



Connecting Community and Family Philanthropy in Latin America: **Mexico**

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Preface

Instructions for living a life:

Pay attention.

Be astonished.

Tell about it.

From the poem, “Sometimes” by Mary Oliver, *Devotions: The Selected Poems of Mary Oliver*. (Penguin 2020), p. 105 (italics in original).



Acknowledgments

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Cover Photo:

The cover of this report features a photograph of *alebrijes*, fantastical creatures of Mexican folk art that combine elements from different animals to create one-of-a-kind figures, much as community foundations in Mexico take on a variety of roles and approaches to meet the specific needs of their communities (Shutterstock.com).





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Executive Summary

This report explores the dynamics of community philanthropy and family philanthropy in Mexico in order to inform efforts to strengthen the connection between the two. In terms of community philanthropy, our primary focus is upon Mexico's community foundation model, which is the most institutionalized form of community philanthropy and a uniquely important actor in the philanthropic ecosystem. Wealthy families and family businesses in Mexico are known to have strong local ties and to prioritize place-based development, and Mexico has more community foundations than any other Latin American country. In terms of family philanthropy, we have cast a wider net, interviewing families who work closely with community foundations, have their own private or company-linked foundations, or use a mix of organizational vehicles for their philanthropy. We also interviewed a handful of philanthropists who have not worked with community foundations, in order to get a sense of the full range of options.

In a second phase, the researchers intend to apply the lessons learned in Mexico and refine the project's research methodology so as to explore the community foundation model's potential for success in other Latin American countries. The model's importance cannot be overstated, as community philanthropy is a powerful catalyst for strengthening local philanthropic ecosystems and cultivating a strong culture of generosity.

Family philanthropy is a longstanding source of charitable contributions in Mexico, with deep and abiding connections to the Catholic Church and faith; however, in recent decades, it has taken on a more secular orientation, like Mexican society as a whole. As Mexico is characterized by families retaining control of businesses and consortiums, so too is there a close relationship between family and business philanthropy. As wealth has grown dramatically, Mexico is at a pivotal point of generational transition. The next generation is actively seeking new ways to channel their generosity and social commitment to foster greater shared prosperity across society.

On the other hand, the community foundation model was imported to Mexico from the U.S. in the 1990s (Landa, 2020, p. 3). This institutional form has been adopted and adapted to meet a variety of local contexts in about half of Mexico's 32 states. One of the strengths of this model — which emphasizes the creation of an autonomous organization that mobilizes mainly local assets to promote sustainable development in its geographic community — is its flexibility and the diversity of roles open to community leaders. These leaders, whom we term evangelizers, play a crucial role of promoting the model, along with other key private and public actors, and connecting their efforts to broader national and global community philanthropy movements.

One of the key roles that a community foundation plays in serving the community's evolving needs is strengthening its philanthropic ecosystem, which is a set of interconnected actors (including organizations, individuals, donor institutions, and knowledge brokers), the norms and regulations that mediate their interactions, and the cultural norms and values that shape society and behavior. Historically, Mexico has presented a challenging enabling environment, characterized by low social and institutional trust, a largely hostile government, and a historically small and underdeveloped sector. Thus, in the absence of a strong culture of formal philanthropy, the promotion of community philanthropy has been challenged on all fronts: to encourage people to engage philanthropically; to support and promote a nonprofit sector that is relatively underdeveloped; and navigate a regulatory environment that aims more at constraint than encouragement.

This research project has captured the insights from anonymous interviews of more than 50 family and community philanthropists, professionals, and thought leaders. The project's Advisory Council, composed of

18 members, not only provided guidance and insight but critically important introductions. (See Appendix A: Advisory Council Members.)

The report seeks to distill those insights as well as other recent research to assess the current challenges facing philanthropy in Mexico and offer recommendations on how to strengthen the connections between generous, community-minded families and their local community foundations. In addition, we developed five organizational profiles to place those insights in specific contexts, a key consideration for community philanthropy. The profiles include four community foundations — COMUNIDAR (Fundación para Unir y Dar A.C., Corporativa de Fundaciones, Fundación Comunitaria Puebla, Fundación del Empresariado Yucateco (FEYAC) — and a unique funders’ collaborative based in Mexico City, Ensamble. (See Appendix B: Foundation Profiles.)

In light of a history of largely faith-based and often informal giving on the part of families and a dynamic set of relatively new community philanthropy institutions, we identified five opportunities to improve connections between the two. The opportunities were derived from our analysis of insights from current and potential supporters of Mexico’s community foundations and recent research. They are intended to inform what the advocates for the movement can do to expand and deepen their relationship with potential supporters. Foundations can act on these opportunities to create strategies tailored to Mexico’s diverse state-level contexts:

1. Write a Compelling “Gospel of Community Philanthropy” for Mexico.

Foundations can raise awareness by articulating their value, developing case studies, and promoting the concept of community philanthropy to a broader audience.

2. Cultivate Evangelizers and Spread the Good News.

Leaders and board members can act as ambassadors by promoting the foundation’s work and fostering relationships between civil society, the private sector, the public sector, and the community.

3. Craft Compelling Narratives That Highlight Impact and Enhance Trust.

By emphasizing transparency and showcasing measurable impact, foundations can build trust and foster greater generosity among donors.

4. Focus on Collaboration, Learning, and Advocacy.

Philanthropic families are eager for opportunities to learn — from each other and from experts — and community foundations can provide such opportunities by convening local partners, facilitating multi-party collaborations, and advocating for a better environment for civil society.

5. Cultivate a Broader and Deeper Philanthropic Culture.

By expanding beyond current donors, community foundations can engage with a more diverse donor base, including younger generations and everyday givers, through meaningful philanthropic opportunities.

Additionally, the report provides discussion prompts to spark conversations among community foundation leaders and potential supporters. The aim of these discussions is to deepen the community’s understanding of the community philanthropy generally and the community foundation model in particular and pave the way for more place-based partnerships and collaboration. Together, these opportunities and dialogues can help strengthen the sector and expand its impact.





Introduction to Key Terms

Launching a research project on philanthropy in Mexico from a U.S.-based, university-affiliated research center, we recognized the importance of bridging linguistic and conceptual differences. In this introductory section, we clarified key distinctions between English and Spanish terminology, as well as explained our use of concepts like the "philanthropic ecosystem."

Although the Spanish words *filantropía* and *fundación* have English cognates in “**philanthropy**” and “**foundation**,” these linguistic similarities obscure significant differences in their usage in Mexico and the U.S., even globally. In Mexico and Latin America, *filantropía* often implies traditional Christian charity, and *fundación* is broadly construed to refer to any nonprofit organization, not just grantmaking entities (Layton, 2022a). For reasons of historical development and its tax code, Mexico lacks a legal or fiscal definition of a grantmaking institution, but researchers have used a functional definition drawing upon financial data provided by the tax authority, labeling as donor entities those that pass a threshold in the amount of funds donated and the number of recipients (Villar & Puig, 2022).

In the U.S., the word philanthropy is often narrowly construed to mean large financial donations by the wealthy, although there is an ongoing effort to broaden the concept to include diverse actions by individuals of all means (Layton, 2022b; Shabazz, 2024). In this report we define philanthropy as “private action for the public good,” a more inclusive understanding that encompasses various contributions beyond monetary donations (Payton & Moody, 2008). The word foundation typically refers to grantmaking entities, with private foundations subject to specific rules, such as the requirement to distribute 5% of their assets annually (Council on Foundations, n.d.a).

The term “**community philanthropy**” lacks a definition that is widely accepted in either country. Drawing on their research and experience in community philanthropy in Vietnam, Doan (2019) offered the following definition:

Community philanthropy is both a form of, and a force for, locally driven development that strengthens community capacity and voice, builds trust, and most importantly, taps into and builds on local resources, which are pooled together to build and sustain a strong community. (p. 7)

What sets Doan’s definition apart is that it emphasizes the creation of social capital as a key aspect of community philanthropy, and it does not specify an organizational form. With regard to resources that are “pooled together,” community philanthropy is perhaps best positioned to mobilize all Five T’s of generosity: Treasure, Time, Talent, Ties, and Testimony.

Similarly, the term “**family philanthropy**” does not have an agreed-upon definition in either country, beyond the basic idea that it is philanthropy practiced by a family, sometimes over generations. In the U.S., the discussion of its definition often quickly substitutes the word philanthropy with the word foundation (National Center for Family Philanthropy, n.d.). Even the term family foundation is challenging to define (Moody et al., 2011). In reference to our above definition of “philanthropy,” we define “family philanthropy” as families taking private action for the public good, remaining agnostic about how formal or institutional their action is.

In the U.S., “**community foundations**” are classified by the Internal Revenue Service as 501(c)(3) public charities, the same designation as other nonprofits. What distinguishes them from private foundations is that



their financial resources must be raised every year from a variety of sources (Frederick et al., n.d.), and what distinguishes them from other public charities is their focus on grantmaking in a geographic area (Council on Foundations, n.d.b). In Mexico, the institution of a community foundation is not widely known and has no special governmental or fiscal designation. In this study, we will use the definition of “community foundation” provided by Comunalia (n.d.), the alliance of Mexico’s community foundations:

[A community foundation] is a civil society organization that seeks to contribute to the solution of problems in a specific territory; works with the community and groups of interested actors, through alliances, articulation and mobilization of resources, to make sustainable development possible from the strengths of that community. (para. 4)

According to Comunalia, Mexico’s community foundations seek to address common challenges by involving local community partners, supporting sustainable solutions, and mobilizing financial and non-financial resources — especially locally.

The “**philanthropic ecosystem**” is a dynamic network of interconnected actors and the institutional and cultural context in which they interact. (Knight, 2018; Layton, 2009). Key actors include individuals (including volunteers, donors, and staff), organizations with varying levels of formality, family philanthropists, donor institutions, businesses, and government regulators and agencies. They operate within an institutional context or enabling environment that regulates their interactions and fuels the ecosystem: this context consists of a legal framework, fiscal incentives, accountability mechanisms, human capital, capacity-building opportunities, and financial resources. The cultural context includes core values like trust, reciprocity, and civic engagement, shaping how actors within the enabling environment interact.

In the U.S., the philanthropic ecosystem is mature and fully developed, as the nation is home to over a million registered charities, some of the world’s largest grantmaking foundations, and a vibrant infrastructure of philanthropy support organizations. Although the U.S. sector faces key challenges, including the decline in everyday givers (Generosity Commission, 2024) and the underfunding of marginalized communities (Rendon, 2020). Historically, Mexico has had a challenging philanthropic ecosystem at the national level, consisting of an unfavorable regulatory environment, a largely hostile government, limited availability of funding, and a historically small and underdeveloped sector (USAID, 2022; Layton, 2009). Thus, each community foundation in Mexico faces the same difficult national context but a unique set of opportunities and challenges in their own state, and this variation provides the rationale for the profiles we developed for this report.

The term “**philanthropic culture**” refers to shared values, beliefs, and attitudes, as well as implicit norms and expectations, that influence and shape a groups or a society’s philanthropic behavior and practices (Putnam & Garrett, 2020: pp. 164-165). A philanthropic culture includes how individuals and organizations perceive their responsibilities toward giving, the norms around charitable behavior, and how both elites and the general public engage in and with philanthropy. The philanthropic ecosystem is foundational to the development and sustenance of a philanthropic culture. A robust ecosystem provides the necessary support structures and incentives that encourage philanthropic activities, thereby fostering a culture of giving. For instance, when there are clear role models, peer engagement opportunities, and favorable policies within the ecosystem, individuals and organizations are more likely to participate in and value philanthropy. Over time, this participation solidifies into a broader cultural expectation and norms, contributing to a more deeply ingrained philanthropic culture that deepens over time. In essence, while the philanthropic ecosystem provides the framework and infrastructure for channeling generosity, the philanthropic culture consists of the prevailing values and practices that reinforce it. They are interdependent, with the strength of one reinforcing the vibrancy of the other.

In terms of Mexico's philanthropic culture, informality and distrust play a significant role (Layton & Mossel, 2015). The challenge of informality is nicely illustrated by *World Giving Index 2024: Global Trends in Generosity* (2024) from the Charities Aid Foundation (CAF). CAF notes that, in Mexico, informal acts of kindness, such as helping strangers, are more prevalent, with 64% of the population engaging in this type of activity, while formal philanthropic activities are less common, with only 22% of Mexicans reporting donating money and 20% volunteering their time for an organization. By contrast, CAF's data reveals a stronger inclination towards formal philanthropy in the U.S., with 61% of the population donating money to organizations, 39% volunteering their time, and 76% helping a stranger, reflecting a more institutionalized culture of giving.¹ CAF combines these three activities into one index in order to rank countries. Based on these scores, the U.S. ranked 6th and Mexico 104th out of 142 participating nations.

¹ It is important to point out the U.S. has been experiencing a steady and alarming decline in household giving and volunteering, which led to the creation of the Generosity Commission. The Commission released its report, *Everyday Actions, Extraordinary Potential: The Power of Giving and Volunteering*, in September 2024. <https://www.thegenerositycommission.org/report/>



Overview of the Project

In this section we first provide a brief introduction to Mexican history and society through the lens of civil society, as well as a summary of recent research on philanthropy. We then state our research questions and methodology.

A Pivotal Time for Mexican Philanthropy

The history of philanthropy in Mexico is deeply rooted in two traditions. First, are the pre-Hispanic traditions that emphasize collective work, such as *tequio*, a communal requirement that continues as a widespread practice in indigenous communities today (Bonfil Batalla, 1996). Second, are the charitable practices of the Catholic Church that emerged during the colonial era as the primary institution responsible for channeling mutual aid and addressing poverty (Valero, 2010; Guadarrama, 2007). However, as Mexico transitioned into the modern era, the process of secularization, led first by liberals like Benito Juárez in the 19th century and the authoritarian Institutional Revolutionary Party (PRI) in the 20th century, began to challenge the Church's dominant role in society, including its near monopoly in providing social welfare. In a 1979 essay, "El ogro filantrópico," Octavio Paz critiqued the PRI's authoritarian governance. The PRI, which ruled Mexico for seven decades, was "philanthropic" in that it claimed the exclusive right to provide for the people's needs, yet it was an "ogre" in its ferocity in crushing any challenge to its dominance that could not be co-opted.

Challenging Political Environment

Two seismic events — one literal and one political — triggered a profound transformation in Mexico's civil society. In 1985, an 8.0 magnitude earthquake devastated Mexico City, revealing the PRI's ineptitude and corruption in failing in its responsibility to provide for the public's welfare, thereby weakening its political dominance. The political upheaval came in 2000, when the presidential candidate of the National Action Party (PAN) won, marking a major shift in the country's political landscape. The first peaceful transition of power in a century signaled a new era for civil society. The PAN, a conservative party, took steps to improve the relationship between the government and civil society, including the passage of the Federal Law for the Promotion of the Activities Conducted by Civil Society Organizations (CSOs) in 2004. This law mandated that federal agencies collaborate with and help fund CSOs transparently. During this time, leaders within the sector also undertook initiatives to enhance transparency and accountability (Layton, 2017). Aid agencies and private foundations supported the development of independent civil society organizations, as well as local philanthropic institutions, including community foundations (Charles Stewart Mott Foundation, 2012; Worldwide Initiatives for Grantmaker Support, 2010).

In 2018, a 4-year-old political party, the Movement for National Regeneration (MORENA), swept into power (Ballesteros & Helfgott, 2023). Their leader and successful presidential candidate, Andrés Manuel López Obrador (popularly known as AMLO), began to reverse these positive developments. AMLO's administration, marked by its hostility toward civil society organizations and philanthropy, reverted to many of the PRI's tactics. AMLO's rhetoric and policies, such as the controversial *Circular Uno* — the equivalent of an Executive Order in the U.S. that he issued shortly after taking office — have had a significant impact on civil society organizations in Mexico (Appleseed Mexico, n.d.). *Circular Uno* mandated that all federal ministries cease any form of cooperation with or funding of civil society organizations (CSOs). The government justified this action by arguing that organizations were often used as intermediaries for corruption and that the funds would be better utilized if directly managed by the government (Torres, 2024). The sector has accused the tax

authority of undertaking “fiscal terrorism” against organizations, including stripping Mexico's largest community foundation, the Chihuahua Businesspersons' Foundation (FECHAC), of its tax-exempt, charitable status (Esparza Garcia, 2020). While it is important to acknowledge that AMLO's term ended on September 30, 2024, and Claudia Sheinbaum, Mexico's first woman president, took office on October 1, 2024, Sheinbaum is not only a member of MORENA but also a political protégé of AMLO, so there is little reason to expect a dramatic shift in policy (CIVICUS, 2024). In addition, AMLO pushed through the legislature a series of major reforms that the international community regards as anti-democratic, including the dismissal of the entire federal judiciary, which will be replaced over two years via popular elections (Pueblita, 2024).

A Resilient Sector

Despite these challenges, recent research on philanthropy in Mexico revealed a sector that remains resilient, both in terms of regional comparisons and national findings. A 2018 global report identified 859 foundations across six Latin American countries; of those, 336 foundations (40%) were in Mexico — more than any other country in the region, including Colombia, Brazil, Peru, Argentina, and Chile (Johnson, p. 13). A 2019 regional study of grantmaking foundations highlighted that Mexico's community foundations were distinct from other types of foundations in the region (Berger et al., pp. 108-120). The community foundations were among the most recently established, all were founded after 1990, and they were more likely to combine operating programs with grantmaking, employ more staff, and engage volunteers at a higher rate. While community foundations had more limited economic resources than other foundations in the region, they focused heavily on community development, sought greater collaboration with other foundations, and upheld stronger practices of transparency and accountability. The study concluded by hailing Mexico's community foundations as “a model to be promoted in the region” (Berger et al., 2019, p. 109).

Another study particularly useful to this research, *From Prosperity to Purpose: Perspectives on Philanthropy and Social Investment among Wealthy Individuals in Latin America*, was conducted by a team from the Harvard Kennedy School. This team published both a regional report (Johnson et al., 2015a) and country reports, including one on Mexico (Johnson et al., 2015b). While the team aimed to understand the philanthropic engagement of the wealthy more generally and regionally, we shared with them the reliance on interviews as a key source of data. Although their research was conducted a decade before ours, many of their findings and recommendations reinforced our own, as we point out in the following pages. The team found that the high number of community foundations is a distinctive feature of Mexico's philanthropic landscape, relative to the absence of community foundations in the other nations in their sample (Johnson et al., 2015b).

Regarding national research, two studies provide complementary views of the current state of civil society and philanthropy. The book *Generosidad en México III*, edited by Jacqueline Butcher García-Colín (2022), provides a wide-ranging, empirical analysis of philanthropy in Mexico as practiced by individuals and institutions, drawing upon a mix of survey research, publicly available financial data, and legal analysis. This work underscores the diversity and richness of the country's philanthropic activities, reinforcing the idea that generosity is a deeply ingrained cultural value, often expressed through mutual self-help or *solidaridad*. A publication from the U.S. Agency for International Development (USAID) (2022) provides a systemic and comparative analysis. According to their report, *the 2021 Civil Society Organization Sustainability Index*, the only element of Mexico's philanthropic ecosystem that improved consistently since 2018 was Sectoral Infrastructure, despite declines in Financial Viability, Advocacy, and the Legal Environment. This increasingly robust infrastructure consists of entities that provide essential services like training, networking, and advocacy, playing a crucial role in the sector's sustainability.



Pronounced Inequality

To locate this discussion of the historical development of Mexico’s civil society and the current state of its philanthropic sector in a fuller context, it is important to discuss the distribution of wealth. Throughout its existence as a colony and a nation, Mexico has had persistent poverty in its marginalized communities and a pronounced concentration of wealth among its powerful elites (Camp, 2017).

Table 1. Percentage Distribution of Wealth in Mexico in 2022, by Wealth Percentile

Top 1%	47.9%
Top 10%	79.1%
Middle 40%	21.1%
Bottom 50%	-0.3%

Source: WID.world. (December 30, 2023). Percentage distribution of wealth in Mexico in 2022, by wealth percentile [Graph]. In Statista. Retrieved July 27, 2024, from <https://www.statista.com/statistics/1294751/distribution-wealth-by-percentile-mexico/>

The economic disparities in Mexico are stark. In 2022, the wealthiest 1% of the population held 47.9% of the wealth, and the bottom 50% had -0.3% or “negative wealth,” meaning that their debts exceed their assets. (See Table 1.) Clearly, the wealthiest Mexicans have the economic means to be generous, and the nation’s poorest population could benefit not only from philanthropy but from public policies aimed at social development. These data underscore the ongoing challenge of inequality and the critical role that a vibrant philanthropic sector could play in addressing inequality and fostering social development in the country.

Research Questions

The research in this report aims to contribute to the body of knowledge that can inform and improve philanthropic practice in Mexico. While we touch on broader themes, our primary goal is to understand and expand the engagement of Mexican families with community philanthropy, especially their connection to community foundations. To do this, we connected with various influential actors in family and community philanthropy in Mexico, including philanthropists, community foundation leaders, and regional and subject matter experts.

We sought to address the following core questions:

- How do wealthy families and donors in Mexico currently think about and practice philanthropy, especially their place-based giving and their support for institutions such as community foundations?
- How does the cultural, economic, and regulatory climate affect the family-community nexus that we are investigating?
- What strategies can be used to increase family donor engagement with institutionalized community philanthropy, based on what has worked (or not) so far, and what families and experts believe will work best?

More specific questions we address in this report include:

- What are the current ways in which families express their generosity and seek to improve their local community? What do they see as obstacles to more family giving in Mexico?
- What is the philanthropic relationship between families, their business interests, their family offices, and local community foundations/institutions and nonprofits?
- What are the obstacles and challenges facing those who try to expand and improve connections between donor families and community giving institutions?
- What are some key strategies that have strengthened the ability of community foundation leaders to overcome obstacles and engage local families as philanthropists?

We place particular emphasis in our analysis on cultural, historical, regional, and other contextual factors, as well as the effect of the national regulatory environment on both family giving and community foundations. However, our empirical lens was exploratory, focused on asking open-ended questions of those closest to this work in Mexico rather than testing hypotheses with targeted inquiries. (See Appendix B: Interview Guide). Moreover, we always kept our pragmatic, applied purpose in mind, looking for what has actually worked to improve connections between family and community philanthropy and asking interviewees to share their recommendations for improving and expanding local giving institutions and the philanthropic ecosystem in Mexico.

Methodology

To address the complex questions outlined above and meet the project's applied goals, we utilized multiple methods and sources of data. The methodology was designed in accordance with the guidelines of Grand Valley State University's Institutional Review Board (IRB). (See Appendix B: Interview Guide). As such, interviewees were guaranteed anonymity. In the few instances where direct quotations are attributed to the speaker in the report, the interviewee has granted permission.

Literature Review and Field Scan

The project began with a comprehensive review of existing research on philanthropy in Latin America and Mexico in particular, as well as relevant literature on community foundations and the community-family philanthropy connection. The field scan documented prior studies related to our inquiry and identified key sources of data on philanthropy in Mexico.

In-depth Qualitative Interviews

The core data for this project comes from in-depth interviews with 47 individuals closely involved in some way with family or community philanthropy in Mexico. Of these, 27 interviewees were donors of various sorts, including individual philanthropists, members of family foundation boards, and next-generation members of philanthropic families. Most of the other interviewees were professionals working in the field, either for community or family foundations, or for institutions advocating for and organizing philanthropy across Mexico. In addition to these practitioners, we also interviewed academic experts and researchers of Mexican philanthropy.



Interviews were relatively unstructured, using a guided conversation method that emphasized several core, open-ended questions in the interview guide. The questions aimed to address the research topics outlined previously, while also including opportunities for respondents to share their stories of success and disappointment and to speculate about an ideal future for Mexican family and community philanthropy.

Four individuals were formally interviewed twice, and several also gave informal advice and information in separate meetings. Most were interviewed individually, but in a few cases, members of the same family or organization were interviewed as a group. Roughly a quarter of the interviews were conducted by Zoom, and the rest were in-person interviews conducted during three separate trips taken by the researchers to Mexico. Almost all interviews were conducted during 2023.

Interviews were conducted in both English and Spanish, depending on the interviewee's preference. Spanish-language interviews were translated into English, and all interviews were transcribed using automated transcription services, with quality control checks done by native or fluent speakers of each language. The English transcripts were then extensively coded using MAXQDA software and analyzed to identify themes and core findings.

Profiles

This project also involved the development of five profiles, which appear in Appendix B of the report. Four are focused on community foundations and their states (COMUNIDAR, Nuevo Leon; Corporativa de Fundaciones, Jalisco; Fundación Comunitaria Puebla, Puebla; Fundación del Empresariado Yucateco A.C. (FEYAC), Yucatan), and the fifth highlights a national coalition of donor institutions in Mexico City (Ensamble). The five institutions were selected in order to include diversity of perspectives, contexts, and operations. These profiles utilize information gathered in the field scan and the interviews, as well as additional background research on each case. They serve both to illustrate and inform the key findings and recommendations of the project. Although not a community foundation, Ensamble was included in order to understand the motivations and preferred practices of a self-organized group of family and corporate philanthropists. In fact, Mexico City does not have a community foundation at present.

Future Research

In a second phase, the researchers intend to apply the lessons learned in Mexico and refine the project's research methodology so as to explore similar research questions - and derive practical recommendations - in other Latin American countries. Community philanthropy is a powerful catalyst for strengthening local philanthropic ecosystems and cultivating a strong culture of generosity, and the community foundation model has tremendous potential across the region. At present there are very few community foundations operating in the other nations of Latin America. The research questions and interview protocols will be adjusted to reflect the reality that subjects will likely have very little to practically no experience with community foundations, although some will be involved in place-based giving.

Advisory Council

Throughout the project, the researchers engaged closely with a formal advisory council, consisting of philanthropic leaders, researchers, and experts, drawn mainly from Mexico but also including experts from the U.S., Brazil, and Chile. We met with them periodically to seek their advice and feedback at every stage of the research, from formulating the questions to identifying and helping to recruit interviewees to reviewing pre-

liminary findings and this final report. (See Appendix A: Advisory Council Members.) Council members and others also gave extensive guidance, provided introductions, and offered other assistance outside of formal meetings — and continued to do so during the dissemination of this work. This deep engagement was an intentional effort on our part to ensure the research examined family and community philanthropy in Mexico from a practical perspective, so as to enable us to meet the ambitious goal of the project to support those who want to improve and expand both the understanding and practice of Mexican philanthropy, especially those who lead its community foundations and engage in or with family philanthropy.



Family Philanthropy: Culture and Dynamics

Don Arturo Jiménez Bayardo, President, Corporativa de Fundaciones

David Pérez Rulfo, Director, Corporativa de Fundaciones

Don Arturo: But I ask myself, why did we come into this world? There are different answers, such as I came to make money; I came to make my family happy; I came to make myself happy. Maybe each answer has its own logic. On one occasion my father asked me if I knew why I had come to this world. I answered that it was to study, to be a good professional. He answered that those were things that came as a by-product. He told me that my main task, and he insisted that I never take it out of my mind or heart, was to share, to be an example so that this world would be a better place. He said that if we all shared what we had, the world would be a very different place.

David: That is in fact Corporativa's slogan, "Live to share." (*Vivir para Compartir*)

As captured in the quotation above, the starting point for many family philanthropists are the values that were passed down within their family. For Don Arturo Jiménez Bayardo, the founder and board president of Corporativa de Fundaciones in Guadalajara, his father taught him that the purpose of life is to share, and that by setting that example the world could be transformed for the better. As our focus in this project is to investigate the linkages between family and community philanthropy, we begin here with some observations about the cultural norms and traditions that have shaped family philanthropists and go on to describe their current practices and concerns.

Cultural Norms and Traditional Philanthropy

Perhaps the simplest way to summarize family philanthropy in Mexico is to return to where we started this report: While there is a long history of charity and giving in the region, and in recent years there have been important developments in organizing and expanding the philanthropic sector, most giving in Mexico remains hidden, informal, and relatively unsystematic. In terms of philanthropy remaining discreet, more than once a Mexican donor referred to the Biblical injunction,

But when you give to the needy, do not let your left hand know what your right hand is doing, so that your giving may be in secret. Then your Father, who sees what is done in secret, will reward you (*New American Bible, Revised Edition, 2011, Matthew 6:3-4*).

As to the informality of philanthropy, as one interviewee put it, family giving in Mexico is largely based more on "gut feeling" rather than being "strategic." While this is the case for most families and donors, there are some families that are very strategic, formally organized, and professionalized in their philanthropy – as we will show in this report.

Most charity continues to follow traditional patterns of giving to religious institutions or informal and occasional support of local causes and needs. This holds true for a wide range of donors, including many of those who can give larger gifts. One person described the challenges of making giving more systematic by saying, "Changing the perception and activities of the local businessmen has been very, very hard. They still want to go down to [give to] the nuns."

Many people we talked to attributed this primarily to the “philanthropic culture” in Mexico. We often heard statements like this one from an interviewee: “I feel like the culture of philanthropy is way behind in Mexico than it is in the United States.” Another explained, in Spanish, that even though there are plenty of donors, “No existe una cultura de ser donante.” By this phrase, this speaker and others implied that there isn’t a strong shared sense of what being a “donor” entails. In addition, many are reluctant to publicly self-identify as a donor for reasons that include Christian humility, wanting to avoid attention, and concern for public safety in a national context where violence and high-profile kidnappings are not uncommon. We often heard that the vast majority of giving in Mexico is very private and often deliberately kept out of view. One donor told us, “I don’t go around talking about this. My friends don’t know.” This further suggests that there is a lot more giving happening in Mexican communities than most people know about, and this lack of knowledge and discussion of giving has contributed to the misguided notion that Mexico lacks a philanthropic culture.

When philanthropy is publicly acknowledged in Mexico, the focus is very often on a few prominent families and big donors: this is similar to how philanthropists are often perceived in the U.S. One observer noted there was a “very loud minority and very quiet majority” of philanthropic families. However, many of those well-known donor families do not seek attention either, but they are contributing significant funds and channeling their time and talent through established family foundations. Due to their connection to their locales, many families practice place-based philanthropy. Moreover, they often take the lead in *organizaciones de segundo piso* (or, second-floor institutions), which include many community foundations, the Center for Mexican Philanthropy (Cemefi), and Ensemble, a donor collaborative highlighted in a profile.

“There are probably some businesses engaging in community philanthropy without even realizing it. In Mexico, the people familiar with and connected to the concept of a community foundation are a very tiny group. ... There are ‘loud minorities’ and ‘silent majorities’ involved, and both deserve recognition. There are a lot of people doing great things, but they wouldn’t necessarily label it as philanthropy. I think it’s a matter of recognizing what already exists because a lot is happening outside the traditional boundaries of what we consider ‘community philanthropy.’”

– Prof. Ana Cristina Dahik Lahoor, IPADE Business School

In many Mexican communities, the most prominent donors are either long-standing wealthy families who have created some of the few foundations in that community, or the current owners of family businesses whose giving is very closely linked to their key partners and constituents. In our interviews, we also learned that it can be hard at times to distinguish “family philanthropy” from “family business philanthropy.” Not only do many contributions come through the family business and focus on populations connected to the business (e.g., organizations that assist local workers, schools in communities where the business operates, etc.) but many times the operations of the business are designed to serve the public good and are promoted as such. The leading role of family business in supporting corporate social engagement is something found throughout Latin America, so it is not surprising to see it expressed in Mexico (Rey-Garcia et al., 2020).

Most of the philanthropic giving in Mexico – both publicly known and hidden – is local giving, which reflects the local origins and focus of most businesses. While there are notable exceptions of family businesses whose operations extend across the country, the vast majority of enterprises are local or regional and small- to medium-sized (INEGI, 2023a).



This local or regional focus also derives from Mexican traditions of strong regional identities and city loyalties, and to the fact that giving is often personalized and/or responsive to immediate and proximate needs, based on solicitations rather than driven by a broader strategy. And Mexican donors give for many similar reasons as donors in other parts of the world – giving to causes and institutions that have affected or benefited your kith and kin, “giving back” in places where you’ve experienced success, giving in response to social expectations that this is what “community leaders” do, and so on. Just as the economy itself is largely informal – estimated to constitute about 55% of Mexico’s gross domestic product (INEGI 2024) - so too is much philanthropy, including organizations and donations.

We also learned a lot about the obstacles to family giving in Mexico, including but extending beyond the issues of underdeveloped “cultura de ser donante” discussed earlier. Donor families we interviewed talked about many of the same challenges of family philanthropy in other countries (e.g., difficult family dynamics, uncertainty about risk and decision-making, etc.) (Tantia et al., 2024). Other more specific cultural and national dynamics were also identified as inhibitors of greater giving. For instance, the importance of caring for one’s family (“Can I leave an inheritance to my children?”) seems to keep some affluent families from increasing their giving. And some people pointed to the rigidity of social classes and lack of social mobility as a problem, as generations who grow up in a bubble of wealth do not sufficiently understand the lived realities of those less fortunate. The decline of religiosity is affecting the next generation as well, as church attendance declines so too does the socialization of giving through a collection plate or campaigns.

Over-regulation and Persistent Distrust

A structural obstacle to increased family giving, and to the further development of the philanthropic sector overall, is the national regulatory and political context, especially in recent years. This was something we heard about repeatedly in our interviews. One person explained, “It is public knowledge that the current government does not believe in foundations. In 2018 they dismantled government institutions that were meant to fund these types of activities and civil society organizations.” (This comment alludes to the Federal Promotion Law of 2004 referenced above in the section, A Pivotal Time for Mexican Philanthropy, which mandates that federal agencies should fund and otherwise support civil society organizations). One former regulator reflected on the difficulty of complying with burdensome regulations and opined, “I think a public servant should be required to work outside a government agency, getting to know the problems that they will eventually have to address.”

Ironically, despite onerous regulations, which would seem to be intended to minimize fraud and result in great confidence in the sector, philanthropy is impeded by high levels of distrust (Layton & Moreno, 2010, 2014; Layton & Mossel, 2015). The interviewees in our study repeatedly pointed to generalized social distrust and distrust towards organizations as a daunting challenge. These findings echo those of the Kennedy School’s research, which cited their lack of trust in organizations as being an obstacle to their full philanthropic engagement (Johnson et al., 2015b). This is not an isolated problem but is part of the larger context of low levels of institutional and interpersonal trust in Mexico (Mattes & Moreno, 2017). Some observers emphasized how trust is low among some potential donors because of high-profile philanthropic frauds and failures that too often garner attention while successes remain hidden. One interviewee stated the problem forcefully: “I have always believed that in Mexico many projects fail because there is not enough structure, support, or trust on part of the donors. There have been many frauds and people wonder where their money goes.”

Philanthropy in its “*Infancia*”?

Many of the Mexican philanthropic families, professionals, and experts with whom we spoke described philanthropy in the country as still being in its *infancia*. They shared this view despite knowing that Mexico has a long history of giving, particularly religious giving, and being aware that a significant amount of philanthropy occurs but remains hidden. So, what do they mean by this claim of philanthropy being in its infancy, given that it is neither new nor uncommon?

In one sense, they are referring to the lack of widely shared awareness of what philanthropy is, let alone what the terms “donor,” “family foundation,” “community foundation,” or even “civil society organization” mean. One interviewee argued that the general public knows little about this field:

If you were to ask a random guy on the street, ‘Name me 10... no, name me five not-for-profits, just name them.’ I’m not sure that he could name them. I mean, there’s not a lot of visibility of not-for-profit organizations.

Another noted, “There is a gap in understanding philanthropy in this way. When you talk to Mexicans about doing a [philanthropy] program, they understand that you want to help people on the street to eat.” This concern over visibility and awareness ties into the worries about the underdeveloped national philanthropic culture discussed earlier.

More specifically, when people describe Mexican philanthropy as being in its infancy, they often refer to how giving has remained “old-fashioned” and how the sector and the institutions supporting family giving lack professionalism or organization — especially compared to more developed sectors, like in the U.S. As one person put it, “There was always this money given to the nun or to the elders or to whatever, but professional philanthropy in Mexico is a lot younger than it seems.”

While leaders and organizations have worked hard to professionalize and organize philanthropy, especially in the last 25 years, there is still a long way to go. As one insider in the sector described, “They’re trying to make this jump from charity to philanthropy, and they’re still learning how to.” Another noted that while there are many “individual initiatives” in communities and families, particularly in the areas highlighted in our profiles, “They are all small, and, by the same token, they have limited strengths.” They need the “courage to connect and to become bigger,” in order to enhance the impact of their generosity upon the challenges they want to address. One obvious way to do that is to collaborate with a community foundation, but the lack of knowledge of the institution is a major stumbling block.

The problem with this perception of philanthropy as underdeveloped or still struggling to emerge is that it often leads to a lack of confidence in the field and among philanthropic families. This can become a self-fulfilling prophecy, further hampering expansion, innovation, and organization in the sector. One Advisory Council member whom we interviewed and who has conducted extensive research on philanthropy and the business sector, Prof. Ana Cristina Dahik Loor, referred to it as the lack of “collective self-esteem” in Mexican philanthropy.



The Declining Role of Religion

Even though Mexico is becoming less religious, according to a report by INEGI (2023b), and Mexican family philanthropy is now less dominated by giving to the Catholic Church or other religious institutions, understanding how religion has shaped and continues to influence family philanthropy is crucial for grasping the connection between family giving and communities. Many families who give in the unheralded and private ways described above primarily donate to religious institutions. Similarly, many major philanthropic families continue to support the church, religious schools, and charities affiliated with religion, alongside their increasingly secular and formalized giving. Religious teachings still motivate various forms of giving, though this influence is waning among younger generations.

When we asked Mexican family donors to describe their history of giving and current charitable activities, their stories almost always began with some version of, “We always gave to the nuns.” One donor recalled,

I remember when I was a child at my grandparents’ house, we used to go to the orphanage. We would go every Sunday for lunch, and some young nuns would arrive with cookies and marshmallows. Everything was focused on how we can help others. ... I think it’s something I lived every day. My path started from there.

Others described fathers and grandfathers who were very philanthropic and started their family foundations or giving traditions, but solely focused on religious donations. One philanthropist noted, “My father started the foundation. ... The typical businessman that just wrote checks and checks to all the priests, nuns, and Catholic institutions.” (While most stories involved giving to Catholic institutions, similar narratives were shared by Protestant and Jewish Mexican donors.)

Religious motives for giving were particularly prominent among older donors. One donor explained, “I am Catholic, and I help orphanages, convents, disadvantaged schools run by Catholics. I consider it an obligation and a privilege to give something.” Given Mexico’s under-developed public social services, this philanthropy has remained crucial. Another stated that religion is deeply intertwined with the philanthropic ethos of the country:

Because we are a Catholic country, we tend to want to help others. ... This Catholic philosophy of helping others without expecting anything in return is what moves Mexicans. Help is seen at all social levels, not only among those who have means but even among those with little who still tend to give to the church.

As religiosity declines, the influence of religious motives and institutions is changing, though not disappearing entirely. Multigenerational giving families are finding new ways to give while continuing their legacy of religious charity. One family member explained how he and his siblings are trying

to change this mindset of that culture to more of an impact long-term, impacting people to change their lives. So, I think we have evolved a little bit, and we still do both. We still do both because there are some causes that are dear to my parents.

However, this evolution is likely to accelerate, as religious giving becomes less central for younger family members. One donor highlighted this challenge, saying,

I think that the religious character and the connection it has with philanthropy, it’s going to change. What I’m seeing is that the discourse is changing to universal values. ... I’m not sure if it’s good or bad, it’s just the way that I see it

changing. Because for the newer generations, it's very hard to sell that you're doing this because you're a Catholic. You won't sell it.

This generational shift from a church-based focus to an emphasis on impact and professionalization is explored further below.

Generational and Gender Dynamics in Families

In addition to the declining role of religion, intergenerational transitions within Mexican families significantly influence their philanthropy. This theme emerged frequently in our interviews with donor families and those who work closely with them.

Many donors emphasized that their philanthropic values and strategies were learned from older family members, often reflecting the deep importance of family in Mexican culture. Charity is often infused in family life, with many learning from mothers, grandmothers, aunts, or other female relatives. As one person noted, “Philanthropy, as we would say here in Mexico, comes from one’s mother. If she teaches you, it is passed on from generation to generation. Seeing your parents do things becomes a topic of conversation in the family.” This involvement extends to the next generation, while many parents we interviewed emphasized their respect for their children making different choices: “My children are very involved, but I respect them in the sense that they can enter or not.”

Within philanthropic families and across generations in those families, the dynamics of how philanthropy is handled – and by whom – follow common patterns, according to our interviewees. In many families, especially at the beginning of their philanthropic journey, the patriarch makes decisions, often informally and in response to direct solicitations from others in the community. Matriarchs play a key role as well, serving as what one interviewee labeled the “values person” in the family, the one who keeps charity (often tied mainly to the church) in the family conversation. Over time, family decisions often evolve to include other family members and generations, especially the next generation of women in a family, who step into this philanthropic role more commonly than sons and grandsons, who tend to focus more on being successors in the business itself. This is not the case with all families, but it was a common enough pattern to be noted many times in our research.

The challenge of involving the next generation is pervasive, with many viewing the current generational transition as a crucial moment for Mexican philanthropy. One person shared, “We are worried about what to do with the next generation,” while others expressed concern about encouraging philanthropy among younger generations. Some families were more optimistic, believing the next generation could bring “maturity, growth, and evolution” to their giving, already “innovating in how to give” and questioning traditional approaches. Others made intentional efforts to let each family member “find their area of passion where they can have an impact,” while some families struggled to balance new generational interests with traditional causes.

A keen observer of family businesses and philanthropy noted that the challenge often evolves with each generation: “If you are first generation, you probably ... are married in a way to whatever social cause the family decided to support. ... But then I think that can get diluted as it goes down generations.” This progression can lead to an increased focus on giving areas beyond the family's original locality, especially if the next generation is more geographically dispersed. As more of Mexico's elites are educated abroad, they view Mexican philan-



thropy through a more critical lens, as they are exposed to different philanthropic practices and expectations, especially the highly professionalized fundraising efforts of U.S. universities and other nonprofits.

Gender dynamics also play a significant role in these transitions, often determining who leads family philanthropy in local communities across Mexico. Women, particularly from younger generations, frequently take on leadership roles. A next-generation woman described how she was brought into her family's foundation: "Many years ago, my mom and my aunts got together to have breakfasts. And in those breakfasts, they started talking about which institutions they were helping. ... And they started inviting us [her and her sister] to those breakfasts."

Often, daughters are brought into the family business but are designated to lead the philanthropic side while sons manage business operations. One such daughter described her experience: "Truth is, it started because my father wanted me to join the company, and he knew I always gave back. And it was a great opportunity for me. I have told him all my life that he gave me a purpose." Another woman sought advice from others who were "the only girl in [the] family," on how to propose leading the family's philanthropy. However, women leading family philanthropy sometimes face challenges, particularly in being taken seriously when working alongside men, such as local business owners or community leaders. They were sometimes viewed primarily as the "sister of," "wife of," or "daughter of" someone, rather than recognized for their own roles.

Family Business and Family Philanthropy: Practically Inseparable

Family philanthropy in Mexico is deeply intertwined with the dynamics of family-owned businesses, which in turn significantly shapes the intersection of family and community giving. A substantial portion of charitable donations in Mexico flows through family-owned corporations, often directed to the communities where these businesses operate. One interviewee shared that it was more cost effective for them to support organizations through in-kind support of materials and labor rather than going through the red tape of deducting donations. Many family businesses have philanthropy embedded in their financial practices, as illustrated by one interviewee who noted that "a percentage of the dividends we receive has to go to the family foundation," while another shared that their father "stipulated that 10% of the profits would be destined to social service." Additionally, businesses frequently match employee donations to amplify their impact, with one person explaining, "for every peso collected by the employees, the company would contribute two more."

This local focus in giving reflects a strong sense of responsibility, often described as a "social pact" between businesses and their communities, where giving back is seen as both a moral obligation and a way to maintain a positive reputation. Some business owners also view their philanthropic efforts as a means to keep employees engaged and motivated. As one business owner put it, "We want our workers to also feel that their jobs can impact their community through our philanthropy."

Family businesses are also the primary supporters of community foundations across Mexico, reinforcing the essential connection between business and local philanthropy. Beyond traditional giving, many businesses engage in corporate social responsibility (CSR) initiatives, focusing on employee welfare and community projects. One family leader described their CSR efforts:

The people who work with us, in addition to paying them the best salaries that can be paid in Mexico, we help people who have been working with us for more than three years ... by improving their homes and, in many cases, by building new homes.

These CSR activities are particularly appealing to younger generations within family businesses, especially those educated in the U.S. or at Mexican universities, where CSR is increasingly emphasized. This generational shift is leading to significant changes in how family businesses approach philanthropy, with younger members bringing new perspectives and questioning traditional models. As our Advisory Council member, Prof. Ana Cristina Dahik Loor, observed,

The new generations are facing new competing logics in terms of how you donate, in terms of how you do philanthropy. ... The new generations are receiving all this new information and new models, and with a narrative that competes against [the traditional giving] one ... "Wait a second, so I'm not supposed to do philanthropy anymore because it's inefficient?" ... Narratives are changing. There are competing logics ... I think it's tricky for them because they also want to keep the family legacy alive. There's a romantic element behind all of this. There's a lot of social-emotional wealth around being part of the legacy of whoever founded the company. But they also want to do new, innovative things, right? But there are no cool references – contemporary, modern, new references for family philanthropy in Mexico.

This evolving landscape reflects the broader changes occurring within family businesses in Mexico, as they navigate the balance between maintaining their philanthropic legacy and adapting to contemporary practices and expectations. Our interviewees stressed one expectation in particular, that organizations should be operated professionally with demonstrable impact.

Conclusion

This section has highlighted the key insights we uncovered during our interviews with family philanthropists, leaders, and experts in the field. As we have recounted, family values and traditions play a significant role in Mexican philanthropy, with many donors focusing on informal, private giving tied to religious and local causes. As younger family members, particularly women, take on leadership roles, philanthropy is shifting toward more strategic, impact-driven approaches. Family businesses are also key players, integrating corporate social responsibility and community engagement into their operations. Despite challenges like regulatory hurdles and a lack of trust in the sector, family philanthropy in Mexico is evolving and seeking greater professionalization, innovation, and impact. In the next section, we will examine the evolving role of community philanthropy and begin to consider how community foundations can address these challenges.



Community Philanthropy and Community Foundations

“I believe that many people are conscious of how important it is to give back to society a little of what they have, of what they have received. ... With that awareness, they are seeking ways that they can have a strong and far-reaching impact. You can do a lot of things, go very far, and by acting through and with the Fundación Comunitaria Puebla, your initiative can have a multiplier effect. The time we spend thinking, listening to, and understanding these initiatives and seeing how we can make them happen, ... we take the Fundación Comunitaria to all these places, contributing to the improvement of the community.”

- José Ramón Lozano-Torres, Board President, Fundación Comunitaria Puebla

In the quotation above, José Ramón Lozano-Torres, one of the founders and current chair of the Fundación Comunitaria Puebla, precisely articulates what the value-added is for a family philanthropist to work with a community foundation as an intermediary who can amplify a donor's impact and begin to address the concerns expressed in the section above. As the following pages highlight, there is a critical role for leaders like Ramón and community foundations to play in advancing philanthropy, especially community philanthropy, in Mexico.

Overview of Community Philanthropy and Community Foundations in Mexico

Community philanthropy takes on a variety of institutional forms. Collective giving activities, such as giving circles (Philanthropy Together, n.d.),² have a long history and the concept of community informing those activities reflects a wide range of how people understand their identity, be it based upon geography, gender, race, place, faith, sexual orientation, or combinations of elements. This report is primarily focused on a more highly institutionalized form of community philanthropy, the community foundation. (Please see the Introduction to Key Terms for a more detailed discussion.) This form is relatively new in Mexico, although the model of mutual aid and shared community work is deeply rooted in Mexico's pre-Hispanic past. Indigenous communities engaged in collective efforts to address communal needs long before the arrival of European settlers. This tradition of mutual aid has persisted through the centuries in indigenous communities, adapting to important shifts in technology and migration (Bonfil Batalla, 1996).

The institutional form and the use of the term community foundation — *fundacion comunitaria* — was exported from the U.S. in 1995, when Cemefi began its work to promote the concept (Landa García Téllez, 2020). This was part of an effort by Western foundations and governments to promote the community foundation model globally after the Fall of the Berlin Wall and the rise of democracy, seeking to address the challenge of making civil society more sustainable with local resources (Sacks, 2000, pp. 4-8; Charles Stewart Mott Foundation, 2012). Despite its foreign origins, the concept found fertile ground in Mexico, where place-based generosity

² For a thorough discussion of various forms of collective giving, see the section titled, “A Closer Look: Typology & Archetypes of Collective Giving Groups,” pp. 7–19, in Loson-Ceballos, A., & Layton, M. D. (2024). *In Abundance: An analysis of the thriving landscape of collective giving in the U.S.* <https://johnsoncenter.org/wp-content/uploads/2024/04/in-abundance-an-analysis-of-the-thriving-landscape-of-collective-giving-in-the-u-s.pdf>

has a long history. This cultural continuity has allowed the community foundation model to adapt and grow, even as it introduces new methods of mobilizing resources and faces a challenging context for institutional philanthropy.

As mentioned above, Mexico's tax code does not have specific regulations for community foundations or any type of grantmaking foundation. Instead, registered charities fall under the general category of "authorized donees" (Villar & Puig, 2022). The lack of specific legal recognition for community foundations in Mexico presents challenges but also offers flexibility in how these foundations raise funds and balance grantmaking and operating programs. For example, some community foundations, like FECHAC and FEYAC, rely on one principal source of funding, a surcharge on local payroll taxes. While some focus on grantmaking as their core activity, many invest their resources principally in programmatic efforts to support grassroots development through technical assistance (Murrieta Cummings et al., 2024). It is important to note that one expert observed that only about a quarter of Mexico's community foundations offer donor services, a near-universal practice among U.S. foundations.

Geographically, there is much greater coverage by community foundations in the U.S. compared to Mexico. North of the border, there are over 1,000 community foundations that are present in every state and the District of Columbia, and they serve most local communities (Candid, 2021; Council on Foundations, n.d.c.). In contrast, 14 of 17 community foundations in Mexico operate statewide, and half of the country's 32 states have a community foundation. Notably, two of Mexico's largest metropolitan areas lack a community foundation altogether (Mexico City and Toluca, State of Mexico). (See Appendix D: List of Comunalía's Membership and Appendix E: Map of Comunalía's Membership.) Given that the U.S. had a 70-year head start, a stronger philanthropic culture, and greater political stability in the 20th century, this is not surprising. Mexico's foundations are spread across a diverse landscape, from the wealthiest to the poorer states, those with an abundance of not-for-profits to those with a scarcity.

Like *Alebrijes*: The Diversity of Mexico's Community Foundations

The adaptability of the community foundation model is one of its greatest strengths, allowing it to be molded by local context so that it can best respond to local challenges. According to Landa García Téllez (2020), "There is no [single community foundation] model; there are principles that are adapted to local realities and circumstances" (p. 2). This flexibility has allowed community foundations in Mexico to reflect the unique cultural, social, and economic contexts of the areas they serve.

Pamela Cruz, Comunalía's Special Projects Coordinator and a member of our Advisory Council, is fond of likening the diversity of community foundations in Mexico to the colorful and varied forms of *alebrijes*, the fantastical creatures of Mexican folk art. Just as *alebrijes* combine elements from different animals to create one-of-a-kind figures, community foundations in Mexico blend various roles, functions, and approaches to meet the specific needs of their communities (the cover of this report features a photograph of *alebrijes*). To take the analogy to *alebrijes* a bit further, the traditional form of these creatures as they originated in Oaxaca are made from carving copal wood: this consistency of the base material corresponds to how all community foundations share the core values of community philanthropy. The varied shapes of *alebrijes* can be likened to the wide range of activities that community foundations engage in, depending upon their local community's strengths and challenges. And their myriad, brilliant colors are how community foundations seek to be seen by the community.



This diversity reflects regional and state-by-state differences and the distinct challenges and opportunities each community faces, and it allows a community foundation to be a flexible intermediary for generosity. This intermediary role is a foundation's core value proposition, as it emphasizes the added value of a community foundation in being able to build connections, understanding, and trust between donors and organizations.

As one person deeply familiar with the field explained, "Most of the first community foundations were not necessarily new foundations. They were foundations that were already working in a region or had some characteristics that resembled a community foundation." This highlights how existing institutions adopted the moniker and adapted the model of community foundation while reflecting their local context. This has led to a wide variance in community foundation models across Mexico, each as unique as an *alebrije*.

This diversity can be seen in how differently Mexico's community foundations define their roles and responsibilities.³ Some community foundations focus primarily on grantmaking to local organizations, others take on a more direct role in implementing programs to address local needs, and most fall in between. Serving donors, a near-universal practice among U.S. community foundations, is not central to the work of many Mexican foundations: one expert noted that only about a quarter of Mexico's community foundations offer donor services and added, "It is not about the donor only, it's the donor connected to the community." This operational flexibility is crucial in a country where the nonprofit sector is underdeveloped, and where community foundations often have to step in to fill gaps in services or infrastructure. This diversity is not just a strength but a necessity in a context as varied and complex as Mexico.⁴

The Importance of "Evangelizers"

The spread of community foundations in Mexico can be credited to the work of what we term "evangelizers" — leaders who are already recognized as philanthropists, deeply passionate about the community foundation model, and committed to promoting it in their communities and beyond. While Yang et al. (2021) refer to these individuals as "mediators," we use "evangelizers" because it conveys the passion behind their advocacy. As Yang et al. (2021) note, "mediators, as trusted actors within elite networks, promote and legitimate institutional innovation by tailoring the model to satisfy local requirements" (p. 970). These evangelizers adapt the model to local needs, cultivating long-term success.

Consistent with Yang et al. (2021) and our interviewees, evangelizers leverage their influence and networks to build support for the community foundation concept. As Landa García Téllez (2020) emphasizes, "Leadership is the most important component to creating a community foundation" (p. 13), underscoring the critical role of these evangelizers. Consistent with our research and Yang et al.'s (2021), Landa García Téllez highlights that such local leadership is essential in establishing these foundations, emphasizing that trusted leaders act as bridge builders, connecting diverse groups and inspiring engagement. They extol the benefits of community foundations by telling their own success story, and that of other families and donors who have similarly benefitted from becoming engaged collectively. These leaders not only advocate for the model but also shape

³ The diversity of community foundations and their contexts raises an important new research question: Is there a correlation if not a causal relationship between the activities of community foundations and key aspects of their state context? The ideal starting point to answer that question would be to gather systematic data on all 17 of Comunalía's members and their state or municipality. The report, sponsored by Comunalía and authored by Murrieta Cummings et. al (2024) <https://comunalia.org.mx/wp-content/uploads/2024/08/Informe-Voluntario-de-FC-VF-FINAL-LONG.pdf>, is a firm foundation upon which to build.

⁴ These observations also raise the question of how community foundation operations vary within other nations and between them. Such an exploration of empirical variation could help explain the variation in the uptake of the model and help inform a rigorous, internationally applicable definition of the term community foundation.

the culture and values of the foundations they help establish, setting the tone for their operations and their relationships with donors, beneficiaries, and the broader community.

One of the main objectives of Comunalia, the alliance of community foundations in Mexico, is to support and nurture these evangelizers. Comunalia provides a platform for sharing best practices, offering training, and developing tools that can help new community foundations get off the ground. They also focus on capacity building for existing community foundations, helping them to strengthen their operations and expand their impact. According to a leader of Comunalia, "We create this network of support between community foundations," which is essential for the sustainability and growth of the community foundation movement in Mexico.

This support network is particularly important given the lack of a standardized community foundation model in Mexico. The diversity of community foundations means that each one has to find its own way, and the guidance provided by Comunalia and other evangelizers – be they individual or institutional, domestic or foreign – can be invaluable. By helping community foundations navigate challenges such as regulatory hurdles, donor engagement, and program implementation, these leaders ensure that the community foundation movement in Mexico continues to evolve and grow.

The work of evangelizers is also crucial in bridging the gap between local and national philanthropy. As they advocate for the community foundation model, they help to build connections between local foundations and national and international networks, opening up new opportunities for collaboration and funding. This broader perspective is important for ensuring that community foundations in Mexico are not isolated but are part of a larger movement that can share resources, knowledge, and influence.

In conclusion, the community foundation model in Mexico, exported from the U.S., has undergone remarkable adaptation to fit the unique cultural, social, and economic contexts of the country. This adaptation has led to a diverse and dynamic community foundation landscape, much like the colorful and varied *alebrijes* of Mexican folk art. The strength of the community foundation movement in Mexico lies in its ability to be flexible and responsive to local needs while maintaining the core principles of community philanthropy.

The role of evangelizers in promoting and sustaining the community foundation movement in Mexico cannot be overstated. These leaders are the catalysts for the creation and growth of community foundations, providing the vision, energy, and support needed to build strong and effective community foundations. Their work, supported by networks like Comunalia, ensures that the community foundation model continues to evolve and expand, adapting to new challenges and opportunities as they arise.

As the community philanthropy in Mexico continues to grow, it is clear that there is no one-size-fits-all model. Instead, the diversity of community philanthropy institutions, including foundations, that reflect the unique characteristics of its community is a testament to the adaptability and resilience of this form of philanthropy. The future of community foundations in Mexico will likely see continued innovation and evolution, as these institutions remain committed to their mission of supporting sustainable development and community well-being across the country.



Why Local Matters

The importance of local context also cannot be overstated when it comes to the success of community foundations, especially in Mexico where the model is a recent arrival. The community foundation model is inherently place-based, meaning that its effectiveness is closely tied to its ability to address the specific needs and dynamics of the community it serves. This is particularly true in Mexico, where the concept of community is deeply rooted in local identity, history, and culture. The phrase used by one interviewee, “local trumps everything else,” encapsulates this sentiment, as donors and community members alike place a high value on supporting initiatives that benefit their immediate surroundings.

Our interviewees consistently expressed a personal and business connection to their community. This connection is not just emotional but also practical, as many donors believe that by supporting their local community, they are also ensuring the well-being of their employees, customers, and themselves. One donor expressed this by saying, “we become beneficiaries as well,” highlighting the symbiotic relationship between local philanthropy, family business, and community well-being. This focus on the local is also strategic, as donors are more keenly aware of the needs and potential solutions within their own communities.

“I realized that we need to start educating wealthy families and business owners. It’s important not to be transactional but to connect with them as advisors and present successful projects. The goal shouldn’t be to simply direct their money into our accounts but to involve them directly in projects, even if their donation doesn’t go through our community foundation. ... We need to learn how to engage with them and help foster their understanding. I think this has been one of the most important lessons I’ve learned over the past few years.”

– David Perez Rulfo, Director, Corporativa de Fundaciones

This local focus is further reinforced by the trust that donors place in familiar organizations and community foundations. Trust is a critical component of successful philanthropy, and it is more easily established in local contexts where relationships are personal and long-standing. Donors are more likely to contribute to initiatives led by people they know and trust, and community foundations play a crucial role in facilitating these connections. As one interviewee noted, “Locally, since there's influence and trust, it's very simple for us to help, because we trust the people.” This trust-based approach to philanthropy is a key reason why local giving is so prevalent and galvanizing in Mexico, especially in a context where institutional and social trust are low.

The focus on local giving, driven by strong family ties and a deep sense of community, underscores the importance of place-based philanthropy in Mexico. Donors are more likely to support initiatives that benefit their immediate surroundings, where they can see who benefits and the direct impact of their contributions. This local focus is reinforced by the trust that donors place in community foundations, which are seen as reliable and effective intermediaries for channeling resources to where they are most needed (Córdova, 2023).

Research that has examined trust in Mexican civil society organizations and community foundations paints a complicated but hopeful picture. In a recent study conducted by Comunalía and sponsored by the Global Fund

for Community Foundations, Córdova (2023) found that government officials and CSOs who had worked with community foundations expressed high levels of trust, based largely on their transparency. The opportunity is for community foundations to develop more alliances and collaborative relationships, as those who work directly with them trust them. Those unfamiliar with their local community foundation expressed high skepticism toward all elements of civil society.

Moreover, the local focus of community foundations allows them to be more responsive to immediate needs and crises. For example, Mexico's community foundations played a significant role in the response to the 2017 earthquake (Boyer et al., 2018) and the COVID-19 pandemic (Boyer, 2020), mobilizing resources quickly to address not only urgent needs but long-term rebuilding and resilience. This ability to adapt and respond to immediate humanitarian emergencies, while maintaining a long-term development orientation, further cements the importance of community foundations in the broader philanthropic ecosystem. The lack of adequate municipal and state government infrastructure, especially in Mexico's poorest states, makes community foundations even more important in relief and rebuilding efforts.

Conclusion

This section has provided a brief overview of community philanthropy in Mexico, with a special focus on the community foundation model. Depending on their trajectory and the local context, community foundations can play a pivotal role, providing the connective tissue between various actors — especially family philanthropists, donor institutions, the business sector, and organized civil society. In this role, they can act as a catalyst in strengthening philanthropic actors, the enabling environment, and philanthropic culture. While the model was imported from the U.S., its roots in mutual aid align with Mexico's long-standing traditions. The adaptability of these foundations — like *alebrijes* — has enabled them to configure themselves to respond to local needs flexibly. The importance of leadership or “evangelizers” in promoting the model and connecting donors with projects is emphasized, alongside the significant role community foundations play in building trust locally. Finally, this section highlights how foundations address gaps in municipal infrastructure, particularly during crises like earthquakes and the COVID-19 pandemic.



Five Opportunities for Moving Forward

“The question is whether these civil society organizations are trustworthy or not. That is why COMUNIDAR, as the community foundation in Nuevo León, is here to provide that trust: we accompany families and companies, and we know very well the social sector and what they want to do for Nuevo León. ... By understanding the social sector and the civil society organizations working directly with the people, we facilitate connections between donors and causes. We ask donors, What resources are you able to give? How do you envision giving them? We can help you explore the full range of possibilities, from one-time donations to long-term social investments that create lasting community impact.”

– Carmen Garza T, former board chair and co-founder, COMUNIDAR, in an interview with *En Común*, August 8, 2024.

Rather than identifying specific next steps, we describe five areas of opportunities for enhancing the connection between family giving and community philanthropy, especially with and through community foundations. This seemed to be a more valuable approach in light of the diversity of state-level contexts that community foundations face and the varied organizational forms and trajectories they take in Mexico, as described in four of the Profiles. (The fifth profile drew upon a collaboration among family and corporate foundations so as to illuminate what such philanthropists are looking for in an intermediary.)

Each section below includes quotations from interviewees that help substantiate the opportunity, a list of what philanthropic families said they need, potential roles for community foundations to meet those needs, and an explanation of the opportunity. In addition, to help activate these opportunities, in Appendices F and G we provided two sets of queries, one for community foundation leaders and current supporters and a second for potential supporters. We believe that these questions can serve as a first step in sparking a conversation — *detonando una conversación* — that can lead to a deeper understanding of the community foundation model and its value proposition, thereby opening the door for partnerships and collaboration.

1. Write a Compelling “Gospel of Community Philanthropy.”

“What are community foundations?” – Family philanthropist

“[Mexico’s philanthropists] have no clue what a community foundation is.” – Philanthropy expert

“What we’re working on is articulating the value of the community foundation as a vehicle for generosity — being a bridge of intermediary — in a very flexible way, both for donors and projects. I know that philanthropic intermediaries are not very popular but reframing that role of being an intermediary [and] bringing in value regarding capacity building, for donors, for the organizations, or the people benefiting from [them], building the capacity of the community to solve their problems.” – Comunalía staff person

“Some businesses are probably doing community philanthropy, and they're not even aware of it. I think that in general, in Mexico, the people who would know and relate to the label of a community foundation are a really tiny group.” – Philanthropy expert

"[Community foundations] crave knowledge and tools to know how they can bring value to the donors... also how to fundraise, but mostly how they can sell the idea that community foundations are worth investing in. ... also how to bring more donors together and engage in philanthropy. I think it's also something that foundations are thinking about... how they can leverage more resources other than funds, how they can bring talent to the community foundations." – Family philanthropist

Philanthropic families said they need:

- Evangelizing and outreach to increase their awareness and understanding of the community foundation concept.
- Education on the benefits of employing a philanthropic intermediary.
- Anecdotal and empirical evidence of the impact of their local community foundation, preferably from a trusted peer.

Potential roles of community foundations to meet those needs:

- Articulate a clear concept of what a community foundation is and how it benefits the community as a whole.
- Promote the case for your local community foundation and how it uniquely works to meet your community's needs.
- Develop case studies and clear metrics of the success of the community foundation's work, especially in collaborating with donors.

In 1889, the U.S.-based industrialist Andrew Carnegie wrote an essay now referred to as “The Gospel of Wealth,” hoping to inspire his fellow wealthy industrialists to be more philanthropic. His message still resonates with the rich in the 21st century, as one book dubbed today's billionaire philanthropists “Carnegie's Children” (Bishop & Green, 2008, p. 13). Advocates for community philanthropy need to articulate a compelling value proposition for their movement, a “Gospel of Community Philanthropy.” While core aspects of this message should resonate nationally and even internationally, foundation leaders must adapt this message to the unique environments of each community in Mexico. Comunalia has a history of working with its members to reach a shared understanding and promote the model to key actors. As one expert argued, community foundations urgently need to articulate “how they can sell the idea that community foundations are worth investing in.” In turn, each foundation needs to adapt that message to its community.



2. Cultivate Evangelizers and Spread the Good News.

“The reason I am here is because ‘R’ invited me.” – Family philanthropist

“I was looking for help with my family’s giving, so I called up ‘C.’” – Family philanthropist

“‘A’ was the force behind the scenes that made this happen.” – Family philanthropist⁵

Philanthropic families said they need:

- Mentorship and encouragement from well-known and trusted figures who lead by example.
- Opportunities for enhanced social connections and collaborative ways to improve their giving and their impact on their community.

Potential roles of community foundations to meet those needs:

- Cultivate in your board and donors the capacity to be effective evangelizers for community philanthropy.
- Connect with local leaders, expanding their relationships not only with civil society but also with the private sector, government, and schools and universities, spreading the word about your community foundation and encouraging greater philanthropic engagement
- Sponsor events where people can gather to celebrate philanthropy, acknowledge achievements, or just meet each other.

Who can best deliver a positive message about community giving and foundations? Leaders who are respected for their social commitment, generosity, and integrity. Our interviewees repeatedly pointed to the importance of inspiring and respected local leaders who acted as evangelizers for their community foundation and convinced, cajoled, and connected a larger and larger circle of actors to become involved. If it is to grow, the movement needs more of these leaders. Prior research has also identified the need for more role models and peer engagement as essential to promoting the community foundation model (Yang et al., 2021) and philanthropy in general (Johnson et al., 2015b). In addition, our experience disseminating the results of our research underlined the value people place on being together to reinforce existing connections and make new ones.

3. Craft Compelling Narratives That Highlight Impact and Enhance the Visibility of and Trust in the Sector.

“I have always believed that in Mexico many projects fail because there is not enough structure, support, or trust on [the] part of the donors. There have been many frauds and people wonder where their money goes.” – Family philanthropist

“In the dynamics of foundations and entrepreneurs, the key word is trust. If this does not exist, we cannot make progress.” – Community foundation staff

“Keeping the family together and having an institution that they want to be a part of and that they feel proud of because it has a huge impact in Mexico, and we are making a difference.” – Family philanthropist

⁵ Names were reduced to first initials to maintain the anonymity of the interviewees and their contacts.

Philanthropic families said they need:

- Opportunities to increase their knowledge of civil society organizations to cultivate trust.
- Greater familiarity with the options for measuring impact and sharing results.
- Access to information, both data and narratives, that link philanthropy to meaningful community change.

Potential roles of community foundations to meet those needs:

- Strengthen organized civil society and philanthropy in terms of their visibility and trustworthiness.
- Develop measures of impact that are affordable and accessible to nonprofits and compile data that is relevant to them and leads to organizational learning.
- Craft stories – with data – that emphasize impact and accountability.

A common thread running through our interviews and prior research is the lack of knowledge about and trust in nonprofits. Johnson et. al. (2015b) found among their interviewees, the absence of trust in nonprofit organizations is a major hurdle to philanthropy. This distrust is a grave concern for the community philanthropy movement as community foundations have a critical role as an intermediary between donors and recipients. One way to address this challenge is to develop compelling outcomes or impact narratives, combining data, facts, and stories that demonstrate the sector's important role in building a better community. The lack of such information – transparently shared – is a significant barrier to encouraging greater generosity (Johnson et al., 2015b). Community foundations need to make progress in evaluating impact and strengthening their internal capacity as well as that of their grantees. Such work will go hand-in-hand with enhancing the sector's "collective self-esteem" in terms of its ability to deliver results and to communicate with donors, civil society, governmental actors, and the public.

4. Focus on Collaboration, Learning, and Advocacy

"If we start sharing stories of how collaboration actually works ... then you will create a new baseline for future collaborations. ... We don't know how to collaborate now. But if we start sharing stories, we can say, 'Listen, this worked well!'" – Family philanthropist

"It is just sharing thinking processes, methods, and models that work and understanding examples of success and failure. And I love sharing the failures. I always come to the table and ask, what went wrong, and what can we learn from it? Because otherwise, you put the failures in a corner, and nobody looks that way. And we continuously trip and fall in the same spot." – Family philanthropist

"Not only does the government not support [philanthropy], but in many ways, it seems to hinder philanthropy." – Family philanthropist

Philanthropic families said they need:

- Opportunities to share stories of success and failures, especially related to collaboration between foundations and with civil society and government.



- Resources and partners to help grow their expertise in giving effectively, to overcome hesitancy and help build a path toward greater giving.
- A legal and fiscal framework that induces less fear, provides greater clarity, and encourages philanthropy.

Potential roles for community foundations to meet those needs:

- Convene relevant community partners and facilitate multi-party collaborations and coalitions.
- Develop learning opportunities that meet the needs of local donors and emphasize peer learning and professional development.
- Advocate for a more robust enabling environment for civil society.

Family philanthropists are especially eager for opportunities to learn from each other. Per the second quotation above, one interviewee stressed the importance of learning from less-than-successful efforts and resisting the temptation to “put the failures in a corner.” The need to communicate, coordinate, and collaborate was a recurrent theme throughout our interviews. Various forms of collaboration — between individual and institutional donors, governmental actors, and the nonprofit sector — can be catalyzed by community foundations. Within state and local communities, this can lead to better programmatic outcomes. Embracing the roles of convener and community leader is critical to the success of community foundations. In addition, collaboration and peer learning among community foundations, facilitated by Comunalia, can lead to improved fundraising strategies, impact measurement, and advocacy. Embracing the roles of community leader, convener, and connector is key to the success of community foundations.

5. Cultivate a Broader and Deeper Philanthropic Culture

“There is no culture of being a donor.” – Numerous interviewees

“There is not a great culture of philanthropy. It is still lacking.” – Philanthropy expert

“Everybody's trying to find the way forward. Even families that have given significantly for decades are trying to understand how this becomes generational and how they organize and focus their giving.”
– Family philanthropist

Philanthropic families said they need:

- Fundraisers and organizations, including community foundations, to seek support beyond the wealthiest, well-known philanthropists. Efforts should focus on mobilizing a broader audience — often referred to as 'everyday givers' in the U.S. — and encourage contributions beyond cash, embracing all Five T's of generosity: Treasure, Time, Talent, Ties, and Testimony.
- Strategies that engage the younger generations by meeting them where they are in their philanthropic journey.
- Efforts that balance the desire for families to maintain a low profile with the need to celebrate and encourage generosity.



Potential roles of community foundations to meet those needs:

- Articulate the expectations and activities involved in fulfilling the role of community donor.
- Attract more people as donors and volunteers from diverse social strata by generating meaningful opportunities, in partnerships with civil society, schools, and universities.
- Intentionally mobilize the generosity of younger people, recognizing that these efforts must be age-appropriate and move beyond participating in events to cultivating a deeper understanding of and engagement with philanthropy as part of a meaningful life.
- Strike a balance between promoting and highlighting acts of generosity in your community with the desire of many families to maintain a low profile.

The larger goal of articulating a compelling message for community philanthropy and cultivating leaders to deliver that message is to engage more community members in contributing to its collective good. This means embracing practices that cultivate generosity and build a stronger philanthropic culture. One way community foundations can do this is by clarifying the roles that donors play, to help address the problem of a lack of “cultura de ser donante.” This seems possible because these communities in Mexico already have a clearly defined and widely known role of “local business leader.” Also, in increasing engagement, community foundations should look beyond the “usual suspects” and to various social strata. Our interviewees stressed the importance of intentionally mobilizing the generosity of younger people, a theme which other research regionally and internationally has emphasized (Johnson et al., 2015b; Goldseker & Moody, 2017).

In its most recent global report, Giving Tuesday (2023) found that the challenge of a declining number of donors is a global phenomenon. They concluded, “the social sector as a whole is not inviting enough different kinds of people into its support ecosystem, whether as donors, volunteers, or advocates” (para. 10). Mexico’s community foundations can learn from other actors around the globe facing this same challenge, as well as examples from within their own country. For example, the Fundación Comunitaria Puebla shared their experience in forming partnerships with local businesses to engage their employees as donors, especially German automotive plants. This engagement has even extended to employees in Germany. Through partnership and shared learning, community foundations can cultivate a stronger culture of being a donor by providing opportunities for business leaders, their employees, and others in the communities to discuss what it means to be a donor and to act in that capacity. The success of these efforts can initiate a positive cycle in which the organizations of community philanthropy reach more community members with encouraging stories of success, thereby boosting the collective self-esteem of the sector and creating positive momentum for greater engagement.

How to Activate These Opportunities

How can Mexico’s community foundations and their allies best take advantage of these opportunities? Recall our description on page 10 of the philanthropic ecosystem as a dynamic network of interconnected actors and the institutional and cultural context in which they interact. We believe that community foundations can serve as connective tissue and catalysts in this ecosystem, nurturing the ties between their community’s philanthropic actors — family philanthropists, organized civil society, other foundations, the business sector, and government — improving the enabling environment (including the regulatory frameworks, expanding and improving human capital, and increasing the availability of funding), and cultivating a more robust philan-



thropic culture (especially in terms of generosity, trust, and reciprocity). Research in the U.S. has shown that change in the community foundation field begins from the bottom up at the level of individual foundations (LePere-Schloop et al., 2024): if these findings apply to the Mexican context, then existing community foundations have a vital opportunity to support their sister foundations and advance the field.

Mexico's alliance of community foundations, Comunalia, has a strong history of collaboration among its members and with a broader group of proponents of the community foundation model — drawn from Mexico and worldwide. This latter group includes donors, philanthropy-serving organizations, community foundations from other nations, and universities. The alliance serves as a forum for the kinds of activities – knowledge building, dissemination, shared learning, capacity building, and advocacy – that will be essential for readers of this report to realize the full potential impact of the community foundation model.

Given the five opportunities identified, the potential and diversity of Mexico's community foundations, and the platform for collaboration offered by Comunalia, what are some concrete next steps that Mexico's community foundations, Comunalia, and their allies might take?

1. **Build wider and deeper connections.** Mexico's community foundations can take the findings from this report, consider the opportunities described in light of their unique context, and use the queries for internal and external allies (found in Appendices F and G) to spark conversations that can lead to more significant connections, trust, and collaboration. These conversations can be conducted internally or with the support of a facilitator.
2. **Develop a compelling message and communications strategy.** Comunalia has made significant strides in articulating what we have called a Mexican Gospel of Community Philanthropy, crafting a shared value proposition and messaging campaign for its members. There is a successful precedent for this work from the state of Michigan in the late 1980s, when community foundations developed a public relations campaign with the slogan, "For good. Forever." (Johnson & Collier, 2012, p. 11). Not only should Comunalia be supported in advancing and concluding this work, but each of its members should engage their board, staff, and allies in a conversation about how they can best adapt that message to their local context. The findings in this report and the Queries presented in Appendices F and G could all be useful in this effort.
3. **Provide resources for strengthening foundations and their staff.** There is a clear need for professional development and capacity strengthening for Mexico's community foundations, which presents an opportunity and a challenge. Many Mexican community foundations have already demonstrated an ability to carry out some of the critical tasks running through the five areas of identified opportunities, including delivering metrics that capture the impact of grantmaking and programs, providing donor services, and cultivating collaboration with state and local governments. The challenge is that some community foundations have larger staffs and relatively dependable funding, while others are in what one interviewee described as "survival mode." In light of this challenge and to take advantage of the opportunities, it is necessary to subsidize the staff time needed for peer learning and professional development as well as the delivery of training and sharing of expertise.

The leaders and advocates for the community philanthropy movement in Mexico are well-positioned to take advantage of these opportunities. They have a history of collaboration among themselves and connections with the key supporters, including the Center for Mexican Philanthropy, which incubated the movement early

on; the Charles Stewart Mott Foundation, which supported this study; the Inter-American Foundation; and the Global Fund for Community Foundations, to name a few. In addition, Mexican and foreign universities have collaborated with Mexico's community foundations in developing meaningful training and conducting relevant research: continuing, broadening, and revitalizing these partnerships would provide valuable resources in terms of knowledge creation and knowledge sharing for Mexico's community foundations and significant opportunities to its academic partners.



Conclusion: Frente Despejada - A Vision for the Future, Inspired by the Past

No eres Amo por la sangre si primero no has vencido la prueba de los hombres. Hay muchos que la sangre si tuvieron pero a Amos no llegaron pues perdieron la prueba.

- Si pierdo, nadie soy-.
- Solo es Amo quien sabe servir mejor-.

Así Carrizo del Río pasó la prueba y se convirtió en el Amo Frente Despejada.



You are not a Leader by blood if you have not first passed the test of leadership. Many had royal blood but did not become leaders because they failed the test.

- If I lose, I am no one.
- Only those who know how to serve best are Leaders.

Thus, River Reed passed the test and became Leader Clear Forehead.

The passage above is the critical moment of the tale *The Test* (Ortiz-Dietz, 2020), which centers on a young person from an Indigenous Zapotecan community facing a profound moral dilemma. River Reed, along with his best friend and other youths, is competing in a multi-day race that marks a rite of passage from boyhood to manhood and determines who will earn a place in the community's leadership. Blindfolded and led deep into the forest, each participant must find their way back to the village within three days and to do so alone.

During his journey, River Reed encounters his friend, who has been bitten by a snake and will die without help. Faced with this moral dilemma, River Reed decides to carry his friend back to the village, fully aware that this act of compassion will cost him the chance to complete the challenge on time. Though he arrives late, the elders celebrate his return, recognizing that authentic leadership is found in service. In honor of his selflessness, he is welcomed as a leader and renamed "Frente Despejada." While the literal translation of his new name is Clear Forehead, it symbolizes clarity of mind, purity, and readiness for leadership in this context.

We encountered this compelling story during a visit to Puebla in a small museum located in the Casa del Mendrugo. The Casa was built by the Jesuits shortly after the city of Puebla was established in 1531, and it derived its name from how the priests lived off the crusts of bread (*mendrugos*) that their neighbors offered them as alms. The founders of the city of Puebla thought that the valley had never been inhabited. However, during the restoration of the Casa in 2010, workers uncovered the remains of a woman who lived there in 1500 B.C.E., during the time of the Olmecs (La Casa del Mendrugo, n.d.), which has been dubbed the "mother culture" of Mesoamerica (Coe, 1968).

For us, the significance of these stories of Frente Despejada and the Casa del Mendrugo is that the story was preserved and the building was restored by one of the co-founders and the current president of the board of the local community foundation, José Ramón Lozano-Torres. Today, the building is home not only to a museum (which displays archeological finds recovered from the restoration, Zapotec artifacts, and examples of *Talavera*, among other treasures) but to a restaurant intended to celebrate the cuisine of Puebla, as well as to provide a space for gatherings. Indeed, it is a powerful testament to the enduring legacy of generosity and pride of the Mexican people.

Mexico's deeply rooted traditions emphasize interconnectedness and service leadership, drawing from its pre-Hispanic roots and Catholic heritage. Our research demonstrates how these traditions inform a philanthropic culture of generosity now expressed through family and community philanthropy. What is lacking is a philanthropic infrastructure that nurtures that culture, effectively channels that generosity, and transforms it into impactful change. Mexico's community foundations have an opportunity to strengthen not only their local context for philanthropy but also the national philanthropic ecosystem by acting collectively.

We hope that we have done justice to the voices and insights of the many leaders who we interviewed and that the opportunities we have identified help Mexico's community foundations strengthen their connection to the nation's generous families.



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Appendix A: Advisory Council Members

Name	Position	Affiliation	Location
Gabriela Boyer	Regional Lead for Community Philanthropy and Foundation Representative for Nicaragua	Inter-American Foundation	Washington, DC, USA
Jacqueline Butcher	Director	Centro de Investigación y Estudios sobre Sociedad Civil, A.C. (CIESC), School of Humanities and Education, Tecnológico de Monterrey	Mexico City, Mexico
Pamela Cruz	Special Projects Coordinator	Comunalia	Los Cabos, Baja California Sur, Mexico
Ana Cristina Dahik Loor	Director	Research Center for Social Responsibility, IPADE Business School	Mexico City, Mexico
Nick Deychakiwsky	Senior Program Officer	Charles Stewart Mott Foundation	Flint, Michigan, USA
Daniela Fainberg	Philanthropy Consultant	Independent	São Paulo, São Paulo, Brazil
Tatiana Fraga Diez	Executive Director (until January 2024)	Comunalia	Monterrey, Nuevo Leon, Mexico
Emilia Gonzalez	Director	Center for Philanthropy and Social Investment, Adolfo Ibáñez University's School of Government	Santiago, Chile
Caroline Kronley	President	Tinker Foundation	New York, New York, USA
Agustin Landa	Founder of LANZAA consulting, former President of Comunalia	LANZAA/Comunalia	Monterrey, Nuevo Leon, Mexico
Katherine Lorenz	President	Cynthia and George Mitchell Foundation	Austin, Texas, USA
Tony Macklin	Philanthropy Consultant	Independent	Pittsburgh, Pennsylvania, USA
Laurie Paarlberg	Charles Stewart Mott Chair on Community Foundations	Indiana University Lilly Family School of Philanthropy	Indianapolis, Indiana, USA
Pilar Parás García	Board Chair (until April 2024)	CEMEFI (Mexican Center for Philanthropy)	Mexico City, Mexico
David Perez Rulfo	Director, former President of Comunalia	Corporativa de Fundaciones	Guadalajara, Jalisco, Mexico
Carol Sanchez	Retired Professor and Director of Seidman International Business Programs	Seidman College of Business, Grand Valley State University	Grand Rapids, Michigan, USA
Jennifer Touchet	Vice President, Personal and Family Philanthropy	Greater Houston Community Foundation	Houston, Texas, USA
Rodrigo Villar	Senior Researcher	Center for Philanthropy and Social Investment, Adolfo Ibáñez University's School of Government	Santiago, Chile



Appendix B: Foundation Profiles

To illustrate the variation among Mexico's community foundations, the project developed five organizational and state profiles, capturing their diverse organizational forms, programmatic orientations, trajectories, and local contexts.⁶ By focusing interviews and other research on these five profiles, we gained a deeper understanding of the philanthropic engagement of families in these contexts than would have been impossible with a broader approach across all 16 states where Comunalia's members operate. Four of the profiles focus on community foundations and their respective states: Fundación para Unir y Dar A.C., commonly referred to as COMUNIDAR, in Nuevo Leon; Corporativa de Fundaciones in Jalisco; Fundación Comunitaria Puebla (FCP) in Puebla; and Fundación del Empresariado Yucateco A.C. (FEYAC) in Yucatan.

The fifth profile examines Ensamble, a national coalition of donor institutions, primarily family philanthropies, based in Mexico City. (See also Serna & Butcher García-Colín, 2022). As Mexico City does not have a community foundation, this case was included to provide insights into how family philanthropists collaborate in the absence of such an intermediary, offering lessons for community foundations aiming to foster collaboration with local families.

The profiles draw on data from field scans, interviews, and additional background research, offering valuable context on the distinct opportunities and challenges faced by each foundation. Two key sources were particularly helpful in developing the table below: Cemefi's *Compendio estadístico del sector no lucrativo 2023*, which provides data at national and state levels, and the *Índice de Fomento a las Actividades realizadas por las Organizaciones de la Sociedad Civil* (IFAOSC) (González Ulloa Aguirre, 2022), which evaluates each state's regulatory environment and governmental support for civil society. This state-level data, along with national statistics, are presented in the table on the following page.

⁶ A report sponsored by Comunalia and authored by Murrieta Cummings et al. (2024) provides concise descriptions of all 17 members, <https://comunalia.org.mx/wp-content/uploads/2024/08/Informe-Voluntario-de-FC-VF-FINAL-LONG.pdf>.

Table 2. National and State Level Data on Civil Society and Philanthropy

State	Nuevo Leon (Comunidar)	Jalisco (Corporativa)	Puebla (Fundacion Comunitaria)	Yucatan (FEYAC)	National
Population	5,784,442	8,348,151	6,583,278	2,320,898	126,014,024
Favorability of State Regulations (0-100)	51.8	78.6	44.6	30	NA
Rank (of 32 states)	8	1	13	15	NA
Authorized Donees (ADs)	597	686	257	258	10,605
ADs per 100k People	10.3	8.2	3.9	11.1	8.4
Donations (USD) 2022	\$265,393,402	\$113,181,159	\$39,855,218	\$21,855,768	\$2,731,801,482
Donations per Capita	\$46	\$14	\$6	\$9	\$22
Trust in Sector	66.7%	64.8%	56.1%	63.1%	59.4%

The data were taken from the Fichas informativas estatales, chapter 3 of Center for Mexican Philanthropy (CEMEFI), *Compendio Estadístico del Sector no Lucrativo 2023*. (<https://www.cemefi.org/centrodedocumentacion/11568.pdf>, accessed 7/23/24). Sources identified on p. 260.

Population: Instituto Nacional de Estadística y Geografía (INEGI) *Censo de Población y Vivienda 2020*. Cuestionario Básico Disponible en <https://www.inegi.org.mx/programas/ccpv/2020/>. Accessed 9/2/2023.

Poverty: National Council for the Evaluation of Social Development Policy (Mexico). (October 20, 2023). Share of population living in poverty in Mexico in 2022, by state. In *Statista*. Retrieved September 16, 2024, from <https://www-statista-com.ezproxy.gvsu.edu/statistics/1036147/poverty-rate-mexico-state/>

IFAOSC (Index of Promotion of Activities Carried out by Civil Society Organizations): González Ulloa Aguirre, Pablo Armando (coord.) *Reporte del índice de Fomento a las Actividades de las Organizaciones de la Sociedad Civil 2021 México*. Articulación Ciudadana para la Equidad y el Desarrollo, A.C. e IFAOSC. Accessed 9/12/2023.

Authorized Donees: Sistema de Administración Tributaria (SAT) *Directorio de Donatarias Autorizadas*. Disponible en http://omawww.sat.gob.mx/donatariasautorizadas/Paginas/padron_directorio.html. Accessed 1/11/2023.

Grantmaking Foundations: Information prepared by Fondos a la Vista, a project of Alternativas y Capacidades, A.C. Retrieved October 14, 2024 from www.fondosalavista.mx. The data reported is from 2023.

Trust in Sector: Instituto Nacional de Estadística y Geografía (INEGI) *Encuesta Nacional de Calidad e Impacto Gubernamental (ENCIG) 2021* Disponible en <https://www.inegi.org.mx/programas/encig/2021/>. Accessed 8/11/2023.

As the data in Table 2 show, each state presents a unique set of opportunities and challenges. However, these data are intended to help us understand the state context and not be the final word on each locale's philanthropic culture. For instance, the number of authorized donees and total donations suggest the level of philanthropic engagement but do not fully capture the panorama of organized civil society, which includes contributions and organizations that are not registered by the tax authorities. The table also presents the number and percentage of grantmaking foundations, which are not only key indicators of the strength of the state's philanthropic ecosystem and help explain per capita donation levels. Generally, states with more grantmaking foundations report higher amounts of donations. States with large corporate concentrations rank particularly high. While not shown in the table, Mexico City is home to 167 foundations, accounting for 57% of all foundations, and Nuevo León ranks second with 28 foundations, representing 10%.



The data and profiles underscore the need for targeted strategies to strengthen community foundations, particularly in states with high poverty rates and less favorable regulatory conditions, where services and community building are most urgently needed. What follows is a brief discussion of each state's data, which is reflected in the profiles distributed throughout the report.

- **Nuevo Leon/COMUNIDAR:** With a low poverty rate (16%) and relatively strong trust in the nonprofit sector (66.7%), Nuevo Leon stands out as a state with high fundraising potential. Among our cases, it has the highest level of donations per capita at \$46 and the highest number of grantmaking foundations among the states profiled, with 28. Both of these data points can be explained in large part by the fact that Nuevo Leon is home to many of the nation's largest corporations and their foundations, including Banorte, FEMSA, Alfa, and GRUMA. COMUNIDAR also benefits from a supportive regulatory environment, a comparatively high number of charities per 100,000 inhabitants (10.3), making it a relatively favorable context for a community foundation.
- **Jalisco/Corporativa de Fundaciones:** Jalisco has the most favorable state regulatory environment (78.6), a high number of registered charities (686), and above-average trust in the nonprofit sector (64.8%). Surprisingly, Jalisco has a relatively low level of donations per capita (\$14). This can be explained by the relative scarcity of grantmaking foundations in the state at 17 (6%), and none are as large as those in Nuevo Leon. Corporativa is undertaking efforts to better understand and promote giving both at the elite level, by commissioning a report to understand corporate donors (Dahik Loor et al., 2023) and among everyday givers, by promoting a local program of Giving Tuesday, Un Dia para Dar Jalisco (n.d.).
- **Puebla/Fundación Comunitaria Puebla (FCP):** With the highest poverty rate (54%), and one of the lowest numbers of charities per capita (3.9), Puebla faces significant challenges in both demand for services and the sector's capacity to deliver them. The lower trust in nonprofits (56.1%) and relatively unfavorable regulatory environment further exacerbate these difficulties, making it crucial for FCP to focus on strengthening the philanthropic ecosystem by building trust in the sector and enhancing its visibility.
- **Yucatán/Fundación del Empresariado Yucateco A.C. (FEYAC):** Yucatan's combination of a high poverty rate (39%), a challenging regulatory environment (favorability of 30), and moderate donations per capita (\$9) imply that FEYAC faces a significant challenge in a state where nonprofit growth is needed but difficult to achieve. On the positive side, the state has a relatively high number of registered organizations per 100,000 inhabitants (11.1), and trust in the sector is above average (63.1%), providing an opportunity for FEYAC to build from these strengths and cultivate a more conducive philanthropic culture.

Community foundations in states with high poverty rates and lower regulatory favorability, like FCP and FEYAC, face significant challenges in raising funds and building nonprofit capacity. Yet, services and civic engagement are most sorely needed in those states. With a more favorable nonprofit environment in Jalisco, Corporativa is better positioned to expand the sector's capacity; however, the foundation clearly needs to improve public trust and engagement in philanthropy in Jalisco. Given the favorable context in Nuevo Leon, specifically its relatively low poverty rate and relatively strong philanthropic and nonprofit context, COMUNIDAR faces a relatively favorable context for its work. Although Ensamble draws its membership nationally, this does not imply that it has members in all 32 of Mexico's states nor that its grantmaking covers all states. The fact that Ensamble is based in Mexico City reflects the concentration of wealth and philanthropy that is concentrated there.

COMUNIDAR (Fundación para Unir y Dar A.C.)

Monterrey, Nuevo Leon | Established 2012 | comunidar.org

Since its founding by a small leadership group, with guidance from Comunalia and financial support from Fundacion Frisa, COMUNIDAR has grown dramatically, emphasizing the cultivation of donors in a context noteworthy for its wealth and generosity. An interviewee explained the origin of the foundation: "With five other friends, I started the community foundation. We noticed that something was missing, that plenty of families would enjoy supporting a cause, and that they didn't have the vehicle to do it."

COMUNIDAR is certainly one of the leaders among Mexico's community foundations in donor cultivation and the use of *fondos filantrópicos*, or philanthropic funds. These funds give families and businesses the opportunity to contribute to an account they control while benefiting from the guidance and support of COMUNIDAR, thus avoiding the challenges of operating their own foundation.

In Nuevo Leon, COMUNIDAR enjoys a favorable philanthropic ecosystem, as described in the overview section. A unique aspect of Monterrey's business culture has played an important role in COMUNIDAR's creation and success. As one expert commented,

In Monterrey, businesspeople work as a team, not just in philanthropic matters but also in their own companies. The boards of the most important companies in Monterrey are structured with businesspeople from other companies in Monterrey. This collaborative approach extends to philanthropy as well.

This collaborative business environment has been instrumental in the creation of COMUNIDAR and in its growth. Another person highlighted the importance of long-term relationships in the region's philanthropic ecosystem, stating, "Both Puebla and Monterrey work with very well-known families that they have been working with for a long time. They have long-term relationships."

The foundation's governance is overseen by a board of directors drawn from founding families and businesses, representing diverse expertise from business, government, academia, and civil society. In 2023 through its funds structure, COMUNIDAR managed 13 foundations and supported 167 civil society organizations (CSOs) through 19 calls for proposals. Their initiatives primarily focus on education (34%), health (27%), community development (21%), and environment and conservation (14%). The foundation also plays a key role in guiding social investors and supporting strategic philanthropy. The organization is led by an executive director who has been with COMUNIDAR since its inception, overseeing a staff of 14. Each staff member's role is aligned with the foundation's strategic focus areas.



Corporativa de Fundaciones

Guadalajara, Jalisco | Established 1999 | cf.org.mx

Established in 1999, Corporativa de Fundaciones has strong roots in the philanthropic tradition of Laboratorios Sophia, a business founded in 1946 by Don Pablo Jiménez Camarena as “a business with a social purpose” (*un negocio con sentido social*). An interviewee explained that the articles of incorporation stipulated that 10% of the company’s profits must be dedicated to philanthropy, and this provision now ensures core operating support for the foundation. This early commitment to philanthropy helped inspire the foundation’s approach to expanding its reach through the community foundation model, adopting the name Corporativa de Fundaciones, best translated as Foundation Consortium, to indicate that it aspired to be a community-wide effort.

While Corporativa operates in a relatively favorable environment in Jalisco, with a strong enabling context and levels of trust, its per capita donations are below the national average (at \$14 versus \$22). As pointed out above, the national average and the averages in Mexico City and Nuevo Leon are significantly boosted by the concentration of grantmaking foundations in those entities. The foundation is developing strategies to better understand and promote giving both at the elite level, by commissioning a report to understand philanthropy among business elites (Dahik Loor et al., 2023) and among everyday givers, by supporting a local program of Giving Tuesday, Un Dia para Dar Jalisco (n.d.).

In 2022, Corporativa de Fundaciones invested heavily in key programs, including: the "School in Community" initiative; the "MATI Project" for gender equality and microenterprise; institutional strengthening for nonprofits; and a program area focused on engaging with international donors, both public and private. As part of its fundraising strategy and drawing upon a recently commissioned study, one interviewee reflected:

I realized that we need to start educating wealthy families and business owners. It's important not to be too transactional with their money but to connect with them as advisors and present successful projects. The goal shouldn't be to fundraise for the foundation but to involve them directly in projects, even if it doesn't go through our community foundation.

Under the leadership of the same director since 2008, Corporativa employs 11 staff members in administration and finance, seven in grantmaking and communications, and various specialized teams assigned to individual projects. The foundation’s board consists of 11 members (four women, seven men), all of whom have significant ties either to corporate social responsibility efforts or affiliations with the Universidad de Guadalajara and major actors.



Fundación Comunitaria Puebla

Puebla, Puebla | Established 2000 | fcpuebla.org

After three years of work and with the support of the Triangle Community Foundation, Fundación Comunitaria Puebla (FCP) was established in 2000 (Landa, 2020, pp. 3-4). In contrast to the working group composed of donors in Monterrey, this group drew mainly from leaders of local organizations. The foundation is committed to fostering social development by promoting education, health, and community empowerment in its state, focusing on improving the living conditions of vulnerable populations and marginalized communities (Comunalia, n.d.).

FCP aims to bolster the non-governmental sector, increase project funding, and amplify the local voice. Despite its efforts, the foundation faces significant sustainability challenges due to the unfavorable state context, including the lowest concentration of authorized donees, a per capita donation level of just \$6 USD (a quarter of the national average), and a trust level of 56%, which is lower than the national average. Puebla ranks 29th out of 32 Mexican states in the Human Development Index (HDI). FCP has, however, successfully cultivated enduring relationships with local leaders and employers, particularly with an automobile production facility. Board members actively participate in various social causes, helping the foundation expand its reach.

Aligned with the United Nations' Sustainable Development Goal #17 of the 2030 Agenda, FCP receives support from over 2,000 donors. The foundation has reached more than 10,000 beneficiaries and manages more than 40 funds. As one interviewee explained,

It operates in a unique manner because their funds are either donor-advised, where people decide where to put their money, but they also call donations to the social projects that they are sponsoring 'funds.' So, some of their funds are for fundraising for projects operated by FCP, some are thematic and do grantmaking, and others are family funds.

In addition, FCP has established numerous partnerships both nationally and internationally despite operating with just three staff. This structure allows FCP to manage donor-driven funds and their social projects, adding flexibility to their fundraising and grantmaking operations. One noteworthy achievement is that a prominent business leader and philanthropist shared that he helped to establish a fund that facilitates donations from an auto manufacturer in Germany, including contributions from auto workers. FCP's collaborations with local manufacturing facilities run by foreign companies — with support from local employees — have been an important and ongoing part of its operation.



Fundación del Empresariado Yucateco A.C.

Merida, Yucatan | Established 2009 | feyac.org.mx

Fundación del Empresariado Yucateco A.C. (FEYAC) defines itself as "the social arm of the State Business Coordinating Council" (Consejo Coordinador Empresarial). Established in 2009, its origins trace back to a group of business leaders who attended a course at the IPADE Business School, where they learned about the model of the Fundación del Empresariado Chihuahuense (FECHAC) (Chihuahua Businessperson's Foundation) (López Osorio, 2020). One expert explained,

They are a group of businesspeople who came together and said, 'We want to invest in our own state, and we want to do it together.' In Chihuahua, Sonora, and Yucatán, businessmen formed organizations like FEYAC to invest collectively in their region's development. ... While they have the characteristics of a community foundation, they remain largely controlled by the business sector, which is a unique and positive feature.

These three foundations have collaborated with their state government to establish stable funding mechanisms, usually connected to a surcharge on payroll taxes. FEYAC's sustainability has been threatened as an agreement with the government to receive a percentage of the payroll tax has been drastically reduced in recent years. One interviewee stated, "We have not been able to recover because they took away 60% of the income with which FEYAC operated and multiplied" through intersectoral partnerships. Such challenges in collaborating with the public sector have been shared by their counterparts in Chihuahua and Sonora.

Promoting corporate social responsibility is central to FEYAC's mission. The foundation helps companies earn Cemefi's Distinction of Socially Responsible Companies (Distintivo ESR®). FEYAC focuses on social development in Yucatán and neighboring states, focusing on education and quality employment as central themes with the long-term objective of preventing crime and maintaining the social fabric.

FEYAC has a seven-member team and 12 additional staff for its Participatory Community Intervention Program (PICIP), its most innovative initiative. Since 2015, PICIP has operated in highly marginalized communities. Through a participatory assessment, the community identifies its priorities, and FEYAC designs interventions in areas like education (students with notable academic deficiencies), health, inclusion of children and youth, income-generating projects, and community life. The foundation secures funding from both public and private sources, collaborating with local governments and businesses to implement these projects.

To achieve a greater impact, in 2025, FEYAC will cease to operate this program directly, transforming itself into a grantmaking foundation and focusing on securing greater social investment from the business community. The intention is not only to support the PICIP model but also other models and organizations that have already yielded results at the national level.



Ensamble

Mexico City | Established 2019

Unlike the four preceding profiles, Ensamble is not a community foundation, but a loosely structured group of funders composed of corporate, family, and institutional grantmakers operating nationally. It is included as a profile because it offers community foundations important insights into what philanthropic families seek in peer learning and collaboration.

For some time, key philanthropic leaders had discussed facilitating and formalizing collaboration among some of the larger and more institutionalized family foundations. Although they launched the initiative that became Ensamble in May 2019, the COVID-19 pandemic in 2020 catalyzed a handful of philanthropists, mainly women, to join together to coordinate their efforts and reach out to others. One of our interviewees described a conversation she had with another co-founder, “We had been kicking around the idea of forming a network for a couple of years. And when COVID came up, she asked me, ‘Is this the time? And I said, ‘It is.’” Ensamble was legally formalized in 2023. It is made up by 36 grantmakers who pay membership dues, two think tanks, and three individuals.

As a collaborative network made up of diverse grantmakers, Ensamble reflects a positive development in Mexican philanthropy, including family philanthropy. Its founding leaders and their partners created a flexible, agile framework to facilitate their cooperation. Their operation embodies their guiding principles, which sometimes vary from how a community foundation operates:

- Each foundation independently decides how to allocate its resources, enriched by strong communication, collaboration, and trust among members. Ensamble has provided a space to create and strengthen trust among its participants. This has been a key element for the network's success and the possibility to gradually increase the level and scale of collaboration in pursuit of systemic solutions.
- Ensamble does not receive or channel resources. In the cases in which the creation of common funds is decided, the resources are channeled through one of the participating donor foundations. They prefer to coordinate and collaborate without seeking public visibility or a high profile, focusing instead on quietly working together toward common goals.
- There is a backbone organization that coordinates and executes the network's efforts.

As one co-founder explained,

I see Ensamble as an excuse to finally formalize a family's giving. And what we are constantly hearing is, "My father used to do it this way, but now that we have to formalize this, we're looking for a way forward so we can donate more effectively."

Ensamble offers that way forward by providing a structure that creates opportunities for collaboration and encourages peer learning.



Appendix C: Interview Guide

Community and Family Philanthropy in Mexico: Connections, Challenges, and Strategies

Note: Interviews will be conducted as guided conversations rather than a scripted list of questions, using standard, open-ended, qualitative interviewing techniques. Therefore, no interview will cover all the following questions in the following order. The intention in this guide is to incorporate the likely full range of topics to be covered in the interview conversations, not to give a sequence of questions or require all to be covered in each interview.

Set-up Comments

- Introduce ourselves first.
- This study is interested in family and community philanthropy in Mexico, and how they connect. When we use the term “philanthropy,” we mean the use of private resources for the creation of a social or public benefit, usually giving your money or time or talent to charitable organizations. When we use the term “Community Foundation”, we use the definition from Comunalia, the alliance of Mexican community foundations, which is, “a civil society organization that seeks to contribute to solving problems in a given territory,” usually through the mobilization of financial and other resources. We want to talk to you about your own philanthropic experiences and approach, what is happening in communities such as yours, as well as what you see as trends and challenges across Mexico.
- These are open-ended questions, not a survey. The goal is for you to talk and us to listen – feel free to tell stories, give examples, or wax philosophical. The goal is for us to ask short questions and for you to give long answers.
- All your responses will be kept confidential. We will not tell others who said what, and only the researchers will have access to the recording and transcripts. We will also maintain anonymity and not attribute quotations or comments in any publications. The only exception to this is if we decide we need to use a quotation and it is too difficult to hide the identity of the speaker. In those rare cases, we will send you the quotation and ask for your permission and/or any edits before publication.
- The interview will be recorded and transcribed. You can tell us to turn off the recorder at any time as your participation is fully voluntary.
- Feel free to ask questions at any time, or ask us to clarify, or say you don't want to answer the question. You can end the interview at any time.

[Ask the interviewee to spell their name and say the date to start recording.]

Intro - Personal Background and Philanthropy Role(s)

- Let's start by having you give us a short bio – e.g., where you're from, what you do for a living, something about your family, and that sort of stuff.
- Please tell us a bit about your connection to philanthropy.

- FAMILIES: personal and extended family, family business, giving vehicles, causes, local/national/international, family offices, peer giving, etc.
- OTHERS: professional role in philanthropy, other roles, history of involvement, causes, local/national/international, connection to family philanthropy, etc.

I. Family Philanthropy in Mexican Communities

- Please describe how you see the current patterns in family giving in Mexico – what stands out the most?
- Are Mexican families generous, would you say? Why or why not?
- What if any are the differences between giving by wealthy families and those who are not?
- When families, give, what do they support and how do they offer support?
- What are the causes or issues that are of most concern?
- How else, besides philanthropic giving, do Mexican families express their generosity and seek to improve their communities?
- Have these patterns changed over time?
 - Looking back over the last 5, 10, or 20 years, what changes have you seen?
- What influences these patterns in your view (e.g., religion, history, tax incentives and government policies, regional differences, etc.)?
- How do Mexican families think specifically about local (or place-based) giving?
- What are the differences in family giving to local communities vs. giving nationally or internationally? Is one more important overall than another? Do families see or practice them differently?
- FAMILIES: Following up on your own summary of giving from earlier, why and how do you give locally vs. nationally vs. internationally? Relationships specifically with community institutions?
- What is the relationship between Mexican family businesses/family-owned corporations and family philanthropy?
- FAMILIES: How does your family think about the line between your business and your philanthropy? Is this blurry or distinct? Do you see your business as philanthropic itself and helping the community/country?
- For those families who do give locally, what kinds of community institutions do they support and why?
- How would you characterize the current relationship between giving families and community foundations [identify community foundation by name where appropriate]?
- Why do you think it is important for families to give in the local community? What advantages does that bring and why is it especially needed?
- For those families that are not as philanthropic – or that chose not to give much in their local community – what keeps them from doing so, in your view?



- What, if any, are the main obstacles to more family giving, especially in local areas?
- Are there some families who do not give at all? If so, why not, in your view?
- FAMILIES: Have you ever stopped or scaled back your giving, and if so, why was that? What did you have to overcome to renew your giving or give more?
- FAMILIES: Can you give an example of a time when you felt your family's philanthropy was particularly successful? Why did it work and why was it meaningful for you?
- FAMILIES: Can you give an example of a time when you felt your family's philanthropy was clearly not successful? Why was that the case and what did you learn from that experience?
- OTHERS: What are some examples of successes that you've seen in making great connections between families and community giving or community foundations? Why did those work and what can we learn from them?
- In your view, how does the level of prosperity, and/or the sources and distribution of wealth in a community influence the strategy and orientation of community philanthropy?
- How does the role of family donors in community giving change differ between areas with greater wealth and inequality vs. areas with less?

II. Community Foundations in Mexico

Here, we will use the definition from Comunalia, “a civil society organization that seeks to contribute to solving problems in a given territory; works with the community and stakeholder groups, through alliances, coordination, and resource mobilization, to make sustainable development possible from the strengths of that community.”

- How do families and others in Mexico think about community foundations in general?
- FAMILIES: Are you familiar with the [name local community foundation]? If so, what have you heard and how do you think about their role and value?
- Why do you think community foundations have not been created as widely as they are, say, in the United States?
- OTHERS: How would you characterize the American model of the community foundation? Can that model work in Mexico? Why or why not? What elements are most transferable, and which are hardest?
- What other institutions are there in communities like yours that are related to giving and philanthropy – besides what we've defined as community foundations?
- Why are these the institutions that come to mind?
- How do you see them as different from community foundations, as we've described them?
- Do you see any advantage to one type of institution versus the other?
- If you know of examples where a community foundation has thrived, why do you think it was a success? How were local donors and families involved?

- What mattered the most for getting local family donors involved in the foundation?
- OTHERS: Are there certain kinds of communities that are more likely to be successful in creating a community foundation? If so, why? What are the qualities of families or communities that are needed?
- OTHERS: What about cases where a community foundation was successful for a while and then declined or failed or closed?
- What mattered most for the negative outcomes?
- What were the key strategies, and the key actors, that helped?
- What are the ideal roles for various stakeholders to play in developing a community foundation – e.g., local/national/international funders, family office staff, community leaders, philanthropic entrepreneurs, charity/NGO leaders, etc.?
- How much role does/should government leaders have?

III. Recommendations

- If you were consulting with families and community leaders in another Mexican region, what would you recommend to them to increase family donor involvement in supporting local community giving or institutions like community foundations?
- Who should be involved and how? What should the process be for developing these kinds of institutions?
- What “landmines” should they look out for? What obstacles to expect?
- FAMILIES: Based on your experiences, what would you recommend to philanthropy leaders or community foundation advocates? What works best for getting families like yours more engaged? What should they avoid doing?
- OTHERS: What is happening at the national level to improve family engagement with community foundations? What is keeping it from happening more? What can national leaders do better?
- Thinking about philanthropy in Mexico in 10 years, what would you most like to see? What would change – i.e., what would stop, what would start anew, what would reform?
- Would you personally like to see community foundations become much more widespread in Mexico? If so, why, or why not?

Wrap-Up

- Is there anything else you want to tell us that we haven’t discussed? Any final reflections?
- We might be contacting you with additional questions. Also, please contact us with anything you think of that you want to add.

[Thank the interviewee for their time and generosity in sharing and stop recording. Review next steps, if any.]



Appendix D: List of Comunalia's Membership

Table 2. Comunalia Members, 2024

Name Nombre	Location/State Ubicacion/Estado	Website Sitio Web	Email Correo electrónico
Comunalia (Alianza de Fundaciones Comunitarias)	Nacional	https://comunalia.org.mx/	info@comunalia.org.mx
Amigos de San Cristóbal, A.C.	Chiapas	https://amigosdesc.org/	amigos@amigosdesc.org
Comunidad, A.C.	Morelos	https://www.comunidad.org.mx/	comunicacion@comunidad.org.mx
Corporativa de Fundaciones, A.C.	Jalisco	https://www.cf.org.mx/	forta@cf.org.mx
Fondo Potosino A. C.	San Luis Potosi	https://www.fondopotosino.org/	hola@fondopotosino.org
Fundación Comunitaria Cozumel, I.A.P.	Cozumel, Quintana Roo	https://www.fundacioncozumel.org/	info@fundacioncozumel.org
Fundación Comunitaria Malinalco, A.C.	Malinalco, Edo. De Mexico	https://fundacioncomunitariamalinalco.org/	info@fcmalinalco.org
Fundación Comunitaria Oaxaca, A.C.	Oaxaca	https://fundacion-oaxaca.org/	info@fundacion-oaxaca.org
Fundación Comunitaria Puebla, I.B.P.	Puebla	https://fcpuebla.org/	direccionfcp@gmail.com
Fundación del Empresariado Chihuahuense, A.C.	Chihuahua	https://fechac.org.mx/	fechac@fechac.org.mx
Fundación del Empresariado Sonorense, A.C.	Sonora	http://www.fesac.org/	info@fesac.org
Fundación del Empresariado Yucateco, A.C.	Yucatan	https://www.feyac.org.mx/	contacto@feyac.org.mx
Fundación Internacional de la Comunidad, A.C.	Baja California	https://www.ficbaja.org/	areyes@ficbaja.org
Fundación Merced Coahuila, A.C.	Coahuila	https://mercedcoahuila.org/	contacto@mercedcoahuila.org
Fundación Merced Querétaro, A.C.	Querétaro	www.fundacionmerced.org	info@fundacionmerced.org
Fundación para Unir y Dar, A.C.	Nuevo Leon	https://comunidar.org/	contacto@comunidar.org
Fundación Punta de Mita, A.C.	Punta de Mita, Nayarit	https://www.fundacionpuntademita.org/	info@fundacionpuntademita.org

Appendix E: Map of Comunalia's Membership



Appendix F: Queries for Community Foundations and Their Supporters to Ignite an Internal Conversation⁷

1. What does the term “community foundation” mean to us?
2. In a single sentence, can you state the purpose of our community foundation?
3. Are we — board, staff, donors, supporters, grantees, partners — effective evangelizers for our community foundation?
4. Do we have compelling stories of our success as a community foundation? Do they include data?
5. What is our vision for our community foundation? In one year? In five years? In ten years?
6. What assets do we hold? What obstacles do we face? Moreover, what strategies do we have to overcome them?
7. What are the key sectors, and who are our community's key actors in philanthropy? Consider organizations, donors — both individual and institutional — regulators, educational institutions, and the media.
8. Are we in dialogue with them? If so, how are we connected? If not, what will it take to connect?

⁷ Thanks to Nick Tedesco and Tony Macklin of the National Center for Family Philanthropy for sharing their “Self-Assessment Tool for Community Foundations,” which helped inform and inspire the questions in this appendix. For more information, see: <https://www.ncfp.org/community-overview/community-foundations/>

Appendix G: Queries for Family Philanthropists and Businesses to Ignite an External Conversation⁸

1. How would a more prosperous and equitable community benefit my family and business?
2. Am I as a community leader, philanthropist, and-or business owner content with the current level of prosperity and opportunities for success in our community? If not, how might we help make more significant progress?
3. How do my business and my family currently contribute to the community?
4. What are examples of our contributions? How have we succeeded?
5. What are the key obstacles we have encountered?
6. How have we worked to overcome obstacles?
7. Who are our current or potential partners in this work?
8. Do we know of inspiring examples of contributions and success from families, businesses, grantmaking foundations, or other actors? If we are unaware of such examples, how might we best learn about them?
9. Is the community foundation one of our partners? If so, how do we work with them? If not, how can we benefit from becoming partners with the foundation?

⁸ Thanks to Nick Tedesco and Tony Macklin of the National Center for Family Philanthropy for sharing their “Self-Assessment Tool for Community Foundations,” which helped inform and inspire the questions in this appendix. For more information, see: <https://www.ncfp.org/community-overview/community-foundations/>



