

**SIXTH INTERNATIONAL CONFERENCE  
OF  
THE INTERNATIONAL SOCIETY FOR THIRD SECTOR RESEARCH (ISTR)  
RYERSON UNIVERSITY and YORK UNIVERSITY  
TORONTO, CANADA  
JULY 11-14, 2004  
“Contesting Citizenship and Civil Society in a Divided World”**

**Building Citizenship and Voluntary Participation in Mexico:  
Social and Economic Implications from a National Study**

**Jacqueline Butcher**

**CEMEFI / Universidad Iberoamericana**

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**CONTESTING CITIZENSHIP AND CIVIL SOCIETY IN A DIVIDED WORLD**

***Building Citizenship and Voluntary Participation in Mexico:  
Social and Economic Implications from a National Study***

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**I. Abstract**

Changing political, social and economic conditions in Mexico have led to the need of understanding why and how people participate, the various ways in which this occurs, and in what measure they contribute to their society. This paper presents the structure and methodology utilized for the first National Volunteer Survey ever undertaken in Mexico. The Mexican Center for Philanthropy (CEMEFI, 2003)<sup>1</sup> has engaged in a 12 month study that includes: a) a look into the historical (Reygadas, 1998) and cultural factors<sup>2</sup> (Verduzco, 2003) embedded in Mexican society that surround giving and volunteering, b) findings from a national survey on voluntary action and service, c) a series of case studies on CSOs that add a qualitative understanding of the sector, and finally d) theoretical and empirical<sup>3</sup> (Butcher, 2003) research that reveals a comprehensive outlook on both formal and informal volunteer participation throughout the country. One of the main hypotheses is that, as in the case of the economy, there is a large proportion of informal participation, which in a way, explains the subsistence of almost half of the country's population living in extreme poverty. The results of the study provide an informed basis for decision making in the

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<sup>1</sup> The questions for this survey were influenced on other volunteer studies performed in the *US in the Giving and Volunteering* series of the INDEPENDENT SECTOR and on other Latin American surveys such as the most recent Peruvian study, (Portocarrero, F., Sanborn, C., Millán, A., Loveday, J., (2002) , still in process, since similar cultural elements are present from this geographic region.

<sup>2</sup> Verduzco, G., (2003). *Organizaciones del Sector No Lucrativo: Visión de su trayectoria en México*, México: CEMEFI/COLMEX. This book presents a perspective on the history of CSOs in Mexico, also providing a historical explanation on motivation and participation in Mexican civil society. Many other authors, have studied paternalistic patterns of participation and citizen behavior throughout Mexican history.

<sup>3</sup> A recent study with Mexican volunteers on a face to face interaction with recipients.

government public policy arena and reveal ways for established CSOs to promote and enable citizens for more effective participation in community issues.

This is the first time a study of such nature has been attempted due to the lack of reliable information on the Sector as a whole and on volunteer participation in particular. The National Statistics Agency, INEGI<sup>4</sup> does, however, provide basic demographics on labor and on household expenditures. One of the objectives of the study was for INEGI to include several key questions on voluntary participation in their surveys, to subsequently provide ongoing statistical information for the public at large. Other sources of information for the study include the latest government information on citizen participation (ENCUP, 2003) research from national economic and social science institutions, practitioners and informed individuals from the Third Sector. Although Mexico was one of the countries involved in the Johns Hopkins Comparative 22 country study (Salamon & Anheier, 1966), the rapidly changing social and political situation of the country requires new information on the size, growth and nature of the Sector, and specific information on citizen and voluntary participation, which implies continuous refurbishing, updating and ongoing research.

The social and economic implications of voluntary action are also discussed in this paper since participation, solidarity and voluntarism are some of the important sources for the creation of social networks and trust, basic ingredients in the formation of the social capital (Putnam, 2000) within any given country. The numbers of participants, their economic contribution in volunteer hours in the formal and informal ambiance, plus the ways<sup>5</sup> in which individuals become responsible citizens become key issues in the search of solutions to the country's utmost needs: poverty, inequality, resource distribution, governance and civic participation.

## II. Introduction

The basis for engaging into a study of this magnitude is the lack of reliable information on the Third Sector in Mexico and on voluntary action in particular. There have been very few attempts at mapping the sector and with the information we have available the number of CSOs is said to be around 20,000.<sup>6</sup> Although a series of comparative and worldwide studies have been completed such as the Johns Hopkins Comparative Study and the World Values Survey, the data and conclusions arrived at do not paint a correct picture of the voluntary activities within the nation. For example, it is hard to understand that in a country such as Mexico where there is barely government support for the sector, we are just

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<sup>4</sup> Instituto Nacional de Geografía y Estadística. (National Institute of Geography and Statistics).

<sup>5</sup> AMEVAC (Mexican Association of Volunteers) This organization has studied voluntary action in Mexico City and the metropolitan area.

<sup>6</sup> CEMEFI Directory has around 7,500, and these are considered associations that give service to third parties, which means not all civil associations are included.

beginning to find out the amount of money the actual government gives out to Mexican CSO. In a recent study, devised due to a new transparency law where government information had to be publicly available, most information can now be found on the websites for the different Secretariats. In looking into this public information it was discovered that some of the funds that had been destined to help organizations continue on with their work have not been used (CEMEFI, 2003). The cry of non-support in funding that comes from within the organizations throughout the country may have to do with the lack of knowledge on where to begin looking for it. This does not mean that these funds are enormous, but they could be considered substantial. In 2003, the federal government subsidized 2,606 CSO with approximately 1 thousand 80 million pesos equivalent to around 100 million US dollars, thus assisting 2675 development projects. The main source of these funds were: Indesol<sup>7</sup>, Banobras<sup>8</sup>, Pemex<sup>9</sup> and the National Lottery.

If we look carefully into the worldwide studies mentioned above, certain discrepancies become apparent and they require a more ample explanation. For example, if we looked at the World Values Survey of 1999-2002, (Hodgkinson, 2003), based on questions from the European Values Study we are told that on the questionnaire, the questions related to membership and volunteering were quite limited<sup>10</sup> The paper explains... *"no questions were asked on the time volunteers spent volunteering nor what they did when they volunteered"*. Also, that *"the lists of types of organizations and activities for volunteers provided in these surveys were determined before there was a serious attempt to classify volunteer activity"*. Although in general, it must be said that this study is useful for researchers to get an idea of the changing values and value systems around the globe, one cannot expect this study to refer exclusively to volunteer activity. What was taken from this investigation was a generalization that was useful for a relative comparison within nations and geographical regions. It also helps to explain values and beliefs covering countries in all six continents. However, if we look at the numbers for Mexico, it is interesting to see the rate of volunteering for Mexico which is 36% of the adult population counted as volunteers. This number compares to the US, being 66% and Canada 47%. It is also interesting to see that, volunteering is higher than in Western European countries such as the Netherlands (31%), Denmark (32%) and Belgium (33%), and close to Britain (43%), countries with a long tradition of volunteering and several, with large government subsidies and support for this kind of activity.

In looking at another important comparative effort, the Johns Hopkins Comparative Study, Mexico comes out as the smallest provider of employment (0,2%) , compared to Sweden (8,2%) and the US (4,6%) and the international average

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<sup>7</sup> Indesol. Instituto Nacional de Desarrollo Social. (National Social Development Institute)

<sup>8</sup> Banobras. A Mexican government bank for building purposes.

<sup>9</sup> Pemex. Petróleos Mexicanos ( Mexican Petroleum Company)

<sup>10</sup> Op. Cit., p.37.

being 2,5%. These results come from a 24 country study where the levels of volunteering were expressed as a proportion of total nonagricultural employment.

Both these studies are examples of comparative efforts that ask the same questions in all countries. What we would like to address for this particular research project is : Can the same questions be asked in all countries? How deep do these studies go? What more has to be done to begin understanding each country's different realities? A good example of the kind of research that is a rich source of steady information are the Independent Sector series (Giving and Volunteering USA) done for the US. These questionnaires are constantly being revised for the individuals that answer them. They contain comparable data and cross-analysis that can be statistically used time and time again and the results are public. This is the kind of information that must be made available to the Mexican public on the state of affairs of their voluntary and non-profit sector, it must be up to date, reliable and comparable.

For starters, several recent Mexican studies are beginning to reveal information on participation. Data from the 1993 National Mexican Economic Census tells us that in that year, the Mexican non-profit sector had operating expenditures of 0.5% of the gross domestic product. In general, the above information becomes controversial, since the existing data was reporting about 12% of the adult population as volunteers. A partial survey (AMEVAC, 2003)<sup>11</sup> where Mexico City and Valley of Mexico were surveyed<sup>12</sup>, the proportion of the adult population volunteers was reported as 16.6%. This area is considered urban concentrating the lion share of the country's economic activity. The questionnaire used for this survey was based on the UN Volunteer handbook created by the Independent Sector and the UN Volunteers during 2001, the International Year of the Volunteer.

In particular, the Mexican government through the Ministry of State,<sup>13</sup> has taken onto itself to make two consecutive studies, on citizen participation: ENCUP<sup>14</sup> 2001 and 2003. Furthermore there is another survey that could also be considered important for our purposes, the National Survey on Values, Citizens and Democratic Culture from 1999 by the National University<sup>15</sup> and the recent electoral institute, IFE<sup>16</sup>. The studies differ in a few of their questions as focus groups were tried out and questions were refined from one to the next. They were basically designed to understand Mexican mentality in politics, voting patterns

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<sup>11</sup> AMEVAC, Asociación Mexicana de Voluntarios, A.C., (Mexican Association of Volunteers).

<sup>12</sup> The area considered in the survey is Mexico City and its adjacent metropolitan area with a population of approximately 18.65 million inhabitants in 2002. One of the largest, if not the largest, city in the world.

<sup>13</sup> SEGOB, Secretaría de Gobernación, ( State Secretariat )

<sup>14</sup> ENCURP, Encuesta Nacional sobre Cultura Política y Prácticas Ciudadanas ( National Survey on Political Culture and Citizen Practices)

<sup>15</sup> UNAM, Universidad Nacional Autónoma de México, ( National Autonomous University of Mexico)

<sup>16</sup> IFE Instituto Federal Electoral, (Federal Electoral Institute)

and citizen participation. Several questions had to do with associative practices, which could be useful knowledge for organizing volunteer activity.

The results of the latest ENCUP Survey set the stage for our own research. There are several issues that begin to paint a picture in what Mexicans value and how they would most likely participate. First of all there seems to be a low on trust between citizens. Nine out of 10 Mexicans agree on the phrase: "*If I don't take care of myself, no one else will*", However over half of the surveyed population agreed with the phrase: "*most people practice solidarity with others*" and the same amount agreed that: "*People should compromise first with their community and second in their own interest*". But in general (72%), Mexicans think that..." *people basically worry only about themselves*".<sup>17</sup> These answers have to do with individual values. When we take an overview of the institutions, the level of trust is said to express the resistance of cooperative disposition toward established institutions. On a scale of 1 to 10, people trusted doctors (8.2), the army (8.1) and the Catholic Church (8.1) the highest; social organizations fell to 7.4, the lowest grade was given to the police (6.2).

What about participation? Basically, most people (71%) think that they are co-responsible with the government in solving public issues. In these answers we can see the great differences between various educational levels, for example: In people with less schooling, one out of every two people (52%) answered that they feel this, while 9 out of every 10 people interviewed (85%) with postgraduate studies answered positively. On the other hand only 2 out of every five interviewed identify a problem that they would like to help solve and over half of them (57%) think they can influence government decisions. This number indicates that people do not believe that they have the power to change the way things are in their community either by direct action or by working along with the government. This also implies that they do not believe that the people that they have elected to public positions have anything to do with them. They think (56%) that it is very difficult to get organized to work with others on a common cause and only 6% on those interviewed ever tried to ask their representatives for help in the solution of a public problem. Only 4 out of every 10 people have tried to get organized to solve a community problem and have volunteered in some shape or form in some community activity, although most people (85%) have donated either money or goods to charity. One out of every 4 declared having belonged to a religious organizations vs. only one out of every 20 declared having belonged to a philanthropic or benefic organization.

Looking at the previous figures there is much food for thought in as how much Mexicans participate, are willing or have the possibility of being or becoming volunteers. These results should come as no surprise when we look at Mexico's historical background and how culture has influenced citizen

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<sup>17</sup> Interestingly, this number changes to only 5 out of every 10 people that have a graduate degree.

participation. At least half of the population does not believe that their personal actions matter, they are not willing to work with others for a common cause and are not used to participating. There are serious considerations for public policies that should be designed to instill cooperation and participation among the citizenship. It is hard to work with and for others when you do not even trust the people that are supposed to protect you, the police. It also shows the great variation of opinion and will to participate as educational levels increase.

These results weave into the latest findings that look into how Mexico will reach the Millenium Development Goals. (Fuentes & Montes, 2004) In this analysis, the authors see the urgent need to attend vulnerable groups to tip the balance of inequality. Many factors were taken into consideration: the urban-rural differences, the fact that there is a North-South divide, with great regional disparities in terms of education and infrastructure. The indigenous groups are the ones worst off in terms of poverty, illiteracy levels, gender equity and basic infrastructure. Participation in social issues by the general population is diverse and unequal, as is, for example, wealth and education distribution. These results can provide an informed basis for decision making in the government public policy arena and reveal ways, especially for established CSOs to enable citizens for more effective participation in community issues that are crucial for the development of the country.

### III. Historical Background

The relationships between government and CSO in Mexico have been studied and commented by different researchers (Butcher, 2002)<sup>18</sup>, (Verduzco, 2003). Other authors have provided a vision of civil participation looking back into customs and traditions of the indigenous population in Mexico reflecting on the influence of the Spanish culture from the 16<sup>th</sup> century until the present. (Reygadas, 1998), (Arredondo, 1996) (Aguilar Valenzuela, 1997) & (Olvera, 2001) It is important for this paper to present a basic historical perspective to serve as the backbone of understanding to participation and voluntary action, since the influence of how people become active participants in society is relevant for voluntarism in itself. Precisely from the need to understand diverse and different ways that people become engaged is how this study has come about. There are a few historical aspects presented here that have been mentioned before (Butcher, 2000). More have been added to provide a complete context that will sustain the culture that evolves around voluntary service.

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<sup>18</sup> Part II of this paper amply considers precise historical periods and social movements in Mexico. *A New Perspective in Voluntarism and Citizen Participation in Mexico : Recreating Civil Society/Government Relationships*. Fifth International Conference of the ISTR: Transforming Civil Society, Citizenship and Governance: The Third Sector in and Era of Global (Dis)Order. July7-10, 2002. University of Cape Town Cape Town, South Africa.

As the historical process is reviewed, it gives an outline of how recent in Mexican history civil participation begins to gather momentum. Some authors speak of organized civil society as emerging in the sixties when NGOs proliferated around the globe (Miraftab; 1997: 361-375). Others, propose a sense of civil involvement after the 1985 earthquake in Mexico City and several surrounding states, when a surge of solidarity sentiment was channeled into new organizations that distributed goods and services to those affected by the natural disaster. Thus, at this time, fostering more of a “civilian” presence in voluntary action instead of only the customary “religious” oriented volunteering, by giving people the chance to participate freely in a community issue. A number of these efforts were lost however, after the novelty wore off and public trust declined when the government took over some of the relief distribution. The Mexican way of “giving” has not traditionally been by participation, but by channeling funds through the Church and civilian organizations. Voluntary action and extensive expressions of solidarity have been ever present, but not in the Tocquevillian tradition. Citizenship as a concept, and the idea of civil society in Mexico was practically non-existent in the XIXth century, to the point of being called “imaginary citizens” (Escalante; 1992).

One must go farther back in Mexican history to the pre-colonial times to understand the culture of the indigenous population and its organizational structures of cooperation and mutual support. In Aztec times, the social unit was the *calpulli*, made of people of the same social background, owners of land where individual and collective action took place, supporting its members in every aspect of social, economic and political life it could be considered the predecessor of what would later become social assistance. Another predecessor would be the *tequio*, where when one member of the community had received support, he had the obligation of reciprocating in equal amounts providing the same quality of the service rendered. *Tequio* also referred to relationships with government or religious authorities, later on, the Spaniards imposed this activity as tribute. In modern times it could be translated into a form of taxation. Later on, other forms of societies, imported from Europe, the co-fraternities (*cofradías*) were the only allowed form of lay participation, but always under some sort of vigilance from the Catholic Church. These forms of organization during the colony played an important role for solidary forms of support, evangelization, social integration and subordination. (Bechtloff, 1996). There was very clear cut social structure in place at the arrival of the Spaniards, but the imposition of the new religion shifted this structure in many ways. The Catholic Church destroyed the problem solving capacity, the reciprocity and solidarity customs and traditions that the indigenous population had established to sustain and address community problems, introducing the concept of social assistance or welfare, based on an idea of Christian charity.

Researchers continue to explain the history of “civil organizations” covering the last four decades of the century (Méndez; 1997: 103-123), thus explaining in economic terms what could be considered the Third Sector in Mexico, at the same time classifying these organizations under eight possible social forms of participation: self-reliance, self effort, institutional social assistance, emergency social assistance, patronage, corporativism, neo-corporativism, social mobilizations and social co-efforts. In 1990 there were around 10 million people in extreme poverty conditions and 1996 there were at least 17 million people in the same circumstances. Actually, in both relative and absolute numbers, we could say there are more people under the poverty and extreme poverty line now than there were at the beginning of the XXIst Century. The present government has presented encouraging figures that show this situation slowly changing. The numbers should be closely looked at to see if these correspond only to a new classification of “poverty”. This situation is presently leading towards a redistribution of the workforce throughout the country and the migration of skilled and unskilled labor to other countries as a means to increasing earnings in the pursuit of a better quality of life. Over time, it also tells us a story of inequality which explains in a way, a widening of the social gap from the very beginning.

After the war of Independence and into the Reform of the state, jurisdiction changed and some institutions were taken over by the State, the Church was prohibited to be the pivotal provider of social services, but the state proved to be a less effective provider. The new individualistic and liberal ideas of a minority “automatically” transformed all men and women into individual citizens. After the Mexican Revolution in 1910, social welfare was considered a social right, and a secretariat of Public Assistance was created, while some private institutions still in continued on. Then came the dictatorship of one individual, Porfirio Díaz until 1930. After he left, a series of presidents followed and transformed the political participation into a dictatorship of a one party rule: the PRI<sup>19</sup>, which monopolized societal expressions of solidarity and social services many times creating relationships with the population creating “official community programs”. It must be said that there were many of these programs: SOLIDARIDAD, PROCAMPO, PRONASOL, to mention a few.<sup>20</sup> The name the present government has for similar national social programs is PROGRESA and OPORTUNIDADES, although there has been an effort to erase many of the old political tones that these official organizations had in the past with a great

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<sup>19</sup> PRI , Partido Revolucionario Institucional, (Institutional Revolutionary Party)

<sup>20</sup> More information on the decades of how government social programs functioned can be found in a publication (mimeo) by Dr. Rodolfo García Zamora, from the Universidad Autónoma de Zacatecas, who participated in the Masters program of Social Economy at the Universitat de Barcelona and the CIES. July 9-10, 1999, Barcelona.

emphasis in getting rid of paternalistic overtones. In the later years, neo liberalism transferred onto society more welfare functions, thus abdicating to a point, some of the responsibilities of the social revolutionary pact, and also translating the management of the economic project to civil society without the corresponding transfer of the necessary resources or the favorable laws in place to be able to succeed, thus in essence what has happened is that “... *most assistential practices are kept and actualized within the old colonial imagery and contribute to the general reproduction in today’s society*” (Reygadas ; 1998: 53).

These ideas of assistance<sup>21</sup> and dependency pattern mean in essence, that practices are established to take care of the results of a problem without making a proper community needs assessment that will reveal the root or the cause of either the conflict or the problem. In reality, the majority of the population has not transferred this historically paternalistic approach from both Church and State, and still expects to be taken care of in a way. When this does not happen, because of broken political promises or inability of the State to cope, each takes care of its own, and solidarity towards others, falls back into family and communitarian tradition. There is a question of how long this may last, even though traditions die hard, the economic forces at hand are quickly breaking up family structures as migration begins to shape and mobilize the population. As State promoted agriculture programs fail and credit becomes unavailable, many are forced to look for other options of survival. The migration to other regions within the country or across borders that begins as being temporary, many times ends up being permanent as Mexicans find other places of labor that will better their economic situation.

Inequality also seeps deep into the problem of democratization in Mexico (Hoyo, 1997), there is a *formal* democracy, not a *real* one (González Casanova, 1982). Things, however, are changing rapidly as people become conscious that their vote now means something. They are also becoming aware that politicians cannot get away with what they used to and that the public is beginning to ask for accountability of action in politics. It is only until recently that politization, which is not the same as democratization, started taking place after a 70 year rule of a single political party, the PRI<sup>22</sup>. The State has not been able to support the increasing societal needs. Charges of corruption and mismanagement caused this party to lose grip and influence in the country. Since the last presidential elections, this ruling party has lost seats in Congress and in State legislatures; and the 2000 presidential elections pointed Mexicans towards a different panorama

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<sup>21</sup> The term assistance or assisting practices is used instead of a word that would have no translation into English: *asistencialismo*, which is a coined term on the way the Catholic Church and government institutions have traditionally proceeded in a paternalistic approach to helping the needy. It became a “way of life” that has historically produced dependency.

<sup>22</sup> PRI, Partido Revolucionario Institucional ( Institutional Revolutionary Party)

for the future. As of July 2000, the changes occurring with the toppling of a 70 year party rule has drastically changed the civil-society-government relationship. (Butcher, 2002)<sup>23</sup> This does not mean that during this time there were no other societal organizations such as communal and community organizations, but “formal” organizations were those under the supervision of a law that was not federal in nature. Recent changes came about as of 2003, with a new law called: *Law to Foment Activities of Well Being and Social Development*. However, there is still a long way to go in its implementation due to the work that must be done as far as the rules and regulations for the proper functionality of this law and its dissemination to the public as well as to the CSO that must abide by it.

What does this mean to voluntarism, civil participation and voluntary work in Mexico? How does this history affect voluntary service and civil society participation? Traditionally, voluntary work had to do with religious and moral obligations, or was looked upon as social welfare issue. In rural areas, community participation, a form of voluntarism, has never been considered volunteering and many groups outside of cities have not become in a strict sense, legally formal organizations or voluntary associations. Facts tell us in a 24 country comparative study from Johns Hopkins that the amount of formal volunteering in Mexico. Of all the countries researched, it is the one with the least formal volunteer participation, and the smallest non-profit sector in Latin America. (Salamon, Anheier, List, Toepler, Solowski and Associates; 1999). This may have several explanations; one being that goods and services contracted by governments in other countries go to no-profits, and this indicates a healthy relationship between those two sectors. Not so in Mexico whereas, the relationship between the nonprofit sector and the government has been very complex. (Aguilar; 1996) Some NGOs were seen by the government to be a threat to public stability. Many services that NGOs and non-profits cover in other countries, are here provided by the government. Another important explanation stems from the idea of what volunteering is and who the Mexican volunteers are. In the Johns Hopkins study, initially, syndicated members had been considered volunteers until the realization that participation in these organizations was obligatory, undermining the volunteer element of free will participation. (Salamon & Sokolowski, 2003)<sup>24</sup>. In presenting various theories as possible explanation of the differences of volunteering around the globe, they concluded...“ *Mexico is an example of a “statist” society where volunteering nevertheless takes a mainly expressive form according to our data, contrary to what the social origins theory would predict. The reason for this, however is that 40 % of all volunteering in Mexico is for trade unions, which have been an extension of the state bureaucracy and the former ruling party (PRI). Because of this it is probably appropriate to exclude such volunteering as not wholly voluntary. Once this is done, the remaining expressive component of volunteering is quite*

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<sup>23</sup> Op. Cit.

<sup>24</sup> p. 87.

*small, only 20 % of the total, which is more in line with the statist pattern predicted by the social origins theory".<sup>25</sup>*

Voluntarism in Mexico encounters a series of barriers to participation that are very real, stemming from a variety of reasons: some of them are legal since the laws that enable social participation are intricate, sometimes confusing and not Federal in nature; taxation and deducibility are a provision of the Secretaría de Hacienda<sup>26</sup>. In beginning a formal voluntary organization, there is a decision to be made, becoming an *Asociación Civil (A.C.)* Civil Association, or an *Institución de Asistencia Privada (I.A.P.)* Private Assistance Institution. These and other legal and fiscal matters make the creation of new voluntary organizations a challenge. Other reasons have to do with understanding the concepts that underlie voluntarism, and the traditional way of solving community problems. This is where the cultural aspect plays out an important role, as this is also why most of the voluntary action itself is carried out informally, in a family context where solidarity towards others encounters resonance. (Butcher; 1999) The Johns Hopkins study also reveals different levels of volunteering in Latin America suggesting a *... "dualistic nonprofit sector in this region, with a more formal component oriented to middle class professionals, and a smaller, more informal segment oriented toward the poor.*

In a nutshell this simplistic historic timeline considers three distinctive periods that refer to the history of assistential institutions in Mexico (CEMEFI, 1996), that could be considered useful in setting a context for voluntary action.

### **First Period.**

The main characteristic for this period lies in the strong influence of the Catholic Church when founding the first institutions for social welfare. It begins in colonial times with the creation of the Hospital de Jesús in 1524 and ends in 1860 when the liberal faction took over control of the government.

### **Second Period.**

This period presents a strong presence of the State in the area of social welfare. It begins with the victory of the liberals in 1860, the secularization of Church property and ends in 1960, when civil society begins to appear as an active partner in attending societal needs.

### **Third Period.**

Civil society takes on a more predominant role in attending social problems and needs at this time. It began in the 1960's and still continues. Poverty and social differences became more apparent and overwhelming during the sixties and seventies. New groups formed as NGOs that were dedicated to a growing

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<sup>25</sup> Where industrialization has not progressed and working class elements remain weak, the result is more likely to be a "statist model" characterized by limited growth in both government social welfare spending and voluntary activity.

<sup>26</sup> Secretaría de Hacienda (Secretariat of Internal Revenue)

marginalized population. In the past twenty years poverty has accelerated even more and the capacity of the State is being questioned more and more as the economic crises increases.

On the other hand, it can be seen that civil participation is rising and continues to grow and this is where social change is beginning to take hold. Many new non-profits, NGOs, civil organizations, philanthropic and voluntary associations have formed in Mexico recently. According to CEMEFI<sup>27</sup>, in ten years, from 1984 to 1994, as many associations were created as in the 100 previous years, and numbers are increasing. There seem to be new ways of associating with each other, especially in Latin America (Arvitzler, 1999), thus transforming the way civil society interacts within and how it associates and exchanges goods and services with other sectors. In academic environments, classification has become an issue and some are closer to the Mexican context than others. Acquiring an understanding of voluntary action actions becomes imperative in finding theoretical frameworks that seem to work best for the country's social reality. More research is needed to actually quantify the number of volunteers in both formal and informal settings. This historical backdrop hopefully provides an explanation of the urgency of finding out how many people, be it in a formal or an informal setting, engage in participating freely in their communities for both their benefit and the common good's as well.

### III. Concept

Volunteering, in general, means work with no pay. However, it means many other things as well. Voluntary action around the world is essentially the same. But as we well know, each culture has its own interpretation, tradition and custom of carrying on the same kind action. Motivations change and realities are different. To begin this study, the first step became establishing a concept that would encompass all the diverse kinds of volunteer activities and expressions of solidarity that Mexicans engage in to decide where the line must be drawn to consider them voluntary service actions.<sup>28</sup>

Traditionally, people all over the globe have helped each other, especially in a time of need and disaster. Closed societies have become more open to participation forming groups and associations to solve community problems. In the second half of the XX century to the present, there has been a worldwide apparition of voluntary participation that has less to do with traditional and

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<sup>27</sup> Mexican Center for Philanthropy

<sup>28</sup> This paper presents worldwide volunteer concepts focusing on a volunteer definition for Mexican volunteer study.

church oriented activities and more to do with diverse interests such as: ecology, sports, gender issues, children, art , etc. However, there are common elements in the action of volunteering and these are:

- a) Non-obligatory
- b) Done for benefit of others: society as a whole or for an organization, not including family or close relatives
- c) Non-paid
- d) For some definitions, it takes place in an organized context

The first three elements of voluntary action or volunteering could be present in all definitions of which there are many. Some definitions are very strict in regards to the beneficiary and formulate the requirement that a “public good” is produced ( Wilson, 2000) and in this manner, excluding that volunteers work for their own group and/or organization. This definition would exclude all volunteering for political activity, for example. Other definitions suggest that the volunteer receives certain personal benefits as they incur in the act of volunteering, giving their time or sharing their talents with others, however we would like to name this action. One such definitions came about after a long study and was presented in 1989 by the American Red Cross...“ *volunteers are individuals who reach out beyond the confines of their paid employment and of their normal responsibilities to contribute time and service to a non-for-profit cause in the belief that their activity is beneficial to others as well as satisfying to themselves*”. This particular definition includes all of the above requirements adding two things, the way people act: in the spirit of service and serving others, and suggesting that personal motivation is an important element of voluntarism. Acting in favor of others requires for me not only to participate, but to serve and grow as a person in the process.<sup>29</sup> ( Butcher, 2003).

A recent book edited by Dekker & Halman in 2003, *The Values of Volunteering: Cross Cultural Perspectives*, presents an ample view of volunteering around the world. In its introductory chapter there is a clear analysis of what and how volunteering is understood in different contexts. This inclusive take on voluntary action makes a serious effort in revising and understanding the reasons for this action. Three elements stand out in this chapter, the first is the importance of values in volunteering...“ *People are guided not only by their passions and self-interest, but also by their values, their norms and their belief systems ...altruism may be one of those values, but so may solidarity, reciprocity, beneficence , injustice, equality and inequality, and in the end, religious values may be mentioned in connection with voluntary work*”. The second element has to do with culture...“*As it is becoming increasingly*

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<sup>29</sup> This could be considered a humanistic perspective on volunteering. An ample explanation of this view in : *A Humanistic Perspective on the Volunteer-Recipient Relationship*. Ch. 7. in Dekker & Halman, (2003).

*clear, culture matters. ...and because values are an important attribute of culture, it seems reasonable to assume that collective values are important to volunteering as well.*" The third important element in this particular chapter has to do with the revenues of volunteering. What is thought of a result of these actions in time, money and quantity of services rendered. These authors also the creation of *social capital* and *public discourse* as important results of associating voluntarily. One, social capital, having to do with "*social networks and the norms of reciprocity and trustworthiness that arise from them*", (Putnam, 2000), and the other, public discourse, which is a reflection on social problems, the articulation of collective values, and the development of political goals in a society. This seems to happen in the socializing that occurs through volunteer activity. Whether and how this activity (volunteering) contributes to civil society as a whole still needs to be thoroughly analyzed.

The fourth ingredient of voluntary activity (d), has to do with a certain amount of organized participation when engaging in this activity. Our definition of volunteer service will not include this ingredient. For the purpose of the Mexican study, the basis for this paper, the settings of the amount and organizational level required are important. Formal organizations are those registered with the tax authorities and considered CSOs. Informal activity covers the range from individual volunteering to loose structures and networking ongoing into full fledged structures that usually cover a specific community needs, but that are not necessarily registered or officially recognized. A Toolkit, designed to measure volunteer activities all over the world, uses a different terminology and divides this idea in "managed" and "unmanaged" (INDEPENDENT SECTOR and United Nations Volunteers, 2001).

Volunteering, should be observed both in structured and unstructured settings, and these, open the possibility for diverse isolated or/and individual action as well. Here, sporadic action will also be considered as there are some questions that have to do with how frequently people participate. In the proposed questionnaire there are questions on voluntary work in all kinds of situations so a wide variety of this activity can be considered. However, in the qualitative part of this study, the case studies will be built around different amounts and kinds of volunteer activity in places where we have identified a certain amount of networking and community building that are taking place. In depth, ethnographic interviews would be necessary to study individuals, and these are not being considered at the moment.

Recently, researchers have classified volunteers in relation with their interests or their motivations. (Handy, 1988; van Daal, 1990) Some authors say that three kinds motivations based volunteering could be distinguished: *reciprocal support*, the motivation being solidarity support bases on common interests, *service provision*, motivated by the donation of time and talent to others and finally *social involvement*, motivated by the idea of an active and participative citizenship. The

UN definition proposes four instances: *self help, philanthropy and service to others, advocacy and citizen participation* . In declaring 2001, the International Year of the Volunteer, there was a clear intention by the UN to promote more research on these activities and to disseminate the contribution these activities have had towards societies in general. It recognized the role that volunteering or voluntary service has in development..." *the volunteer represents and enormous reserve in abilities, energy and local wisdom that may help governments to carry out better, efficient, transparent, participative and focused programs and public policies. However, it is uncommon that volunteering be recognized as a strategic resource that may positively influence public policy and more uncommon that it be taken into consideration in international strategies for development. The International Year of the Volunteer (2001) offers a unique opportunity, to confirm on one hand an ancestral tradition, recognizing its potential as an asset in social promotion..."*

#### IV. Voluntary Service in Mexico

In general, in Latin America it could be said that alongside formal volunteer groups and associations, with a mostly Catholic influence due to the original institutions that began during the Spanish colony, it could be said that there is also a clear "informal" aspect to voluntary service activity ..."*when we talk about volunteering in Latin America and the Caribbean, it is necessary to recognize this silent and permanent form of donating time and service to the common good..."* (Thompson & Toro, 1999). Political and religious motivation could have been considered the main motivation to participate voluntarily in the past. In Mexico due to the 60s and 70s social movements mentioned in our historical review, new social actors become evident as politics begins to take hold and revolutionize they way participation is envisioned. In the present, varied motivations now scatter the panorama many times with a tint of advocacy for : poverty, women and children, environment and citizen participation to mention a few. This form of participation is seen less in the "charity" mode and has taken on more of a "solidarity" mode.

However, in relating to the culture issues mentioned before, several researchers have begun looking at aspects of culture that reveal the way Mexicans enact their participation. Verduzco (2003) sees beyond the structural-operative Johns Hopkins structure. He sees people in Mexico participating not from and individualistic standpoint, whereas individuals associate and get together to solve community problems, but from a more corporatist perspective, reminiscent of the (PRI) one party rule customary way of creating solutions. He speaks of a ..."*corporative participation accepting at the same time authoritative figures"*. The author explains that this is due to a colonial past where the indians and mestizos were subordinated to the Spanish crown and this, plus the influence of a strong authoritarian Catholic Church with intolerant attitudes, brought on the vertical

authoritative structure that people still seem to follow and encourage. After the State takes on control with the laws of Reform in the XIX century, in the beginning of the next century, these were transformed into political corporatist style of handling things when the PRI came into power. Another researcher, Reygadas (1998:53), sees the same images that have a strong effect on participation saying that ...*"most assistential practices are kept and actualized with the old colonial imagery and contribute to its general reproduction in today's society"*. This is one aspect of the ways of participation, accepting authoritarian figures and perpetuating the model which in the end creates dependency and paternalism. On an individual basis, however, this paternalism is not as evident ( Butcher, 2003:123). In a qualitative study undertaken with Mexican volunteers the results were that ...*"the volunteers in the study that rendered their time and talents in formal organizations did not particularly create dependency in the individual scope of action. The kind of relationship established was independent of the nature of the organization."*

*In one-on-one relationships, paternalism does not seem to be as active as originally thought, at least not to the point of influencing the individual volunteer attitude or the relationship. Since paternalism was considered historically the predominant cultural model in civil society participation, one would expect more "help relationships" than the ones actually found."* These individual attitudes could indicate that volunteering and voluntarism as a whole takes on different manifestations and there is a need for more research into not only individual acts of volunteering, but also into CSO structures in Mexico. As trends quickly change and they are beginning to do so in Latin America, a careful eye must include individual participation and well as community and group activities.

Taking into consideration culture, history and present situation, a concept of voluntary service for Mexico could be described as such: *"A volunteer is a person who by choice, pursues a non-profit endeavor, investing time and service into an activity that transcends family for the benefit of others and of society."* This definition encompasses all others, including the UN description and at the same time allows for both formal and informal voluntary activity to be included. The same goes for the kinds of activities volunteers engage in which are:

1. Self-help
2. Philanthropy and service to others
3. Advocacy and campaigning
4. Citizen participation and self government.

## V. Hypothesis

The informal aspect in volunteer service and participation is a key assumption for building one of the hypothesis for the study. Mexico is a country

of contrasts, especially in social contrasts (Vazquez Mota, 2003). Mexico is the ninth economy in the world, but it also is number 12 in terms of inequality in the world, and 4<sup>th</sup> in Latin America.<sup>30</sup> In looking at education and health here is where we can see inequality become more apparent. For example, in average, in terms of education if we take the lowest 10% of the population, it would take them 100 years to acquire the education obtained by the highest 10% of the population. In terms of having water in their homes, a third of the lowest 10% of the population has to fetch and carry their own water since it is not available in their homes. It is calculated that over 40% of the economy is informal, which means that the government does not receive taxes from that economically active sector of society.

How do Mexicans survive these extreme circumstances? In a study that has been considered a classic on the marginalized, Lomnitz (1975) describes how the lowest echelon of society lived in Mexico City, what is now the largest city in the world. What she describes, however gives us a look into the kinds of networks people create to survive and advance both socially and economically. These networks are where trust is extremely high and are based on reciprocity, not on altruism. The important aspect of this study is how these networks are established among equals, the meaning of family and extended family including the godfathers (*compadres*) that become emotional and economic substitutes for needs as life progresses.<sup>31</sup> These relationships become social resources of relationships and many times, of social mobility.

Why then, would volunteer activity appear, even informally when the social networks are so tight and exclusive? Custom prevails, it is part of the culture, and even though most of these customs require some kind of compromise between groups of people that could not be considered volunteering, in our definition, it exudes a general sense of generosity towards others. As people merge from marginality, customs and traditions transcend into the next social class and situation as some of the trust may be given to individuals that are not closely related, thus, helping others in their community. It is not uncommon for people to take on great responsibilities for others, even bringing up children or taking care of the elderly that are not related to them. People get together for support for both emotional and economic purposes: marriages and births, deaths and burials, celebrations and religious festivities. These are, places where we suggest that informal volunteer activity begins, at this level of society it is mostly based on religious beliefs, customs and on community needs.

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<sup>30</sup> Article written by the Secretary of Social Development, Josefina Vazquez Mota.

<sup>31</sup> An example of these godfathers, co-parents or *compadres*, when one has a child, godparents are chosen to take care of the religious upbringing of a child if the parents are absent. But this figure grows into every day needs, when there is a party in the community, there is a “padrino” for everything the party needs: cake, music, dress etc. This way the economic impact of social events gets redistributed. The influence of the “compadre” goes beyond and economic one, it reflects trust and someone to go to in times of need of any kind.

The first hypothesis of this study on voluntary service in Mexico is primarily, based on these assumptions of generosity and reciprocity amongst individuals, families and groups and secondly, on the knowledge of the difficulty in becoming a formal organization in Mexico, circumstances that have been described by several researchers and civil society experts on the subject. (Butcher, 2002). In informal circumstances, a great majority of the population does not pay all their taxes, many do not even need a tax deductible receipt to support of a cause. Here we can denote a large contrast with the formal and legally registered CSOs, where circumstances are beginning to change since Corporate Social Responsibility is becoming important in Mexico and many of the larger companies need CSOs to be institutionalized, transparent and accountable to receive any kind of economic support. Therefore, our hypothesis read as follows:

Hypothesis I. There is a large proportion of informal volunteer activity that remains unaccounted for in Mexico. The study will reveal the amount of this activity to be applied to economic values. Amount of volunteer hours multiplied by a internationally comparable factor, will provide the economic impact that volunteer hours contribute to the GNP.

Hypothesis II. Formal volunteer activity represents around 40% of the total volunteer activity and services rendered.

Hypothesis III. Volunteer participation and service reflect the diversity of solidarity options that Mexicans choose to express.

## VI. Study Design

*Project:*

*“Voluntary Service in Mexico”* is the name of the 12 month project that CEMEFI <sup>32</sup>is undertaking in response to the needs on information on the Third Sector and on volunteer participation in particular. Its main objective is to research voluntary action wherever this may be to *“evaluate and understand these actions and their contributions as far as quantity, economic value and influence on citizen participation in Mexico.”* In its general objectives the following were mentioned:

1. Quantify the number of volunteers in the country both in formal and informal contexts.

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<sup>32</sup> CEMEFI, Centro Mexicano para la Filantropía, (Mexican Center for Philanthropy)

2. Establish number “volunteer hours” through voluntary service and translate into contributions to the GNP. Donations and contributions of time, talent and money will be considered in the study.<sup>33</sup>
3. Formulate questions to be added the INEGI National Census that refer specifically to volunteering and voluntary action.
4. Understand both social and cultural processes that influence volunteer action.
5. Widen the knowledge on voluntary action and participation by including factors such as motivation, citizenship , associative levels, trust and spheres of action.
6. Study the role that volunteer association and volunteer action play both in participation and in the building of citizenship.

*Methodology:*

Quantitative as well as qualitative aspects have been taken into consideration in the elaboration of this study on voluntary service. The first will fulfill the expectations of objectives 1-3. The second pathway will cover the last three objectives. Both methodological elements need careful consideration and must be based on the concept of voluntary service previously studied and presented by the research team.

Quantitative Research:

This portion of the study will undertake a national survey with questions that will be geared to addressing the above proposed objectives. In the variables to classify the population by socioeconomic levels, the marketing concepts were applied ( marginalized E, lower middle class D, middle class C, higher middle class C+ and high A/B) other characteristics such as age, gender, schooling, work, occupation, religion and geographical region are also included.

The questionnaire is pre-codified with ten independent variables that define the segmentation criteria, and also 150 area-questions based on the established parameters. In the survey, qualitative aspects will be covered with ten open ended questions.

The sampling frame will be a stratified random sampling, based on the selection probability that is proportional to the size of the localities (PPT)<sup>34</sup>. The frame used will be the same as the one used by the IFE<sup>35</sup>, which are the ones that present more precision and are more actualized that the AGEBs of the INEGI, the national statistics bureau. No more than ten interviews will be taken on every

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<sup>33</sup> To add information to the results presented here, an important survey will here be considered. It is the Encuesta Nacional de Ingresos y Gastos de los Hogares, 2000 ( National Income and Household Expenditures Survey, 2000) which survey the same family on five different occasions.

<sup>34</sup> PPT, probabilidad proporcional al tamaño (probability proportioned to size)

<sup>35</sup> IFE, Instituto Federal Electoral, Federal Electoral Institute

initial point. It will be a household-based sampling frame. The sample size is 1500 interviews, with a margin for error of +/- 2.5% and 95% reliability.<sup>36</sup>

In accordance with population distribution in the Mexican Republic, more than a fourth (26.2%) of the interviews will be handled in locations that have less than 2,500 inhabitants<sup>37</sup>. Almost one out of every seven ( 13.4%) will be done in townships (*pueblos*), defined for having between 2, 501 and 15,000 inhabitants. Both of these are in rural areas. Urban areas are defined as those having a population larger than 15,001 inhabitants and they represent 60.4% of the country. They are divided into small cities ( 15,001-50,000 people), medium size cities ( 50,001-100,000 people) and large cities ( 100,001-500,000 people) and macrópolis those that have more than half a million inhabitants. Some academics and the INEGI determine as rural towns where less than 2500 people live. In this definition, the urban population of Mexico would then cover 73.8% of the country. The results will be integrated in accordance with both national and international criteria.

We are presenting a population distribution by size of locality and corresponding sample for the study:

POPULATION DISTRIBUTION BY SIZE OF LOCALITY AND PROPOSED SAMPLE

SIZE OF LOCALITY	-2.5	2.5 to 15	15 to 50	50 to 100	100 to 500	MORE 500	TOTAL
INTERVIEWS	392	200	130	88	310	380	1500
PERCENTAGE	26.2	13.4	8.7	5.9	20.6	25.3	<b>100.0</b>

It must be noted that there are many regional divisions that we can propose. We could use one that the research team considers adequate or use the ones already considered by official and government sources such as the one CONAPO<sup>38</sup>. This division is intergated by nine regions: Northwest (Baja California, Baja California Sur, Sonora y Sinaloa), North (Chihuahua, Coahuila y Durango), Northeast (Nuevo León y Tamaulipas), North Central (Aguascalientes, Guanajuato, Querétaro, San Luis Potosí y Zacatecas), West (Nayarit, Jalisco, Colima y Michoacán), Center (Distrito Federal, Estado de México, Hidalgo, Puebla, Morelos y Tlaxcala), Gulf (Veracruz y Tabasco), Pacific South (Guerrero, Oaxaca y Chiapas) and Peninsula of Yucatán (Yucatán, Campeche y Quintana Roo).

It is also important here to note that our sample is a national representative sample, which differs from other studies mentioned here as guidelines for the survey questionnaire such as the Peruvian study where their sample covered 10

<sup>36</sup> This is the one recommended by INDEPENDENT SECTOR and UN experts for comparability.

<sup>37</sup> These are called *rancherías*

<sup>38</sup> CONAPO, Consejo Nacional de la Población, ( National Population Committee)

major cities in that country. The sample is ample enough to obtain a statistically valid result in a national region by size of locality and region.

Furthermore, the individuals that will apply the survey have ample professional experience. The control and supervision will be set with a 6:1 ratio. The captured data will have a double verification system and will be evaluated with computer programs that are used commercially. (Stat, Statgraphics, SPSS, Pinpoint, etc.) The survey will be tested for validity answering the questions suggested and using the "Delphi method". The survey will also be piloted to correct any misunderstandings in the way questions are asked by those applying the survey

In the planning of the research, the three principles suggested in the UN Toolkit were followed. First there was an identification of the need for the information on volunteering and to whom these results would be most useful. The second issue became extremely relevant since, the advice was to "*profit as much as possible from the experience of others before organizing new research*"<sup>39</sup> Existing sources in Mexico on previous research on the subject was exhaustively reviewed both private and public institutions that conduct national surveys were contacted to include any relevant material into the study. It was decided to undertake a full-scale national survey, due to the lack of sufficient information in the field of volunteering and voluntary participation. Some studies and surveys have relevant information that will be useful to the study have been mentioned in the introduction and are included in the bibliography. The study will be both valid and reliable and what we consider of crucial importance, statistically relevant for national and international comparisons.

#### Questionnaire design:

In contracting a commercial firm to administer the survey there are two things that the research team needed to complete. One is the concept and the axis for research and main hypothesis. The other is the questionnaire design. The concept must be clear and must run through qualitative and quantitative portions of the study. It has become the basis for a questionnaire that is relevant for the Mexican population.

In revising questionnaires performed in other parts of the world a decision was made to take advantage of similar questions for similar circumstances. The basic questions that cover demographics and essential elements that make the survey comparable were included first. The next step was to see which survey fit in best with the Mexican culture. Some of these questions needed translation and adaptation for the Mexican mentality. The end result is a questionnaire with the influence of several surveys and studies which will be mentioned here for research

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<sup>39</sup> Ob. Cit. p. 11.

purposes. The paragraphs in the following section describe the general premises of each of these surveys and their utility in the design of this one.

A) The basic guideline for the this questionnaire were the UN suggestions in its *“Measuring Volunteering: A practical Toolkit”* ( INDEPENDENT SECTOR and United Nations Volunteers, 2001) The ideas at the end of the booklet are generalized and refer to volunteer activities, and is helpful because as the toolkit says, it is ...*“not based on any preconceived notion of volunteering”*<sup>40</sup> Although these items have not been tested for validity, the ideas of a questionnaire for a survey are well thought out for any kind of population, environment and culture. This is where additional items were included mostly focused on behavior. Especially in the section described as *“community activity”* in the Toolkit, the typical activity that is common amongst the indigenous and rural population are building schools and roads<sup>41</sup> and agricultural tasks.<sup>42</sup> It is also important to distinguish between religious volunteering and cultural issues since often times these are entwined.

This same UN Toolkit was used for the questionnaire of a recent survey applied form AMEVAC<sup>43</sup> in 2003. This survey covered what is known as the Valley of Mexico which includes Mexico City, the Federal District, and the metropolitan area around it that occupies a part of the state of Mexico. The population surveyed amounts to approximately 20 million individuals. In general, the main result of the survey was that 16.2% conduct volunteer activities in this urban area of the country.

B) In Lima, Peru under the auspices of the CIUP<sup>44</sup> a survey entitled: *Encuesta Nacional de Donaciones y Trabajo Voluntario* ( National Survey on Donations and Voluntary Work) was applied in 2001 in an attempt to map voluntary work in all of Peru. Several important limiting aspects of the survey must be mentioned. These are related to differences in the questionnaire for our research purposes, a clarification proceeds here only to establish the differences between both surveys. 1. The concept used describes volunteering as...*“ organized and non-paid work, realized in benefit of others or for society at large through some form of social organization”*. Important trends in voluntarism in Peru surfaced after the application of this survey in the 10 largest cities in Peru. The results were that 34% of people surveyed had been volunteers in 2000. Most organizations (52%) that do volunteer work are not national, but local in nature, showing a volunteer motivation that could be more related to everyday needs and the solution of

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<sup>40</sup> Ob. Cit. p. 29

<sup>41</sup> One must be careful in these questions because some of this construction work in rural communities could not be strictly considered volunteer work. In the past regime, several government programs included construction in exchange for votes.

<sup>42</sup> These tasks were mentioned earlier and interviewers must distinguish between a reciprocity favor and a volunteer activity.

<sup>43</sup> AMEVAC, Asociación Mexicana de Voluntarios, Mexican Association of Volunteers.

<sup>44</sup> CIUP, Centro de Investigaciones del Pacífico

problems that have to do with subsistence vs. abstract or ideological principles. Religion turned out to be the first motivation for volunteering. An important observation is that in calculating the money that Peruvians donate and calculating the volunteer hours that people dedicate to this kind of work, the same methodology as undertaken as for the JHCP was utilized. The value in dollars for 2001 ascends to 281,103,581.00 USD.<sup>45</sup>

This information becomes useful since it is a survey applied to another Latin American country where there may be a great number of similarities. Our survey is statistically and methodologically different since it includes both group and individual participation. The questions included were useful as examples in the importance of creating questions for a Latin mentality.

C) Argentina engaged in a study on volunteer work, *Estudio Sobre Trabajo Voluntario*,<sup>46</sup> in 2000. Gallup, Argentina was in charge of the national survey. The results were that 26% of the Argentinian population said to have engaged in some form of voluntary work in the previous year. Several phrases from this survey are direct, to the point and have a practical guideline for our research. Such as : “ *Anyone can be a volunteer. You don’t need special characteristics to be one*”, to which the population responded affirmatively (81%). More than half (70%) of those surveyed did not agree that “*volunteers are basically people with a higher socioeconomic level*”. Phrases such as these include insight into the perception of a population and are useful to dissipate the myths in volunteering in geographical regions, in this case, Latin America. Economic distribution in Argentina and Mexico is very different and educational differences are also opposed. This is why each country needs to engage in understanding the regional aspects involved.

C) A survey that is being conducted in Mexico at the moment (May, 2004) under the auspices of the ITAM<sup>47</sup> in Mexico City also has to do with donations and volunteering. The results have not been processed, but the main premise of this research is to target donations in Mexico. This is a national survey designed around the 2001 Giving and Volunteering survey in the US. Although donations are not the main target of our research, there are questions in our survey structured to obtain information to ask about the donation of not only time but money and other resources as well. This is a logical format and the results can be comparable between both Mexican studies in the future.

D) Giving and Volunteering in the United States Series are surveys that for years have been the guideline in the creation of surveys and questionnaires on this subject. After an exhaustive revision of all these surveys, the one performed in

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<sup>45</sup> Portocarrero, F., Sanborn, C., Millán., Loveday, J., ( 2001) *Voluntarios, donantes y ciudadanos en el Perú: reflexiones a partir de una encuesta*, mimeo.

<sup>46</sup> Study on Volunteer Work

<sup>47</sup> ITAM, Instituto Tecnológico Autónomo de México. ( Autonomous Technological Institute of Mexico)

1996 seems to fit best our study purposes. The reasons being that this specific survey was developed by a national advisory board of scholars and practitioners seeking to improve the former questionnaires and where special attention was given to ... "demographics...therefore, oversamples of blacks, persons of Hispanic origin and affluent households were included in the study in order to trace the level of participation by these groups in the traditions of giving and voluntary service."<sup>48</sup> Another important feature has to do with levels of trust. As mentioned in the Mexican ENCUP<sup>49</sup> survey, trust is low institutionally and amongst individuals and the 1996 survey states that ... "new questions were added to the survey to people's trust in one another and the social behavior of contributions for that type of charity". In the trends reported as a result of this survey include data on both formal and informal volunteering<sup>50</sup>, an issue that is important for our research.

E) A South African presentation of results entitled: *The Size and Scope of the Non-profit Sector in South Africa*, (2002) as part of the JHCP, has been also enlightening to understand the cultural aspects of the non-profit sector in a locality and the difficulties when cross-country studies are attempted. It is also the report of an attempt to "map the size and shape of the civil society sector...it adopted a unique methodology precisely to capture the diversity and breadth of the sector". This methodology reflected civil society groups that had not been considered in the original methodology and needed to be included in the research project. Some of these groups were: co-operatives, stokvels, burial societies, religious organizations and political parties. Another set of distinctions were: developmental, survivalist and opposition NPO<sup>51</sup>. The questionnaire used for this study has been useful, since if it designed to capture all kinds of activities within NPOs.

#### Qualitative Research:

To reach beyond any survey, there are qualitative research issues that must be included to look into be able to comprehend expressions of "social solidarity" in Mexico. These issues also have to do with correcting the interpretation that people perceive in volunteering, since many of these expressions have never been considered, before this study, as volunteer activity in this country. Statistical data and cross variables from the survey will produce a certain amount of information on the size and probably on the scope of voluntary action. Even though some questions have been included encompass motivation, attitudes and significance in the life of a volunteer, the circumstances that involve the volunteer also become

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<sup>48</sup> *Giving and Volunteering in the United States, Findings from a National Survey*, 1966 Edition, INDEPENDENT SECTOR., Introduction., p xiii.

<sup>49</sup> Ob. Cit.

<sup>50</sup> Informal volunteering involves

<sup>51</sup> Non-profit Organizations

important plus the ample variety of possibilities and frameworks of action need to be included.

In creating comprehension of the circumstances where volunteering is involved, the qualitative aspect provides a wider vision of the nature of the phenomena in one given country. Here what has been chosen is a series of *case studies* (Stake, 1994), in a “collective case study” which, theoretically, it is believed that...” *understanding them will lead to better understanding, perhaps better theorizing, about a still larger collection of cases...*” that can represent the wide range of kinds of volunteering in diverse settings. For this portion of the study, large or small groups of individuals will be considered, instead of individual volunteers. The survey will single out if people that volunteer do so in a formal or an informal volunteer setting. The types of group activity can represent better how people get together to solve community issues. They must have:

- a) A certain degree of structure and they can be :
  1. Formal CSOs which would require for them to be legally registered and to have existed as an organization for over a year.
  2. Informal. This accounts for a sporadic association to serve a community, a group that works on a temporary basis, or a committed group of individuals that is not registered even though they provide an important service or have been working together for a certain stretch of time.
- b) An activity that must reflect what we have defined in our concept of what a volunteer stands for.
- c) A network of action of some sort for the benefit of others.

Due to the historical and cultural factors presented in the other sections of this paper, eight types of organizations were considered for the qualitative portion of the study:

- A) Church-linked organizations<sup>52</sup>
- B) Rural community organizations
- C) Popular organizations in urban settings
- D) Youth organizations
- E) Non-Profit organizations or CSOs
- F) Political organizations/citizen participation
- G) Community foundations
- H) Informal service oriented group ( health, education, participation)

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<sup>52</sup> IN Mexico, 87% of the population is considered Catholic, so the chances are a Catholic organization will be chosen, but many other religious preferences in the country also have active volunteer groups. The Catholic Church has been a strong motivator for social action, even in the times of the separation of Church and State plus a period of persecution in Mexican history.

Some organizations may cover several aspects of these descriptions, but at least six case studies are to be developed following a series of similar procedures. The aim is to answer several research questions such as: why do these organizations form? what needs do they respond to? what is their role and influence on their community, on society? how do they relate to other sectors: the state and the market, and what do their activities and modes or participating as volunteers reflect? Their main axis should be that they are organized and networking as volunteers to solve community issues. Case researchers seek out what is common and what is particular about the case, but the end result regularly presents something unique where all aspects are considered: the nature of the case, its historical background, the physical setting, other contexts including economic, political, legal and aesthetic; other cases through which this case is recognized and those informants through whom the case can be known. The Constructivist paradigm, (Guba & Lincoln, 1990) will be adopted. This paradigm which reflects a relativism ontology, a transactional epistemology and a hermeneutic dialectical methodology that will frame and reinforce methodological resources that will be undertaken on the *case study*, such as :

- Open ended questionnaire that includes the mentioned characteristics
- Semi-structured interviews
- Analysis of documents and recorded data

Since this national study becomes a first in its nature, it is meant to provide a better picture of solidarity and voluntarism. Although the survey will be applied to the adult population, in this portion of the study, special attention will be given to youth groups, with a case study, since it is in the early stages of development that many individuals learn to become volunteers. Service learning as such is not included in the curricula, but many private schools, in the larger cities in the country, include some form of community service to expose their students to inequality and poverty and foment the care of others.

## VIII: Final Comments

The social and economic implications of this research project are many. First of all, volunteers and voluntary service in participation toward the common good is of utmost importance to a country like Mexico in this moment in its history. This should be underlined in the building of a strong civil society. Myths will be dissipated on to what and how these actions arise and help create a much needed social and economic infrastructure. The extent of the economic value of “volunteer hours” will tell us the impact of these actions on the economy. In the

AMEVAC survey, which only pertained to Mexico City and the metropolitan area, the average time span that volunteers give are almost 6 hours a week (5.8 hours). In total they add up to 44 million hours a month (44.173 hours). In FTE in a 40 hour a week job those would represent 276 ,000 jobs. The market value of this work, assuming a 3.5 USD payment per hour, in other words a monthly salary ( which in Mexico is above the minimum wage, but is a low paying job), we are speaking of almost twenty thousand million pesos a year ( \$19,878,023,578.00) approximately 1.8 billion USD. These figures cannot be extrapolated, making our present study extremely relevant, since the make up of the region is complex. It is an urban population that concentrates most of the wealth of the country and is not comparable with the rest of the country, even considering the urban areas. Our research will hopefully provide information by regions of the country and by size of population as well.

Another aspect that could be theorized on the importance of producing information on voluntary actions could be mixed in with these. It was mentioned in the introduction that in a recent poll<sup>53</sup>, citizens in their majority placed trust in the army ( 8.1%) and the Catholic Church (8.1%) , as the institutions they could rely on the most, and placed the political parties ( 6.4%) and the police ( 6.2%) on the lowest end of a 1-10 scale. This only reflects the realities in as much as trusting their surroundings where as due to the constant disillusion, false promises by leaders and political parties, added to an ancestral indigenous communitarian tradition, the population has suffered to the point where trust is precarious and is not given, not even to the group that supposedly protects them. With this situation, they fall back on themselves, their families, extended families and close associates in a form of “*exclusive altruism*”<sup>54</sup> (Butcher, 2002) where each takes care of its own.

Due to a historical lack of trust, this situation brings on a barrier to act out looking for the common good for society. As a practical example, this can be illustrated in the recent figures (Inter-American Dialogue, 2004) of the flow of remittances into Mexico from US migrant workers for their families back home. In 1996, Mexico received 4.2 billion US dollars in remittances, this figure has sky rocketed onto 8.9 in 2001 and growing. This amount of money is translated into survival for many communities.<sup>55</sup> The report shows that in communities of under 30,000 people, the income perceived is 40% in remittances. “*These remittances*”, says the report “*are not only a major source for economic growth, but are also a significant force for social development*”. If family values and tradition are so strong, the future is uncertain once migrants either stay in their new home, bring their

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<sup>53</sup> ENCUP, 2003.

<sup>54</sup> In speaking of values, family is still the first value among Mexicans. This paper explains more about volunteer practices in Mexico and its present situation.

<sup>55</sup> *All in the Family. Latin America’s Most Important International Financial Flow.* (2004) Report of the Inter-American Dialogue Task Force on Remittances. January.

families to join them or until the next generation adopts and absorbs their new country's customs and traditions.

In what concerns voluntary participation in Mexico, it is interesting to observe that once migrants cross the border into the US, for example, they begin forming volunteer groups and clubs that support those back home and make things easier for others to also migrate. This level of association-ism is not observed before the migration phenomena, but is understandable when one is alone, does not speak the language and needs comfort from familiar customs. Needs push change to occur and also motivate people to associate voluntarily.

As we have observed both in this paper presentation and in others, historically, civic associations of volunteers, such as Alianza Cívica and Poder Ciudadano<sup>56</sup>, were some of the civic groups partly responsible for political and democratic transition in <sup>57</sup>the 2000 presidential elections, where the ancient PRI 71 year party rule was toppled. Civil society expressions are becoming stronger on what is becoming a learning process, and the realization that participation is a must. On June 27, 2004, approximately a million people took to the streets in a silent march against delinquency and corruption in Mexico City. Citizen participation, which is not the same thing as volunteering<sup>58</sup>, could be considered the first step towards the creation of volunteer action and *social capital* as well. In this theory, both "bonding", which are alliances between people who are more alike, and "bridging" which are connections between people who are different along some important dimension-race, socioeconomic status, gender-need to be reinforced in Mexican society, <sup>59</sup> inequality being what it is.

There is a true volunteer potential in these citizens that are waking up to the possibilities of changing their surroundings when they care enough and become organized to be efficient in the solutions to problems that are common to them all, corruption and government inefficiency, in this case. Many Mexicans be it in a "managed", or in an "unmanaged"<sup>60</sup> way, are already participating as volunteers, the purpose is to create awareness so that many more do so in the future. The UN<sup>61</sup> states that... *"voluntary action creates bonds of trust and encourages cooperation: in other words, it creates social capital. If the people who volunteer happen to be of different ethnic origins, religions and economic status, the fact of their acting together can help increase social harmony. Voluntary participation in public affairs...can also help to create a politically literate public, which is important for the preservation of democratic principles...people who are powerless as individuals can get things done when they*

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<sup>56</sup> Civic Alliance and Citizen Power

<sup>57</sup> Butcher, 2003. This paper is devoted to developing the concept of a volunteer in Mexico.

<sup>58</sup> To be a volunteer we would have to follow parameters set in section III: Concept.

<sup>59</sup> In American society, there is a need for more "bridging" to overcome these gaps and differences. Presented in *Better Together*, a report for the *Saguaro Seminar :Civic Engagement in America, 2000*.

<sup>60</sup> UN terminology

<sup>61</sup> Ob. cit. p. 7.

*volunteer together as a community...*" Volunteering can add value to the services that governments provide and can be a source to acquire skills for the workforce or validate to the contributions of the elderly onto society. In all, obtaining reliable information about volunteering is essential if these valuable contributions are to be developed to their full potential, finding out about both formal and informal participation will be key to educating both the government and the public on this invisible resource and what it can accomplish.

## IX: References

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## X. APPENDIX

1. Questionnaire in Spanish. *El Servicio Voluntario en México*.

