

# Strategy for Fostering Volunteerism



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**The Inter-American Initiative on  
Social Capital, Ethics and Development (ISED)  
Strategy for Fostering Volunteerism**

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## **1. EXECUTIVE SUMMARY**

In November 1997, the United Nations General Assembly proclaimed 2001 as the “International Year of Volunteers”. This recognition was not unexpected; some degree of volunteerism has characterized every civilization and society. Yet now volunteerism is being viewed as an integral part of a nation’s development, and a path to the creation and maintenance of social capital.

The UN defines “volunteer service” as actions that are non-profit, non-wage and non-career that individuals carry out for the well-being of their neighbors, community or society at large.

It may take the form of traditional customs of mutual self-help to community responses in times of crisis and effort for relief, conflict resolution and the eradication of poverty. Volunteers have contributed significantly to the welfare and progress of industrialized and developing countries.<sup>1</sup>

This report provides a brief overview to the character and diversity of volunteerism and civic service in Latin America. In particular, it aims to provide some ethical insights into the potential that authentic volunteerism has to strengthen and improve the quality of development – of a nation, community, and even the individuals involved in or benefiting from volunteerism.

Volunteerism is not without its detractors, who sometimes raise deep concerns about the misuse or exploitation of volunteerism, the corruption of its altruistic motives, and its potential to generate any significant and lasting positive impact. This report shares in many of those concerns, and attempts to raise the reader’s awareness of some of the moral dimensions that require careful consideration if volunteerism is to avoid such failings.

This report concludes with a set of proposals for the Initiative on Social Capital, Ethics, and Development (ISED) that are related to the ethically-desirable means and ends of volunteerism. These criteria can be used strategically to evaluate potential volunteerism programs, to help shape new programs, and as a partial basis for the monitoring and evaluation of on-going voluntarism programs and policies.

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<sup>1</sup> See <http://www.un.org/av/photo/subjects/iyv2001.htm>

## 2. NATURE OF VOLUNTEERISM

### 2.1 Definition

“Volunteerism” is most commonly defined as the use of or reliance on individuals who volunteer to perform social or educational work in communities, with little or no compensation.<sup>2</sup> The services provided by such volunteers, often over an extended time period, are critical to the creation and preservation of social capital. Often the work performed by volunteers is described as “civic service”, which leading academic Michael Sherraden defines as: “an organized period of substantial engagement and contribution to the local, national or world community, recognized and valued by society, with minimal (or no) monetary compensation to the participant” (Johnson 2004).

Volunteerism can mean more than just individuals offering freely of their time. The application of volunteered resources to support development and the public interest expands the scope of volunteerism considerably, to embrace the contribution of money and other resources to institutions engaged in development or community-building activities. The “voluntary sector” and “voluntary organizations” (“VOs”) are terms that were widely used in the United States in the early 1990s to describe what we now more commonly refer to as civil society, civil society organizations (CSOs), or Non-Governmental Organizations (NGOs). In the early writings of David Korten, he described voluntary organizations in the following way:

They depend primarily on appeals to shared values as the basis for mobilizing human and financial resources. Citizens contribute their time, money, and other resources to a VO because they believe in what it is contributing to society. They share in a value commitment to the organization’s vision of a better world. This value commitment is the distinctive strength of the VO, making it relatively immune to the political agendas of government or to the economic forces of the market place (Korten 1990).

Most NGOs depend to some extent on contributions (in the form of membership fees or donations) to fund their activities, and to the degree that they do so they remain a legitimate expression of “volunteerism”. Yet many NGOs also operate on the basis of receiving grants of funds from foundations and the government, and are in this context less directly “voluntary” organizations. This confusion also applies to volunteerism as defined as the process of using volunteers to pursue valuable ends in support of the public interest; some of these volunteers receive no pay, others receive a stipend, while others receive other forms of in-kind payment such as free tuition. The latter can be quite significant in terms of monetary value.

Further complicating matters is that in many instances, the “volunteerism” isn’t voluntary at all. Several countries (Costa Rica, Dominican Republic, El Salvador, Honduras, Venezuela, and Panama) require the “contribution” of some number of hours of

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<sup>2</sup> It is sometimes labeled “voluntarism”, although this term also has a second meaning in philosophy describing a theory or doctrine that regards the will as the fundamental principle of the individual or of the universe.

community service in order for students to graduate. Other countries include youth volunteerism and community service in their education policies (Argentina, Brazil, Chile, Uruguay), and in many instances these civic service activities are mandatory.

The private sector too is now being seen to “volunteer” to carry out civic service in a variety of ways. These may include having corporations cover the salary and expenses (up to a ceiling amount of time and/or money) of employees who engage in civic service projects in the community. Such individuals are not volunteering in the same way as an unpaid volunteer, yet from the beneficiaries’ perspective their civic service activities may be identical except that one volunteer will wear the T-shirt of a corporate “donor” and be receiving regular pay and benefits, while the unpaid volunteer will not. Where corporations volunteer to redirect some portion of the paid services of their staff (who are seldom if ever *required* to do this substitution of community work in lieu of their regular duties, but are encouraged to do so as a gesture to support good public relations), the corporations are the primary “volunteers” and the individual employees who are engaged in civic service while being paid as usual by their corporation can be viewed in the same manner as employees of an NGO.

Corporations are also finding other ways to become responsible and civically-engaged institutions, through sharing resources and facilities, sponsoring programs, offering special discounts on products or services to meet the needs of poor and disadvantaged persons, and other “socially responsible” measures – which tend frequently to have obvious value in public relations, and in fostering a business-friendly environment. Corporate philanthropy, and other forms of charitable activities, can start to push the horizons of “volunteerism” to very wide and imprecise boundaries.

There is even a new related phenomenon emerging that has been termed *voluntourism*. As the word implies, voluntourism combines vacation travel with volunteering at the destination visited. Large numbers of organizations – both nonprofits and travel businesses – already have active websites and are deeply involved in organizing volunteering vacations. This trend has also spawned some new vocabulary: *voluntourist*, *ethical holidays*, *travel philanthropy*, and more.

For the purposes of this paper, however, the term “volunteerism” will be limited to a description of programs organized and administered by the state, by non-profit or religious institutions, academia, or occasionally by private sector firms, in which individuals or groups of individuals (e.g. college students) perform civic service works in the community, often intended to serve the needs of the poor, those with special needs, and those inadequately served by the state.

## **2.2 Rationale for Volunteerism**

The phenomenon of volunteerism is rationalized by those who volunteer, who sponsor volunteerism, or who benefit from volunteerism on a variety of bases. Among the most common are the following:

- *Volunteerism is natural.*

Volunteerism grows from a natural desire of humans in a community to assist each other – what is historically called “mutual aid”. Volunteerism provides an opportunity for volunteers to fulfill their moral inclinations by demonstrating their concern or compassion for others in the community through constructive action, by expressing their engagement with issues of concern to them, or by actively showing their solidarity with others around them – particularly the poor.

- *Volunteerism builds social capital.*

In the modern context, many types of volunteerism occur in the form of programs involving sometimes significant numbers of volunteers, serving many beneficiaries. As these volunteer programs become more common, they arguably have become an important means to build social capital in a community or even a nation. Through the contribution of labor, time, energies, and intellect, volunteers jointly forge solidarity between social and economic classes, and with each other. Volunteerism forms a very tangible basis of trust, understanding, and relationship, while allowing the individual volunteer to grow in maturity, experience, and confidence.

- *Volunteerism is valuable for youth.*

Many volunteers are youth. By nature of their age and maturity, youth are largely excluded from formal social or political participation in most societies, but through volunteerism opportunities they are able to participate in a tangible way in the pursuit of broader public interest activities, and from that process acquire a sense of social identity and cultural pride.

- *Volunteerism is educational.*

One of the most compelling arguments for voluntarism is that it enhances the quality and content of education, at all levels. By involving students in civic service projects, student volunteers get an opportunity to learn from the world around them, to validate theories taught in the classroom with their field experience, and to engage with the larger community. Their schools and universities also benefit, by getting feedback on which theories are most applicable and effective, and by building closer relationships between universities and surrounding communities.

- *Volunteerism offers a fertile ground for research.*

Through voluntary or mandatory civic service projects in the community, universities are able to offer their students opportunities to test theoretical approaches discussed in the classroom. Feedback received from “the field” can, in turn, assist the universities to strengthen, refine, and direct their theories and assumptions, and to improve their data quality and coverage.

- *Volunteerism imparts moral values.*

As noted in an important study of volunteerism in the Philippines: “Voluntarism can also teach the young ethics and values like selflessness, human dignity, social justice, love of

country and service to others...voluntarism may help in molding the character of universities' constituents, especially among the students, which is one role of education" (Alangui 2002). While volunteerism may be of particular assistance in the inculcation of moral values in the young, it also allows more mature volunteers to reflect on and refine their own values as they engage in civic service – which in turn also empowers older and more experienced volunteers to become role models for the young to emulate.

- *Volunteerism expands public service.*

In many countries, the government is unable to meet the needs of many citizens for access to public services, care, and assistance. Through volunteerism, the reach of society is extended, beyond what government itself can afford or support without recourse to volunteerism. This direct expansion of society's earliest notions of mutual aid often meets many of society's most urgent needs, particularly in poor countries.

### **2.3 Volunteerism as a Continuum**

Analysts generally view volunteerism as a phenomenon whose characteristics span a continuum, distinguished by level of service, formality, and time commitment. At one end is *mutual aid* (informal care-giving and care-receiving among a community), while in the middle is found *sporadic* or *occasional* volunteering. At the other end of this continuum, volunteerism takes the form of *civic service*, which is more structured and intensive than other forms of volunteerism, with longer time commitments for the volunteers.

At the civic service end of the continuum, volunteers may not necessarily be "voluntary" (as in nationally mandated youth civic service programs), and they are given clearly defined roles. Civic service is also characterized by such attributes as goal directed programming, involvement of institutions, and "strategic investments".

Civic service is applied in a wide variety of applications, but among the most common are community development, education and skills development, civic engagement, health care and support, meeting basic needs, protecting or preserving the environment, addressing issues of human rights and peace, and a range of emergency services.

### **2.4 Brief Historical Overview in Latin America**

Volunteerism in any society is a reflection of the participation by citizens in their societies, and is an important means of building social capital. It is a reflection also of important cultural perceptions and values, which are shaped over time. Unfortunately for several countries in Latin America, the development of such a participatory culture – and the social capital that flows from it – was hampered by a history of military regimes who sought to eradicate citizen participation (e.g. Argentina, Brazil, Chile) or to constrain it within very limited bounds (Mexico) (Klesner 2004).

In other cases, such as in Cuba, volunteerism was harnessed by the state as an important means to achieve socially and ideologically important objectives:

The voluntaristic spirit, which led hundreds of thousands of Cubans to teach illiterate rural people in the early 1960s, is regularly used today by different government ministries to mobilize labor for harvests, blood drives, community cleanup and dozens of other activities. Voluntarism is also regularly used by NGOs... The fact that these values of social justice, compassion, solidarity and participation are represented in the government's and in the NGO programs does not of course mean that the NGOs are controlled or co-opted by the government. It suggests that these values are held widely by the population (Sinclair 2000).

Given this diverse history, the growth of volunteerism in Latin America has been irregular and, in general, slow compared with North America.<sup>3</sup> Latin America's levels of non-political organizational involvement are moderate, and its levels of interpersonal trust are ranked by analysts as low (Klesner 2004). Even where governments officially encourage volunteerism, the lack of appropriate policy and monitoring instruments make this phenomenon difficult to institutionalize and sustain.

The diversity of experiences with volunteerism across the region makes generalizations difficult, although certain findings do stand out. Clearly the existence of solidarity and social trust are important conditions conducive to sustaining and expanding volunteerism, yet recent studies of social trust indicate that Latin American countries rank low in this context, comparable to former Communist countries, and only slightly better than most African countries.<sup>4</sup> The same research did find, however, that in the context of volunteer work (in non-political organizations), Latin Americans fare quite well compared to citizens from other countries, with the exception of Argentina. At the other end of the spectrum, certain Latin American countries – Chile, Mexico, and Peru – rank nearly as high as the most developed democracies in the volume of voluntarism undertaken by their citizens (Klesner 2004).

In Latin America, neighborhood organizations and religious organizations have served as major organizers of volunteerism. Many people in Latin America believe that carrying out volunteer services is an integral part of their religious beliefs. In some instances, volunteerism based on religion is sponsored by international organizations, such as the Rome based Jesuit Volunteer Corps.<sup>5</sup> Among prominent Latin American faith-based volunteerism organizations is Hogar de Cristo in Chile.<sup>6</sup> Religious-based volunteerism has been especially prominent in Catholic social movements, such as liberation theology, in which *voluntariado social* or the social volunteerism movement was established to

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<sup>3</sup> According to the most recent data from the Johns Hopkins Comparative Nonprofit Sector Project, whereas 22 percent of U.S. adults volunteer, only 6 to 8 percent do so in countries like Argentina, Brazil, Colombia, and Peru. [Partners website]

<sup>4</sup> The World Values Survey applied one of their attitudinal variables (social trust) and three different sets of behavioral variables (membership in non-political organizations; volunteer work for non-political organizations; spending time with close friends, co-workers, fellow church members, sports colleagues) to evaluate the conditions of social trust that apply to Latin American countries. See <http://www.worldvaluessurvey.org/>

<sup>5</sup> See <http://www.jesuitvolunteers.org/>

<sup>6</sup> See <http://www.hogardecristo.com/navegacion/index.html>

broaden the base of church-sponsored volunteers away from the exclusive domain of wealthier but socially concerned elites (*asistencialismo*).

Unfortunately, little in the way of reliable or comprehensive data exists on volunteerism or its impact in Latin America. Countries and other stakeholders of volunteerism largely operate and craft their policies on an ad hoc basis, or based on narrow experience, leading many academics to advocate for funding for more substantial research to be carried out in this field. This lack of empirical data on volunteerism is a major impediment to improving the quality and scope of strategic applications in volunteerism by all stakeholders in the region.

## 2.5 Major Types of Volunteerism

In formulating an appropriate strategy for ISED's approach to volunteerism, it is important for ISED and the Inter-American Development Bank to be aware of the range of volunteerism. The description below provides an overview.

- *International.*

Many international volunteerism organizations are active in Latin America, mostly sponsored by major NGOs (e.g. Global Vision International<sup>7</sup>), religions (e.g. American Friends Service Committee<sup>8</sup>, Lutheran World Relief<sup>9</sup>), religious based NGOs (e.g. Habitat for Humanity<sup>10</sup>, Operation Blessing<sup>11</sup>), regional or multilateral institutions (UN Volunteers<sup>12</sup>), foreign universities (e.g. Stanford University<sup>13</sup>), or even foreign governments (e.g. the Peace Corps of the USA, active in 14 Latin American countries; Voluntary Services Overseas of the British Government, active in Guyana). In a recent survey, it was found that 93% of international volunteerism programs are administered by NGOs, and that the major areas of concentration include education, community development, and environmental protection (Johnson 2004).

- *Government Programs.*

Several Latin American governments now sponsor volunteer programs, although many of these are managed through state-run universities, and through public schools. As noted earlier, in Costa Rica, Dominican Republic, El Salvador, Honduras, Venezuela, and Panama some number of hours of community service is required in order for public school students to graduate. Other countries, including Argentina, Brazil, Chile, and Uruguay, do address youth volunteerism and community service in their education policies, but specific and reliable data on the types and extent of school age volunteerism programs in Latin America is either missing or difficult to access.

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<sup>7</sup> See <http://www.gvi.co.uk/>

<sup>8</sup> See <http://www.afsc.org/latinamerica/Default.htm>

<sup>9</sup> See <http://www.lwr.org/>

<sup>10</sup> See <http://www.habitat.org/>

<sup>11</sup> See <http://www.ob.org/about/index.asp>

<sup>12</sup> See <http://www.unv.org/about/index.htm>

<sup>13</sup> See <http://www.stanford.edu/group/vila/index.html>

- *School and University Programs*

Both public and private universities and schools throughout Latin America engage in civic service and service learning, with academic-linked volunteerism being probably the most prevalent form of volunteerism in the region. The applications are both extensive but also very diverse, ranging from weekend interactions to longer programs spanning one or more semesters.

“Service learning” is the most common form of academic-linked volunteerism. Service learning is a method under which students learn and develop through active planning and participation in organized service experiences intended to meet specific community needs. This form of volunteerism ideally is integrated into the student's academic curriculum and provides structured time for a student to think, talk, or write about what the student did and saw during the service activity. As such, it provides students with opportunities to use developed and newly acquired skills and knowledge in real-life situations in the beneficiary communities. Service learning also enhances what is taught in school by extending student learning beyond the classroom and into the community, in so doing also fostering the development of empathy and caring for others.

The earliest form of civic service based at universities in Latin America is *Servicio Social*, which started as a Mexican government program in the 1930s to enlist the (mandatory) support of medical students for a period of six months each, helping with the health needs of the rural poor. Other Latin American countries, such as the Dominican Republic and Costa Rica, adopted similar programs for their own medical students.

Not all of the university volunteerism programs are mandatory, however. The Universidade Solidaria in Brazil is a student volunteer program involving students, faculty, and community stakeholders. Many Catholic universities in the region sponsor voluntary programs as well.

University-based programs are, by their nature, exclusive, and involve primarily the elites.<sup>14</sup> Only a small proportion of citizens are able to attend universities, and these students are seldom from the poorest sections of the society. For many students involved in volunteerism programs, this may be their first opportunity to engage with their less fortunate fellow citizens in activities often intended to meet social needs. The universities are also roleplayers themselves, as institutions who sponsor and are responsible for their volunteers, and as partners with the beneficiaries in establishing, managing, monitoring, and maintaining the sustainability of the volunteerism programs. While not regarded as service organizations (outside their important role in providing education as a public service), universities are often regarded as privileged institutions who receive significant funding from the national treasuries of their countries, and volunteering allows them to “give back” to the community as responsible institutional citizens, reaching often different people than would otherwise be the case if the university only interacted with students, staff and faculty.

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<sup>14</sup> Only 6% of Brazilians are able to attend university, for example.

- *Faith-based Community Programs*

Much of the volunteerism that occurs in Latin America, particularly at the end of the continuum that is characterized by sporadic or short-term participation by volunteers, occurs through churches and faith-based organizations. These activities are intended as an example of faith in action, often drawing upon important religious values as the primary motivations for the volunteerism. The diversity of such activities is enormous, from simple measures intended to assist the poor (soup kitchens, donation of used clothing, and various community service projects) to more sophisticated and extended interventions such as tutoring programs, counseling services, provision of a range of social services, offering temporary shelters, or providing advocacy for persons in need. Faith-based communities may also be very effective in providing volunteers to assist in emergency disaster relief operations, or specialized professional services (e.g. medical services for the poor). Many faith-based volunteerism programs also involve donations of funds for supplies, food, medical equipment, clothing, temporary shelters, or other related needs.

The degree to which any faith-based volunteerism program is utilized as a means of proselytizing or advocating for a certain set of religious beliefs, values, or ideology is also widely varied. Some faith-based volunteerism programs are largely secular in their application, with no component intended to seek new members of their religious community, or explicitly to address religious values or beliefs.<sup>15</sup> Other faith-based volunteerism programs may, to the contrary, focus extensively (or even exclusively) on evangelization, spiritual discourse, or other forms of religious outreach. In some cases, faith-based communities will target their volunteerism assistance to needy members of their own faith, while in other cases the beneficiaries may be from many (or no) faith backgrounds.

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<sup>15</sup> An example would be the work in Latin America of the American Friends Service Committee, a Quaker organization.

### **3. ETHICAL EVALUATION OF VOLUNTEERISM**

The Inter-American Initiative on Social Capital, Ethics and Development (ISED) of the Inter-American Development Bank is involved in volunteerism in three main instances. First, ISED may from time to time have its own funding available to provide as grants to foster programs that involve volunteerism. Second, ISED may at times apply its financial resources to fund research into various aspects of the volunteerism phenomenon. Third, ISED is occasionally asked to evaluate proposals or on-going interventions that include a volunteerism component, or to provide advice in the design of such a program.

Before proposing a strategy for ISED to pursue in these three various roles associated with volunteerism, it is necessary for ISED to give thoughtful attention to the ethical implications of its strategic policies and actions. In all three instances, an ethical diagnosis would therefore best begin by the identification and consideration of the “means and ends” of volunteerism, followed by reflections on the values, advantages, and principal moral issues associated with this phenomenon. The objective of such an ethical evaluation would be to generate specific guidance relative to the Inter-American Development Bank’s relationship with volunteerism in Latin America, and to identify priority measures that ISED might pursue to improve the quality and positive impact of volunteerism.

#### **3.1 Volunteerism as a Goal**

Whether volunteerism is an inherently good and valuable goal, i.e. an end in its own right, is a topic best suited to philosophical examination, and is not pursued in any considerable detail here. Briefly however, volunteerism is constitutive of ethically desirable states, such as the achievement of a virtuous character: a virtuous person would be more likely to be motivated to demonstrate his or her concern for others through voluntary actions. Similarly, under social contract moral theory, achieving a state where society comes to value volunteerism would be desirable as this would indicate that social capital was strong, and that solidarity was reflected in voluntary actions. Under feminist moral theory, there is much attention given to our interdependencies evident throughout the many complex networks that comprise any society, and the giving and receiving of care necessary to allow human beings to mature and flourish (or even to survive). Feminist ethics would therefore hold that achieving a societal state where volunteerism was commonplace would be a very worthy and desirable goal, as this would reflect the motivations of many members of that society to offer and receive mutual aid with no expectation of monetary exchange. Other prominent moral theories, including deontological (Kantian) perspectives and various human rights moral theories, would be less likely to conceive of volunteerism as a specific goal, but the moral theory known as the capabilities approach might view it as an important means to a fully human life in many instances.

In projects or programs, the achievement of certain target levels of volunteering is often held out as a goal, although in reality such empirical benchmarks are indicators of, and proxies for, other important social goals – such as the creation of social capital, the

mobilization of youth in important social endeavors, or the flourishing of a culture of civic participation.

### **3.2 Volunteerism as a Means**

- *Volunteerism as a Means to other Goals.*

One of the most important goals of any society is to achieve a strong and widespread bond of trust, or social capital, as a way to ensure societal cohesiveness and a strong and positive sense of shared identity. Volunteerism has been shown to be an excellent means to pursue social capital, as it helps people connect with each other in shared endeavors directed at the common good, despite differences in status, education, age, gender, or wealth (some quite significant) that might otherwise divide them.

Many other important social goals are well served by the use of volunteerism as a prominent means. This includes constraining juvenile delinquency, supporting community development, and building networks of volunteers and former volunteers who may be able to offer each other mutual support well into the future.

Volunteerism also is a means to personal goals, such as gaining valuable work and life experience, furthering one's education, and creating a strong personal sense of identity with one's community or state.

In certain circumstances, such as in Cuba, large numbers of people are motivated and encouraged to adopt volunteerism to achieve specific national objectives – bringing in the sugar cane harvest, for example. Cuban medical doctors even serve as one means to support a foreign relations public goal, as many of them volunteer or are recruited under minimal compensation to work abroad in other developing countries, such as in Africa.

### **3.3 Values Associated with Volunteerism**

There are many moral values associated with volunteerism. A partial list would include:

- *Acting in the Public Interest* ~ Volunteerism responds to and addresses issues and needs that serve the community;
- *Collective Responsibility* ~ Volunteerism is often motivated by a sense that everyone has an obligation to assist and – to a reasonable extent – to be responsible for the welfare of others;
- *Compassion* ~ Many volunteerism programs are established on the basis of an expression of care and compassion for those less fortunate;
- *Empathy* ~ Volunteerism programs depend on volunteers growing in empathy with those whom they assist. This is the basis of understanding and trust that is essential to longer term effectiveness and sustainability of the program goals, and is an important element in the moral development of the individual volunteers;
- *Generosity* ~ Volunteers give of their time, energies, and intellect (and often of their resources too) in order to assist others, often forsaking opportunities for personal gain so that they can attend to community needs;

- *Humility* ~ Many volunteers are members of the elite, or are at least of higher social, economic, or educational status than most of the beneficiaries who they serve, yet in volunteering to assist others less fortunate than they, they express a sense of humility that in turn fosters opportunities for new relationships and the strengthening of social capital;
- *Justice and Fairness* ~ Volunteerism is often motivated by a sense that there are injustices that ought to be rectified in terms of the inequity and unfairness in the distribution of opportunities and resources in society;
- *Loyalty* ~ Volunteerism may be motivated out of a sense of loyalty by the volunteer to his or her community, ethnic group, or nation;
- *Moral Equality* ~ Volunteerism is based on the moral principle that all human beings are of equal moral value and worth, and that they should be accorded equal respect – a principle that is much threatened by the impact of poverty;
- *Patriotism* ~ Closely related to “loyalty”, many volunteers feel that it is their patriotic duty to assist others on this basis;
- *Respect for Human Dignity* ~ as moral equals, all humans are worthy of being treated with basic dignity. Volunteerism often responds to this conviction by trying to improve the standards of quality of life for poor or disadvantaged persons, so that they can achieve a life of dignity;
- *Responsibility* ~ Many volunteerism programs are based on a sense of being personally responsible for the welfare of others;
- *Self-respect* ~ Volunteerism often builds a stronger sense of purpose and value in both the volunteer and the beneficiary, in turn cultivating a healthy basis for self-respect and integrity;
- *Social Harmony* ~ By bridging across social and economic divides, and by providing much needed civic service and care, volunteerism does much to foster a valuable sense of social harmony and common purpose;
- *Teamwork* ~ Volunteers often work as members of a team, which may consist of other volunteers alone providing care and service, or more as a partnership team with the beneficiaries as co-equal members of the “team”. Teamwork instills trust and a sense of common identity, and a recognition of mutual interdependence; and
- *Transparency and Accountability* ~ Volunteerism is essentially a moral initiative, and therefore the program that sponsors volunteers must be transparent and accountable for its actions, use of resources, and management practices. Volunteers themselves must also be accountable to those who they serve or assist, in terms of meeting their own volunteer commitments and respecting their fellow volunteers and the beneficiaries. The beneficiaries share some moral obligations to be accountable for making effective and responsible use of the time and resources that have been volunteered to assist them.

### **3.4 Principal Moral Advantages of Volunteerism**

If a poor community is in need of both a basic water reticulation system to provide clean and affordable water and a storm water drainage system to control flooding, but the local government can only afford to do one of these infrastructure systems, what is to be done?

Both systems are vital to the health and development of that community, yet there isn't enough money to do them both. One solution is to involve volunteerism in the form of "sweat equity", in which residents volunteer their time and energy to provide all of the non-technical labor needed at no monetary cost. By not having to fund the labor costs, the local government is left with sufficient funding to provide the technical resources needed for both infrastructure systems. In cases such as these, volunteerism clearly offers many developmental, economic, and social advantages, but what moral advantages flow from volunteerism? And to whose moral benefit?

As described below, there are several distinctive moral benefits associated with volunteerism, affecting the community, the volunteer (and his or her institution), and the beneficiary.

- *Building Solidarity*

In the scenario described above, the community members join together to realize a common objective – the provision of improved infrastructure services. By all able-bodied persons contributing their effort free of charge, there is a sense of common "investment" in the community, and a strengthening of communal identity, trust, and teamwork. These moral attributes are essential to the formation of social capital – the "glue" that holds societies together despite the natural conflicts and divergent views that individuals within any society will have. This solidarity connects people within the community in an interdependent web of both need and – in this case – of mutual accomplishment and "ownership" of their new infrastructure. The community, through this solidarity, gains greater visibility as a coherent and empowered agent of its own development, able to engage with local government to seek collaborative ways to accomplish otherwise elusive objectives. If outside volunteers join community members in such an exercise, they help that community in its efforts to foster solidarity within the community, while simultaneously extending some degree of solidarity to a much broader (in some cases global) network of concerned, caring individuals.

- *Personal Growth*

Volunteerism challenges the individual volunteer to expand his or her moral horizons to embrace persons far beyond the more normal moral circles of family, friends, and neighbors. By thrusting the volunteer into an unfamiliar environment, and placing him or her into a relationship of donating one's time and energy to serving or assisting others who are essentially strangers, the volunteer learns important lessons in how many universal moral values bind all persons together. In many instances, volunteers will be confronted with differing moral perceptions, values, and beliefs, which may lead the volunteer to reflect upon the sources and relevance of his or her own values. Such reflective examination is a critical element in one's moral growth, as one shapes one's character to embody various virtues, and as one becomes aware of (and, in ideal circumstance, one attends to) one's vices.

The act of giving is a moral act that ennobles the giver and creates a bond of caring and community with the receiver. Volunteers (in most cases) give of their time, energy, and intellect to the direct benefit of others. The quality of giving freely of a gift – of

volunteering – is a deeply human experience, valuable for its own sake as well as for the good that flows from it. Being able to experience that gift-giving phenomenon, and participating in the positive impacts that flow from such voluntary service, are deeply meaningful to most volunteers, and to the beneficiaries whom they interact with. These meaningful experiences are moral “assets” that escape the cost-benefit analyses of economics, but which register intuitively as important and valuable to nearly all rational human beings.

Feminist philosophers and ethicists focus extensively on *caring* relationships, which are commonly found in volunteerism, and explain how both the volunteer (the “one-caring”) and the beneficiary (the “cared-for”) both grow and change through this experience, and become more effective within their own circles. Nel Noddings, a prominent feminist ethicist, argues further that there is no need to justify this caring:

As one-caring, I am not seeking justification for my action; I am not standing alone before some tribunal. What I seek is completion in the other – the sense of being cared-for and, I hope, the renewed commitment of the cared-for to turn about and act as one-caring in the circles and chains within which he is defined. (Noddings 1984)

- *A Focus on Public Service*

The premise of neoclassical economics is that individuals will pursue their self-interest through the maximization of income-constrained utility.<sup>16</sup> Arguably, when individuals perceive that a personal advantage is available if they aggregate their own quests for utility by agreeing with others on a common good, they will be inclined to do so, yet it is a stretch to apply this argument to explain why so many people sacrifice significant amounts of time, energy, intellect, and resources that instead could be applied to their self-interested projects to deliberate with others in order to achieve a consensus on what the common good consists of, and how it might best be achieved over time. Forging and sustaining such a consensus requires often considerable amounts of time, and those who participate in such processes are responding to what they perceive to be a civic duty – a moral obligation – to play one’s part in articulating and then collaboratively pursuing the common good.

“Public service” is the larger category of actions and resources required by any society to articulate, pursue, and accomplish a set of common objectives defined ideally through a process of democratic consensus. In many instances, public service objectives are met through the economy, as taxes fund a variety of resources and actions to achieve these ends. In all cases, however, there is not sufficient funding on hand to meet the expense of all the desired “common good” objectives, and in such cases the role of volunteerism – substituting voluntary labor (and sometimes other resources as well) for labor and materials procured through the economy can greatly expand the range and intensity of public service actions and accomplishments.

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<sup>16</sup> “Utility” generally is defined as a measure of the relative happiness or satisfaction (gratification) gained by consuming different bundles of goods and services.

Volunteerism has the benefit of raising popular awareness of the objectives that society identifies as the “common good”, and through volunteerism many more of these objectives are met. This empirical achievement is matched by a sense of common purpose and moral achievement, and by the cultivation of a “public service” ethic within that society or community.

- *Engaging Diverse Moral Agents*

All rational mature human beings make moral choices, based on their own values and the norms of the societies and groups that they identify with. As such, people are moral agents, exercising their autonomy to decide on what actions to pursue, knowing that they are accountable for the reasonably anticipated consequences of their actions. The natural human tendency is to remain in close association – and often close proximity – with other persons who share similar values. While this has many advantages, it does make it easy for individuals to default to group values and norms when confronting choices and deciding on actions, instead of reflecting on their own personal values as a guide to personal behavior.

Volunteerism in many instances brings together many moral agents with a similar set of values, particularly when volunteers are recruited through values-based institutions (e.g. faith-based organizations). Often, however, such volunteers encounter beneficiaries with differing moral convictions and priorities. In such instances, groups of volunteers are challenged to reflect on their own moral values, to seek understanding of the nature and extent of any values conflicts between their volunteer group and the beneficiary group, and to work with the beneficiary group to identify common ground. This effort of establishing a moral consensus may be carried out at a conscious, intentional level, or it may be forged subconsciously through myriad exchanges of views between the two groups. In most cases, achieving a consensus on moral values is essential if a true partnership between the volunteer group and the beneficiary group is to be achieved. A partnership of this nature may be necessary if the volunteers and the beneficiaries are to be able to agree on what actions ought to be pursued, who ought to be responsible for what, how the benefits of projects ought to be distributed among the beneficiaries, how performance ought to be evaluated, and how daily decisions ought to be reached.

There are often many cases where individual volunteers come together with other volunteers from very different cultural, economic and social backgrounds, for example when international volunteers work together with domestic volunteers. Even within an entirely domestic volunteerism program, there is likely to be a wide variation in personal values, principles, and normative perceptions. To be effective as a team, these volunteers will need to undergo a similar process of consensus-building, learning through dialogue and deliberation what values they share, and where they diverge. Conflicts between values are inevitable, and for many volunteers (particularly the young) this may be the first time that their culturally acquired values are questioned by others, by unusual situations, and ultimately by themselves. The process of being challenged to reflect on why one thinks the way one does – what values influence one’s attitudes and behavior – is initially unsettling, but it does allow individuals to become more aware of their own moral values and beliefs, and once so aware, to make up their own minds on whether

these acquired values truly reflect their own personal convictions. In this mix of many volunteers from many backgrounds, there will be significant opportunities for personal growth through reflection on conflicting values, enabling each volunteer to make personal, conscious choices about those values that he or she decides are most relevant and important.

### **3.5 Principal Moral Issues in Volunteerism**

The range of moral issues to consider when reflecting on volunteerism is extensive and varied. Volunteerism as a concept raises profound moral questions in societies based on free market economic values, as the essential character of volunteerism is to offer a valuable commodity – labor – without expectation of a monetary return. Does this mean that societies “value” freely provided labor less than labor that is paid for? Are the contributions of volunteers in terms of not only their “free” labor but also the opportunity costs of not pursuing paid employment recognized in market-based societies, or are such programs viewed as naive, exploitative, inconsequential, or otherwise inappropriate?

Similar important questions arise with respect to who is excluded by volunteerism, as the underlying assumption of volunteerism is that volunteers can “afford” to volunteer – they do not have economic obligations that would require them to seek paid employment. For many poor persons, the concept of taking time off to pursue voluntary service is incomprehensible, as they face many economic obligations to keep themselves and their families fed, housed, and healthy.

There are also concerns expressed that recourse to volunteerism (particularly short term voluntary actions) may be a way for some of the elites to assuage their own moral concerns about the plight of the poor without actually engaging in any more significant action to resolve the growing gap between rich and poor. This “looking good” concern extends to some corporations who engage in voluntary civic service within communities largely to burnish their public relations image, while staying far away from addressing the many challenging moral issues that pertain to large and powerful organizations and their relationship to poor, weaker individuals who are their customers, employees, or who are otherwise directly affected by the corporation’s actions or the corporation’s powerful political connections.

Evaluating the moral dimensions of volunteerism is complicated by a lack of reliable data. In a recent study on the limitations of volunteerism applied to civic service, the authors noted the paucity of existing research on some of the most important moral dimensions of volunteerism, and raised many important empirical questions:

Research on civic service has neglected to examine the power relationships and the resulting inequality between volunteers, hosts, and sponsors. Attention to power dynamics brings to light some crucial questions. Who has the opportunity to participate in service programs? Who benefits from the service programs? Do the hosts and host communities have a choice in program design and implementation as well as a their role in the process? Do the services provided build the capacities of the host community? (McBride 2006)

In addition to the larger issues described above, there are several particular moral concerns associated with volunteerism, as discussed below.

- *Impact on Public Sector Obligations*

Societies are structured within a framework of reciprocal obligations. Over time, institutions of government have evolved to attend to the common needs of society, including the provision of basic infrastructure services, health and education services, security and defense, and rule of law. In exchange, citizens are obligated to adhere to the legitimate laws and regulations of their society, to pay their taxes, and to avoid harming or infringing upon the rights of others. This web of reciprocal obligations is well defined in most societies, and citizens therefore have a range of “reasonable expectations” of what government ought to provide, and how government ought to serve.

Of course governments never succeed in meeting all of their constituents’ expectations. There simply is not the capacity in terms of resources, skills, institutional capacity, or time to accomplish all that is expected, even if from a moral perspective governments remain burdened to always demonstrate progress towards that utopian goal.

Volunteerism programs often intervene in the areas where government has failed to perform. Providing basic services to the poor, building basic infrastructure, assisting in health and education – nearly all of the activities that volunteerism traditionally pursues – can be seen as proper obligations of government. To many, the intervention of volunteerism seems to relieve the government of its moral obligations (under social contract moral theory) to deliver, although to accept this is to question the very premise of governance. An alternative concept is to view volunteerism as a “patch” – a temporary way of meeting a obligation that properly and morally belongs to government, but which government is unable to satisfy at the present time.

Over time, governments can become dependent on volunteerism to meet service delivery obligations. In such instances, governments are likely to become less motivated to meet their inherent obligations (particularly to the poor), at the cost of losing the opportunity to establish a sense of legitimacy in the eyes of their citizens.

A partial solution exists when governments join with volunteerism efforts in a partnership, allowing government resources to have a much greater impact than they would without such voluntary resources being brought to bear on the needs of the affected communities.

- *Sweat Equity*

One of the most common resources that volunteers bring to civic service is their time, intellect, and energy – commonly referred to as “sweat equity”. While in economics such labor can be empirically valued, as it often is when volunteers substitute their “free” labor in exchange for the paid labor that would have been required for government to accomplish any given task so that government monies can accomplish more, the organization of sweat equity requires a strong foundation of social capital within the

community. Unless a very large proportion of able-bodied persons volunteer their “sweat”, there will be potential for division and even possibly conflict between those who contributed their time and energy, and those who are free riders on the sweat of others – enjoying the benefits while not contributing to make it possible. Those who do volunteer to engage in such endeavors share a strong sense of “ownership” of the resulting development project, and are more inclined to maintain and improve it, but only to the degree that they do not feel like their efforts were exploited by those who chose not to participate. A critical mass is needed to mobilize a community to engage in a sweat equity project without the divisive threat that attends to a community that has a sense of a “lazy” group enjoying the fruits of the labor of the “virtuous” (or “naïve”) volunteers.

- *Mandatory Civic Service “Volunteerism”*

Many of the moral qualities that are associated with volunteerism derive from the altruistic character of freely contributing one’s time, energy, resources, and intellect to serve a greater good – the public interest – or the needs of particular disadvantaged, vulnerable, or excluded groups or individuals. What is critical to this quality is the sense of moral autonomy; one’s choice to volunteer is made of one’s own free will.

Many “voluntary” programs are not in reality voluntary. In many instances, for example, university students are required to contribute their time to participate in various civic services activities – without which they will not graduate. In other cases, there is so much peer pressure applied (as in the case of Cuba getting vast numbers of citizens to “volunteer” to bring in the harvests) that one faces grave social consequences for not participating. Being coerced or cajoled into participating in a “volunteerism” program doesn’t negate the value of the undertaking entirely – in many instances those who participated look back on these experiences as having been both meaningful and worthwhile – yet there remains a number of persons in any mandatory program of volunteerism who will feel exploited, undervalued, or disrespected. Even a few persons with such attitudes can effectively poison the team spirit and goodwill of a volunteer endeavor, and they may be branded as “spoilers”, yet the morally legitimate grievances of persons who object to being forced to “volunteer” warrant careful consideration.

From a moral perspective, it is dishonest to label a program as “voluntary” when in fact the participation is required. Civic service programs that require participation on some basis – as with students pursuing a course of studies – are voluntary to the extent that the student is not obligated to pursue that education at that institution, but the moral autonomy of the individual volunteer ought to be respected in the context of the actual volunteerism program itself, not under the umbrella of some larger life choice (to attend university). To this end, programs that are not truly voluntary ought not to be so designated; instead, such programs ought to be described as “civic service” programs.

While there is little doubt that many moral benefits flow from mandatory civic service, the essential act of the morally autonomous agent choosing to give freely of his or her time, resources, energies, or intellect is negated. By losing this quality, the potential for personal moral growth and for the cultivation of social capital is diminished, although at

present there is no available empirical data to compare the two alternatives in terms of impact on the participant/volunteer, and on social capital.

- *The “Value” of Voluntary and Uncompensated Service*

The trend in market-based economies is to expand the market to embrace more and more elements of human interactions – to “commodify” both material things and intangibles alike. Many perceive the payment of fees to adopt babies as approximating the purchase of human beings as “commodities”, and the many internet-based services that now charge fees to assist people to find friends or mates has commodified even human relationships at some level. Yet in this process – attaching a price and an empirical value to a resource, action, or relationship – the society is better able to incorporate the resource, action, or relationship into public policy, strategic plans, and development goals. The leading institutions of development arguably are the international and regional development banks, whose essential nature is to utilize the analytical model of the market to evaluate options when designing development programs and strategies. If you can’t put a monetary value to it, it doesn’t get counted.

Given this reality, there is a tendency by political leaders, public policy analysts, and others to ignore or discount the value of volunteerism. Volunteerism is often perceived as a phenomenon that exists outside the dimensions of normal public policy, and it is therefore no surprise how ineffectual most countries are in creating a policy context for volunteerism.

In a more pernicious view, volunteerism sometimes tends to be belittled or relegated to an inconsequential status by those within existing power establishments and institutions who are used to exercising power by means of the market. It is difficult for those with a strong market view of the world to understand how to value and place volunteerism; much less to incorporate it as a normal mechanism and “outlet” of society. There is recognition at some level among the powerful and those in leadership positions that volunteerism is to be commended and supported, that it is a key component of social cohesion and the formulation of social capital, but the mindset of the market lacks the vocabulary to evaluate or understand altruism. This is, of course, a larger criticism of the market, and volunteerism is but one instance of demonstrating that human beings are often motivated to carry out challenging and ambitious actions to assist other human beings without recourse to market-based incentive structures. Those in power who manipulate such incentives (and disincentives) are left slightly confounded by this phenomenon, but there is little novelty in pointing out that many of life’s most valued assets and experiences exist outside of the market framework.

- *Corporate Social Responsibility and Volunteerism*

Corporations are becoming progressively more active in voluntary endeavors, as described earlier in this paper. Many of these corporations and private sector actors seek to be “good corporate citizens”, giving back to their communities in ways that they deem to be appropriate and responsive to the relationships and opportunities that characterize their corporate experience.

From a moral perspective, the extent to which a corporation can be considered as a moral entity is quite constrained, as arguably it is impossible to not perceive a corporation's actions and character as reflecting instead the very human leadership of that corporation – the aggregated will of its directors. But even when we accept a corporation's good citizenship as simply the organized and aggregated motivations of its leadership, many question whether the allocation by a corporation of resources, staff time, or other assets to assist in civic service endeavors is morally equivalent to other expressions of volunteerism.

Among concerns expressed about private sector volunteerism is the authenticity of the motivation. Are the motivations of corporations to engage in such civic service activities open to question? Are they doing this voluntary act or project simply to portray a more favorable public image, so that their sales may improve based on improved customer loyalty?

Others questions whether a corporation is an appropriate moral agent of voluntary civic service, since it is possible to argue that a corporation's primary moral obligations reside with its shareholders, who have invested in that corporation with the expectation of receiving the maximum financial returns possible under law. By diverting their attention away from profit maximization, the corporation risks being attacked for neglecting their shareholders interests on the one hand, and of not maximizing profits available for taxing by the public sector on the other hand. Under this thinking, the primary public duty of a private sector entity is to be economically and financially successful, so that the public may benefit by access to a stronger tax base, through greater and better compensated employment, and by the increased availability and choices offered to consumers through that corporation's products or services.

While the public interest is not well served by assuming that corporations lack the capacity or moral basis upon which to offer voluntary civic service contributions, the public is wise to be judicious in expecting altruistic motivations from the private sector.

- *Gender Trends in Volunteerism*

Persistent economic and social inequalities in every society continue to mean that cultures place greater value in men's labor and offer greater opportunities and choices to men over women. While the economic gap between men and women is narrowing in many locations, the greatest proportion of poor and disadvantaged persons everywhere is female. One effect of this gender bias is that more women are unemployed or under-employed in the formal economy than men, or their economic role is less well remunerated than men's, and hence more women tend to be available to offer their services in volunteerism programs.

Traditionally in most societies, women's role is associated with care-giving, which aligns closely with one of the primary motivations of persons entering volunteerism programs. These trends tend towards more women than men being attracted to volunteerism are general, and the specific gender divide varies with the institutional sponsor of the

voluntary program, the length of service expected, and the nature of the civic service performed.

Achieving gender equity in terms of access to and distribution of opportunities and benefits is a universal moral goal throughout societies, and there is no reason not to extend this ambition to volunteerism as well. That being said, the social, cultural, and economic context determines to a considerable degree which persons will be in a position to offer their services, time, energies, or intellect to volunteerism programs, and for the foreseeable future it is probable that more women than men will be able and motivated to participate in such endeavors.

Given this situation, volunteerism programs ought not to be seen as exploiting a resource – potential female volunteers – that has been created through conditions of injustice and inequality. This is even more the case given the realization that market-based societies often assign lower status to volunteers than to paid workers. Yet the acknowledgement of a distinctively if far from exclusively feminine concern for recognizing and celebrating society's interdependencies, for responding morally to concrete situations of urgent need by offering care and assistance, and for embracing the care-giver role ought not to be undervalued either, as these moral attributes are extremely important to the quality and effectiveness of volunteerism.

- *Amateurism versus Professionalism*

As societies and economies become progressively more complex, the sophistication of skills required to support and manage these societies and economies also become more complex. For this reason, there is a global trend towards increased specialization and professionalization of the workforce. Volunteerism programs are occasionally attacked on the basis that they irresponsibly attempt to carry out civic service using amateurs, when what is required is a professional or expert. Related questions challenge whether a mixture of paid (or, occasionally, volunteer) professionals or experts ought to be structured into volunteerism programs to ensure that the civic service provided by volunteerism is not of low quality – particularly given that so many beneficiaries of volunteerism are poor. The larger critique is that the needs of the poor are relegated by society to the well-intentioned but unsophisticated ranks of amateur unpaid volunteers, and that the elite and more economically fortunate members of society are given disproportionate access to high quality – but expensive – expert services. Similar criticisms are that the unskilled volunteers displace paid experts with little consideration of the loss of quality that ensues.

The moral response to this concern is to be judicious. Volunteerism programs should continue to recruit experts and professionals in greater numbers, but they – and the public sector leaders and managers who oversee or influence the application of volunteerism programs – should not sacrifice quality (or safety) simply because “free” but unskilled volunteers are available.

- *Displacement of Low-Income, Unskilled Jobs*

Another concern of volunteerism is that it disrupts or distorts the natural economic balance, which in market-based economies has considerable difficulty in situating free labor. Of particular concern is that lowly skilled and poor individuals will lose employment opportunities when volunteers carry out civic services at little or no cost. When such competition or displacement occurs, the results can be the opposite of what was intended – social capital can be severely damaged as impoverished unskilled workers see their paid jobs disappear as mostly middle class volunteers (who are perceived as being financially secure and able to “afford” to volunteer) take up these activities.

The risk of this kind of displacement is, in reality, generally low. In most cases, the work carried out by volunteerism programs simply would not be well paid for even if no volunteers were present, and hence no actual displacement or job competition takes place. Still, it is appropriate that this consideration be taken into account when designing any volunteerism initiative, ideally by involving the intended beneficiaries in discussions at the earliest stages of program design.

- *Lack of Data to Guide Policy and Practice*

As already mentioned in several instances in this report, the empirical data – both quantitative and qualitative – regarding the characteristics, impact, trends, and “lessons learned” of volunteerism in Latin America are superficial at best. While there is growing attention to this deficit, much more urgent research is required – both practically and morally – to guide volunteerism strategy so that it achieves its best intentions and finds a valued and respected role in societies.

Once a robust data foundation is established and maintained, it will be considerably easier for countries to generate more effective and more morally responsive policies in support of volunteerism. Having access to such data will also allow decision-makers and even potential and current volunteers to guard against some of the moral concerns raised in this paper, and to select the kinds of volunteerism programs that are best suited both to the needs of the beneficiaries and to the aspirations of the volunteers.

## **4. PROPOSED STRATEGIC GOALS FOR ISED-SUPPORTED VOLUNTEERISM**

### **4.1 IDB Vision and Priorities**

The Inter-American Development Bank's mission is: "to help bring a better life to millions of citizens in Latin America and the Caribbean--better housing, better health care, zero tolerance for corruption or discrimination".<sup>17</sup> Volunteerism has a role to play in this mission, provided that the volunteerism policies, strategies, and applications are well designed, effective, properly and adequately resourced, and ethical. To this end, the Inter-American Initiative for Social Capital, Ethics, and Development (ISED) offers the following targeted ends and means of ethical volunteerism as a guide to designing, evaluating, and funding volunteerism and civic service activities in Latin America.

### **4.2 Goal One – Improve Information Base**

While not exclusively an "ethics" goal, all assessments of the effectiveness and ethical characteristics of any volunteerism activity will benefit greatly by the creation of a significantly larger data base describing not only the societal, economic, and cultural factors most pertinent to volunteerism in the region, but also the characteristics, accomplishments, challenges, and trends of existing volunteerism in Latin America. In gathering and synthesizing such information, it is very important that data relating to ethical considerations is also gathered. This would include information such as that in the World Values Survey, as well as significant qualitative survey data from interviews with volunteers, sponsoring institutions, government officials, and with the beneficiaries.

### **4.3 Goal Two – Build Social Capital**

ISED is committed to expanding the understanding of all stakeholders, both within the IDB as well as in the region, about the characteristics and importance of social capital. ISED views volunteerism – properly designed and implemented – as an extremely effective method of cultivating and supporting social capital.

### **4.4 Goal Three – Foster Ethical Volunteerism in All Sectors**

As described earlier in this report, volunteerism is evident in all sectors of society. In any sectoral context, however, volunteerism is susceptible to many ethical failings if not carefully and responsibly designed and managed. ISED is committed to assisting governments, NGOs, and private sector institutions in their efforts to achieve volunteerism policies, strategies, and programs that will withstand ethical scrutiny, and that are designed to be sensitive to the many moral concerns articulated in this report.

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<sup>17</sup> Excerpt from the IDB's 2005 Annual Report, Message from the President, available at <http://www.iadb.org/exr/ar2005/message.cfm?language=EN>

## 5. PROPOSED STRATEGIC MEANS FOR ACHIEVING ISED VOLUNTEERISM GOALS

### 5.1 Means to Achieve Goal One – Improved Information Base

- *Support the Consolidation and Expansion of Existing and New Data*

While ISED is not a major funding source for research or implementation, ISED is able to offer advice from the perspective of development ethics on how best to consolidate, validate, and make accessible the data that currently exists on volunteerism, and to establish specific data categories for the acquisition of new data that is sensitive to ethical criteria. ISED is able to offer related advice on how to improve data quality with respect to capturing relevant information on moral values, motivational factors, ethical hazards, societal and cultural values, and related ethical factors.

- *Comprehensive Analysis of Data*

The resources available to ISED are quite limited, and therefore ISED is unable to carry out extensive and comprehensive evaluations of datasets or specific survey instruments. ISED is able, however, to raise a range of ethical factors that ought to be captured in future survey instruments, and to advise others in how best to incorporate an ethics lens in research related to volunteerism. In this specific context, ISED is prepared, within the means available to it, to carry out the following types of facilitation and support:

- Support research by others to understand better how volunteerism is organized formally within Latin America – to what extent this is led by civil society, the state, churches, universities, other institutions, etc.;
- Support research by others to understand better the relationships between domestic volunteerism and international volunteerism;
- Support research into the normative implications in the economics of volunteerism: how much of volunteerism is a proxy for the exchange of other less transparent valuable goods (college tuition)? How much does it cost to support volunteers to a standard appropriate to basic standards of human dignity? How much can a volunteer earn by way of stipend and still remain a “volunteer”?
- From a policy effectiveness perspective, support a review of the moral effectiveness and a comparison of the merits of “*servicio social*” (mandatory service, as in Mexico) versus voluntary service models;
- Facilitate the evaluation of the degree to which volunteerism in Latin America is associated with elitism, charity, and “*asistencialismo*” or with the Catholic based “*voluntariado social*” (which demands sincerity and commitment, and an immersion in the lives of those served); and
- Help to explore ways to broaden the access to volunteerism; including a more extensive exploration of elementary and middle school programs.

- *Dissemination of Findings*

Through its website and widely circulated Bulletin, ISED is in a strong position to facilitate the dissemination of findings about volunteerism arising from reputable research endeavors.

### **5.3 Means to Achieve Goal Two – Building Social Capital**

Volunteerism has the best potential to build social capital when there is an intentional emphasis on teamwork within the volunteer team, partnership between the volunteers and the beneficiaries, and sufficient opportunity for volunteers and beneficiaries to achieve a common understanding. Ideally, volunteerism programs will involve the intended beneficiaries from the earliest stage to identify and clarify the program objectives and methodology, agree on scope of work and how benefits are to be distributed fairly, and set guidelines for operations. Projects should be identified that have significant potential for bridging across class, racial, ethnic, and gender divides, and a credible methodology that strategically incorporates deliberation by all affected parties on decisions that frame the volunteerism program.

Creating an authentic partnership between volunteers and beneficiaries, and between the volunteerism sponsor institution and the larger community from which the beneficiaries originate, means seeking a common identify and sense of accomplishment through collaborative efforts on important development and civic service activities.

### **5.4 Means to Achieve Goal Three – Foster Ethical Volunteerism**

In each society, the many existing and potential applications of volunteerism are both diverse and highly sensitive to their particular contexts. For this reason, there can be no simple “checklist” created to guide those who wish to create volunteerism programs – or evaluate existing volunteerism programs – to ensure that their programs avoid ethical failings.

This document however does serve as an initial guide for deliberations for all those involved in volunteerism, in the private, public, or civil society sectors. It is both possible and desirable to organize one-day workshops for any proposed or existing volunteerism program to discuss the ethical concerns and dimensions, as described in this report. The simple action of moving the normative assessment from an informal and often implicit process to a more formal and intentionally explicit process will allow many potential concerns to be discussed, attended to, and ameliorated as necessary.

In some instances, it may be appropriate for ISED to sponsor or organize a pilot workshop for training-of-trainers in the evaluation or design of a specific volunteerism programs. Those with an interest in the ethical analysis of volunteerism would be invited to attend, where they would be trained in simple, practical measures to evaluate moral concerns associated with volunteerism, and how best to address such concerns. These trainers would then be able to return to their own institutions to help shape policies, programs, and guidelines for volunteerism.

Given that there are often significant differences between public sector, private sector, and civil society in the kinds of volunteerism that they are engaged in, or wish to pursue, it would be appropriate to have separate training-of-trainers workshops for each sector in any given country.

## **6. MONITORING AND EVALUATION OF RESULTS**

There are many proven monitoring and evaluation (M&E) techniques available to assess the practical impact of volunteerism programs. The majority of these involve an array of empirical indicators, tied to specific performance benchmarks, designed for each particular project. ISED would complement any M&E program by recommending appropriate “ethical performance” indicators and benchmarks. These ethical measures would make maximum use of the empirical data already being collected in the selected M&E methodology, as adding new data categories is both time consuming and expensive, but there would almost certainly be a need for some additional qualitative assessments of performance, judged on the degree to which any given volunteerism program meets the values-based aspirations and needs of stakeholders. To achieve this kind of normative M&E application requires an initial deliberative engagement to make those values-based aspirations and needs of the stakeholders both explicit and clear. ISED would be well positioned to guide that form of engagement, and to recommend appropriate indicators and benchmarks to capture “ethical performance” as appropriate to the specific application.

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