

# Chapter 1

## Conceptual Framework for Volunteer Action and Acts of Solidarity

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### Introduction

This book is the result of research carried out with the hope of taking the first steps toward discovering and opening society's eyes to the universe of both formal and informal practices of solidarity in Mexico and the characteristics that define them. This work is the product of a study that the *Centro Mexicano para la Filantropía, A.C.*, (*Cemefi*, Mexican Center for Philanthropy) decided to encourage in order to understand, explain, make known, and eventually promote the actions undertaken by the citizens of this country in solidarity with others and as volunteers.

In the course of these pages it will be possible to outline some of the main volunteer activity and acts of solidarity practiced by Mexicans. Basic coordinates will be traced to contribute to elucidating where and how they are distributed in the country. Also, the value of the time this voluntary work represents will be covered. It will also be possible to observe the map of regional differences and become acquainted with a diagnosis of different ways in which people collaborate, both horizontally and vertically, in social organizations. The dynamics of voluntary actions of solidarity inside organizations – the privileged place of analysis in order to locate the volunteer – and outside of them will also be examined. It is important to point out that, as we shall see later, there are subjects who practice solidarity with others outside formal spheres and the organizations of civil society, and this activity is also important to recognize and validate within the scope of social investigation. This book is a joint effort, as well as an interdisciplinary effort, in connection with a shared concern: getting to know the many-sided and, until now, little explored trend of volunteers and voluntary actions of solidarity in Mexico. Hence, the purpose of this research is to analyze these activities. Both the subject of study and the unit of analysis of these actions are in and of themselves.

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The lack of information in the country about the role of these activities translates into insufficient awareness, resulting not only in an underestimation of volunteer practices and volunteerism in society, as well as the participants that give them meaning, but also in a lack of recognition of the potential – and the contributions – that this set of activities can have in consolidating an evolved civil society.

This is why it was decided to study this participatory trend in the Mexican context by means of a nation-wide investigation that would be able to comprehend the present participation of Mexicans who, by their own choice, without expecting any economic remuneration, and on the basis of the attitudes of solidarity, work for the good of society. As a result, what is shown here are the findings regarding solidarity and voluntary activities as one more form – among others – of citizen participation in Mexico, a product of individual and group efforts in selfless actions for the solution of community problems of all kinds.

The original research project regarding volunteer actions and acts of solidarity in Mexico entitled *Citizen Participation in Solidarity and Volunteer Service in Mexico* arose from the editor's concern to improve the understanding regarding these kinds of activities which – apparently – occur on a daily basis in our country. From within this very activity, observations emerged that led to questions and concerns such as: Who are the citizens who become interested in participating in their communities, and why? Who are the people who commit their time to volunteer actions and acts of solidarity for the benefit of the community without receiving any remuneration? What are these practices of solidarity like in Mexico and how can they be described? Do they correspond to volunteer practices and practices of solidarity in other parts of the world? What is volunteer work? How many volunteers are there in the country and how are they distributed? How much time do they devote to volunteer activities? What are these people like, what is their profile? Do they work in groups or alone? How do they organize themselves to form informal groups and non-profit institutions? What are their roles within the organizations to which they belong? In order to respond to these questions, it was necessary to analyze and formulate these and other concerns, translate them into research questions and propose an academic study covering this kind of participation in the Mexican context.

Exercises that arise from practice and then acquire the form of academic enquiry are not very common; it is much more common to find experts and scholars who observe and explain different social phenomena in an objective manner and from a theoretical standpoint. In this case, the journey from practice to academia, although long, was systematic. First it was necessary to search out and study the existing literature in Mexico regarding these kinds of activities in the country, and also to simultaneously take a global perspective of the same phenomenon so as to understand similar experiences in other parts of the world. Then the information had to be brought together that would allow us to develop a deep understanding of expressions of solidarity by the Mexican people, which are considered to be voluntary actions, and to consider what is understood to be social volunteerism. This is the reason why it was also important to establish definitions that were useful for demarcating the universe of study. Finally, it was essential to structure a flow for the research that would provide an appropriate and adequate methodology for each component of the project.

What began as an individual endeavor became an institutional one when Cemefi adopted the project and approved it as part of its 2002–2007 Strategic Plan. The next step consisted of inviting a team of experts and academics capable of utilizing their abilities and knowledge to analyze the information produced. This is how the final format of an exploratory and descriptive study of volunteer actions and attitudes of solidarity among Mexicans was developed, which is what is presented below.

## Background

Contemporary societies are more and more characterized by the existence of associative phenomena in which social organizations play a determinant role, distinguished by their intermediate position between the government and the market. When explaining the evolution of the concept of civil society, Bobbio (1988, 1575) observes that “civil society is the sphere of relations among individuals, groups, and organizations that develop outside the power relations that characterize governmental organizations.”

This set of relations in civil society and of actions by individuals, institutions, and organizations that are not within governmental structures constitutes a third nonprofit sector that corresponds to a formal reality that is neither under government nor is it commercial (Weisbrod 1974). This sector moves along the vectors of assistance and social and political promotion and development. In some countries it has also been called the volunteer sector or the solidarity sector, owing to the principles governing it and to the individuals participating within its structures.<sup>1</sup>

So-called volunteer actions and acts of solidarity are distinguished from other activities by their particular characteristics of providing both the drive and initiative without receiving remuneration, as well as having an impact on the well-being of society and contributing to what has been called the common good. The volunteers reflect different forms of participation by individuals who use their rights of expression – in some cases, in association with others – in order to exercise their ability as common citizens to participate in public life with regard to matters affecting their communities. Thus, the third sector appears as a collection of private agents who

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<sup>1</sup>See the book: *Más allá del individualismo: el tercer sector en Perú* (Portocarrero et al. 2002, 20–76), which explains the main economic theories about the sector, such as: (1) those referring to the existence of the sector (the theory of public goods, Hansmann’s confidence hypothesis, theories of public choice, theories of industrial organization, the theory of consumer control, business and social offer theories), and (2) those that analyze how the state and the market operate in relation to social organizations (altruistic behavior, the function of ideology, stakeholders). It also presents social theories that have to do with the sector we are concerned with: (1) proposals that attempt to explain, from an overall perspective, how historical and social coordinates influence the nature and dynamics of the sector (the theory of social origins, the third sector of developing countries), and (2) the other theoretical approximations that concentrate on the specific role of some social actors, such as the church and the state (the theory of the welfare state, the theory of interdependence, religion, and the third sector).

are indispensable for the management of collective goods, i.e., who have public ends (Serna and Monsiváis 2006, 26–32).

Therefore, when speaking of organized and private volunteer activities with social and non-profit aims, the third sector is being referred to as a category distinct from the commercial sector (the market) and the public sector (the state), which poses as its main object the search for social wellbeing by dealing with identified human needs and promoting society's participation (Butcher 2003, 111–125). Based on its self-organizing function, and also fulfilling the task of sustaining public communication and debate (Young 2000, 164–180), relational elements are promoted in this sector that strengthen collective wellbeing, on the basis of social norms such as solidarity, confidence, and reciprocity.

Solidarity activity to the benefit of third parties exists in Mexico, but not all the activity involved can necessarily be considered to be of an altruistic nature. There are organizations in the third sector that promote different forms of participation and association, such as: universities, labor unions, minorities, professional associations, and political clientele. The majority are organizations having social and developmental ends, as they are based on providing services to vulnerable populations. Other groups have been formed around resources that exist for the sector. It is possible that some people who start these organizations to provide services to social organizations see it as a future source of employment. There are groups that start off as volunteer organizations and over time look for professionals to help with the organization's cause; others are nonprofit groups of professionals who get organized to support or provide different services to the sector.<sup>2</sup>

Although the importance of the presence and *praxis* of volunteer activity as a fundamental part of some organizations and structures making up the third sector in our country may have been recognized, the construction of formal conceptual elements was needed, supported by the findings of social science research, to determine the role fulfilled by solidarity and voluntary activities in the Mexican reality. Other formats are also used for naming the range of groups and institutions in this sector with group and associative participation, such as: civil society organizations (CSO), nonprofit organizations (NPO),<sup>3</sup> social assistance institutions, philanthropic organizations, nonprofit institutions (NPI), civil organizations (CO), and nongovernmental organizations (NGO), among others.

The appearance of social organizations on the national scene provided space for the proliferation of solidarity and voluntary activities on the part of individuals,

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<sup>2</sup>The main objective of this investigation is to study volunteer actions and acts of solidarity by Mexicans. Formal and informal organizational structures serve as a framework for performing the different roles that individuals play within them. Civil organizations in Mexico have been well studied and are not the subject of this investigation. However, Chapter 5 of this work presents an analysis of the non-profit organizations (NPO) involved in this study in terms of their aims, internal structure, operational mechanisms, funding mechanisms, and the decision-making process on the part of their members.

<sup>3</sup>NPO, nonprofit organization. This term will be used from now on as a group reference for this investigation.

especially in the beginning. Although there are an endless number of studies about social movements and the formation of civil organizations, there is no register of studies about activities of this nature conducted outside the organizational sphere. Starting with the colonial period, social forms in Mexico were imported from Europe, such as the brotherhoods that functioned as lay organizations supporting ecclesiastical work, although they were always monitored by the Catholic Church. Since the creation of the Jesus Hospital, founded by Hernán Cortés in 1524, the Church took the reins of social assistance in hospices and orphanages, as well as providing multiple services in terms of education, catechesis, and, on occasion, even government. This is the institution that in some way came to shape life and the social fabric during the colonial period, without supporting the creation of autonomous secular organizations.

After the colonial period, during the period of independence, volunteer organizations and activities were very limited because of disputes with the new Mexican state. Later, with the advent of the liberal government and the disentanglement or forced sale of the property of the clergy, the state acquired – at the same time – the responsibility of administering the programs to meet the social needs of the population and the activities related to development. Different authors have recounted the history of the social movements and the formation of civil organizations in the course of the history of Mexico. In *Abriendo veredas, iniciativas públicas y sociales de las redes de organizaciones civiles* [Opening paths: Public and social initiatives of networks of civil organizations] (1998), Rafael Reygadas provides an extensive history of charity in Mexico, and hence of the creation of all kinds of civil organizations, as well as the participation of these groups in promoting the development of the country.<sup>4</sup> In the historical account provided by the author, expressions of solidarity and volunteer efforts come to confirm later organizational structures. In the process of institutionalization in the nineteenth century, the Public Charity Administration was created in 1861 under the Ministry of the Interior, with the intention on the part of the liberals of transforming what had been up until that time church assistance into public assistance. In this regard, Reygadas notes that:

[T]he liberal state could not fill the vacuum left by the clergy, since it simply did not have the material structure or the experience necessary to fully attend to matters of public assistance. This is why Porfirio Díaz finally left it to the church to continue with part of the important work that it had been doing for three centuries (Reygadas 1998, 19).

From this historical perspective, it may be observed how a significant component of current volunteer activity comes from structures that were not so much civil as ecclesiastical. This religious influence, we note, continues up until the present day. The influence of these institutions on Mexican solidarity activities is explained in depth later in the following chapter. Many of the first volunteer activities had a

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<sup>4</sup>The first two chapters of this book explain the social and theoretical genesis of social assistance in Mexico, as also the evolution of the ideas of promotion and development, as understood and interpreted from a Latin American, especially, Mexican perspective.

religious hue, for example, in 1868, the Ladies' Charity Association had 12 thousand active and honorary volunteers (Marina 2002). However, after the Revolution (1911–1921), with the formalization of social rights in the Constitution of 1917, the government took an active part in the promotion and creation of institutions and programs in favor of the poor and vulnerable, under the auspices of the Institutional Revolutionary Party (PRI, Spanish acronym), which constituted a corporative political system, creating a culture of paternalism and social assistance that discouraged the formation of autonomous volunteer organizations in the country. Health, education, housing, and rural development policies were promoted and “volunteer” groups were created that were useful and loyal to the party.

The *Casa del Estudiante* [Student House] was founded in the decade of the 1930s, an institution which encouraged social work by students. In this way, the Association of Infant Hospital Volunteers and the National Association of Volunteer Social Service were founded in 1943. The social service requirement in higher education institutions was introduced in 1945 under the auspices of Doctor Gustavo Baz, which was supposedly “voluntary”, although in reality it was designed as a way for students to repay society for the higher education they received almost for free. Even today, social service is a requirement in order to receive a bachelor's degree from both public and private institutions in Mexico.

The government has played a role in “officially” promoting volunteer actions (Becerra and Berlanga 2003, 13–42). The organizations formed by Emilio Portes Gil in 1929 are an example of this kind of support: the National Infant Protection Association and the private charity organization, *Gota de Leche* [Drop of Milk], manned by volunteers and established to attend to nutritional problems in children. However, it is during the government of Lázaro Cárdenas that the concept of social assistance as a right had an effective impact:

His main concern consisted of guaranteeing the social rights of the population and assistance for the destitute classes as one of the responsibilities of the government, orienting his governmental policy toward attacking the causes of poverty and not only attenuating its effects... As a result, in 1937, in the exposition of motives that gave rise to the Act creating the Ministry of Public Assistance, it is recognized that the concept of charity should be changed to that of public assistance (*Ibid.*, p. 30).

The institutions promoted by the government continued to change. In 1961, the National Infancy Protection Institute (INPI, Spanish acronym) was created and, in 1968, the Mexican Child Assistance Institute (IMAN, Spanish acronym). Similarly, in 1977 the National System for the Integral Development of the Family (DIF, Spanish acronym) was founded, and that same year the National Council of Volunteer Promoters was created in 31 states, with 121 volunteer units established with the collaboration of the federal government, the private sector, and the nonprofit sector. The Council established significant work in the training of volunteers and was the first organization of its type to come up within the public sector. It was headed up by the wife of the president in office with the purpose of “promoting and orienting, on a national level, the voluntary participation of people committed to greater collective wellbeing” (*Ibid.*, p. 37). At the end of 1993, this entity involved the participation of 180,000 people and supported 17,104 communities in the country. This organization

disappeared in 1995 owing to a decree by President Ernesto Zedillo, and the actions of its “volunteers” ceased to be supported with public funds.<sup>5</sup>

It is essential to mention the government social programs that on occasion included citizen participation and free labor on the part of many individuals. This was the case with the *Solidaridad* [Solidarity] program promoted during the administration of President Carlos Salinas de Gortari, which brought communities – especially the most isolated ones – new forms of cooperation and mutual aid. Based on this relation with governmental entities, the improvements in the populations have been effective and many times more expeditious. This type of program has been slowly transformed, changing name and orientation. *Pronasol* became *Progresa* and finally the current *Oportunidades* [Opportunities] program, which is administered by the Ministry of Social Development in collaboration with other government entities like the Ministry of Public Education and the Ministry of Health. Similarly, national health programs have evolved in terms of their approach and scope.

In the case of the DIF, its base includes a certain number of communities helped by Community Development Centers and in which elements of citizen participation and volunteer training were included as part of the 2000–2006 National Development Plan (PND, Spanish acronym). In the new 2007–2012 PND, opportunities for citizen participation in the political, cultural, economic, and social life of their communities are included in the seventh objective. In the ninth objective, the importance of consolidating the democratic regime through agreement and dialogue among the different branches and levels of government, the political parties, and the citizens is indicated (PND 2007–2012, 25–26). Although it is true that opportunities have existed for volunteer participation in governmental entities, it is also true that this participation has not been entirely autonomous.

In this fashion, it is considered that a large part of volunteer participation in Mexico, unlike in other countries, has occurred under the protection of governmental entities and not in the form of voluntary individual association, in addition to constituting a more “corporative participation combined with acceptance of authoritarian forms” (Verduzco 2003). This is owing to the characteristics that developed in the colonial past already mentioned, with the strong presence of the Catholic Church and its intolerant attitudes, the factor of subordination that continued during the era of independence, and, after the Revolution, the corporation of social organizations around a single party which remained in power until very recently.

Beginning in the second half of the twentieth century, diverse social organizations were formed that had an influence on the struggle for democracy. In this sense, new

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<sup>5</sup>This document does not analyze these activities. In this sense, it may be considered that the action arising in this framework was not entirely voluntary, but rather constituted a sort of “pseudo-volunteer work”, because a certain degree of compulsion existed. The wives of public officials preside over these activities in many states through governmental entities or federal institutions. Nevertheless, this category is included in the classification of volunteer activity in Mexico, because, even though this first premise is true, it is also the case that this has been a way that many subjects linked to the government bureaucracy who began within this framework have been introduced to and have continued with these kinds of activities.



rules were established for the state–society relationship in the Mexican scene initiating with the student movement of 1968. That period served as a detonator for other social sectors that had been left behind, such as women, labor union members, and factory workers – to mention a few – to create their own civil organizations, which stimulated the creation of new social organizations throughout the nation.

The earthquake of 1985 is considered by many authors who have studied the subject to be a watershed in terms of volunteer participation by Mexicans (Alonso 1996; Méndez 1998; Reygadas 1998; San Juan Victoria 1999; Olvera 1999; Verduzco 2003). The spontaneous volunteer and solidarity action among people who were not necessarily part of some civil organization was very evident and visible in the face of this natural disaster. From that time on, other citizen movements arose to change the political and social scenario of the country. Groups and organizations interested in promoting social change also arose. According to a study made by Cemefi, as many NPO's were created between 1984 and 1994 as in the previous one hundred years. Monitoring of elections began in 1991 on the part of organizations like Citizen Power and the Convergence of Civil Organizations for Democracy, along with key milestones like the emergence of the *Zapatismo* social movement. At the same time, many new citizen networks were formed to help people living on the streets or whose human rights had been violated. In this way, the first social organizations law to emerge from civil society itself arose, which came to be known, thirteen years later, as *the Federal Act for the Promotion of Activities Undertaken by Civil Society Organizations*, published in the *Official Daily of the Federation* on February 9, 2004.<sup>6</sup>

New relations between organized civil society and the government began to develop starting in the year 2000, where it is possible to observe that some of the processes of social change occur by means of citizen groups interested in the field of multiple social action and other fields (Butcher 2002).<sup>7</sup> However, all Mexican social groups and NPO's are not necessarily made up exclusively of volunteers, although, often, these are the people who take the initiative or have the concern to create them and find ways to help and serve others in an organized way. It is essential to remember that forms of pressure and protest are also manifest through civil associations because, in the end, they are the legal mechanisms that the citizens have at hand in order to participate in public affairs.

The historical background shows that the characteristics of political, social, and economic change in Mexico today, established a timely context for carefully

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<sup>6</sup>This law was promoted by several Civil Society Organizations: the Fundación Miguel Alemán (Miguel Alemán Foundation), Convergencia de Organismos Civiles por la Democracia (Convergence of Civil Organizations for Democracy), Foro de Apoyo Mutuo (Mutual Support Forum) and Cemefi, among others.

<sup>7</sup>(2002) V Encounter of the International Society for Third Sector Research (ISTR) in Cape Town, South Africa. There was an attempt to present a brief analysis on the state–civil society relationship in Mexico from the democratic transition until the change of government in the year 2000 in the panel: *Civil Society, Citizen Participation and the Dawn of a New Era: the Third Sector in Mexico in Light of a New Political Regime*.



studying the participatory activities of the Mexican people in the continual construction of civil society. There is a need to know how and how often citizen participation actions considered to represent solidarity and volunteer work, occur because the aim is to understand how they influence the search for present-day solutions to the country's social and community problems.

In Mexico, the first steps taken in the field of philanthropy and organized civil society research have been mainly oriented toward defining the size and the specific activities that characterize the third sector, most of them focused on the NPO's. With regard to the international work reviewed, the most relevant is the John Hopkins University Comparative Nonprofit Sector Project. According to that research, Mexico is the country with the least number of "formal" volunteers and the smallest nonprofit sector in a comparative study of 22 countries.<sup>8</sup> The same study presents the following in its results for Latin America:

"Duality" is the main characteristic in Latin America. There are two independent non-profit sectors in this region: one of them is made up of more traditional charity organizations and other entities linked to the social and economic elite, and the other is related to a type of organization of recent creation called "non-governmental organizations" (ONG's) (Salamon and Anheier 1999, 19.)

Some Mexican studies that have taken up the subject of volunteer action and served as predecessors of the present study are: the metropolitan survey carried out by the Mexican Association of Volunteers, A.C. (AMEVAC, Spanish acronym), (Alduncin et al. 2003), the National Philanthropy Survey (ENAFI 2005) carried out by the Metropolitan Autonomous Technological Institute (ITAM, Spanish acronym) and the Banamex Bi-national Survey (Moreno 2005).<sup>9</sup> Other surveys that have also contributed to finding out more about associative and citizen participation practices include those of the Ministry of the Interior, the so-called ENCUP (the Spanish acronym for the National Survey on Political Culture and Citizen Practices) for the years 2001, 2003, and 2005.<sup>10</sup> Other sources used as reference points for designing this investigation and survey are mentioned later on in detail in this same section.

Up until now, little precise information has been available about the number of nonprofit organizations in Mexico (Verduzco 2003). Depending on the criteria applied for counting them, calculations indicate the presence of about 20 to 35

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<sup>8</sup>See Verduzco, List, and Salamon (2001), *Perfil del sector no lucrativo en México*, for the main findings of the comparative study on the scope, structure, financing, and role of the non-profit sector in Mexico. In the comparative study by John Hopkins University, five parameters were considered to select the organizations that would be used for measuring the sector. These are: private (institutionally separated from the state); organizations (possessing an institutional structure and presence); that do not distribute benefits; are autonomous (essentially controlling their own activities); and have volunteer participation (membership is not legally imposed and they attract a certain level of voluntary contributions of time and money).

<sup>9</sup>See Moreno (2005), *Nuestros valores. Los mexicanos en México y en Estados Unidos al inicio del siglo XXI*. Banamex. Chapter seven contains the author's conclusions about confidence, social capital, and solidarity, as well as volunteer activity and altruism among Mexicans.

<sup>10</sup><http://www.gobernacion.gob.mx/encup>.

thousand NPO's in the country. More than 10,000 institutions are now registered in the Cemefi's Directory of Philanthropic Institutions. According to Layton (2006, 170), if the ENAFI data for 2005 is compared to Chilean data, where there are 50 organizations for every 10,000 inhabitants, in Mexico there is only one organization for the same number of inhabitants.

This background, also, contributed to forming the guiding hypothesis for this investigation, insofar as it indicated that participation in solidarity exists among the people, although this does not always occur through formal groupings. We consider that the sum of the actions both inside and outside NPO structures in terms of hours of volunteer work as well as the donations resulting from this work represent the total solidarity effort on the part of the population.

## Research Proposal

The main hypothesis for this study was formulated on the basis of reflections arising from an exhaustive review of the literature related to these activities and it was considered that by virtue of the small number of civil society organizations and their low level of institutionalization, Mexican social solidarity expressed through volunteer actions and acts of solidarity would tend to present itself in an informal context. As will be seen later on, this hypothesis is corroborated by analyzing the data of the survey done, which indicates that 66% of the people surveyed have participated in these kinds of activities. Of this, 44% do so through an organization, 24% in an informal way with friends and/or neighbors, and 32% as individuals. Adding the last two figures together tells us that 56% of the total engages in solidarity activities in an informal way.

On the basis of this idea, a set of research questions and the main aims of the study were developed, as well as the general objective of this study, which is: *To undertake an exploratory study in order to analyze the characteristics of the paths followed by citizens who carry out solidarity-type activities, as well as to identify the reasons and motives of the volunteers for participating in non-profit organizations.*

The aims established reflect the original questions for investigation and include: (a) analyzing and evaluating both the social and economic contributions of citizen participation acts of solidarity and voluntary service in Mexico; (b) establishing the number of "man hours" that are donated through volunteer work and calculating the economic contribution of Mexican volunteerism; (c) bringing together qualitative and quantitative information on the national level that will be useful for future research on acts of solidarity, citizen participation, volunteer service, and the third sector in Mexico; (d) deepening knowledge about citizen participation in acts of solidarity and volunteer service in both formal and informal spheres as regards motivation, participation, levels of association, and spheres of action; and also, (e) generating greater understanding about socio-cultural processes that influence the kinds of volunteer and solidarity-type actions found in Mexico, by means of analysis of different contexts of volunteer action and its operative structures.

The situation in regard to volunteer, solidarity, philanthropic, and service-to-third-party activities in Mexico is very complex. It was not sufficient to determine the profile and number of volunteers participating in the NPO's, their geographic distribution, the heterogeneity and frequency of their activities; it was also necessary to deepen understanding about informal acts of solidarity in order to find out about their particular characteristics and motivation. The size of the study required the formation of a research team including experts from different fields and the search, within academia, for appropriate methodologies for the task.

The team was composed of Jacqueline Butcher, from the Centro Mexicano para la Filantropía (Cemefi), as director and general coordinator of the project; Gustavo Verduzco, from El Colegio de México; and María Guadalupe Serna, from the Dr. José María Luis Mora Research Institute. The support group consisted of Ernesto Benavides, director of Social Formation of the Tecnológico de Monterrey and Miguel Basáñez, President of Global Quality Research of Princeton, N.J. The research assistant was María Abeyami Ortega.

For the field-work phase, which included participatory observation and information gathering from in-depth interviews, we had the participation of professionals from the Social Formation area of the Tecnológico de Monterrey, who were located at different campuses, and whose active participation and knowledge about the organizations facilitated gathering qualitative information. Sandra Díaz, Luis Manuel López, Norma Buen, Violeta Sandoval, Vivian Rentería, Rosario Wendoline Guerrero, Adria Placencia, Alicia Pérez, María Concepción Castillo, Consuelo Luna, Gabriela Martínez, and Alejandra Delgado participated in this team. José Sánchez, from the Social Science Research Center of the University of Guanajuato and Soledad León, from the University of Guanajuato, carried out the data run to search for the enunciation context using the *NVivo* program.

## Concepts and Definitions for the Study

### *Volunteer Actions and Acts of Solidarity*

There are any number of manifestations of solidarity toward others among Mexicans, in addition to a tradition of volunteer practices. However, the conceptual vision of volunteerism utilized for this study was derived from practice itself. A biased conception that misrepresents the multiplicity and richness of how they are manifest is often detected as a product of the limited knowledge in Mexico concerning volunteer actions and acts of solidarity. It is not uncommon to find that, when one thinks about this subject, the first images evoked may frequently be ones of religious groups or of women from the more well-to-do classes. These are indeed volunteers. But other diverse social actors are also volunteers, who are rarely linked to these kinds of actions in the traditional cultural imagination.

Volunteer actions are so varied and heterogeneous that they cover an extremely broad spectrum of actions: from civic and religious education, through interest in

and defense of human rights, to the solution of specific health and education problems in unprotected populations. Attitudes and actions in favor of others take on many expressions, from the formation of associations dedicated to solving evident and obstinate problems like cancer, blindness, mistreatment, or orphans, to isolated and simple actions of an individual character like teaching someone how to read, displaying a work of art, helping to build a school, or attending someone who is dying.

Today, two fundamental types have been identified for these activities: the first consists of those undertaken through citizen organizations and groupings around the globe that participate in all spheres of social activity, from culture and sports to the most basic social assistance. The second, the dominant form in most cultures, are spontaneous or informal expressions of solidarity.<sup>11</sup>

In many countries, especially developing ones, such as in the case of South Africa,<sup>12</sup> it has been demonstrated that the number of volunteers of the latter type surpasses that of those who work in formal, registered structures. A recent African study including four countries – Zimbabwe, South Africa, Namibia, and Mozambique – (Wilkinson-Maposa et al. 2006) has attempted to classify the different forms of philanthropy, help, and donations to individuals in precarious economic circumstances, taking into consideration the different forms of expression of mutual aid, solidarity, and reciprocity among individuals, including actions considered to be volunteer actions.

Authors who have studied this phenomenon, such as Hodgkinson, Salamon, Reed, Butcher, Dekker, and Halman, among others, have tackled the need to understand this action:

People are guided not only by their passions and self-benefit, but also by their values, standards, and belief systems... altruism may be one of those values, but solidarity, reciprocity, charity, injustice, equality, and inequality, are too, and finally, religious values may also be mentioned in connection with volunteer work (Dekker and Halman 2003, 6).

The importance of the value and cultural dimensions are recognized, as elements to be taken into account for analysis: “[A]s is ever more evident and clear, culture matters..., and because values are an important attribute of culture, it seems reasonable to assume that collective values are also important for volunteer service actions” (*Ibid*, 7).

Recently, social researchers have begun to classify volunteers according to their interests or their motivations (Handy 1988; Van Daal 1990; Meijs 1997). These authors agree that it is possible to distinguish three kinds of volunteerism: reciprocal help, with the motivation being solidarity through common interest;

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<sup>11</sup> *Medición del servicio voluntario: una guía práctica*. Independent Sector y Voluntarios de las Naciones Unidas (2001). This guide classifies them as managed or unmanaged.

<sup>12</sup> For more information on this case, see the study: *The Size and Scope of the Non-Profit Sector in South Africa*, developed by Swilling and Russell (2002). “Informal” groups mainly made up of volunteers represent 53% of the non-profit sector in that country.

providing services, motivated by the urge to donate time and talent to others; and, finally, social commitment, motivated by the idea of an active citizenry which participates.

The main point of reference for the effort to understand the set of volunteer actions and volunteerism on a global level in many different spheres and geographical regions is the year 2001, which the United Nations declared to be the International Year of Volunteers. This was a way of seeking to promote research about these activities and of achieving greater publicity regarding their social impact, as well as encouraging volunteer contributions around the world. In the case of Mexico, we can ask ourselves: Why promote these activities and not others? Are they a positive influence on Mexican society because of the fact that they are volunteer activities or acts of solidarity? How do they contribute to the development of the country and the promotion of citizenship? In answering these questions, the UN recognized the role of volunteer activity in social development when it declared that:

[V]olunteerism represents an enormous reserve of abilities, energy, and local wisdom that can help governments to carry out more focused, efficient, participative, and transparent public programs and policies. However, it is not very common for volunteerism to be recognized as a strategic resource that can positively influence public policy, and even less common for it to be taken into account in international development strategies... [T]he International Year of Volunteers (2001) offers a unique opportunity, on the one hand, to confirm an ancestral tradition with recognition of its potential and, on the other hand, as a major asset in the promotion of social development (UN Social Development Commission, 2000).<sup>13</sup>

Similarly, world knowledge of volunteer activities and their value are considered in surveys like the European Values Survey (EVS) and the World Values Survey (WVS). For its part, the Report on *Follow-up to Implementation of the International Year of Volunteers* (2005) from the General Assembly of the United Nations, reports that:

There are, however, wide variations in trends among countries and regions and this unevenness needs to be addressed if volunteerism is to realize its full potential for contributing to many of today's global challenges. Volunteerism, when properly channeled, is a powerful force for the achievement of the Millennium Development Goals.

There are sufficient reasons then to justify the need to investigate these kinds of actions in a specific and ordered way, since, as is established by the book *Medición del servicio voluntario: una guía práctica* [Volunteer Service Measurement: A Practical Guide], prepared by experts of the Independent Sector and Volunteers of the United Nations (2001), a study of this nature demonstrates to both government and society the contributions of volunteer actions and expressions of solidarity to society in all aspects: social, political, and economic. The guide mentioned indicates that volunteer service is important because it "helps to create a stable and cohesive

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<sup>13</sup>Report of the Comisión de Desarrollo Social. December, 2000. *El papel del Voluntariado en la promoción del desarrollo social* in : [http://www.iyv.org/iyv\\_span/policy/unitednations/csd\\_document/csddocument\\_htm/csd\\_document\\_span.htm](http://www.iyv.org/iyv_span/policy/unitednations/csd_document/csddocument_htm/csd_document_span.htm)

society” and “add value to the services offered by the government”. According to this guide, there are three criteria that cover practically all forms of volunteer activity, which in turn describe the universe of activities in the Mexican context:

1. *It is not carried out mainly for monetary gain.* This means that if the monetary reimbursement that people receive for the work they do is equal to or greater than the “market value” of the work, it cannot be considered to be volunteer activity. However, volunteers may receive payment to cover their basic expenses; this avoids a situation in which people with few financial resources cannot offer themselves as volunteers.
2. *It is carried out based on individual decision.* Free will is a basic principle of volunteer action. However, it may be said that there are pressures to undertake this kind of activity, such as social pressures or the person’s own feelings of moral obligation. This criterion helps to distinguish actual voluntary service from that where there is external coercion and one is obligated to participate. This is the case with “voluntary” social service to receive an academic degree or community service that replaces military service.
3. *It provides benefits for third parties and also for the people who provide the volunteer service.* This criterion makes it possible to distinguish volunteer activity from purely recreational activities like soccer. The criterion covers a broad range that includes everything from individual beneficiaries, such as friends and neighbors, to the society that is benefited by these activities. Providing services for one’s family is excluded here, since this activity is considered to be part of the normal responsibilities of an individual.

The most recent classification by the United Nations proposes four categories of volunteer activity: (1) mutual aid or self-help; (2) philanthropy and service to others; (3) citizen participation; and (4) advocacy or campaigning (Independent Sector and United Nations Volunteers 2001). These terms were explained in a meeting on volunteer action and development called by the United Nations in 1999 (United Nations Volunteers, 1999, 3–5.)

*Mutual aid or self-help.* In many parts of the developing world mutual aid or self-help constitutes the main system of social and economic support. From small informal kinship and clan groupings to more formal rotating credit associations and welfare groups, volunteering as an expression of self-help or mutual aid plays a primary role in the welfare of communities. Self-help also plays an important role in countries of the industrialized North, particularly in the health and social welfare field, where numerous organizations have been established to provide support and assistance to those in need, often organized around a particular disease or illness not covered by government health services.

*Philanthropy or service to others.* Philanthropy or service to others is distinguished from self-help in that the primary recipient of the volunteering is not himself/herself a member of the group, but an external third party, although most people would acknowledge that philanthropy includes an element of self-interest. This type of volunteering takes place typically within voluntary or community

organizations, although in certain countries there is a strong tradition of volunteering within the public sector and a growing interest in volunteering in the corporate sector. There is also a long-standing tradition of volunteers being sent from one country to another to offer developmental and humanitarian assistance.

*Participation.* Participation refers to the role played by individuals in the governance process, from representation on government consultation bodies to user-involvement in local development projects. As a form of volunteering it is found in all countries, although it is most developed in countries with a strong tradition of civic engagement. Participation was recognized as an essential component of good governance at the Copenhagen Summit and has become the watchword of development in recent years, although there is a forceful critique which argues that much of what has passed for participation has been little more than token involvement and a means of legitimizing outsiders' decisions.

*Advocacy or Campaigning.* Advocacy or campaigning may be instigated and maintained by volunteers, sometimes described as activists, for example, lobbying government for a change in legislation affecting the rights of disabled people or pushing for a worldwide ban on landmines, or for the introduction of anti-racism measures. Volunteers have paved the way for the introduction of new welfare services in the field of HIV and AIDS, have raised public consciousness about abuses of human rights and environmental destruction, and have been active in the women's movement and in democracy campaigns in many parts of the world.

Volunteer actions and acts of solidarity cover an enormous range of different service and community help activities, and are not the exclusive component of formal civil society groups. Individuals also practice them in an informal way, in many cases without belonging to any organization whatsoever. When a group of volunteers in Mexico wishes to become associated and constitute themselves as a formal non-profit organization, they may adopt a number of different kinds of legal status, such as civil associations (*asociación civil*, A.C.), institutions or associations for private assistance or charity (*institución de asistencia privada*, I.A.P., *institución de beneficencia privada*, I.B.P., or *asociación de beneficencia privada*, A.B.P.), and civil societies (*sociedad civil*, S.C.). The one that is most predominant among all of these is the A.C., and the least utilized is the A.B.P. (Castro 2005 and Tapia and Robles 2006).

Volunteer action and acts of solidarity are phenomena that possess universal characteristics and particular features at the same time – it represents action inserted into the social settings of concrete cultures to which the subjects belong, adapting themselves to the contextual shadings in a complex way at the local, national, regional, and global levels. This underlines the importance and pertinence of producing information to analyze particular realities of solidarity and voluntary activity in specific contexts and locations on their own terms, to understand the many different ways in which volunteer action and expressions of solidarity may be built among the population.



International studies on the third sector<sup>14</sup> have demonstrated that the more the number of nonprofit organizations, the more the economic and human resources invested, and therefore, the more volunteering there is, implying that more professionals will be trained in this field. Proportionally, there is more non-profit activity and a greater number of volunteers in more developed societies, even though the fields of activity include the categories of culture and sports and the society participates in these to manifest its customs and cultural expressions.

### *Definition of Volunteer*

In our country, little is said about the individuals who make up the NPO's, those who initiate them, and those who sustain them. There are even fewer commentaries about the motives behind these social initiatives, which in some countries constitute an activity that complements governmental activities, sometimes contributing to covering the needs of the citizenry. Insufficient attention is also paid to the people who contribute their efforts and enthusiasm in an isolated way to resolving problems in their communities.

With regard to this point, it is important to conceptualize volunteer praxis as the phenomenon of actions and activities in which individuals do not receive payment for their work and freely choose to give their resources of time, talent, and money for the well-being of others who are outside the circle of their family relations. Who are these people and what distinguishes their activities from others?<sup>15</sup> The first concept established is that of the *volunteer* – who is the subject who undertakes the action? “A volunteer is a social actor who provides unremunerated services. They donate their time and knowledge and dedicate themselves to a work of solidarity, whether in response to the needs of their fellow man or due to their personal motivations, which may be emotional, religious, political, or cultural.”<sup>16</sup> The authors of

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<sup>14</sup> Salamon *et al.* (1999). *Nuevo estudio del sector emergente: resumen*. This comparative study of 22 countries, including Mexico, presents some facets of voluntary individual participation. These authors argue that the size of the non-profit sector is a good indicator of the number of formal volunteers in existence. In another related article, *Volunteering in Cross-National Perspective: Evidence from Twenty-four Countries* (2003), by Salamon and Sokolowski, the findings reveal that in countries where the government spends more on social services for its citizens, there are also a greater number of volunteers. The authors explain that volunteer actions are concentrated in two areas of activity: the area of service to others – which is the Mexican case – and the expressive area – which includes cultural, recreational, and lobbying activities. This international study indicated that volunteer actions and acts of solidarity like those included in this investigation need to be studied deeply to better understand the non-profit sector.

<sup>15</sup> See Butcher (1999). “La solidaridad organizada: el voluntariado social como agente de cambio social en México”, in *Sociedad Civil*, for an analysis of this definition and for a description of volunteer action in Mexico both inside and outside formal organizational structures.

<sup>16</sup> [www.risolidaria.org.ar](http://www.risolidaria.org.ar). Fascículo del Tercer Sector 04. “Todo lo que usted necesita saber sobre Voluntariado”, *Tercer Sector* (2004).

this informative booklet suggest that these acts of solidarity many times serve to consolidate the exercise of public rights and awaken civic awareness about different social problems.

The following is a description of the volunteers who donate their time in an organized way for society:

Citizens who, once having fulfilled the duties of their situation (studies, family, profession) and their civil duties (administrative, political, or trade-union life), unselfishly place themselves at the service of the community, promoting solidarity. In this, they offer their energies, capabilities, time, and, at times, the means available to them, as a creative response to emerging needs of the territory and, as a priority, to needs of marginalized people. All of this, preferably, through the action of a group that provides permanent training and continuity of service in collaboration with public institutions and social forces (*Manual de Formación de Voluntarios 2002*, 11).

The definition of volunteer proposed by the United States Red Cross (Smith 1989), has been particularly useful for our investigation, because it refers specifically to individual activity:

Volunteers are individuals who go beyond the confines of their remunerated employment and their normal responsibilities to contribute with time and service to a non-profit cause in the belief that their activity is beneficial for others, as well as satisfying to themselves (Smith 1989).

However, developing a broad and functional definition of volunteer action for the Mexican context was a fundamental point of departure for this investigation. Aspects related to volunteer actions and acts of solidarity were studied in both the formal and informal spheres. In this way, a definition of volunteer was established for this study that was inclusive of the different modalities of voluntary participation and solidarity in Mexico, activities that arise from the free will of individuals with diverse motives:

Volunteer: A person who, by his/her own choice and without receiving any remuneration, contributes time to an activity that goes beyond the family sphere to provide service to others for the benefit of others and of the society as a whole.

With this definition, it is possible to include both volunteers inside the organizational structures of the third sector and those persons who undertake voluntary activities by way of solidarity outside the formal non-profit organizations in Mexico.

Volunteers are the protagonists of volunteer action and acts of solidarity. These are actions that individuals choose to undertake in their daily lives. It is not suggested that these people represent an ideal of citizen activity; they are rather considered as a set of individuals who undertake these activities as a form of citizen expression and social participation. We are aware that this description covers a very broad range of possible activities and includes Mexicans who, by this definition, contribute time, talent, and different resources for the common good.

## *Participation in Solidarity*

The conceptual challenge for this study was to develop definitions that include volunteer and solidarity-type social participation activities in accordance with the socio-cultural specificities of the country, and the title of the investigation arose from this concern. For this first foray into participative solidarity phenomena in Mexico, the risk of adapting the traditional proposal for the concept of volunteer from the Anglo-Saxon perspective was accepted to arrive at an idea thereof that would contemplate the great richness and heterogeneity of volunteer activities exercised with an attitude of solidarity at the national level. It is considered that the definition of volunteer proposed for this study fulfills this objective.

It is important to be aware that problems and limitations may be found in any attempt to comprehend, explain, and quantify phenomena and the value of such activity. This work may be considered to be a pioneer study of an exploratory character; for descriptive purposes in this investigation, participation in solidarity shall be understood to be represented by the universe of both individual and group actions that occur outside formal NPO groups as one way in which common citizens freely express, without remuneration, voluntary attitudes of solidarity toward others. Expressing solidarity toward other citizens does not guarantee that the action, in addition to expressing solidarity, is ethical or specifically leads to a particular social good. However, solidarity represents – for our context – a way of acting for the benefit of others or of doing something for someone else. Although there are different uses of this term (Bayertz 1999), it is possible to indicate that, conceptually, solidarity presupposes the existence of a community to which one has specific duties.<sup>17</sup> In spite of a confused history owing to the lack of conceptual vigor in the use of the term, the notion of solidarity, as developed in the beginning of the first half of the nineteenth century, fundamentally lays claim to the idea that individuals have specific obligations in their community, obligations that are known in ethics as *positive* obligations (i.e., obligations that imply action). What began in the Aristotelian *polis*, where “*the interest of all is the same*”, has evolved over time up until the term known today was coined.

The notion of solidarity has taken on even greater relevance today. As Valenzuela points out (2003, 504),<sup>18</sup> “it has become so important that it has become a generic

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<sup>17</sup>In fact, the term “solidarity” has its origin in Roman law, where it was used to describe a type of legal situation in which individual subjects bound themselves as if they were a single subject, and therefore this type of obligation was called *obligatio in solidum*.

<sup>18</sup>See Valenzuela’s text (2003), *La noción de solidaridad*, which undertakes a broad exploration of ideas and of the term “solidarity”. In this theoretical-conceptual essay, the main theoreticians of the subject of solidarity are mentioned: Aristotle, Smith, Locke, Hume, Kant, Durkheim, de Tocqueville, Scheler, Rorty, Habermas, and Luhman, as well as mentioning the connotation it has in the current psycho-social trends of Eisenberg and Bandura, and the basis of Freud’s psycho-analysis, also going into Kohlberg’s y Piaget’s moral training of individuals. It also includes an extensive bibliographical review of the use of the concept of solidarity over time, identifying the meanings and shades of meaning with which it has been used and presenting, by way of empirical evidence, some practical acceptations of the notion of solidarity expressed more or less explicitly in the Solidarity movement and other contemporary scientific theories.

term employed to refer to so-called “third-generation human rights”. The idea of “participation in solidarity” in this study indicates, in addition to an attitude of solidarity, taking action as a consequence of this solidarity outside the family circle, without receiving remuneration. Such acts of solidarity suppose:

...an act of will,... an effort to transcend one’s own limits, to transcend one’s own individuality..., this effort also presupposes increased consciousness of the importance of solidarity, which is only really possible when anchored in feelings of empathy and compassion (Manual de Formación de Voluntarios 2001, 505.)

The citizenry expresses its solidarity with others in different ways. The *Volunteer Service Measurement: A Practical Guide* prepared by the United Nations – a key reference material for this investigation – used the notion of service considering it to be an essential and important component for describing volunteer action. In other words, voluntary service assumes a step beyond mere help. It implies both an open attitude and disposition toward the others and an orientation toward serving others instead of a utilitarian orientation. In this sense, Bolos (1997, 15–19) maintains that this kind of service ideally establishes and promotes the formation of horizontal relations and relationships among equals, which is an essential condition for the exercise of democracy. Horizontal or “service” interactions that occur during the experience of solidarity are not the exclusive province of groups of volunteers; they frequently occur in the case of any person with the willingness to give with the spirit of serving others.

Solidarity and voluntary activities do not guarantee, although they do evoke the ethical importance of, acting and achieving a common good for the society in which they are carried out. Our position is based, in principle, on the consideration that these actions are positive for society, within the variety of activities of organizations of a philanthropic nature, and those of social organizations that interact with one another in the third sector. However, we are also aware that there is a diversity of nonprofit dynamics, activities, and forms of participation, and association that attend to different interests, such as educational, political, and professional interests, among others.

## ***Volunteer Work***

According to what Morán (1997) points out, “work” is understood to be the expenditure of human energy oriented toward satisfying personal and social needs; therefore, not all work is found in the market. This author indicates that socially useful activities carried out outside commercial relations – such as domestic work or any work motivated by family ties, solidarity, or love – should be taken into consideration when conceptualizing the division of labor time.

There are several categories of unpaid work, and it is important to clarify that volunteer work does not represent the sum of these kinds of non-remunerated activities. Volunteer work, in addition to being free, is focused – at least in terms of its intention – on producing a social good, a good for everyone. The intention does not guarantee the results; however, it separates these activities from others that do not have the aim of achieving remuneration for the individuals who carry them out.

To consider work as only a human activity that is carried out in exchange for income is to assume a negation or ignorance of different kinds of labor done by thousands of people without receiving any remuneration whatsoever. In this investigation, volunteer work is defined as: *that which is not done according to the logic of obtaining economic benefit, i.e., without seeking material gain, in which time and energy are committed to the benefit of others, without expecting any remuneration in cash or in kind.*

From another perspective, it can also be said that the objective of volunteer work is not to maximize economic benefits for individuals but rather to generate certain services for the community or the public at large (Jerez 1997, 32). With regard to this last point, it is necessary to indicate that expressions of solidarity may involve volunteer work or donations or economic contributions. So the definition of volunteer work in this study does not include donations in cash or in kind – even though they may be voluntary – because this concept refers instead to effort and time dedicated to activities that do not result in any material gain whatsoever for the subjects carrying them out.

According to the definition of Portocarrero and Millán (2002, 2004), volunteer work is organized, unpaid work that is done for the benefit of others or the benefit of society as a whole, through some social organization. It should be questioned whether the existence of a social organization is always necessary in order to perform volunteer work, especially when it is known – as in the Mexican case – that many times actions of collaboration or support are performed outside these structures.

Volunteer work may have a role to play in promoting employment, by adding and developing abilities in those who do not have them. These actions also become ways of approaching the labor market, by creating new services that often become remunerated activities. When seeking to quantify the benefits of volunteer action, several restrictions have to be considered; in the first place, it should be noted that, from an economic viewpoint, volunteer work produces value – although it may be a nonmonetary value – for at least two groups; the volunteers and those receiving this service or the results of this work. In the second place, the limitations of using market costs to evaluate the supply of goods and services to those receiving them, when they do not pay the complete price, should be faced. If all kinds of volunteer work focused on the client are considered, there are forms of volunteer actions, such as political lobbying and actions oriented toward protecting the environment, for example, in which it is more difficult to identify the receiver of the service. In the third place, it is necessary to take into consideration the range of motivations that inspire people to be volunteers and give freely of their time, and some estimate of the value per hour of their actions, in line with their motives (Brown 1999, 5).

It is important to point out that official data, collected by all governments in a permanent way, is not available on volunteer work, as it is in the case of remunerated work. However, even though calculating it is complicated, it is not impossible. To achieve this, concepts must be defined and we must know what volunteer work is and what is not, in addition to establishing a more appropriate methodology for its study in Mexico.

The value and benefits of volunteer labor slowly began to be recognized, as volunteers' also contribute to the formation of social networks, promoting shared norms, and creating networks of mutual confidence. The individuals' attitudes of solidarity and the volunteers' actions represent some of the multiple activities that exist in present-day societies contributing to the development of more social capital (Putnam 2000, 21), which is an important indicator of the levels of participation and democracy in a country. Understanding, from the point of view of this author, social capital as the social networks that individuals build and the reciprocity norms associated with them, it follows that this may be both "a private good and a public good" (*Ibid*, 20).<sup>19</sup>

For this investigation, given the close conceptual relationship between these ideas and the lack of a theoretical consensus among the different authors who deal with this phenomenon, throughout the text volunteer action or acts of solidarity shall be used without distinction, referring to actors expressing solidarity and volunteer actors, whether they are engaged in formal or informal activities of this kind. In this study, what has been quantified, by means of a national survey, can all be considered to be volunteer work by the Mexican people. In the chapter about analyzing the interviews, the time people work inside and outside social organizations is specified.

## ***Volunteerism***

Our definition of "volunteers" complements the traditional group concept of volunteering or "volunteerism". Volunteerism systematizes volunteer action and links it to some type of organization or group. This assumes the idea of a collective that conceives of an organization of work called volunteerism or social volunteerism, as a set of volunteer actions and acts of solidarity carried out in an organized way in groups. It is considered to be a "movement of people who undertake actions for the common good without expecting remuneration, whether in the sphere of civil

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<sup>19</sup>To delve more deeply into the concept of social capital, see Robert Putnam (2000), *Bowling Alone: The Collapse and Revival of American Community*, which emphasizes networks of reciprocity based on confidence and mutual aid, and explains that there are two kinds of linkages in the formation of these networks. The first occurs among individuals who are similar, with mutual and common interests, which is called *bonding social capital*, and refers to a close bond between equals. The second is called *bridging social capital*, and involves a bridge or connection between different and distinct people that goes beyond an intimate relation between peers. Putnam and Fieldstein's work (2003), *Better Together: Restoring the American Community*, should also be consulted, which establishes that the expression of bridging social capital is indispensable for the development of tolerance and openness in the construction of democratic societies. Both forms of relationship are considered by these authors as key to achieving active and inclusive participation in a democracy.

society organizations or in governmental and business entities.”<sup>20</sup> The book *Voluntariados en Chile: lo plural y lo diverso* [Volunteerism in Chile: Plurality and Diversity], locates these actions “within a framework of a project belonging to a specific group” (Secretaría de Gobierno de Chile 2002, 39) and defines “volunteerism” as follows:

...the set of practices by means of which citizens make voluntary contributions or donations of work with the aim of satisfying essential unsatisfied human needs in concrete individuals, people, or groups, which action is carried out in the framework of special or discernible systematic processes of social intervention, linked to groups and organizations of civil society (*Ibid*).

In the international sphere, volunteerism is being more and more recognized as a fundamental social force. Countries like Canada, the United Kingdom, Holland, or the United States promote and support studies that deal with the phenomenon of the revitalization of civil society. These studies are also focused on the characteristics of an organized civil society that occupies participatory spaces which, in general, are not covered or attended to by other sectors of society. However, the views held on the third sector and the research undertaken – including studies on volunteer actions and acts of solidarity – represent, up until now, notions that have been built, for the most part, based on the mentality of the North (Fowler 1998.)

With regard to research on volunteerism in Latin American countries, a few relevant works may be cited. The Chilean government sponsored a study with a focus of a conceptual nature that deals with the subject of volunteerism; the study makes an analysis that considers the situation in that country and compares it with that of other nations, among them Brazil and the United States. In Peru, Portocarrero et al. (2004) conducted a survey in ten Peruvian cities to find out about the number of volunteers and the amount collected in donations of money and in kind. The authors recognize the difficulties due to the conceptual ambiguities about volunteerism and volunteer work, and comment that:

In any case, it has been thanks to this broadness and indeterminacy, in which varied and ambiguous, old and modern social phenomena are brought together, that is probably its main attraction and, at the same time, its most evident weakness. In fact, the tendency to generalize the positive aspects and virtues of volunteer work has led to a situation in which perhaps too many expectations may have been placed on its ability to achieve social change, the strengthening of civil society, and economic development (Portocarrero et al. 2004, 9.)

In general, it could be said about this region that, together with the traditional volunteer benevolence and charity groups coming from religious-type groups – which were founded during the Spanish colonization – there has also been a system of “informal volunteerism”, so that “when talking about volunteerism in Latin America and the Caribbean, it is necessary to recognize this permanent and silent form of donating personal time to the service of the common good” (Thompson and

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<sup>20</sup>[www.risolidaria.org.ar](http://www.risolidaria.org.ar). Fascículos del Tercer Sector 04. “Todo lo que usted necesita saber sobre Voluntariado”, *Tercer Sector* (2004).



Toro 1999, 31). Actions in the political field and those having religious motivation are today the most important incentives for the development of social volunteerism in Latin America, as distinct from other regions, according to these authors.

Also, beginning with the social movements in the decades of the 1960s and 1970s, a series of new actors arose seeking change of a political nature, who revolutionized the ways of perceiving participation. During the 1980's decade, both the emergence of "new social movements" and the NGO's associated with them may be mentioned, where volunteers got organized and acted, some in individual ways and others as groups, not only to fight against poverty and inequality but also to lobby for women's rights, environmental protection, and the promotion of citizen participation. Then this participation became a distinct kind of volunteerism, because in some of these activities, especially those with a political hue, the traditional concept of "charity" was transformed into the concept of "solidarity".<sup>21</sup> In more recent investigations in Latin America, we can see how ideas and concepts about solidarity are modified and transformed toward more modern forms of participation in solidarity based on the citizenry.

## Components of the Study

This investigation includes two main components. The first covers individual solidarity activities by the citizens themselves by means of a national survey. The questions were asked of people who, in an individual way on their own initiative and without being part of a specific group, undertake activities for others outside the sphere of the family. Chap. 2 presents an exhaustive analysis of the relevant questions in the survey.

On this basis, some of the questions developed as part of the general aim of the investigation are considered. However, it was necessary to develop a second component to express the reasons and motivations of people who work in social organizations and groups with a common aim, placing special emphasis on those considered to be volunteers. The methodology adopted in the case studies was chosen to broaden a qualitative perspective of the activities of these subjects. Case studies are relevant to this work, because it is possible, through them, to corroborate much of the quantitative data with qualitative data, increasing the reliability and

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<sup>21</sup>As expressed in an article in the Argentinean newspaper *La Nación*, of April 21, 2000: "What elements does man have, at this point of transition from one millennium to another, to confront these evils, to contribute to the path toward a less unjust and more balanced society? He has, of course, his conscience and the values that illuminate it. Among these values, one of the most important is solidarity, understood as a generous force that moves human beings to do their utmost, unselfishly, to help their fellow man. Only to the degree to which people with more resources get organized to provide help and solidarity to the most unprotected sectors of the population will it be possible to advance toward a civilization less chastened by inequities and injustices."

validity of the investigation. For the Mexican case, case studies help to answer another series of questions that explain these motivations; they make it possible to find out the contexts of these individuals, at the same time as they deepen understanding of the profile of those people considered to be volunteers. The two components of this study complement one another, because they share a common subject of study – volunteer action. In this way, the investigation makes it possible to observe, analyze, and obtain information to understand the same actions from two distinct vantage points – in individual terms and in group terms.

## I

To quantify this type of activity, a conceptual structure was developed by way of definitions to cover – as much as possible – all Mexicans performing these labors. Then, a national survey was developed including all solidarity and volunteer participation alternatives. The first component consists of the application and analysis of a national household survey. We sought to make this survey statistically representative to be able to establish parameters comparable to international studies, and also to be able to find a more reliable number, kind, location, and promoters of the main volunteer activities in Mexico.

The work of preparing the survey was the responsibility of the project director. One of the fundamental points when developing the battery of questions was not to use direct translations; experience indicated that people did not understand a substantial number of the questions. When some of them were employed, adaptations were made that made sense in the Mexican context.<sup>22</sup> In this, the *United Nations Guide* mentioned earlier was fundamental, because it had a clear warning on this problem. Alternative ways of asking the questions were also developed, and these referred more to people's activities than to their membership in organizations, which is the traditional way of asking about volunteerism.

In Mexico, the questions of the National Time Use Survey (*Encuesta Nacional del Uso del Tiempo*, ENUT 2002) were conducive to getting an idea of how people use their free time and their time at home. This survey was not designed for volunteers, but rather to differentiate work by men and women in the home, and it is useful insofar as it is possible to see how they use their free time. Among the

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<sup>22</sup>For the ENSAV, 2005, the following documents, among others, were used for reference: *La medición del servicio voluntario: una guía práctica* (Independent Sector y Voluntarios de las Naciones Unidas, 2001), *Encuesta Nacional de Donaciones y Trabajo Voluntario 2002* (Portocarrero et al.), *Estudio sobre Trabajo Voluntario* (Gallup 2000, Argentina), the survey *Giving and Volunteering in the United States*, (Independent Sector, 1996) and the survey *Giving and Volunteering USA* (Independent Sector, 2001), the book *The Size and Scope of the Non-profit Sector in South Africa* (Swilling and Russell, 2002), *Encuesta Nacional sobre el Uso del Tiempo* (2002, México), and *Encuesta de Acciones Voluntarias del Manual de Cuentas Nacionales de Instituciones sin Fines de Lucro* (Universidad de John Hopkins, February, 2005, USA).

surveys done in Latin America, two stood out because of their contribution in terms of questions posed from the standpoint of a non-Anglo-Saxon mentality – The National Survey of Donations and Volunteer Work (*Encuesta Nacional de Donaciones y Trabajo Voluntario*, Perú) and the Gallup survey done in Argentina in 2000. However, neither of them provided enough questions to cover the broad range of solidarity and voluntary activities; rather, they focused on membership in different social organizations. To delve into activities outside the formal sphere, recourse was had to a South African survey (Swilling and Russel 2002), because, although what the study measures is the third sector and not volunteer action in particular, it used a methodology in which the basis for the sample was not the existing NPO's, as the lists at that time were obsolete. It employed a representative sample of South African communities under the assumption that there was a direct correlation between the type of organization and the type of community. It took into account many aspects of informal groups like cooperatives, burial societies, religious organizations, and political parties.

The broad experience comprehended by the majority of Anglo-Saxon surveys could not be ignored, as they are the countries with the greatest number of studies of volunteer action. Although many were reviewed and are mentioned in the bibliography of this volume, the survey of the *Independent Sector*, 1996, from the U.S. was particularly useful because of its questions about confidence and its greater sample of populations not previously covered, such as higher-income individuals, Hispanics, and Blacks.

Finally, it was indispensable to maintain future international comparability among surveys, and for that reason an effort was made to include the basic questions proposed in the February, 2005, *Manual de Cuentas Nacionales de Instituciones sin Fines de Lucro* [Handbook on Nonprofit Institutions in the System of National Accounts] (John Hopkins University, 2003) from the Center for Civil Society Studies. The questions in this survey are basic for collecting information about volunteer action in the context where people know what volunteerism means; many of these questions were included in our national survey. In the final phase of preparing the survey, both specialists in the preparation of surveys and academics studying the sector were invited to be part of the team, and they gave it its present form. This survey was named the National Survey on Solidarity and Volunteer Action (*Encuesta Nacional de Solidaridad y Acción Voluntaria* or ENSAV), which will be used throughout this text.

The sample was developed from the conceptual framework and the definition of “volunteer” already described. A precodified questionnaire was tested on nine occasions until subtle aspects of the subject were captured, with 26 substantive batteries, 13 attitudinal ones, and 16 socio-demographic ones, taking advantage of the experiences and reactions tested by the most substantial national and international studies. The sampling framework was self-weighted. The size of the sample was 1,497 interviews with people over the age of 18, with a margin of error of  $\pm 2.5\%$  and a level of confidence of 95%. The framework for the sample was probabilistic, on the basis of the electoral districts of the Federal Electoral Institute, updated to the elections of 2003. This kind of framework is recommended by experts from the United Nations.

The sample is considered to be statistically valid for establishing national and international comparisons and the results were organized in accordance thereof. The ENSAV was applied over one week, from September 19 to 25, 2005.

With regard to the accuracy of the concepts for applying the ENSAV, special emphasis was placed on the person being interviewed understanding that the questions were oriented toward a description of his/her activities. Therefore, after a series of deliberations and discussions among members of the research group and the group responsible for applying the survey, it was decided to present an introduction to the poll to ensure that the person interviewed would understand the intention of the questions posed. Hence, when beginning the questionnaire session with the survey, the following was indicated:

I'm going to ask you about help in terms of time or services that you give or have given to other people who aren't part of your family, without receiving payment for that activity and which you have done in a voluntary way. It can be help of any kind: teaching how to read; organizing a neighborhood meeting; a school or church party; a sports team; a collection for the Red Cross or a clinic; helping a sick person who is not your relative; lending a neighbor a hand; helping with a pilgrimage or a political group; a project for the community. Anything that is to benefit others, without payment for you and done in a voluntary way.

The introduction to the survey cited above expresses a broad meaning of volunteer action and acts of solidarity and also contains three elements that are considered to be necessary to comprehend current participation by Mexicans who, of their own volition, without expecting economic remuneration, and with an attitude of solidarity, work for the common good. Thus volunteer actions developed in formal organizations are only a point of departure. This is why it was necessary to broaden the definition of "volunteer" beyond the formal sphere, with the aim of identifying how to incorporate volunteer actions by individuals who do not "officially" belong to a third sector organization.

Questions were asked in the ENSAV relating to the amount of contributions by Mexicans, especially in terms of time, but also in terms of economic resources and contributions in kind. Questions were included to get information on all forms of donations and contributions made by Mexicans in favor of others, an important point to meet the expectations of the study with regard to the number of hours contributed on a voluntary basis so as to be able to account for them in accordance with their market value. The analysis of the survey is presented in Chap. 2 of this book.

## ***II***

The second component of the investigation consists of 15 case studies carried out in different regions of the country so as to delve in a qualitative way into the reasons and motivations volunteers in Mexico have for undertaking this kind of work and offering their services to others. Fourteen of these case studies were done in relation to organizations with volunteers, and one case study was done on an individual basis. A specialist in case studies was invited to participate, given that this methodology was the appropriate one for this part of the investigation. A total of

66 interviews were done with different actors who participate in organizations that include volunteers. In the study, it was also possible to analyze the participative and associative dynamics of different social actors who participate in these organizations, whether or not they were volunteers.

This part of the investigation is not statistically representative. However, the number of interviews and cases considered is sufficient to show some significant tendencies and trends in terms of these kinds of activities in Mexico. The organizations were selected on the basis of a territorial distribution that included different parts of the country, to note and compare regional participative tendencies for these kinds of activities.

In the selection of organizations, 12 of the NPO's where case studies were done are or have been linked to the social service program of the Tecnológico de Monterrey at some of their 33 locations. The specialist in the area of Social Formation of that institute actively participated in executing and following up on this. For follow-up, feedback, and concentration of this group of interviews, the Blackboard platform was used, monitored by the Tecnológico de Monterrey and coordinated with the investigator responsible. The other three case studies were done in the traditional way.

Although it is true that typologies and classifications for social organizations exist at a world level, for the Mexican case in the investigation that concerns us, practice tells us that we will find a larger population of volunteers in health organizations than in business associations and professional associations. Even though all the organizations used for our investigation are nonprofit institutions, this classification does not indicate if there are volunteers active in them or not, so for our selection criterion, spheres of action were chosen that the team of investigators considered represented the broadest array of volunteer action and solidarity activities in Mexico and we developed our own classification taking into account the priority of finding greater volunteer activity in the organization.<sup>23</sup>

Both our own and foreign classifications exist for volunteer activities and civil organizations. We found a typology of nonprofit organizations based on the United Nations' International Standard Industrial Classification (ISIC) called the International Classification of Non-Profit Organizations (ICNPO), prepared for Phase II of the John Hopkins University Comparative Nonprofit Sector Project,<sup>24</sup> which consists of: (1) culture, (2) education and research, (3) health, (4) social services,

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<sup>23</sup>Arredondo (1997) in "Naturaleza, desarrollo y tipología de la sociedad civil organizada" in *Sociedad Civil*, no. 1, vol. II, pp 164–184, offers a classification of civil organizations. A typology of civil associations by Alberto Olvera appears in: "Representaciones e ideologías de los organismos civiles en México: crítica de la selectividad y rescate del sentido de la idea de sociedad civil", pp 31–37, in Cadena Roa, J. (2004) (Coordinador) *Las organizaciones civiles mexicanas hoy*, which presents different forms of civil association in Mexico; the same author comments on the difficulties of covering the entire gamut of possible combinations of citizen associative activities. The typology in our study covers 12 spheres of action which were selected because of being considered as having the greatest volunteer work content.

<sup>24</sup>Salamon and Anheier (1999), *Nuevo estudio del sector emergente: Resumen*, p. 3, Baltimore: Universidad de John Hopkins, Instituto de Estudios Políticos, Centro de Estudios sobre Sociedad Civil.

(5) environment, (6) development, (7) civil rights and legal advice, (8) philanthropic activities, (9) international aid, (10) religious denominations, (11) business, professional, and trade union associations, (12) other.<sup>25</sup>

The categories considered for classifying the spheres of volunteer work in non-profit organizations in Mexico used in the qualitative section of the study are indicated in Table 1.1.

To analyze the qualitative information, four different roles were defined for those interviewed in the organizations, so as to understand the dynamics of their structure and get to know the processes of participation and interaction that occur inside these organizations. In this way, it was possible to observe the relation between those who participate in an organization of this type and some external factors such as the circumstances and life stages of these actors, their management of their available time, the opportunities for participation manifest in each case, as well as an analysis of the reasons and motivations of the subjects interviewed for getting involved in these activities.

The interviews were done between December, 2005 and April, 2006, and included direct and constant feedback from the investigator responsible for this phase to the interviewers. The interviewers were also trained during the months of September and October, 2005. At the beginning of the phase of interviews, there was a period of participatory observation. The information from the interviews was correlated with the *NVivo* program and a data run was performed in search of the enunciation context to obtain relevant information about the aspects directly mentioned by those interviewed when referring to volunteer actions. Chaps. 3–5 of this book cover the results of these interviews.

The appendices are an important part of the information produced by this project, and work by specialists in each case has been included so that it may be used as a reference point for future projects. In addition to analysis of the survey and of volunteer action, these appendices include the methodology applied, the survey graphics, and the questionnaire used, as well as the themes around which the in-depth interviews were structured. Also included, is the statistical data from the national survey which is available on the Cemefi web page.<sup>26</sup>

We then include the sections analyzing the information from the two components of this study. We believe that the point to emphasize is the richness of the material accessible to the reader. We hope that this pioneering effort will place the data arising from this investigation on the table of conceptual and analytical discussion concerning the third sector and citizen participation. We trust that this book will benefit, not only those studying the sector, but, also all those interested in exploring the activities and experiences of its protagonists.

<sup>25</sup>The ISIC and, hence, the ICNPO, classify organizations according to their main economic activity, i.e., the one that consumes the largest part of their operational expenses. So if an organization carries out activities in more than one area, it will be classified based on the area with the greatest operational expenditures. This is particularly important in the case of Mexico, since there are many organizations that work simultaneously in several areas or in areas of activity that are not easily identifiable.

<sup>26</sup>[www.cemefi.org](http://www.cemefi.org)

**Table 1.1** Spheres of action of non-profit organizations in Mexico

Business	Organizations engendered by business associations with quite varied purposes that get their operational funds from the private sector, even while maintaining their non-profit character.
Religious	Organizations engendered by religious institutions, whose objectives may include the strengthening of values and beliefs or assistance to unprotected groups.
Sports/recreation	Organizations that have the objective of promoting sports culture, especially among children.
Youth	Organizations formed to serve a diverse and complex sector like that of youth; they are particularly focused on serving their needs.
Rural/community	Organizations formed with the purpose of helping to develop projects for groups of peasants.
Vulnerable groups	Organizations created to serve children, women, seniors, and indigenous peoples in highly vulnerable conditions.
Urban	These are organizations that have been created to attend to specific demands of groups and/or populations in marginalized conditions that may have either a temporary or permanent character.
Health	Organizations formed with the specific objective of openly promoting the health of the population in precarious conditions that does not have the possibility of using public or private health services.
Educational	Organizations whose purpose is to strengthen education in all its forms and offer this kind of service to a broader sector of the population.
Cultural	Organizations whose objective is to contribute to knowledge, appreciation, and diffusion of different cultural expressions.
Causes	Organizations that have been engendered to fulfill specific objectives according to the requirements of groups of citizens interested in supporting others in different ways.
Environmental	Organizations that have been developed around concerns related to caring for and preserving the diversity of natural resources.

Source: Developed by the authors for this study.

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