church, their generosity toward their church might more closely resemble their generosity toward family, than their generosity (or lack thereof) toward other non-church institutions.

Persons seeking intimacy and personal rapport

Personal rapport, mutual respect, trust and intimacy are highly important to Mexico-born persons. It is perhaps for this reason that compadrazgo is so important to Mexico-born persons, since it “engenders eternal ties of loyalty, trust, affection respect, and mutual

assistance" between persons (Smith *et al.*, 1999, p. 34). Trust is critical in relationships, and is earned not only over long periods of time, but also during times of crisis. The availability of pastors and ministers during times of crisis, then, may greatly contribute to the building of such trust. Pastors and ministers will do well to keep in mind Royce and Rodriguez's (1999) counsel that "there needs to be an intimacy about giving so that people feel a personal connection to the cause or to the persons soliciting funds. Who is involved is almost as important as what the cause is" (p. 15).

Persons who value their word

Mexico-born persons value la importancia de la palabra (the importance of one's word). For this reason, pastors and ministers will do well to keep in mind that such persons will be hesitant to make pledges of support to their church, merely for fear that they may not be able to keep their word in the future.

The religiosity of Mexico-born persons

Mexico-born persons possess an "intensely personal sense of relationship...to religion" (Royce & Rodriguez, 1999, p. 14). They often possess very strong personal relationships with and trust in the deities and saints that populate their religions. A high degree of respect for their churches and ministers also characterize many Mexico-born persons.

Spiritual values are extremely important for Mexico-born persons, and material satisfaction may often be sacrificed for spiritual goods. Mexico-born persons are described as extremely brand loyal. This is true of Mexicans with respect to their churches as well.

Due to the high fertility of religiosity of Mexico-born persons in the U.S., it might be expected that religious rites involving their children (e.g., baptisms, presentaciones de tres años, First Communion, church celebrations of Día del Niño, quinceañeras) will bring such persons – and their extended networks of family and friends – to the church. Thus, such events are opportunities for evangelization. With ample prudence and caution, these may also provide moments for moving persons toward a more generous sharing of their time, talent and financial resources through recognition of their gratitude to God for the many gifts and "blessings" they have received.

The religious giving patterns of Mexico-born persons

Miranda (1999) suggests that the giving patterns of Mexico-born persons in the U.S. have largely remained unexplored. Smith *et al.* (1999) suggests that most giving by Mexico-born persons in the U.S. is either devotional or directed toward such celebrations as the festivals of saints. These two aspects of giving, it seems, reinforce a person's relationship with the object of his/her devotion; the latter, however, does so within a context in which communal bonds are reinforced (Smith *et al.*, 1999). In this way, though seemingly contrary to many stewardship paradigms of U.S.-born persons, the most popular expressions of generosity by Mexico-born persons within church contexts have traditionally been found in fiestas, carnivals, dances, queen contests and other fundraising events. As Smith *et al.* (1999) also note, the cult of saints might also serve as a focus for the sharing of time, talent and financial resources.

*Possible directions for inspiring the more generous sharing
of time and talent by Mexico-born persons*

Stewardship is likely a new concept for many Mexico-born persons, and it does not easily translate into the Spanish language. The Roman Catholic Church in the U.S. has generally adopted the translation of *corresponsabilidad*, a word that has no initial meaning for Spanish-speaking persons. The tripartite emphasis of stewardship on "time, talent and treasure," however, easily translates to Spanish: *tiempo, talento y tesoro*. As with any language group, pastors and ministers serving Mexico-born persons will have the challenge of helping them understand that stewardship encompasses more than the mere sharing of financial resources. The sharing of "time and talent" is thus very easily understood, particularly by persons who have previously been involved in the churches of their natal culture.

Particularly among the older Mexico-born population, "the notion of service is deeply embedded....It derives from a sense of obligation, reciprocity, and the need to give back" (Royce & Rodriguez, 1999, p. 16). This is especially true if persons see themselves as having been "blessed" by God with those things that they enjoy. Royce and Rodriguez (1999) also share that service to the church is a prominent value for Mexico-born persons. For this reason, they advance that such persons will involve themselves in "cooking meals, organizing saints' days, directing Bible study, taking turns meeting with the youth group—as if these activities were simply things one [does] for God as part of one's faith" (p. 17). Nichol's (1990) advice might well apply to U.S. churches hoping to

engage Mexico-born persons, when she writes, “the initial key to winning [their] loyalty may be to attract them as volunteers” (p. 58). Quotah’s (2008) suggestion of substituting the word “helping” for the seemingly more formal “volunteering” may also be of assistance to pastors and ministers hoping to engage Mexico-born persons in their churches. Because the Mexican culture is highly personal and relational, very personal invitations, it seems, will work best in encouraging Mexico-born persons to more generously share of their time and talent.

*Possible directions for inspiring the more generous sharing
of financial resources by Mexico-born persons*

Members of the Mexico-born population in the U.S. comprise the world’s largest remittance market, with \$20 billion being sent by them to their families and hometowns in Mexico in 2005 (Perry, 2006). Hometown associations or clubs de oriundos are also important vehicles, not only for raising funds in the U.S., but also for reinforcing social bonds and cultural identity. The high collectivism and family-orientation of Mexico likely place an expectation on those who have migrated to the U.S. that they will send money to support their families in Mexico. It is important to remember that the first philanthropic priority for such persons will likely be their families.

Because Mexico-born adults in the U.S. are “bridge” people, however, they know from experience both the poverty of their natal culture and the prosperity of their host culture. They know what it is to have needs. They also know what it is to be helped. They desired a better life for themselves. It is only natural that they will recognize the needs of others and feel some desire to assist.

Pastors and ministers will do well to recall Royce and Rodriguez’s (1999) suggestion that Mexico-born persons possess a *dadivoso* (or especially generous) spirit. Giving to the church is common among Mexico-born persons. Perhaps the greatest challenge in this respect lies in the fact that Mexico-born persons bring with them to the U.S. their own traditions of giving, which they learned amid the poverty of their natal culture (Joseph, 1995; Okonkwo, Osili & Du, 2005).

A caution with respect to donor recognition

Though it has not been the experience of the present author, various voices caution that Mexico-born persons may not be interested in receiving credit or recognition for their sharing of time, talent and financial resources. Perhaps owing to the collectivist nature of their natal

culture, Royce and Rodriguez (1999) suggest this will express itself through helping in quiet and noncompetitive ways, a reticence or unwillingness to claim credit, and a hesitation to put oneself forward.

Miscellaneous thoughts

The available literature may also inspire a number of ideas that do not neatly fit with the above categories. Pastors and ministers, for instance, would do well to keep in mind many of the cultural differences that characterize Mexico-born persons. Miranda (1999), for instance, warns that such persons are more outdoor-oriented, focused on process (rather than goals), and intuitive (rather than rational). Metaphor, passive voice and flowery speech may be preferred to direct and concise communication. Other key words for pastors and ministers serving the Mexico-born community might include: social, ceremonial, relational, mystical, spontaneous, short-term, persuasive and communal.

Recommendations for Further Study

Based on the findings of the present research, one might recommend the following possible areas of study:

1. A quantitative study of the sharing of time, talent and financial resources with U.S. churches by Mexico-born persons.
2. The possible correlations between immigration status and length of residence in the U.S., with the level of generosity of Mexico-born persons toward U.S. churches.
3. The possible correlations between immigration status and length of residence in the U.S. with incentives and disincentives for giving to U.S. churches.
4. The development of a model of the "Mexican way" of giving, resembling Miranda's model of the "Hispanic way" of giving.
5. A study of the advantages, disadvantages and effects of donor recognition by U.S. churches serving Mexico-born persons.
6. The relationship between trust and/or personal rapport (between pastors or ministers and the Mexico-born persons they serve) and the generous sharing of time, talent and financial resources by Mexico-born persons.

7. An enumeration of the obstacles to be overcome if a pledge campaign is to work among Mexico-born persons residing in the U.S.
8. Further exploration of the “exchange” expected by Mexico-born persons with the deities and/or saints to whom they have devotion.
9. Further exploration of the possible reciprocal relationship between churches serving concrete, basic needs of the Mexico-born population residing in the U.S. and the generosity of those persons toward the churches that have assisted them.
10. A study of the differences in perceptions between Mexico-born Catholics and Mexico-born Evangelicals toward the generous sharing of one’s time, talent and financial resources.
11. An exploration of the impact of the poverty of Latin America on the patterns of giving to U.S. churches by persons of Latin America.
12. An exploration of the history of the Roman Catholic Church in Mexico and the influence of this history on giving to the Roman Catholic Church by Mexico-born persons.
13. A study of the possible correlations between Hofstede’s (1995) cultural characteristics and/or the cultural characteristics of the GLOBE Study (House, Hanges, Javidan, Dorfman & Gupta, 2004) and the patterns of generosity by Mexico-born persons residing in the U.S.
14. A study of the possible implications of the continuum of philanthropy (Newman, 2002b) for U.S. churches serving Mexico-born persons.

Summary

As is evidenced in the literature, the Mexico-born population residing in the U.S. is markedly different from the native-born population of this nation. Pastors and ministers who are keenly aware of these differences will likely experience greater success in encouraging Mexico-born persons to more generously share of their time, talent and financial resources within the context of their host culture. Despite the limitations of the present work, it is hoped that this study may provide some guidance to pastors and ministers who seek to inspire a more generous

sharing of time, talent and financial resources by the people they serve, such that their efforts might bear great fruit not only for their own churches, but also for the profession of philanthropy and development, and for the world community.

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Appendix A

Annotated Bibliography

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In this early work on philanthropy, Bakal surveys the history of giving in the United States. Two chapters specifically focus on religious philanthropy and Christian charity. The author examines the motives for giving, citing the scholarship of Lewis who formulated more than 110 motives for giving, from subjective factors of compassion, personal identification, self-interest and religious influence, to objective factors of the mission/purpose of the organization and one's relationship to the organization. Themes range from tithing and John D. Rockefeller's thoughts on stewardship, to the belief of some people that they are making premium payments on "hereafter" insurance. The author compares giving traditions (and totals) among religions, noting the use of collection plates and envelopes to stimulate giving. In a section on Catholic giving, the author estimates that \$2.8 billion is annually given to the Church by U.S. Catholics, with roughly 90% from collections and gifts, 8% from bingo, bazaars and special events, and 2% from bequests.

Calixto, J. (September 2, 2003). "Diversity essay: Latino philanthropy in the U.S." found on http://www.afpnet.org/tier3_print.cfm?folder_id=1865&content_item_id=6530.

This essay, written by a certified fundraising executive who is a member of the Association of Fundraising Professionals in Chicago and works for Mujeres Latinas en Acción, is published online and is linked to the website of the Association of Fundraising Professionals. Because the Latino community consisted of more than 35 million people in 2000, and possessed the fastest-growing purchasing power (estimated at \$450 billion) of all ethnic groups, the author speaks of the importance of knowing, involving and stewarding members of the Latino community with respect to philanthropy. Noting existent stereotypes which exist, he warns of the great diversity among Latinos, who represent more than twenty countries, each with its own historical influences. The author admonishes, "nonprofits should also

learn how Latino prospects like to be called and what makes them unique." Length of residence in the U.S. and preferred language should also be taken into consideration.

Carson, E.D. (2000). The new rules for engaging donors of color: Giving in the twenty-first century. In E.R. Temple & D.F. Burlingame (eds.), *Understanding the needs of donors: The supply side of charitable giving* (pp. 69-80). San Francisco: Jossey-Bass.

In this essay, the president and CEO of the Minneapolis Foundation advances that nonprofit organizations must understand the importance and interconnectedness of morality, market and mission, in order to effectively engage donors of color. He begins by acknowledging that the "new" donor is less likely to be "a white male," and he warns against presuming that persons of color have no long-established traditions of giving and volunteering. Rather, he emphasizes that, in addition to other attributes, people of color are also young, use the internet, and are part of the new high-tech wealth. They are, essentially, "the millionaire next door." Interestingly, the author then shifts to say that the focus of the fundraising professional should be on "senior citizens...[whose] time is limited if they are going to be encouraged to engage in philanthropy during their lifetimes." This essay contains a series of seemingly disjointed themes, concluding with discourses on religion and the estate tax.

Carson, E.D. (1995). Understanding cultural difference in fundraising. In D.A. Brehmer (ed.), *Communicating effectively with major donors* (pp. 99-112). San Francisco: Jossey-Bass.

In this essay, the president and CEO of the Minneapolis Foundation emphasizes that fundraisers must communicate differently with varying racial and ethnic groups. He alerts the reader to potential barriers to effective communication when interacting with persons of other racial and ethnic groups, and he urges the adoption of a "salad bowl," rather than a "melting pot," conception of U.S. cultures. He warns that certain words, colors and symbols may carry significance in another culture which may be difficult to understand by those from outside that culture. In the Latin America culture, for instance, the author notes that "philanthropy" and "charity" are viewed as acts performed only by the wealthy, whereas most Latin Americans would characterize their generous acts as mere "giving," "sharing" and "helping." The essay concludes with cautions about making

assumptions regarding cultures, particularly in light of the mixing of cultures through interracial marriages and electronic media.

Conway, D. (1995). Faith versus money: Conflicting views of stewardship and fundraising in the church. In C.H. Hamilton & W.F. Ilchman (eds.), *Cultures of giving: How region and religion influence philanthropy* (pp. 71-78). San Francisco: Jossey-Bass.

Written by the secretary for communication and development for the Roman Catholic Archdiocese of Indianapolis, this essay advances that stewardship is more than a euphemism, and that an authentic understanding and practice of stewardship can unify the themes of faith and money (or stewardship and fundraising). He advances that an underlying negative attitude toward administration and money is at the heart of the financial challenges faced by Catholic and Protestant churches, and that a renewed theology and practice of stewardship, which arose in the late-Victorian Protestant church, might lead beyond the ambivalence about money which is characteristic of U.S. culture. The author argues for the translation of stewardship as a position of "care" or "responsibility" between God and neighbor. He concludes, "When Christians recognize that we are called to be faithful stewards of all of God's gifts...it will become possible for us to earn, save, spend, give, and raise money as though it were a gift from God."

Conway, D. (1997). Interview with Henry Rosso on stewardship and fundraising. In D. Conway & C. Hart Price (eds.), *The practice of stewardship in religious fundraising* (pp. 11-20). San Francisco: Jossey-Bass.

In this work, the secretary for stewardship and communications for the Roman Catholic Archdiocese of Indianapolis interviews Rosso, the founder and director emeritus of The Fund Raising School at the Indiana University Center on Philanthropy. The interviewee refers to stewardship as "the conscience of philanthropy, a sentinel centering the organization on responsible action." Themes include gratitude, accountability, and the responsible use of gifts and talents. In order to appeal to a person's sense of stewardship, the person must first understand and appreciate stewardship. He shares the wisdom of an Episcopalian rector who challenged people to make "a gift to the best of their ability. A gift that will bring joy to their hearts....a gift from the top of their resources, offered with joy, meaning and gratitude for

the privilege of being able to make such a gift.” The interviewee focuses on stewardship both as a responsibility of the giver and of the organization that receives the gift.

Cortés, M. (1999). Do Hispanic nonprofits foster Hispanic philanthropy? In L. Wagner, & A. Figueroa Deck (eds.), *Hispanic Philanthropy* (pp. 31-40). San Francisco: Jossey-Bass.

The author of this essay, who serves as assistant professor of public policy and director of the Program on Nonprofit Organizations at the University of Colorado Graduate School of Public Affairs, suggests that the neglect of the Hispanic community by most nonprofit organizations may explain why few Hispanics volunteer and practice conventional forms of philanthropy. He notes the rapid growth of new nonprofit organizations during the past two decades, arising from informal mutual assistance within the Hispanic community and as a result of the incomplete integration and lack of opportunity for Latinos in mainstream economic and legal institutions. The author wonders whether the rise of so many Hispanic nonprofit organizations will change patterns of giving among the nation's growing Hispanic population. Written for fundraisers and scholars, the essay encourages the exploration of appropriate fundraising strategies and techniques for the Latino population.

Cortés, M. (2002). Questions about Hispanics and fundraising. In R.E. Fogal (ed.), *Fundraising in diverse cultural and giving environments* (pp. 45-54). San Francisco: Jossey-Bass.

Cortés, the director of the University of San Francisco Institute for Nonprofit Organization Management, addresses the challenges of making generalizations about the Latin American community and sets forth the diversity of giving styles among various Latin American immigrant communities. Within the Latin American population, specific geographical identity supersedes one's identity as "Hispanic" or "Latino." Referencing the research of Smith *et al.* (1999), who noted that Guatemalans, Mexicans and Salvadorans contribute relatively little time or money to charities except churches, the author identifies various issues which have not been addressed by research. He notes that Latin American nations "have long histories of centralized government, influential religious institutions, powerful private employers, and systems of law and taxation that do not encourage the creation of officially recognizable nonprofit organizations or

philanthropy." The author also encourages fund raising professionals to consider the individual identities, interests and concerns of prospective donors, rather than facilely summarize them as "Hispanic" or "Latino."

Dollhopf, M.R. (1997). Stumbling stones of the steward. In D. Conway & C. Hart Price (eds.), *The practice of stewardship in religious fundraising* (pp. 63-80). San Francisco: Jossey-Bass.

In this essay, the author, a fundraising professional who assists churches, suggests that though asking for money can be problematic or embarrassing for churches, it is an exercise of good stewardship. Pointing to ancient and contemporary financial abuses by churches (including the Roman Catholic Church's "failed capital campaign" which resulted in the Reformation), the author laments that clergy members (unlike professional fundraisers) are not held accountable for their fundraising. Five principal misunderstandings of how churches should ask for treasure are enumerated, and the author clarifies that (1) churches should ask for money, (2) churches should identify and cultivate individuals for their ability to make large contributions, (3) designated gifts are not selfish and egotistical, (4) for several reasons, it is better for nonprofits to ask for a congregational membership list than a church offering, and (5) churches should develop the necessary systems for asking for and receiving gifts.

Hoge, D.R. (1995). Explanations for current levels of religious giving. In C.H. Hamilton & W.F. Ilchman (eds.), *Cultures of giving: How region and religion influence philanthropy* (pp. 51-70). San Francisco: Jossey-Bass.

Written by a Catholic priest who served as professor of sociology at the Catholic University of America in Washington, D.C., this essay explores factors which impact religious giving, including varying forms of reciprocity and altruism, the impact of institutional factors, and the free rider problem (by which churchgoers hope to pay less than a fair share of the actual costs for sustaining a church). The essay presents five research findings: (1) church giving varies largely by denomination, with Catholics giving a smaller percentage of their income than all mainline Protestant denominations, (2) large gifts by individual church members greatly skew existing data, (3) giving by high-education, high-income Catholics is low relative to other denominations, (4) religious giving is strongly correlated to church

attendance, and (5) religious giving is committed to strong commitment to God and God's promises. Though excluded by most Christian theology, reciprocity with God is explored as a motivator of financial giving.

Hudnut-Beumler, J. (1995). Protestants and giving: The tithes that bind? In C.H. Hamilton & W.F. Ilchman (eds.), *Cultures of giving: How region and religion influence philanthropy* (pp. 79-90). San Francisco: Jossey-Bass.

In this essay, the executive vice president and associate professor of religion and culture at Columbia Theological Seminary notes that though religiously motivated giving is intended for God, it passes through human hands, such that the question arises: Why do Protestants give? The author advances that "the spirit intersects with money," such that church attendance, acts of giving, and volunteering are placed in a larger-than-human context. He attempts to distill the way in which Protestants, "a fundraising reform movement in the history of Christianity," think about giving. The author emphasizes Luther's concept of giving as thanksgiving for unmerited grace, Calvin's views on the stewardship of material goods, and the Arminian/Wesleyan idea that giving is a volitional response to divine activity. He notes that Protestants give to smaller institutions in which they feel ownership, they give from their income (versus from accumulated wealth), and they take seriously concepts of tithing and intentionality.

Jeavons, T.H. (1997). Stewards for whom? Problems with stewardship as a model for fundraising. In D. Conway & C. Hart Price (eds.), *The practice of stewardship in religious fundraising* (pp. 35-44). San Francisco: Jossey-Bass.

In this essay, the author notes the loose citation of the term stewardship in the nonprofit world and cautions against the devaluation of the concept of stewardship through its misapplication to fundraising. The author serves as the general secretary of the Philadelphia Yearly Meeting of the Religious Society of Friends, and is the author of various essays on stewardship and fundraising. He advances that stewardship is a philosophical and theological principle which might raise the moral and ethical quality of fundraising. The author summarizes the evolution of stewardship in the Judeo-

Christian tradition as the work of a servant entrusted with the right ordering of the affairs of a household. Before fundraising can be described as a form of stewardship, he suggests, three questions must be answered: Whose stewards are they, what arrangement (or rearrangement) of the society and world do they seek through their work, and do they create, sustain and enhance relationships of trust through their work?

Joseph, J. (1995). *Remaking America: How the benevolent traditions of many cultures are transforming our national life*. San Francisco: Jossey-Bass.

Written by the president and CEO of the Council on Foundations, this work contains instructive chapters on philanthropy in Native American, African American, Asian American and Latino communities. The author draws particular attention to the primacy of family and church in the Latino community. The author advances that Latinos largely identify with extended family, their barrio (neighborhood), their race, and their religion. He further examines the differences between Mexican Americans, Puerto Rican Americans and Cuban Americans. Sadly, the discourse on Mexican Americans merely includes a description of mutualistas (mutual aid and benefit societies created to meet the needs of the sick and bereaved). Less helpful in illuminating the themes of the work are subsequent chapters canonizing Patrick Flores ("the Mariachi Bishop"), Sister Isolina ("the Mother Teresa of Puerto Rico"), and César Chávez ("Apostle of Nonviolence"). The author concludes that racial minorities assist in transforming our notions of benevolence.

Mexican Ministry of Foreign Affairs & U.S. Commission on Immigration Reform. (1998). *Migration between Mexico and the United States: Binational study*. Austin, TX: Morgan Printing.

Funded by the governments of the United States and Mexico, this dense, two-volume presentation of essays by twenty scholars from both nations is intended for a scholarly audience. The work's essays explore five aspects of migration from Mexico to the United States: the quantification of migration, characteristics of migrants, factors that influence migration, effects of migration, and responses to migration. The work emphasizes that the Mexico-born population in the U.S. is not homogenous, but is highly diversified with respect to residence, legal status, education and skills. This work illuminates differences between sojourners (who consider Mexico to be their principal place

of residence), settlers (who consider the U.S. to be their principal residence), and citizens. It sets forth many economic considerations, such as lower incomes, higher poverty rates and high remittances to Mexico, which might influence the philanthropy of the Mexico-born population residing in the U.S.

Miranda, J. (1999). Religion, philanthropy, and the Hispanic people in North America. In L. Wagner & A. Figueroa Deck (eds.), *Hispanic Philanthropy* (pp. 59-74). San Francisco: Jossey-Bass.

Written by the consulting editor of Christianity Today and the president of the Alianza de Ministerios Evangélicos Nacionales, this essay details the historical, cultural and religious factors which combine to serve as disincentives for philanthropic participation by the Hispanic community. The author speaks of patterns of low church attendance and involvement among Hispanic Catholics, and he wonders to what extent giving patterns within the Hispanic community are shaped by churches and how churches might reverse the giving habits of Hispanics. The author advances that discipleship and spiritual vitality might provide a corrective for the spiritual neglect and cultural insensitivity historically shown by Christian churches toward Hispanics as "essentially the religious serfs of a European colonial church." He notes the duality which has arisen between institutional and popular religion as a result of patronizing missionary attitudes, inadequate clergy, and insensitive ecclesial leadership. Interestingly, the author distinguishes between "the Hispanic way" and "the American way" of thought patterns and fundraising

Mixer, J. (1993). *Principles of professional fundraising: Useful foundations for successful practice*. San Francisco: Jossey-Bass

In this work, written for professional and academic audiences, the author seeks to expose the concepts underlying the philanthropic behaviors of individuals, groups and organizations. Mixer serves as a faculty member of the University of San Francisco Institute for Nonprofit Organization Management, and as chair of the Research Council of the National Society of Fund Raising Executives. In a thoughtful chapter entitled "How and Why People Give," he outlines personal motivations for giving, including guilt reduction (or guilt avoidance), meaning or purpose in life, spirituality, and the desire for immortality (the latter of which he says is closely related to the human

desire for permanence, stability, self-image and survival). Social factors for giving include affiliation, group endeavor, interdependence and altruism. The author also illuminates such external influences on giving as rewards (personal, social and recognition), personal requests, vision of what can be done, involvement in the organization, and traditions and historic values rooted in religious principles and teachings.

Murphy, T.J. (1997). Giving from the heart: Stewardship as a way of life. In D. Conway & C. Hart Price (eds.), *The practice of stewardship in religious fundraising* (pp. 21-33). San Francisco: Jossey-Bass.

In this essay, the Roman Catholic Archbishop of Seattle, who chaired the National Conference of Catholic Bishops' ad hoc committee on stewardship, encourages the development of a spirituality of giving. He notes how the traditional perquisites reserved to major donors flatter the ego but fail to motivate "giving from the heart," and he urges the creation of positive attitudes about stewardship and fundraising to be shared with future leaders. The author outlines the four underlying principles of stewardship: gratitude, accountability, generous sharing, and "giving back with increase." He also expresses three convictions: that stewardship flows from mature discipleship, that stewardship is not expressed in a single action but throughout one's entire life, and that stewardship changes the way in which a person views the world, such that s/he views God as the source of all s/he is and possesses. He emphasizes that stewardship is not a program, but a call to conversion and a way of life.

Newman, D.S. (2002). Incorporating diverse traditions into the fundraising practices of nonprofit organizations. In R.E. Fogal (ed.), *Fundraising in diverse cultural and giving environments* (pp. 11-21). San Francisco: Jossey-Bass.

Based on a study by the Council on Foundations, Newman presents an overview of the issues concerning inclusive philanthropy in African American, Asian American, Latino and Native American communities. Founder of the Philanthropic Resource Group, which is dedicated to building philanthropic resources for the future, Newman emphasizes the need for nonprofits to create a development plan appropriate to the groups it wishes to engage, and the development of sensitivity for the customs of minority cultures. For Latinos, she says, there must exist an intimacy about giving, and a personal

connection to the cause or to the individual soliciting funds. Because the government and the Catholic Church provide nearly all social and health services in Latin America, Latinos respond better to respected community leaders and to crises, than they do to ongoing operations. This essay is intended for fund raising professionals and is published as part of the series, *New Directions for Philanthropic Fundraising*.

Newman, D.S. (2002). How changing demographics are changing philanthropy. In D.S. Newman (ed.), *Opening doors: Pathways to diverse donors* (pp. 1-24). San Francisco: Jossey-Bass.

In this essay, Newman, the Founder of the Philanthropic Resource Group, argues for engaging African American, Asian American, Latino and Native American communities in the fundraising programs of charitable organizations. She cites the growing numbers, influence and wealth of these populations, and she advances that each requires an appropriate development plan. She shares the growth rates of various U.S. Hispanic communities, noting that the U.S. presently possesses the fifth largest Hispanic population in the world. The author shares that immigration patterns, education and income, all of which vary among Hispanic groups, have a direct effect on philanthropic engagement. She draws attention to the strong tradition of direct but informal giving among immigrants. Most helpful is the author's "Continuum of Philanthropy," a model which notes that a person's focus shifts (from survival to helping to investing) as his/her cultural, social and financial stability increase. For each stage of the model, she elucidates motivations, vehicles and recipients of giving.

Nichols, J., (1990). Religious organizations and fundraising. In J. Nichols (ed.), *Changing demographics: Fund raising in the 1990s* (pp. 99-107). Chicago: Bonus Books.

Written by a marketing consultant and senior certified fund raiser with more than twenty years of experience in the non-profit sector, this chapter is part of a larger work by the author on the challenges and opportunities facing non-profit organizations. Nichols, who previously served on two state boards of the National Society of Fundraising Executives, advances that all fundraising professionals should be concerned about potential changes in patterns of religious giving. She points to the importance of religious belief and conviction in motivating individual giving, noting that 70 cents of every charitable dollar go to religion. Interestingly, she shares that persons

over 65 years of age and persons with incomes less than \$50,000 tend to give a higher percent of their total giving to religion. The author also points to correlations between religious giving and marriage, denomination and regular attendance in religious services. Noting that many persons have left the Roman Catholic Church, she urges churches to be welcoming and inclusive.

Nichols, J., (1990). Targeting Hispanic Americans. In J. Nichols (ed.), *Changing demographics: Fund raising in the 1990s* (pp. 49-61). Chicago: Bonus Books.

Written by a marketing consultant and senior certified fund raiser with more than twenty years of experience in the non-profit sector, this chapter is part of a larger work by the author on the segmentation of various donor prospect pools. Nichols, who previously served on the state boards of the National Society of Fundraising Executives in Michigan and Oregon, points to the growth of the Hispanic demographic in the U.S., suggesting it is wise to cultivate the emerging Hispanic majority in many states. Distilling the demographics of various Hispanic populations and noting the "top ten Hispanic markets," she refers to *The Pocket Book of Hispanic Facts* for much of her data. She concludes that fundraising professionals should understand the psychographics of "needs-driven" immigrants, attract them first as volunteers, appeal to their identification as Hispanic first (and only as American second), and employ such advertising strategies as the incorporation of Hispanic themes, bright colors, and family-oriented photographs.

Okonkwo Osili, U. & Du, D. (2005). Immigrant assimilation and charitable giving. *New Directions for Philanthropic Fundraising* (48), 89-104.

Funded by the Center on Philanthropy at Indiana University, this essay co-authored by an assistant professor of economics and a graduate student in economics at Indiana University-Purdue University Indianapolis seeks to shed light on charitable behavior as an indication of assimilation by immigrant populations. The co-authors point to evidence indicating that immigrants, particularly those from countries with philanthropic institutions resembling those of the U.S, readily adapt to U.S. charitable institutions. They also share that though immigrants are less likely to give to nonreligious institutions, they are much more likely to give through private

transfers and to support international charitable activities. Interestingly, their research shows that immigrants from Mexico and Central America are significantly more likely to participate in charitable giving than European immigrants, and the authors suggest that because the private transfers of immigrants are relatively persistent over time, immigrant populations have the potential of shaping charitable giving and other U.S. social and economic processes over time.

Peterson Royce, A. & Rodriguez, R. (1999). From personal charity to organized giving: Hispanic institutions and values of stewardship and philanthropy. In L. Wagner & A. Figueroa Deck (eds.), *Hispanic Philanthropy* (pp. 9-29). San Francisco: Jossey-Bass.

Royce serves as professor of anthropology at Indiana University in Bloomington, and Rodriguez is president of Stewardship Solutions, a company specializing in stewardship and resource development for nonprofits. In this work, they share the fruit of their conversations with diverse clergy and lay Hispanics concerning the role of the church in advancing philanthropy and charity. They share that the most common themes in their interviews include such relational terms as personalism, family, trust, the importance of one's word, the intrinsic worth of each person, service, obligation and giving back. They treat differences between Catholic and Evangelical giving (such as the fact that tithing is expected and reinforced by scriptural reference in Evangelical churches, whereas Catholics often view giving as a matter between themselves and God), and they share strategies for designing and implementing philanthropic efforts that will engage Hispanic communities, highlighting the fundamental importance of relationship in the Hispanic culture.

Petty, J.G. (2002). Can remittances increase charitable giving among immigrant families? In R.E. Fogal (ed.), *Fundraising in diverse cultural and giving environments* (pp. 35-44). San Francisco: Jossey-Bass.

Petty, author of *Cultivating Diversity in Fundraising* (2001) and CEO of the Sacramento Regional Foundation, examines remittances within the context of Latino and Asian affinity for interdependence, hypothesizing that such money transfers may impact the vitality of philanthropy within non-majority communities. Though focusing principally on Asian charitable traditions and programs involving youth in philanthropy, the author urges the involvement of immigrant

youth in philanthropic programs, as well as appreciative inquiry as a means to uncover giving and sharing practices within minority families. She suggests that immigrant youth enjoy a privileged position for interpreting and influencing decisions within their families. The author concludes that paying attention to and successfully blending the giving and sharing patterns of immigrant communities may assist the creation of new models of philanthropy. This essay is intended for fund raising professionals and is published as part of the series, *New Directions for Philanthropic Fundraising*.

Pozo, S. (2007). Migration and Remittances. In S. Pozo (ed.), *Immigrants and their international money flows* (pp. 1-9). Kalamazoo: W.E. Upjohn Institute for Employment Research.

Written by a professor of economics at Boston University and author of various studies on migration and income distribution, this essay addresses the great international money flows comprised of the earnings that immigrant workers send to their places of origin. The author details the remittance patterns of Latin American immigrants in the U.S. who annually send \$40+ billion to Latin American nations. 71% of the 6,000 Mexican immigrants surveyed for this research reported having made remittances to family members in Latin American nations, with their remittances averaging \$300 per month (or 40% of their earnings). Motives for such behavior include altruism, financing family members' trips to the U.S., investment, and "insuring" family members from economic shocks. Among Mexican immigrants, higher remittances are correlated to undocumented legal status, lower educational attainment, living in rural areas, and arriving in the U.S. after 2000.

Prince, R., & File, K. (1994). *The seven faces of philanthropy*. San Francisco: Jossey-Bass.

In this work, Prince and File seek to expose seven donor personality types: the Communitarian (doing good makes sense), Devout (doing good is God's will), Investor (doing good is good business), Socialite (doing good is fun), Altruist (doing good feel right), Repayer (doing good in return), and Dynast (doing good is a family tradition). Prince is a prolific writer who pioneered the study of philanthropy among the affluent, and File, the author of over two dozen articles on nonprofits, teaches marketing at the University of Connecticut. In their chapter on the Devout, they describe those who are motivated to

support nonprofits for religious reasons, namely because such persons believe it is God's will that they help others. The authors present incredible statistics, such as the fact that the Devout direct 96% of their giving to religious institutions, and that they are mostly male (84%), business owners (81%) and college educated (86%).

Rodriguez, C.G. (1999). Education and Hispanic philanthropy: Family, sacrifice and community. In L. Wagner & A. Figueroa Deck (eds.), *Hispanic Philanthropy* (pp. 41-58). San Francisco: Jossey-Bass.

In this essay, the author, who serves as executive director for development and public affairs at the University of Texas Health Science Center in San Antonio, explores why the Hispanic community's contribution to philanthropy remains modest and is not increasing relative to the community's demographic growth. He parallels Hispanic dropout and teen pregnancy rates with the perceived shallowness of Hispanic philanthropy, stating that the former negatively impacts philanthropy. Drawing on data which correlates higher annual giving with such variables as church attendance, age, volunteerism, income, and university education, the author strongly warns that present trends in the Hispanic community must be reversed. Harkening to biblical precedents, he urges philanthropy for the sake of improving the quality of life among the Hispanic community, and he encourages a "sacrificial philanthropy" among the Hispanic community which might mirror that of other immigrant groups. The author concludes hoping that Hispanics might reassess their strengths and forfeit debilitating attitudes.

Ronsvalle, J. & Ronsvalle, S. (1997). Rediscovering accountability. In D. Conway & C. Hart Price (eds.), *The practice of stewardship in religious fundraising* (pp. 45-62). San Francisco: Jossey-Bass.

Penned by the co-authors of *Behind the stained glass windows: Money dynamics in the church*, this essay studies the relationship between accountability and successful fundraising efforts. The co-authors led the Stewardship Project, a three-year research effort concerning the giving patterns of church members. Because those who regularly attend worship services more generously give to charities, the authors advance that the recent decline in church giving may have societal implications. They delineate five accountability relationships that affect fundraising efforts by churches: the establishment of credibility by churches in congregation members' minds, the practice

of “walking the talk” by congregation members, the living of a moral life by the congregation’s pastor, the relationship between the pastor and the regional and national structures of the church, and the individual believer’s situation within American life, which is often defined more by economics than by religious values. Topics include the temptation to avoid discussing money in churches, and the correlation of wealth with individualism.

Smith, B., Shue, S., Vest, J.L., & Villarreal, J. (1999). Guatemalans. In B. Smith, S. Shue, J.L. Vest & J. Villarreal, *Philanthropy in Communities of Color* (pp. 49-68). Bloomington: Indiana University Press.

This chapter on philanthropy within the Guatemalan-born population in the U.S. is part of a larger work by Bradford Smith, Director of the University of San Francisco Institute for Nonprofit Organization Management, in collaboration with three principal co-investigators and various research assistants and volunteers. Based on interviews with 40 Guatemalan-born individuals in the U.S., this chapter is part of a larger reference for fundraising professionals and largely resembles the work’s first chapter on Mexicans. This chapter emphasizes the spirit of generosity which exists among tight, interdependent networks of families. The sending of despachos (packages of gifts and necessities) to extended family in Guatemala is common. Churches, primarily Catholic, are a focus of philanthropy within the Guatemalan community. Even more so than the chapter on Mexicans, this chapter emphasizes the importance of giving to santos (saints believed to have the power to help their supplicants).

Smith, B., Shue, S., Vest, J.L., & Villarreal, J. (1999). Mexicans. In B. Smith, S. Shue, J.L. Vest & J. Villarreal, *Philanthropy in Communities of Color* (pp. 28-48). Bloomington: Indiana University Press.

This chapter on philanthropy within the Mexico-born population in the U.S. is part of a larger work by Bradford Smith, Director of the University of San Francisco Institute for Nonprofit Organization Management, in collaboration with three principal co-investigators and various research assistants and volunteers. Based on interviews with 40 Mexico-born individuals in the U.S., this chapter is part of a larger reference for fundraising professionals, and emphasizes that sharing and helping among the Mexican community is most often directed toward one’s familia (both immediate and extended, in the U.S. and in Mexico) and church. This work illuminates the importance

of cultural celebration (the costs of which are often shared by many padrinos) and the fact that little giving or volunteering is directed toward non-Mexican, non-church organizations. The chapter highlights the impact that a priest can make within a community, and how the church's responsiveness to needs can engender a greater degree of involvement and giving among its Mexico-born members.

Smith, B., Shue, S., Vest, J.L., & Villarreal, J. (1999). Salvadorans. In B. Smith, S. Shue, J.L. Vest & J. Villarreal, *Philanthropy in Communities of Color* (pp. 69-87). Bloomington: Indiana University Press.

This chapter on philanthropy within the Salvadoran-born population in the U.S. is part of a larger work by Bradford Smith, Director of the University of San Francisco Institute for Nonprofit Organization Management, in collaboration with three principal co-investigators and various research assistants and volunteers. Based on interviews with 20 Salvadoran-born individuals in the U.S., this chapter is part of a larger reference for fundraising professionals, and provides a third lens through which to view philanthropy among persons from Latin America. Though based on a relatively small number of interviews, this chapter provides important contrasts to the previous two chapters in its emphasis on the care provided by Salvadorans for elderly parents and the willingness of Salvadorans to provide shelter for other compatriots for little or no money. The chapter refers to the Catholic Church and some Protestant churches as "social outlets" and important sources for shaping communal giving patterns within the Salvadoran community.

VanWey, L.K. (2007). The power of home: Remittances to families and communities. In S. Pozo (ed.), *Immigrants and their international money flows* (pp. 123-142). Kalamazoo: W.E. Upjohn Institute for Employment Research.

VanWey, an associate professor of sociology at Indiana University and writer on topics of migration and remittances, pulls together decades of research to show that patterns of remittance (and migration) largely vary with such individual characteristics of migrants as gender, age, marital status, and length of migration. The author astutely notes that "all migrants are someone's child, spouse or parent," such that migration is often based on family needs, and a moral responsibility is attached to one's remittances. Three migration-remittance systems are proposed for male heads of households who have migrated,

young adults who migrate before forming their own families, and collective remittances from hometown associations formed in the destination country, where people, ideas and money are exchanged between countries. Whereas remittances used to support parents will not outlive the lives of those parents, the author notes that collective remittances have the most immediate potential for positively affecting economic development in the home country.

Villa Parra, O. (1999). Hispanic women: Nurturing tomorrow's philanthropy. In L. Wagner & A. Figueroa Deck (eds.), *Hispanic Philanthropy* (pp. 75-84). San Francisco: Jossey-Bass.

The author, who previously served as associate director for the Institute of Urban Studies at the University of Notre Dame and as the executive director of the Lily Endowment in Indianapolis, seeks in this essay to explore the rich dynamics Hispanic women bring to the philanthropic tradition. Though beginning with an uninteresting biblical perspective on charity and an unenlightening definition of philanthropy, the essay distills the author's 25 years of experience in adult education. She advances that Hispanic women "ultimately make their philanthropic decisions based on intuitive or personal reasons. They move from the heart; they have a passion for the issues they support." Themes include emotional involvement in issues, family traditions of giving to church and community, the concern for educating young people to give back, and the desire to give rather than to pass on wealth to the next generation. The remainder of the work is dedicated to esteeming various women for their modeling of philanthropy.

Wagner, L. & Hall-Russell, C. (1999). The effectiveness of fundraising training in Hispanic religious organizations. In L. Wagner & A. Figueroa Deck (eds.), *Hispanic Philanthropy* (pp. 84-104). San Francisco: Jossey-Bass.

Wagner previously served as associate director of the Indiana University Center on Philanthropy, where Hall-Russell worked in the research and academic programs division. In this work, they report on results from the Hispanic Stewardship Development Partnership project, a three-year study of the development and implementation of fundraising training for seven Hispanic church and parachurch organizations in the U.S. Interestingly, the co-authors of the study found no difference in traditions of giving and stewardship as a result

of Hispanic cultural or national origins. Rather, differences could be traced to generation, foreign-born versus native-born status, social class, region and religious affiliation, with the latter being most prominent. Hispanic persons were reluctant to be identified as a single population group, preferring to identify themselves by cultural, geographic and historic roots. In this study, stewardship as a biblical principle was readily understood, and the value of relationship in the Hispanic community was emphasized.

Willmer, W.K. (1995). "Evangelicals: Linking fervency of faith and generosity of giving." In Hamilton, C.H. & Ilchman, W.F., Eds. *Cultures of giving: How region and religion influence philanthropy*. San Francisco: Jossey-Bass, 101-116.

In this essay, the vice president of university advancement at Biola University in La Mirada, California studies high church attendance and giving patterns within the evangelical church, which purportedly comprises one third of the nation's population. The author, who serves as chair of the board of the Christian Stewardship Association, draws a relationship between generosity and fervency of faith (as expressed in church attendance and an attitude toward religion as "very important"). He enumerates the primary factors influencing giving by evangelicals: an earnest concern for lost souls, a desire to preserve the nation's values, a response to biblical teaching on stewardship, and the heeding of biblical instructions about possessions. Key questions are raised by the author: Will evangelicals be lured toward materialism? Can evangelicals survive in an increasingly secular culture? Can evangelicals remain unified? Will evangelicals come to value higher education so as to dialogue with the culture at large?