

CERFE

THE MISSING PAGES

Research on the Role of Poor as Volunteers
in Strategies for Combating Poverty

Final Report

Rome, July 2001

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Foreword

This document, "The Missing Pages – Research on the Role of Poor as Volunteers in Strategies for Combating Poverty", was drafted by CERFE on behalf of the United Nations Volunteer Program (UNV) in view of the United Nations 59th General Assembly, to be held in December 2001 at the end of the International Year of Volunteers.

The drafting of this document should be seen within the context of the actions taken by UNV over the past 5 years, aimed at redefining the nature, the scope and the impact of volunteering within a constantly changing global context. Many steps forward in this direction have already been taken; however, in the overall picture that has emerged, the portion devoted to participation by deprived or poor people – in other words, the "practicability" of volunteering by the poor – appears to be inadequate. And it is these "missing pages" that this document attempts to provide.

Since this document comes at the end of a lengthy development phase, it was felt that the first part of the text should give an overview of the key points of that process, in the form of a summary containing no new information. However, it does highlight the key phases, including those of a theoretical nature, that have led the United Nations to draw up a new approach to the struggle against poverty and social exclusion, in which the role of volunteering can be considered fundamental.

The second part of the text focuses on the issue of the "practicability" of voluntary action by the poor, highlighting the new elements encouraging it and the empirical factors that make it possible, as well as the problems that have to be coped with. This part ends with a proposal for structural solutions linked to a process which integrates the various forms of volunteering (a "volunteering system" or, perhaps, a "volunteerism society") against the background of what may be called a universal mission for the eradication of poverty.

The third part of the document examines volunteering in terms of the actors and the tasks they perform within the framework of a global struggle against poverty (one of the commitments of the United Nations' "Millennium Summit"). In keeping with this policy, efforts were made to pinpoint not only the obstacles which hinder volunteering but also the factors which encourage it and facilitate it. These are important points to be considered when defining and implementing public policies focused on placing volunteering at the core of the fight against poverty and social exclusion.

Finally we put forward some proposals for defining the strategies and courses of action to be undertaken in order to design policies aimed at strengthening volunteering systems, and to find ways of reducing poverty and social exclusion through volunteering.

All the topics dealt with are illustrated by means of case studies drawn from the main research work carried out during the past few years. However, due to lack of space, it was not possible to include mention of the current debate – at times rather heated – on a number of these topics, or to discuss the merits of the various and sometimes conflicting viewpoints.

The document was drafted by Giancarlo Quaranta, Federico Marta and Cristina Brecciaroli, following two meetings with the UNV on April 27 and June 7, 2001, and the Expert Meeting in Geneva on July 4-5, 2001.

Rome, July 2001

PART ONE

**THE UNITED NATIONS
AND VOLUNTEERING
IN THE 1990s**

As a first step, it is important to outline, albeit briefly, the main stages of an itinerary that has led, over recent years, towards laying the foundations of a **new paradigm to the struggle against poverty and social exclusion, hinging on the role of volunteering.**

Although this itinerary began a long time ago, only recently has it been taken up as a major issue by the United Nations system. It should be viewed within the context of the **decade of World Summits and International Conferences**, with special focus on the 1995 Social Summit in Copenhagen. The events of this past decade have brought about major challenges on important issues which crucially affect all those who are involved in improving the conditions of the world community, whatever their position and the tasks they perform.

Starting from the 1995 Social Summit, the outcome of these key events, together with the discussions and the documents accompanying them, has led to what might be called **volunteering's answer to the main challenges of social and economic development.**

This itinerary (summarised below) can be divided into two phases: the first (1995-1998) characterised by increasing awareness of the role that volunteer work can play as a strategic resource in the struggle against poverty and social exclusion; the second (1999-2001) concentrating on efforts to draw up clear definitions of the various types of volunteering concerned, as well as the principles, strategies and policies required to make it a truly effective instrument.

1. TIMELINE: PHASE ONE (1995-1998)

The World Summit for Social Development

The Copenhagen **World Summit for Social Development** (March 1995) launched new challenges for the international community. Not only did it outline the principles, aims and central topics (with priority given to poverty, unemployment and social exclusion) which all States and Governments are called upon to examine, but it also suggested a number of practical commitments to **make social development a feasible reality** in the near future.

The aims of the Summit and the commitments undertaken have heralded a sort of **“call to action” for the world of volunteers** – a world which not only embodies the principles set out in Copenhagen in all their different forms, but also fully meets the needs and conditions that make social development possible.

First of all, because **volunteering is an integral part of civil society** which, in the Summit's Declaration and Programme of Action, is called upon to take part constantly in social development, to the same extent as the United Nations, multilateral financial institutions, regional organisations, national governments and local authorities¹.

On the other hand, volunteering seems to be implicitly called upon any time mention is made of the need to **“strengthen the ability of local communities and groups** with a common concern to develop their own organisations and resources, and to promote policies relating to social development, including those carried out through the activities of non-governmental organisations”². This is not only because volunteering is coessential in the sphere of non-governmental organisations, but also because it constitutes one of the most widespread ways in which communities and groups organise themselves and take action.

Furthermore, voluntary organisations are by definition able to meet some of the State's needs to make a **broader and more efficient**³ **use of the resources** allocated for social development. Such organisations are recognised as being more cost-effective than States in providing certain services, though not entirely cost-free⁴.

Lastly, there seems to be wide scope for voluntary action within the framework of policies **to eradicate poverty**. The implementation of such policies places great emphasis on giving a central role to action at grassroots level, and to empowering the poor and their organisations⁵.

“Strategy 2000”

The opportunity to meet the challenges suggested by the Social Summit was taken by a number of organisations including the UNV which drew up a strategy, called **“Strategy 2000”**, when outlining the programme for the 1997-2000 four-year period. This strategy envisaged a two-track itinerary: first of all, recognising the need to devote efforts to meeting requests for **intervention in single countries** (so as to **effectively satisfy national priority needs**); secondly, renewing and enhancing the commitment **to setting up innovative roles for UNV volunteers**, especially in respect of new global issues.

In this context, the UNV re-iterated its intention to continue drawing upon the **added value of voluntary work, especially in efforts directed to improving the quality of life for the poor**, relying on the **outstanding features** of voluntary work – the participatory approach, its focus on people, and the experience and know-how that volunteers can transfer.

Guidance on the role of NUNV's

At the same time, emphasis was placed on the need to aim not only at mere technical assistance but to promote a more widespread **course of action aimed at strengthening local institutions and capacity-building in voluntary organisations, both at local and national levels**⁶, through the work of national volunteers, defined as NUNV's.

¹ Copenhagen Declaration on Social Development, Paragraph 57, Section B

² Copenhagen Declaration on Social Development, Paragraph J, commitment 4

³ Copenhagen Declaration on Social Development, commitment 9

⁴ Expert Working Group Meeting on Volunteering & Social Development, New York, November 29-30, 1999.

⁵ Programme of Action of the World Summit for Social Development, Paragraph 28, Section A

⁶ UNV guidance note on the use of NUNV's 1998.

Against this background, the idea is gaining ground according to which nationally-based volunteers belonging to the UNV should **play a catalytic and synergetic role** which includes:

- **supporting community-based initiatives and the efforts of local volunteers** so as to foster the development of self-help initiatives;
- **enhancing the organisational ability of CBO's and NGO's** through a needs analysis, and the management and training of leaders;
- **facilitating the exchange of information and the creation of networks** and links between a wide range of actors (CBO's, NGO's, local authorities, national governments, etc.);
- **providing technical assistance and expertise for development projects** by transferring the knowledge, skills and experiences acquired;
- **facilitating the mobilisation of local women stakeholders** as an essential resource for voluntary action.

Declaration of the International Year of Volunteers

In November 1997, an additional and fundamental step was taken to meet the challenges launched by the Summit. Following the initial proposal by the Japanese government, later adopted and formalised by the Economic and Social Council, the General Assembly declared 2001 as the **“International Year of Volunteers – IYV”**.

The aim of the International Year is to raise **awareness regarding the potential of volunteering, especially at a local level, in solving global problems** (such as environmental degradation, poverty, drug abuse and HIV/AIDS infection) and in mitigating the impact that these problems have on the more vulnerable segments of society. Among other things, this awareness arises from the recognition of:

- the **growing contribution** of volunteers, especially at a local level, **in strengthening welfare systems and in boosting social and economic well-being**;
- the **creation and promotion of new actors among volunteers** locally, nationally and internationally;
- the presence of a **large female component** in voluntary activities;
- the ability that these participants have to work effectively by **setting up partnerships** with Governments, public administrations and the private sector.

2. TIMELINE: PHASE TWO (1999-2001)

In 1999, with the approach of the International Year of Volunteers, key events, documents and declarations (some of a theoretical nature) were stepped up with the aim of formalising, in the framework of United Nations, volunteering as a major resource in meeting the challenges of social development and, in particular, in reducing poverty and forms of social exclusion.

The Expert Meeting in New York

In November 1999, the first Expert Group Meeting took place, organised by the UNV in preparation for the Special Session of the General Assembly in Geneva, June 2000. During the meeting, the experts called upon to discuss the background paper “Volunteering and Social Development” agreed on a general definition of volunteering as **an expression of an individual's freewill and ability to help others towards the improvement of society**.

In order to be defined as such, (in the words of the document) the action performed must be based on **three key characteristics**: firstly, monetary compensation of any sort should be a secondary consideration; secondly, the voluntary action should be based on freewill; thirdly, it should benefit the community as a whole or someone other than the volunteer.

This is a wide-ranging and complex vision of volunteering that includes four basic types of voluntary activities.

1 TYPES OF VOLUNTEERING

Mutual aid or self-help: This type of volunteering is popular both in Southern and Northern Countries. In the former, mutual aid or self-help constitute the main system of social and economic support and plays a primary role in the welfare of communities. Self-help also plays an important role in the North, particularly in the health and social welfare field where it is often organised around a specific disease or illness.

Philanthropy or service to others: This type of volunteering is distinguished from self-help in that the primary recipient of volunteering is an external third party, although elements definable as self-interest remain. It may also take the form of a long-standing tradition of volunteers being sent abroad to provide developmental and humanitarian assistance, giving rise to North-South and South-South forms of co-operation.

Participation: This type of volunteering refers to the role played by individuals in the governance processes, leading to their full involvement within the context of development projects. As a form of volunteering it is found in all countries, although it is most developed in countries with a strong tradition of civic engagement.

Advocacy or campaigning: This type of volunteering is especially based on awareness-raising campaigns carried out by activists in order to lobby governments for a change in legislation affecting the rights of disabled people. In some cases, it is resorted to in relation to locally relevant issues, in others to global issues.

UNV, 1999

Furthermore, the document highlights both the **benefits** that volunteers receive from their own actions (besides the more evident ones for the beneficiary)⁷ as well as the **advantages that governments can obtain from voluntary action**. It is generally accepted that such advantages stem from the fact that volunteering:

- provides a significant **economic contribution** to society (in countries in which this contribution was analysed, it was found to be between 8 and 14% of the GDP);
- represents a **fundamental element for development and good governance**, insofar as it contributes towards building and strengthening social capital;
- encourages the **inclusion of the excluded and marginalised** (especially the elderly, women, the young and the disabled);

⁷ Section 3, par. 29 of the Background Paper.

- it also plays a fundamental role in promoting **full employment** by encouraging the employment of the unemployed.

Lastly, Governments are invited to take action in order to increase and facilitate the opportunities of volunteering, especially through:

- the development of **policies to support** volunteering, adjusting them to the way it manifests itself in each country;
- the launching of initiatives aimed at establishing **partnerships with key stakeholders**, including the voluntary and private sectors;
- the recognition of the fundamental **independence of volunteering**.

The Invitational Seminar in Hilversum

At the Invitational Seminar in Hilversum⁸, UNV representatives and 22 governments from all over the world met to discuss the issue of volunteering and the role of the State.

The participants attempted to find an answer to the crucial question “what are the conditions and key elements needed to design an effective governmental policy to support volunteering?”⁹ in three workshops devoted to: Local Policies on Volunteering; Volunteering and the Role of NGOs; Volunteering and the Private Sector.

A general consensus was reached in recognising both the importance of volunteering in any type of society and the fundamental role that governments must play in promoting and facilitating it. However, this recognition was based on the awareness that there is not only one model of reference, but that each government should design its own policies in such way as to fit the culture, the structure and the nature of volunteering as it manifests itself in that specific country, at the same time respecting its independence.

The opening ceremony for the International Year of Volunteers

During the inauguration of the IYV in November 2000, the Secretary General of the United Nations, Kofi Annan, forcefully re-iterated the importance of the intrinsic value of **volunteering for every social class** and every society, as well as the need to promote it at community level, both within and outside one's own community. He emphasised that “societies need to recognise and promote volunteering as a valuable activity. They must facilitate the work of volunteers, and encourage volunteer action at home and abroad...”¹⁰.

The Round Table at The Hague

Then in November 2000, a round table was held on “Volunteerism and social development: Below the waterline of public visibility”, organised by the UNV at The Hague. During this event a group of experts, mainly from developing countries, tackled the issue of cultural diversity and its incidence on the way volunteering and voluntary action manifest themselves and are put into practice.

⁸ Hosted and organised by the Dutch Ministry for Health, Social Security and Sport, 10-12 May 2000, the Netherlands.

⁹ P.H.B. Pennekamp, “Report on the Invitational Seminar of Volunteering and the Role of the State”, 10-12 May 2000, Hilversum, the Netherlands.

¹⁰ Declaration made during the inauguration of the International Year of Volunteers, 2001. New York, 28 November 2000. SG/S/7642.

First of all, attention was focused on some of the core issues of the spirit of volunteering – for example, it is unquestionably considered to be a heart-felt attitude and a civil virtue, but it should not be viewed as something done exclusively in the service of others. In actual fact, there are inevitably traces of self-interest in volunteering, such as personal satisfaction, counting on mutual trust and being included in circuits of solidarity and reciprocity.

As reported in the minutes of the discussion, although the spirit of volunteering is incorporated in the social capital networks below the waterline of public visibility, it should be considered as one of the essential building blocks for any strategy aimed at promoting social integration, sustainable development and the struggle against poverty.

The debate also focused on the **need for governments and civil society to cooperate and complement one another by carrying out effective partnership strategies** in order to tackle problems and catastrophes that such actors are not able to deal with individually, especially because of “structural” shortages of resources.

Lastly, the debate re-iterated the **need for governments to support volunteering** and outlined some of the possible ways of doing so:

- **decentralising** resources and authority so as to draw service providers closer to the community, thus enabling its members to control these services;
- **sustaining the organisational abilities of people, especially those living in poverty** by means of legal and fiscal provisions that would remove barriers to local associative activities;
- **facilitating communications and transport** especially in geographically disadvantaged communities;
- encouraging **access to information** especially that relating to policies and public programmes;
- encouraging mechanisms for the circulation and **exchange of information** both between communities and between communities and the State;
- **promoting initiatives aimed at broadening the range of volunteering opportunities** among the most excluded segments of the population.

**2001 UN Commission
for Social Development**

Between December 2000 and April 2001, within the framework of the various events and initiatives associated with the International Year of Volunteers, attention was once again focused on some of the aspects involved in defining the role of volunteers.

In particular, the Commission for Social Development - Session February 2001 - appealed to States and Governments to promote voluntary action by all possible means and, above all, to boost voluntary action by **encouraging the active participation of groups who only have limited access, or no access at all, to the social benefits of volunteering.**

2

GUIDELINES FOR STATES AND GOVERNMENTS

Guidelines for the promotion of volunteering, set out by the Commission for Social Development, include:

5. Encourage States to support voluntary action for social development by creating a favourable environment, through:
 - increasing public awareness of the vital contribution of volunteering to the social and economic functioning of their communities;
 - taking general measures concerning the mobilisation, preparation, training and recognition of volunteers;
 - establishing an "enabling" fiscal and legislative framework;
 - encouraging research into the volunteering and its impact on society;
 - ensuring access to information on opportunities for volunteering.
- 5 bis. Encourage governments to take into account the possible impact of general **social and economic** measures upon citizens' opportunity, ability and willingness to volunteer.
6. Encourage governments **to include volunteering in their national development planning**, recognising the contribution of volunteering in the achievement of social goals.
7. Invite governments to consider all means available for **more people to become involved** in voluntary action, including the young, older people and those with disabilities.

ECOSOC, 2001

3. VOLUNTEERING AND THE STRUGGLE AGAINST POVERTY AND SOCIAL EXCLUSION

Against the background of the international debate over the last six years, it is important to recognise the fact that the world of volunteers is able to meet the **major challenges launched by the cycle of World Summits and especially by the Copenhagen Summit** in respect of worldwide development.

Within this framework, there is a growing and increasingly evident **self-awareness of the centrality of the role that volunteering can and must play on an international, national and local level.**

By contrast, **governments and local administrations do not seem to appreciate** what volunteering can represent and the potential it has in terms of co-operating to develop national public policies. They seem to be reluctant to consider the world of volunteering as an equal counterpart with whom to discuss, define and launch new forms of partnership.

However, strategies and facts show that there is an **ever-growing commitment and an increasing involvement** of all volunteers and voluntary associations in co-operating in the implementation of policies, especially those aimed at the social integration of people in a weak position, and at the struggle against poverty.

This involvement seems to manifest itself through all **types of voluntary action** and **at all its various levels**. Considering volunteering as a unique and complex experience, it can be thought of as expressing itself on **four levels that merge into two macro-categories: “non-local” and “local” volunteering**.

The first level of **“non-local” volunteering** refers to **international** actors and initiatives and is represented by most of the large NGOs and by the volunteers who operate for international organisations. The second level refers mainly to the activities of NGOs and other bodies operating in **regional or national** contexts but nevertheless with a non-local scope of action.

“Local” volunteering instead refers to all initiatives and **actors**, organised to a greater or lesser extent, **who operate exclusively on their own territory** (third-level). These organisations are very widespread in almost all countries and they go by different names and forms, such as community-based organisations, grassroots organisations and some forms of neighbourhood networks.

In many cases, this level of volunteering already counts on the **partial or exclusive participation of people in a state of deprivation or poverty** who take part not only for their self-rescue but also for the improvement of their standards of living and of the community in which they live and work. We can therefore speak in terms of **volunteering by the poor at a local level** (fourth level).

Therefore, with a view to more effectively responding to the major social and economic challenges that now face humankind, we might say that there is an on-going **process of reconsideration and change that is expected to lead to the full incorporation of the poor in the struggle against poverty and social exclusion**.

However, the aim has not been completely achieved yet. The reason for this is not so much the continuing existence of a number of obstacles hindering the recognition of volunteering as a strategic resource for development, as much as the need to make some headway in **adding a page to the new paradigm for the struggle against poverty and social exclusion**: the missing page.

The aim of this paper is precisely that of trying to add this page by analysing the **role that people in a state of poverty can have, or rather already do have, in expressing their own voluntary action**. They can and must be placed at the centre of the policies aimed at eradicating poverty, no longer as the more or less passive beneficiaries of such projects, but in their capacity as full-fledged actors.

PART TWO

TOWARDS A NEW PARADIGM

The prospect of a strategy that would see the poor in the front line in the struggle against poverty is far from being hypothetical, especially if we consider the opportunity of finally giving all types of volunteering a central role in development policies.

In this respect, we can outline context-linked elements that encourage this line of action, as well as several empirical factors that, to some extent, make it inevitable.

A

Context-linked elements

1. THE END OF THE EAST-WEST CONFLICT

The end of the division of the world into two blocs has had the effect of downplaying collective action in the poor areas of contemporary societies, especially in the southern hemisphere. From a predominantly antagonistic and critical culture, we have shifted towards a culture of collective action mainly directed towards setting up democratic societies in which the mere existence of poverty and social suffering seems to be a contradiction, hence even more shocking. **The struggle against poverty and social exclusion have therefore been placed on the international agenda** along with recognition of the active role that can be played by the very people involved.

2. URBANISATION

The growth of cities, with a high concentration of poor people in certain urban areas, has made **mass poverty more visible** and therefore more dramatic. At the same time, the urban poor are brought into contact with **resources that are essential for their mobilisation**, such as sources of information, leadership, organisations, institutional authorities, culture, food, spaces, etc.

3. THE NEW DEVELOPMENT PARADIGM

Within the context of the so-called **knowledge society**, it is increasingly evident that societal development is a dependent variable of human resources and especially on skilled resources. **Poverty in unstable countries affects vast numbers of people, and diverts resources from development.** In many countries, awareness of this situation is changing the approach to development policies by giving priority to protecting and upgrading people who are disadvantaged or at risk of poverty. The result is a **radical change in the way of taking part**, whereby the poor are recognised as being actors and full partners in combating their state of want.

4. THE SPREAD OF SOCIAL AGENCY

In the last few decades, States have begun to take less part in the “governing” of societies and, at the same time, a more intelligent approach to national policies has developed. The result has been, especially during the 1990s, a significant increase in the number of **actors, both as individuals and as groups**, but also of **enterprises, universities, mass media, professional associations**, that have entered the field of social solidarity with the aim of taking concrete action in favour of the disadvantaged. The foundation for this worldwide movement is a strong swell of **human solidarity** that will inevitably involve the poorer areas of our society. It is therefore reasonable to say that there exists **an axis of social agency** that, at one extreme, has the organisations of **civil society** representing the more complex forms of volunteering which have entered into partnerships for **good governance** with public authorities at national and international levels; at the other extreme, there is **the galaxy of local volunteering** that ranges from individual experiences to organised activities in poor communities and beyond.

5. THE ROLE OF THE UNITED NATIONS

The ten years of **international summits and conferences promoted by the United Nations** in the late 1980s, ending with the Millennium Summit of September 2000, has raised national and international **awareness** regarding four crucial issues:

- Humankind can reasonably attempt to solve the social and environmental problems that afflict it, including that of **poverty**;
- States play an indispensable role in this scenario, but **limited human and financial resources** make any direct, large-scale intervention problematical;
- There is an urgent need for extensive **collaboration between all the actors, whether public, private or non-profit**, in achieving social development aims and especially in the fight against poverty;
- **Partnership must be given its full value** as a way of collaborating between various actors who decide to share the responsibility for effective governance, and especially to include the poor since they are co-authors and partners in alleviating their conditions of deprivation.

6. THE TECHNOLOGICAL REVOLUTION

The accelerating development of new information and communication technologies has provided humankind with **high-potential tools to deal with, and attempt to solve, social problems on a global scale**, especially poverty and social exclusion. The world of volunteering too is caught up in this extraordinary opportunity to carry out social development and empowerment activities, in particular in low-income communities.

7. GLOBALISATION

Globalisation is **not only a context in which volunteering operate** but also one which produces a dual effect. On the negative side, we have effects arising from the social and environmental risks linked to the consequences of a worldwide economy which have led people to speak of an “uncivil society” characterised by social injustice, the widening of the gap between poor and rich countries, the spread of new diseases (AIDS/HIV), the taking place of the global market for weapons, drugs and terrorism (see Annan, UN,

2000). On the positive side, there are the effects stemming from the widespread circulation of information and the creation of new opportunities for social and economic development.

Globalisation is above all the **arena in which volunteering has become, and can increasingly become, one of the major players**, in terms of promoting interpersonal links and social values. The challenges that all concerned actors, including volunteering, must be able to meet and reformulate are by and large represented by the conflicts that characterise our present age, often originating from economic, social, cultural and ethnic inequalities.

B

Empirical data

Never before has poverty been described and interpreted in all its **tragic dimension**. To be poor does not only mean having an income below two dollars or even one dollar a day. Poverty entails the lack of the most basic material and immaterial resources, as well as isolation, depression, and loss of identity. Behind poverty, there is often disease, old age, alcoholism, crime, disorientation and low self-esteem.

However, recent studies have shown that the poor of all types have surprising reserves of ability with which they not only start up effective forms of **self-help**, obviously under suitable circumstances, but even carry out **voluntary activities** for the benefit of their community. Is voluntary action by the poor therefore a resource that we can count on? First of all, let us begin by taking a look at the signs that emerge from empirical research.

1. THE SOCIAL CAPITAL OF THE POOR

Studies on social capital show the existence of **family and neighbourhood networks** in low and very-low income communities, capable of putting in place actions of mutual aid without which the very survival of the people would be in jeopardy.

3

POOR PEOPLE'S BASIC RELATIONSHIP AS A SAFETY NET

In Ghana, "extended family" is synonymous with "social safety nets". In Guatemala, the most common way of facing a critical situation involves relying on family nets, friends, and neighbours. Through basic safety nets, poor people manage to access small aid enabling them to pay for medicines, physician's bills, transportation, or purchase foodstuff during difficult periods.

Narayan, 1999

4
NIGERIA AGE-GROUPS

Age-groups – defined as including people of the same age – carry out important activities such as building roads, providing small loans, helping the members of the group find small plots of land for farming. However, the age-group also plays a fundamental role in socialisation, in helping maintain law and order within the community.

Narayan, 1999

2. THE POOR AS ACTORS

A significant finding of the research concerns the quantity and quality of **actions** that the poor – including the extremely poor – carry out every day in order to survive.

5
**THE HEDGEHOG HAS ONE BIG IDEA, BUT
THE FOX HAS MANY IDEAS**

Most full-time employees in northern and southern countries, and also some categories of especially disadvantaged poor people, behave as the hedgehog does in that they are totally dependent on a single source of income to survive.

But the majority of poor people in the South, and more now in the North, are, one way or another, "foxes" – they do not have just one source of support, but several, and maintain a complex portfolio of activities which include:

- home gardening (both rural and urban) and the exploitation of micro-environments;
- common property resources, such as fishing and hunting;
- scavenging (mainly urban);
- beachcombing (seaside) and gleaning (mainly rural), including traditional rights and access to private residues (buttermilk, crop residues as fuel, etc.);
- processing, hawking, vending and marketing – including food, beer, liquor, vegetables, other produce from home gardens and common property resources, and item-scavenged;
- share-rearing of livestock;
- transporting goods;
- mutual help, including small borrowings from relatives and neighbours, and loans from saving groups;
- contract outwork (weaving, rolling cigarettes, making incense sticks etc.);
- casual labour and piecework especially in agriculture;
- specialised occupations (barbers, blacksmiths, carpenters, tailors);
- child labour;
- craft work of many sorts;
- mortgaging and selling physical assets, future labour and children;
- family splitting, including putting children out to others;
- migration for seasonal work in agriculture, brick-making, urban construction, etc.;

- housework;
- remittances from family members who are employed away;
- seasonal food-for-work;
- social assistance;
- begging;
- theft;
- discrimination and triage, especially with girl children and weaklings.

Chambers R., 1997

Furthermore, researchers have singled out the ability of the poor to put in place **strategies** that go beyond mere survival.

6

THE SURVIVAL STRATEGIES OF THE POOR

The poor resort to three main groups of survival strategies.

Risk reduction strategies aimed at **reducing the probability** of a shock or negative fluctuation (individuals or households seldom take such action). Action is needed at middle and macro levels.

Risk mitigation strategies aimed at **preventing negative outcomes** and decreasing the impact of a shock and downward fluctuation. This is the context the poor act more effectively in, diversifying a portfolio of activities and goods, through forms of insurance of their formal and informal resources, and through collective risk-sharing mechanisms, using the social resources and capital of a community larger than the family household (also including remittances from abroad).

Risk-coping strategies which aim to **relieve the impact** of a shock or a negative fluctuation, after it occurs. In these cases, families use savings, resort to loans from relatives and friends, reduce consumption, increase the number of working family members (often involving children), and rely on social safety nets. These strategies often provide immediate relief, but entail much higher costs in the long run: if the crisis lasts long, traditional crisis-management mechanisms may break up, and the alternative may consist in resorting to illegal activities (especially in urban areas).

The World Bank, 2000a

3. VOLUNTARY ACTION BY THE POOR

Another important fact that emerges from the various research studies is the tendency found in many low-income communities to move from linkages aimed merely at survival to actual voluntary action expressed through all of the forms of volunteering (self-help, philanthropy, advocacy, and participation).

This transition very often occurs thanks to the intervention of an organisation which is outside the community.

7

MEDIATING AGENCY

In developing countries, it is informal associations, rather than formal ones, that play a more important role for development. Most collective action takes place within informal support nets, that aggregate and disperse depending on opportunities and needs. However, a crucial doubt emerges. Are high social capital levels, expressed in these traditional forms, enough to shake rural people from the inertia they are always associated with? Will solidarity between village inhabitants be mainly used to protect tradition, or does it represent a collective action capital in the modern sense, expendable for development purposes?

The solution proposed with reference to the expendability of the traditional-origin social capital for development purposes lies in the mediating agency concept, activating the social capital stock, making it more productive. High levels of social capital do not automatically translate into better development results, but may do so in the presence of capable and effective mediating agents, such as an NGO or a non-local volunteer organisation.

Krishna, 2000.

4. THE POSITIVE ASPECTS OF THE FEMINISATION OF POVERTY

75% of the poor are women. This fact indicates the dire situation of many women and how the impoverishment and social exclusion process develops from the negative crisis that is affecting the structure of families (a great many women are heads of family with dependent children). At the same time, it should also be noted that this often has a **positive aspect associated with women's potential for social action.**

8

ASSOCIATIONS OF POOR WOMEN IN KENYA

In Kenya there are several examples of women's associations that have been successful.

An example is that of an association active in the semi-desert and isolated Mandera district, where most people live in sometimes extremely severe poverty. Here, for the past seven years, a women's association has been carrying out activities providing assistance to the needy, and supporting poor families to pay for school fares or other services. The group, made up of 30 members, despite the scant material resources at their disposal, continues to help not only the families belonging to the group, but also members of the community living in extreme destitution, who can in no way contribute to the efforts of the group (Kenya, 1996).

Two other interesting experiments are the Muchenwa (80 members) and the Omoteme Women's Group (47 members) associations, whose membership, although they were established as women's associations, now also include men. Both initiatives collect resources by purchasing or leasing plots of farmland, and renting housing or equipment for the poor families in the area. The Omoteme association helped 20 families to build their own houses. Muchenwa managed to lease several plots of land now farmed by its members who, when their turn comes, purchase tools for the families, using the income earned from crop sales, and help the most needy members in the community.

Narayan, 1999

Experience shows that it is women who play a leading role in self-help activities and it is women who are the first to undertake voluntary action at a local level. Poverty is thus one of the areas of social reality in which a **gender-linked mainstreaming strategy** can find its actual and urgently needed application.

9 THE STORY OF PARMILA DAS

Parmila is a 30-year-old Indian woman, the widow of a man belonging to a powerful local clan, who died after a long disease, leaving her with two children of 7 and 3 years of age. To pay for her husband's medical expenses, the couple was forced to sell a plot of land.

Parmila comes from a well-off family. The great poverty she found herself in forced her to take up very menial jobs, against the aristocratic spirit of her husband's family of origin, and despite her own family's good name. Owing to these circumstances, she was rejected by both families, which in no way provide her with any form of support.

She now earns money by selling wood, cleaning rice, and working on a casual basis for local employers. She also has access to a number of seasonal working activities.

Despite this, Parmila still has great expectations for her children who, thanks to their mother's efforts, attend school regularly. Parmila has already chosen the high-school she wants her children to go to in the future.

The World Bank, 2000b

5. THE POWER OF DIVERSITY AND THE POTENTIAL FOR ACTION BY THE POOR

It is a mistake not to distinguish between social exclusion and poverty, just as it is wrong to have a one-sided concept of poverty and the poor. The experience acquired in these past few years has shown, in particular, that **the failure of many social policies is associated with the idea that the poor and those who suffer the process of impoverishment are all the same**. This approach is not only in contrast with upgrading the poor to become actors but also, and most importantly, makes it all the more difficult **to help the extremely poor or involve them in empowerment processes** that require, for example, very long time-frames. It is therefore important to make a few distinctions, especially in relation to a strategy that envisages the mobilisation of the poor.

We should therefore consider:

- **the prone-to-risk:** individuals, families and communities that are not poor yet but which are affected by processes of gradual impoverishment or social exclusion;
- **the borderline cases:** people in conditions of poverty but intermittently so, often closely linked to their occupation or their state of health;
- **the overall poor:** although such people have lost the ability to control their environment (identity) because of their lack of resources or social ties, nonetheless they still have the energy and will-power to change their condition (agency);
- **the extreme poor:** those who are below the minimum threshold of \$1 a day and who, in some cases, have given up struggling, compounding their lack of resources with forms of depression and bewilderment, as well as a dramatic loss of self-esteem.

These distinctions are clearly tentative but nevertheless they are essential in order to grade the intensity and the contents of social policies, and above all to be able to deploy the will of the poor for change, and their capacity as actors. The following is a broadly schematic example:

- prevention, for those prone to risk;
- economic support and services for the borderline;
- an enabling environment and empowerment for the overall poor;
- relief and long-term empowerment for the extremely poor.

Furthermore, each of these strategies is supported by a **conscience-raising** action based on bringing to the surface the **potential for action by the poor** that experience has proven to be a common ground for all types of deprived people. This cannot be overlooked in any kind of policy-making, including those policies aimed at the extremely poor.

This **potential is available** for programmes that envisage involving the poor themselves in reaching the goal of emancipation from poverty.

10

THE DREAMS OF A YOUNG MAN

Fabio is 23 years old, lives in a *favela* in Santo André (Brazil), and comes from a very poor family. When he was eight, he started working with his mother. At the age of 11 he found a job in a Santo André firm, while keeping on attending school. Since then he has taken up several jobs to help his family, but never gave up studying.

To support his sick grand-mother, he moved to Suzano, losing his job. There, he was forced to make the most of the situation, trying to collect money by taking on menial jobs. In the meantime, his girlfriend got pregnant, and Fabio tried to help her by working more during the daytime, and studying at night.

His life-long dream is to earn a Law degree, to continue studying to become a judge. He wants to reach a position that would enable him to help protect the rights of people living in the *favelas*, who, says he, have no perception of their rights. These people are discriminated against by the police and by politicians, who take advantage of their knowledge to the detriment of those who possess no knowledge at all. Fabio would like to share his knowledge with ignorant people. "If you are a lawyer," said Fabio, "a policeman cannot abuse his power with you".

Melo M., 1999.

11

THE WAY OUT OF POVERTY

A.R. lives in Ghana. When he moved from the countryside to a slum in Chittagong city, with his 18-year-old wife, he was in extreme poverty. He left his village after his father's death. In order to cure him, his family of origin had sold all their possessions. After moving to the city, A.R. could only find a job as a rickshaw-puller while his wife worked as a cleaning woman for relatively wealthy families. In a few months, they managed to save money and buy a rickshaw. Within a year, A.R. bought another four. Now, he is the owner of a small rickshaw transport company. They could use the money earned to build a new house in another slum.

Narayan, Chambers, Shah, Petesch, 2000

6. ACCESS TO RESOURCES

Parallel to the urbanisation process, both in urban and rural settings, there has been an increase in **access to material and immaterial resources** (such as information) **by the “borderline” and “overall” poor**. This is mainly to the credit of **voluntary organisations, public administrations** and, to a lesser extent, **private enterprises** but also **single individuals**. This greater availability of resources, although it is not particularly significant in mitigating the state of poverty itself, nonetheless lays the foundation for a quality-leap in the action of the poor and for the **transition** from an attitude of preservation and the reproducing of relationships for mere survival, to one oriented towards **mutual aid, solidarity and other forms of voluntary action**.

12

THE CASE OF THE HOMELESS

A comparative study on the homeless in eight U.S. cities showed that, although the situation is also of extreme poverty, there is a significant difference in terms of access to resources – not only material, but also information and other resources. The reason for this difference is the ability of homeless people themselves to maintain stable relations with local organisations, from which they get resources of various kinds. As a matter of fact, the homeless do not draw the resources they need from other homeless people, who also lead a life of deprivation, but rather from the organisations they meet in their daily routines.

Cress, 1993

13

LOCAL COGNITIVE RESOURCES

In the main disadvantaged areas of the world, ATD Fourth World runs Street Library programmes in response to the wish to learn shown by deprived children, especially among those who have the least access to education. Volunteers bring books, drawing material, and computers to poor communities in various places such as Ouagadougou, New York City, Antananarivo, Madrid, or Guatemala City.

In Manila, for example, volunteers meet children every week to read books, draw, and paint with them. The programme is not run by full-time volunteers only. The older boys and girls in the community take more and more initiatives to support other children.

Fernando, 19 years old, who lives in a cemetery, comments on his ten-year experience in the project. "I was only 9 years old when the Street Library came to my place. At that time, I thought it was only books and more books. But later on, I realised it was a way to teach children to be good citizens". Today Fernando organises reading sessions with children in his neighbourhood.

Lizel is 22 years old and lives in the same community. Her experience in the programme convinced her to take up studying again in order to be a teacher.

International Movement ATD Fourth World, 2000

PART THREE

PROBLEMS AND SOLUTIONS

Despite the evidence, we are accustomed to considering **people without resources as incapable of performing an effective voluntary action** that might go beyond the family or neighbourhood. This view clearly leads to serious questions even though we might draw some solutions from the empirical evidence mentioned above.

A

Structural problems

We shall define as “**structural problems**” those factors that hinder voluntary action by the poor and that arise from the state of poverty itself. These problems should be considered separately from the hindering factors that mainly concern the design of public policies and not the specific issue of the viability of voluntary action by the poor.

These structural problems can be divided into five types: (1) the relationship between family and neighbourhood-bonding on the one hand and the feasibility of volunteering on the other; (2) fleeing the community, or the urge to escape from the situation; (3) forms of de-qualification of human resources; (4) the problem of time, especially for the extremely poor; (5) the mobilisation of resources required for action.

1. SOCIAL TIES: *BONDING VS. BRIDGING*

The acknowledged value and richness of family ties and other types of relationships in low-income communities is unquestionable even in terms of mere survival. However, a superficial understanding of the meaning of family, neighbourhood or village networks can lead to the error of always considering social cohesion as an absolute value, whatever the context. As a matter of fact, an excess of bonding exclusively directed towards reinforcing the community, risks making it implode thus creating a sort of **poverty trap**. On the contrary, for volunteering to be activated, what is required is a **bridging action between the community and the outside world**.

14
WHEN FAMILY TIES BECOME A VICIOUS CIRCLE

The social wealth of poor people is often defined as a two-way street. As a matter of fact, those who try to help others are also in need of help themselves. This triggers a vicious circle that prevents them from accumulating resources that might help them out of poverty.

Groups of poor people interviewed in Mali confirmed that accumulating resources individually or at a family level is difficult if not impossible owing to the needs and requirements of other family members. They are mutually tied by their needs and this also affects family planning. When someone decides to have few children in order to save money more easily, he/she ends up having to support his/her relatives' children. If, on the one hand, the extended family is as strong as a social security network, on the other hand, it makes it harder to get out of poverty because it has the effect of draining resources in the long term.

Narayan, Chambers, Shah, Petesch, 2000

15

THE HARAMBEE CASE IN KENYA

Kenya has a strong self-help tradition, in the form of the so-called "*harambee*". According to some estimates, there are more than 30,000 *harambees*, which are primarily made up of poor people. Their activities vary from chicken-farming to the payment of school fees and hospital charges through micro-credit. According to a recent research study, however, most of these groups tend to promote isolation rather than social relations and, as a result, end up being a "poverty trap" beside to representing a limit to the development of organised forms of voluntary action.

Krishna, 2000

2. FLEEING THE COMMUNITY

Once the standards of living have improved and the prospects for personal development have risen, there is still the risk of an **individualistic type of choice** which is all too comprehensible, and often caused by the loss of motivation for voluntary action. This type of choice reduces the community's social and human capital and, in the long run, might even turn it into a **society of rejects**.

16

THE LOSS OF VALUABLE EXPERTISE IN A DEGRADED COMMUNITY

In the town of Douala, Cameroon, a group of young people led by an enterprising young man set up an association for the disinfection of stagnant water to get rid of mosquitoes that cause malaria.

In a short time, about 150 young people in the neighbourhood joined the association. They were all unemployed and came from very poor families. To become members of the association, they had to pay a low fee, which was used to buy the first tools for disinfection. A low rate was charged for the disinfection service. Thanks to the high demand for this service from the neighbourhood inhabitants, in a few months the young group were able to buy several pieces of equipment. The initiative was so successful that the municipality of Douala decided to assign the disinfection of the whole town to this association.

In about a year, the young members of the association were able to gain full expertise both in the technical field of disinfection (equipment use, procedures, etc.) and in the management of small service companies (many of them had also attended specific training courses).

Nevertheless, once the group had completed its work and received payment from the local government, the association began to break up. All its young members left their slum and moved either abroad or to better areas in the city. Using the money earned, many of them started up their own small businesses in other fields (carpentry, building, etc.), which subsequently went bankrupt.

Funds for disinfection have also been allocated for the year 2001 by the municipality of Douala, but nobody is qualified to use them. The association's equipment is in a state of neglect. In the meantime, mosquitoes are coming back.

CERFE, 2001

3. DE-QUALIFICATION

A specific case of flight refers to **skilled human resources** whose loss represents a severe blow to the **cognitive capital** of the community in question. This is particularly evident in the case of members of the community who have specific abilities in using new technologies (the digital divide), in accessing information (the information gap), and in using English as a *lingua franca* in such fields.

17

THE STORY OF A TOGOLESE GRADUATE

When skilled poor people do not manage to migrate from the poor communities in which they live, they risk having to do de-skilling jobs. This is a waste of precious brains that might be useful for local development.

After getting a university degree the same year his father was forced to accept early retirement because of the structural adjustment plan implemented by the government, a young Togolese could not find any job that was up to his qualification and began to help his mother with mending and tailoring.

Since his father's pension was very low and his mother did not make enough money, his family decided to move to their village of origin where life was less expensive. The young man and his two brothers who were attending school, stayed in the town, in the house their father had started building, where only one room was roofed and there was no floor at all.

Owing to the state of the house, the young man lost all his customers who refused to bring their clothes to such a dirty and dusty place. On the other hand, the young graduate could not afford to pay a rent elsewhere.

Things seemed likely to change when the young man got an assignment from an international NGO that was carrying out a project in his area. They told him they were very satisfied with the work he had done, but could not offer him any long-term job, not even abroad.

Thanks to his co-operation with this NGO, the young man was able to repay some of his creditors and buy school books for his brothers. After this brief experience, however, the situation worsened again. At present, this young man sells peanuts in the street and earns some 600 F CFA per day. In the beginning, he was ashamed to beg for money in the street and hoped nobody would recognise him. But later, he met some old friends who had been at university with him and ended up begging money to survive like him.

Narayan, 1999

4. THE TIME FACTOR AND EMPOWERMENT

The design and implementation of any form of social development project based on volunteering by the poor must reckon with the time factor. It is necessary **to come to terms with the most serious and deep-reaching consequences of poverty** and therefore also with the time needed to recover the individual abilities of anybody that might have been, for example, in a state of poverty ever since birth, as in the case of trans-generational poverty. The “time factor” refers to the time needed for the **empowerment processes** to be completed and is therefore directly proportional to the severity of the conditions of poverty.

18 THE LACK OF STRENGTH

The conditions of prolonged and serious deprivation in which some poor people are forced to live are unlikely to be fully and rapidly changed by targeted interventions.

All through the interviews conducted with poor people by the World Bank, the poor are often described as tired, worn out, weak, primarily as a consequence of food scarcity coupled with the need to perform hard manual work.

For example, in Nigeria, the poor end up finding an occupation only in the agricultural sector and, as might be expected, the poorest among poor people encounter several difficulties in carrying out these activities, since they are extremely weak.

K.L., from Ethiopia, says: “we eat only when we find some food and sleep when we have nothing to eat. Apathy and sleep enable us to save food and energy.”

Narayan, Chambers, Shah, Petesch, 2000

19 LOSING THE WILL TO LIVE

The persistence of very serious poverty conditions leads poor people to develop a feeling of powerlessness when faced with the reality and the challenges of deprivation, and this also results in serious depression, alcoholism and drug abuse episodes as a way to escape from this situation.

A woman from Ecuador, who has several children, says: “Sometimes I think about committing suicide, I’d like to escape from this situation at all costs...my children are always crying and I can’t give them anything to eat...life is so sad.”

Narayan, Chambers, Shah, Petesch, 2000

5. THE ISSUE OF MATERIAL RESOURCES

For low-income communities, **the lack of resources represents the most serious structural problem**. Not only does the lack of resources strongly hinder voluntary action but it also hinders **access** thereto. Paradoxically, these communities often have great difficulty in using material resources correctly. They need **information and knowledge**, in other words a substantial cognitive mediation, in order to enable them to assimilate material goods.

**THE IMPORTANCE OF MEDIATING AGENCIES WITH
THE VIEW TO OBTAINING RESOURCES**

Kaka is a young boy from India coming from a very poor family, who, thanks to his initiative and the support of local organisations, succeeded in getting out of poverty.

Kaka and his three brothers inherited from their parents only half an acre of very poor land, where *jowar* was cultivated. Later on, as a consequence of the “illegal” appropriation of woods, that piece of land became larger and larger and appropriation was legalised.

Thanks to the support of a local NGO (Active), Kaka thought about expanding his farm activity and convinced his brother and his sister to save money and buy additional acres of land, until they would be eligible for the support and aids granted by the Tribal Development Authority (consisting of free seeds and financial support).

Then, his sister opened a small shop in the village and started selling smoked fish and palm-tree wine; meanwhile, she was still receiving a remuneration as kindergarten assistant (including meals on the school premises).

Kaka gained the esteem and appreciation of the whole village. He now has a TV set, a house, a bicycle and two coats (he is the only one in the village with two coats). He currently works as secretary for Sangha, the local lending institution, and this has further increased his popularity and esteem within the village.

The World Bank, 2000b

B

From volunteerisms to the “volunteering system”

For structural problems, there are structural solutions based on the fact that **volunteering can be regarded as a unitary phenomenon**, in spite of its various forms. It originates from a change in the quantity and quality of **human subjectivity** in the context of globalisation, probably in connection with problems such as the following (independently of whether they are the cause or the effect thereof):

- the increase in “problem-solving” information made available to individuals or to mass media;
- the spread of education;
- democratisation processes and the acknowledgement of human rights;
- technological innovation;
- greater access to consumer goods;
- activating health care and social security systems;

- a certain degree of modernisation affecting prevailing values also in suburban areas and in rural villages;
- the acceptance of a global type of social ethics;
- the shortcomings of the public administration in terms of resources and efficiency, especially in the welfare sector;
- the establishment of a social governance model based on political decentralisation and the recognition of the active role played by civil society;

and much more, with the consequence of developing, both at individual and group level, a strong “free cultural” orientation towards self-organisation and independence (sometimes referred to as a “societal revolution”). This orientation is aimed at improving individual and social reality.

A unitary and global view of this macro-phenomenon has now been acquired during the year 2001, dedicated symbolically to volunteering by the United Nations, a year which is approaching its end, while opening broad perspectives towards the future.

This perspectives concern the possibility of systematically involving volunteers of all types and levels in the struggle against social exclusion and poverty. Is it possible therefore to include the poor in this wide-reaching plan? Is it possible to overcome the problems that we referred to as the structural problems affecting voluntary action by the poor?

An affirmative answer is possible only if we start from the consideration that volunteering by the poor is **of the same breed as national or international volunteering**. Underlying a general mobilisation of civil society – in collaboration with States and international organisations – against social exclusion and poverty, there is therefore the need for **a synergy between all forms of volunteering** so that each one can produce an **“added value”** effect in terms of social development.

But what type of system are we speaking about? Today it is possible to imagine that volunteering might become a factor in the globalisation process and therefore rely on all its components to give rise to a **global system** encompassing, in their different capacities, individuals, small groups, CBOs and NGOs, at national and international levels. One might say that to a certain extent this system already exists.

21

THE CASE OF GROOTS

GROOTS International is a global network aimed at encouraging the direct participation of grassroots women in national and international meetings designed to discuss issues that directly affect women and their communities. This network gave life to several new organisations and co-ordination activities, with the view to involving women at a basic level.

Thanks to GROOTS international Network, for example, GROOTS Kenya guarantees an experience exchange as well as visits and direct meetings among women, organised at grassroots level worldwide. This has immediate and evident effects both on personal living conditions and the ability to participate in the social life of one’s village.

Another example concerns FOWD (Forum for Women and Democracy), which despite the post-war situation in Uganda, has conducted information and ability building activities aimed at grassroots women, by helping them contribute, effectively and favourably, to the Constitutional Review process and to the political life of their country.

Groots Kenya, UNED-UK, 1999

Volunteering today in all countries comes in many shapes and forms, with a tendency however to take on **a coordinated pattern of actors, relationships, values and opportunities** which is becoming more and more like an actual social system.

Speaking of volunteering as a system has **two main advantages**:

- 1 – it conveys the unitary character of the overall phenomenon which is spontaneous and independent of external actions. The system exists – it can be reinforced and utilised but it does not need to be created since it is not a project but rather **a complex web of social and cultural processes** on a vast scale;
- 2 – it enables us to highlight and explain **processes** which are taking place anyway, and which have to be **guided and controlled**. In this respect, we can single out three main aspects:

The process of identifying the system: within the context of social development policies, governments, international bodies, enterprises and local authorities are all beginning to perceive volunteering more and more as an identifiable entity compared to other systems, while volunteering, in a sort of social mirroring, gradually expands in a common perspective its awareness of its responsibilities and potential.

The process whereby a culture of solidarity and social responsibility spreads, tending to gather round the axis of voluntary action an ever-widening number of individuals, groups and communities, from every social class and condition.

The process of operational integration between different types and levels of volunteering which comes about in the presence of a series of factors involving tension or opposition, that define its dynamics.

Local / non-local

The vocation and practice of non-local volunteering is based on the tendency to collaborate with local volunteering. There is no conflict between the two levels, at most there is a strong **need for coordination, especially with respect to supporting volunteering in low-income communities.**

22

NGOs SUPPORT FOR LOW-INCOME COMMUNITIES

The poverty reduction strategy does not only improve access to services, markets, and economic opportunities, but also empowers poor people to participate in the development process.

India District Poverty Initiatives Projects in Andhra Pradesh and Rajasthan (India) are to be mentioned as examples of this trend. Since they are designed to finance small-scale subprojects at community and village levels, these initiatives seek to mobilise and empower groups of poor people, through different participants, by helping them to voice their demands as well as to plan and implement their own poverty-reducing schemes.

In Bangladesh, local communities are helping NGOs to implement a new nutrition project, within the framework of the National Nutrition Program.

In Sri Lanka, within the context of agricultural irrigation projects, NGOs will train villagers to play a decisive role in planning and implementing development activities.

The World Bank, 2000

**CO-OPERATION BETWEEN NGOS AND CBOS AIMED
AT FIGHTING AGAINST POVERTY**

Kefa Mairura Otiso, when talking about the relations between NGOs and CBOs in Kenya, says that NGOs, especially international ones, hardly ever provide personal services to the beneficiaries.

They rather mobilise local communities through CBOs, which conversely deal primarily with more practical issues such as the direct management and delivery of services.

Therefore, from a functional standpoint, NGOs act as mediating agencies. The success recorded by the programmes aimed at fighting against poverty, is thereafter based primarily on the efficiency of NGOs and CBOs co-operation.

Otiso, 2000

Integration / autonomy

Integration is necessary especially when individuals in a **serious state of poverty** are involved in voluntary action at local level. It is nonetheless advisable that this integration always be oriented towards the **autonomy of low-income communities**.

SETTLEMENT UPGRADING PROJECT

The Settlement Upgrading Project in Senegal, aimed at involving the squatter population in the improvement process of their living conditions, includes people's participation among other main strategies. "The squatter population or their representatives actively take part in all stages of their living conditions improvement process: decision-making, implementation, financing and facilitating management. Once they have organised themselves as a 'Groupement d'Intêret Economique-GIE' (Economic Interest Group), the population defines priority needs. All decisions are taken jointly by paying great attention to the available financial means."

MOST Clearing House

Volunteering / economic aspects

There should be no contrast between volunteering and economic aspects, especially when involving people exposed to social deprivation. A misinterpreted sense of ethics tending to exclude any form of retribution for volunteering is what causes many people to flee from the community, often just at the time when development activities are proving to be successful. On the contrary, the fact that many poor people succeed in overcoming the threshold of mere survival should instead involve the issue of the professional status of the people concerned. There is therefore a **close link between mobilisation of the poor against poverty and creating job opportunities**.

25

ACQUISITION OF SKILLS AND JOB CREATION

The project aimed at transforming R'Mel Shanty Town in Agadir (Morocco) relies upon people's participation in the commission controlling the state of progress in conjunction with the representatives of the local council, the Government and the *Agence National de Lutte contre l'Habitat Insalubre*. The inhabitants are working jointly on the project aimed at building their homes. In order to do so, they have acquired special competencies and skills along the line of the aforementioned project, whereby they succeeded in finding a job in the building sector, beyond the scope of the project itself.

In Brazil, a similar project entitled "Team work for head of family mothers", resulted in women's involvement in the building and restructuring of their homes, thereby increasing their vocational qualification. Out of these, about two thousand women are currently working as carpenters, electricians, joiners, etc.

MOST Clearing House

Cognitive capital / volunteering

The presence of educated people, whatever the level, or of skilled people, can be a fundamental **success factor** in the struggle against poverty. In this respect, notice should be taken of the important role played by the NGOs at non-local level and the ability to enhance local human resources.

26

ACCESS TO INFORMATION AND ITS MANAGEMENT

"Key to the empowerment of marginalised communities is unfettered access to relevant information within an integrated regional and national network, coupled with the development of skills and abilities that would equip these communities for the utilisation of such information for community building purposes." The importance of information, as well as the transfer of skills to low-income communities, are the key elements of three pilot projects implemented within the Province of Gauteng (South Africa) under the auspices of HSRC Human Science Research Council).

MOST Clearing House

27

THE IMPORTANCE OF "BRAINS"

"I went to school for eight years, until my parents died. Then I was forced to go to work. Since I could read and write, and at that time hardly anybody could in our village, I was chosen as "sarpanch" assistant for the village. I supervised the works and checked the accounts of building projects. Then, an NGO launched a farm project for that area.

They were looking for somebody who could read and write, somebody who was familiar with some official procedures and trusted by the village. Since then, I have worked for several other projects, whereby I selected a group of people and worked with them. I convince people from the village that the project is good and very often they accept only based upon my assurance."

Krishna, 2000

Poor communities need a certain amount of mediation from external agencies in order to draw upon the **resources needed for their mobilisation**. Obviously **this function can be performed with a greater probability of success by an NGO as it is capable of better understanding**: a) what immaterial resources are needed (spaces, training, leadership, organisation, external relations, information); b) what type of material resources the community needs, and the quantities (money, instruments, communication systems, etc.) and, above all, c) how to help the community to make use of these inputs so as to mobilise towards voluntary action by recovering, or rather developing, an identity of its own.

The same holds for inputs from **resources directly aimed at improving the well-being of the beneficiaries**. In this case too, it is important to accompany the distribution of resources, whether they be material (subsidies, housing, work equipment) or immaterial (services, training, education) with **capacity-building activities** directed towards conscience-raising, empowerment, self-esteem and confidence in one's community.

28

THE RESOURCES OF POOR GROUPS COME FROM OUTSIDE

A comparative study has analysed the resources based upon the contribution they give to the success of self-organisation efforts by the homeless. The resources considered are generally referred to as "Facilitative organisational resources", in that, given the severe deprivation of the homeless, it is taken for granted that resources could only come from the outside, especially from other organisations. Such resources are classified as follows:

- **informational resources**, concerning the cognitive capital of facilitative organisations (FOs), which is made available to the homeless;
- **material resources**, i.e. the tangible assets and services that FOs provide to the homeless;
- **moral resources**, which entail FOs compliance with the objectives and actions of the homeless, thereby guaranteeing legitimisation and support;
- **human resources**, i.e. the FOs possibility to make the necessary personnel available for the activities to be conducted by future homeless organisations, since work is the key element.

Cress, 1993

29

UNISTAR PROGRAMME

UNISTAR was created by the United Nations Development Programme (UNDP) in 1985 to meet an increasing demand for short-term, highly specialised volunteer advisory services to the private and public sectors of developing countries. Since then, leading international experts and managers have put their expertise to the service of countries in development to help companies and organisations solve many of the problems, which hinder enterprises.

In 1993, UNV took over the administration of UNISTAR activities and set up a resource bank of human resources offering a broad range of business and technical skills, in particular general management, marketing, strategic planning, industrial design, product development, manufacturing and finance.

As an example, in India an internationally renowned fashion designer advised a women's business association on textiles and fashion overseas marketing and also recommended the creation of an apparel design centre to train female entrepreneurs.

In Palestine, at the request of the Ministry of Agriculture, a UNISTAR Volunteer inspected olive farming and olive oil production in the region. The Volunteer advised on new harvest methods, modern machinery to cut costs of production and the use of quality labels, which would open new markets in Europe.

UNDP, UNISTAR

C

A major step forward: “the volunteerism society”

Up to now we have talked about what we might call the **globalisation of volunteering** in the form of a unitary system. We have also seen how such a system is beginning to come into operation even at the level of poor communities. If this activation of the poor were to take place on a large scale, it would eventually become a social process of vast dimensions, which might have an impact on social reality as a whole. We might talk of a major leap forward in social dynamics, as has happened with the “knowledge society”, leading to the concept of a “volunteerism society” in which volunteering would become a basic feature of the social structure and a characteristic modality of social relationships.

We shall attempt to describe the features of this “volunteerism society” as it might take shape if the trends we have described continue to develop effectively.

Resources

The volunteerism society could provide extraordinary, maybe decisive, support to **human, financial and organisational resources available to States** for the struggle against poverty and social exclusion, to be combined with the actions taken by States and the international community, since:

- **volunteering is in itself a way of breaking the isolation typical of poverty** or of overcoming the dynamics of social exclusion and therefore of recovering human resources for development;
- the North-South and South-South connections, typical of volunteering, make it possible to acquire, in any given national or regional context, **additional financial resources from civil society and information** free of charge, for solutions applied to shared problems at national and regional levels;
- faced with the challenging task of reducing or even eradicating poverty worldwide, volunteering is capable of putting into action an organisational **culture of participation and quality**, without which the struggle against poverty would be in vain.

30	
MASS VOLUNTEERING	
<i>Estimates of the volunteer percentage out of the total population of some countries and groups of countries</i>	
Netherlands	38.0
Sweden	36.0
Great Britain	34.0
Canada	28.5
France	20.8
Germany	18.0
Bulgaria	19.0
Italy	13.3

Average of 22 Countries* 28.0

* Netherlands, Ireland, Belgium, United Kingdom, Germany, France, Spain, Austria, Finland, Czech Republic, Romania, Hungary, Slovak Republic, United States, Argentina, Brazil, Colombia, Mexico, Peru, Japan, Israel, Australia.

Gaskin K, Smith J. D., 1995; Fondazione Italiana per il Volontariato, 1999; Salamon et al., 1999

31 VOLUNTEERING IN THE SOUTH

Volunteering is also a widespread phenomenon in many Southern countries of the world. Unfortunately, general quantitative data is not available. However, some examples are the following.

- In Mexico, volunteers are estimated around 36% of the population.
- In Argentina, the figure is about 24%.
- During the 1990s in Brazil, in response to the Citizens' Action Against Hunger and for Life Campaign, about 3,000 voluntary committees were set up all over the country within the space of 3 months; it is estimated that about 38% of the Brazilian population has directly participated in this campaign, by guaranteeing their voluntary action or through donations.
- In 1994 in Togo, the volume of trade managed by voluntary organisations was approximately equal to 4 billion F.Cfa, much more, than the government spent on rural development.
- In 1996, the Poverty Paper Assessment issued in Kenya published some estimates as to the number of more or less organised groups, only in rural areas, to the tune of 300,000 units.
- In India, volunteers are about 13% of the population. They are believed to be increasing. Only in three districts of Andra Pradesh State in India, 400 self-help groups were recently set up, 94% of which are wholly made up of women.

UNV, 1999; SAPAP, 2000; Salamon et al., 1999

32 VOLUNTEERING IN EAST EUROPE

Volunteering in its present form emerged only recently in most East European countries. Detailed figures are lacking but we can nevertheless give an outline of its components and history.

In Bulgaria, it is estimated that volunteers constitute 15% of the overall population.

According to social analysis terminology, volunteering, in its Russian form, concerns:

- charity 52%
- common use 33%
- self-development 6%
- help from administration 6%
- creation of local community 3%

Brief history of volunteering in Russia

- 1988 - Creation of the 1st volunteer organisation in St. Petersburg, "Nevski Angel" that provides "express service" for lonely and old people
- 1989 - 1st school for volunteers, invitation of teachers from high schools
- 1992 - Most volunteers have higher education and are committed to carry out social plans. They create "club for leaders of NGO"
- 1993 - The number of women volunteers has increased, some of them come from very poor families. "Nevski Angels" organise "The day of volunteering", with 300 participants. This has become an annual appointment
- 1994 - Broad discussion about the terms "Volunteerism" mission and ethics
- 1995 - Broad international partnership in training and volunteering program.

Gaskin K., Smith J.D., 1995; Rabkine D., 2001

Effectiveness and impact

In view of the characteristics of volunteering as a system of vast social dimensions, it could result **effectiveness** of the struggle against poverty, greater than what is attained by other public or private agencies alone, since it succeeds in **changing the reality**, also at the level of the biographies of the individuals concerned, thanks to features such as:

- **the ability to mobilise voluntary action by the poor** through interlinking non-local and local volunteering;
- **the ability to operate in the most problematic areas of human existence** and put forward solutions and services in a context that is neither regulated under public law nor market-oriented but rather characterised by what we may call "social caring";
- **the ability to work in partnership** with public authorities and corporate, thus giving leeway to different subjectivities.

Relevance and efficiency

In the light of its **broad scope and widespread nature**, volunteering on a large scale guarantees criteria of relevance and efficiency, with respect to the plan for fighting worldwide poverty and, on a national level, the eradication or the significant mitigation of **mass poverty**. Specifically:

- **relevance**, arising from the quantity of actors provided by the volunteering system and from their characteristics (the poor themselves) as well as the actual power they hold over their reality and the possibility to change it;
- **efficiency**, because, even if volunteering entails some costs, a set of programmes aimed at combating poverty carried out on the basis of volunteering activities (viewed as a system which the poor themselves belong to with full title) is enormously less costly than any other system.

Concreteness

Volunteering, because of its concreteness and its closeness to the real life of the people concerned, is **an extremely effective instrument** which, once a global scale has been reached, will play a decisive role in areas such as:

- **the struggle against environmental degradation**, in the context of which low-income communities – leading actors for better or worse in environmental dynamics – can be successful both in terms of rehabilitation and of "job and enterprise creation";

- **urban upgrading and preventing slum-creation**, which cannot be implemented without slum dwellers and their organisations taking on an ever more incisive role;
- **promoting decentralisation**; the meaning that is becoming increasingly widespread in international cooperation and in national “institutional building” policies refers not only to the devolution of central powers to local authorities **but also to involving civil society, and therefore volunteering, in local governance.**

Hope

The so-called “**impossible missions**” of our time and the **hope of solving the problems linked to them**, are associated with the great potential of volunteering at all levels, as in the following cases:

- “**conflict resolution**” that presently operates mainly thanks to the action of groups of women belonging to all social classes and ethnic groups in countries torn by decades of civil warfare;
- the **struggle against diseases such as HIV/AIDS** that require capillary mobilisation, mass awareness, the availability of resources for the purchase of medicines that are costly at all levels, the training of skilled personnel – all in all, a set of operations that can only be carried out thanks to massive participation and the help of volunteers;
- the **struggle against drug-addiction** that affects societies all over the world, a struggle that could often be mitigated by giving a social life back to the extreme poor for which volunteers have an outstanding vocation and a specific operational ability.

Faced with the above scenario, we have to tackle the **problem of political responsibility**. We should especially ask ourselves about the role of **States and international organisations**. Of course, the prospect to tie the struggle against poverty with voluntary action, and especially voluntary action by the poor, **cannot be a pretext for public authorities to opt out**. In fact, the opposite is true: this prospect represents a **great opportunity** that should be taken up by southern countries as well as northern countries which are already involved in international development cooperation. In the fourth section of this paper, we shall see the possible general lines for a political plan, which is already partly underway, aimed at giving substance to the ideal match between voluntary action and poverty.

CENTRAL ALGORITHM

1. **The poor are actors** and not simply the beneficiaries of public policies. They possess a **social capital** of family and neighbourhood relations that helps to make their very survival possible. This social capital, under given conditions, can lead to the activation of forms of **full-fledged volunteering** in its various forms (self help, service to others, participation, campaigning).
2. There are **positive signals concerning volunteering by the poor**. The practice of basing policies to combat poverty on the active participation of the poor themselves is becoming increasingly widespread and is proving to be fairly successful.
3. More generally speaking, there is a widespread tendency to promote volunteering of all types and at all levels as the **fundamental instrument in the struggle against poverty and social exclusion**.
4. The structural problems that tend to make it difficult, if not outright impossible, for the poor to get involved in voluntary action, tend to be solved through the realisation of forms of **integration or coordination with different types and levels of volunteering** (especially with volunteering by the poor).
5. The growing tendency of the poor to be volunteer is reinforced and supported by the **spread of a culture of responsibility and social solidarity** which strengthens the various forms of voluntary commitment in every sense, from the local to the trans-national level.
6. This is giving rise to a network of relationships between the different poles of volunteering at a global level that might be defined as “**a volunteering system**” capable of involving the poor in a wide-ranging strategy to combat poverty so as to reach that critical mass that would enable the system to interact with other major dimensions such as political and economic systems.
7. This involvement paves the way for what might be called “**the volunteerism society**”, which in terms of resources, effectiveness, relevance, etc. can be an **instrument that can match up to the challenges** which humankind is currently facing in terms of poverty and social exclusion.
8. Lastly, the “volunteerism society” should not become the **pretext for traditional public policy bodies to opt out**. On the contrary, it represents a **great opportunity** to finally achieve concrete and permanent results. This would require enhancing the efforts put into developing and implementing a global strategy to combat poverty and social exclusion **hinged on volunteering** and in particular, volunteering by the poor.

PART FOUR

THE POLITICAL PLAN FOR A GLOBAL STRUGGLE AGAINST POVERTY

A The actors

The “volunteering system” and the “volunteerism society” are useful metaphors to highlight the existing and potential effects of **broadening the scope of the definition of volunteering or voluntary action** to include **collective action in the context of low-income communities**. However, they are not intended to mean that, once the scope of the definition has been widened, there will no longer be any need for the intervention of governments, international cooperation, business enterprises and other actors capable of implementing policies to combat poverty and social exclusion.

Widening the concept of volunteering should be viewed in the light of the following considerations.

A great opportunity

The internationally expressed desire to turn the struggle against poverty and social exclusion into a viable objective, together with recognition of the role played by volunteering (especially volunteering by the poor), **represents a great opportunity to start a political design for social development** that have a reasonable chance of success.

Everybody should do their share

This opportunity can be seized on condition that **all the actors do their share** by shouldering or reconfirming their responsibility, delivering the necessary services, investing economic resources, mobilising human resources, making available appropriate technologies, guaranteeing legal instruments, providing the infrastructures and, last but not least, promoting a culture of solidarity and welcome for those emerging from a state of poverty.

Hexagon of realism

A political plan aimed at significantly reducing and ultimately eradicating poverty is viable only with continuous help from the **six types of actors** that make up what might be called the “hexagon of realism”. The six sides of the hexagon are represented by: **1) Governments**, whose role is irreplaceable, both in terms of financial, infrastructural and technical resources and of political will; **2) local authorities**, the indispensable enforcers of social policies; **3) the local civil society** which includes NGOs and other citizenry organisations, the world of business exercising its social responsibility, universities, mass media, professional associations; **4) the countries in the northern hemisphere**, whose *governments* should increase and not reduce the economic resources allocated for

development aid and whose civil societies should mobilise to find additional resources; **5) international organisations**, whose task is to focus international dialogue – in terms of strategies, investments and policies – on the struggle against poverty and social exclusion; **6) the “volunteering system”**, in all its forms and levels, with special attention on the volunteering of the poor which should present itself as, and actually become, **one of the largest and most incisive resources in this political plan.**

Triangle of effectiveness

A second geometrical metaphor is also useful to represent the operational nucleus necessary for the success of an action programme based on the volunteering of individuals and groups operating in the area of social deprivation. In this respect, we might refer to a triangle of effectiveness whose three sides are represented by: **1) non-local volunteering** which operates on a national or even international level and which performs the essential function of mediating with and mobilising the other type of volunteering, that of the poor; **2) local volunteering in low-income communities** (in other words, volunteering “of the poor”), namely the second pole of the “volunteering system”; **3) public authorities**, both central and local (sometimes in collaboration with international organisations), whose role is to be the catalyst for volunteering in general by managing resources, political decision-making, actions aimed at raising the awareness of public opinion, legitimating the leadership of CBOs and NGOs, capacity building, etc.

The research sector

Most of the information available on the relationship between volunteering and poverty (on the differences between poverty and social exclusion, or on the poor as actors and not only as beneficiaries of public policies) stems from the **quality of social research carried out in recent years.** The scientific community has indeed made a significant contribution towards promoting the new approach to volunteering. It should therefore be considered as the **permanent interlocutor for each of the six types of actors** in the political plan to combat global poverty.

The market

The market plays a significant role in causing (or conversely, alleviating) poverty and the various types of social exclusion (for instance, the dynamics of the employment market, the choice of investment locations, the accessibility and the quality of public services run by the private sector). It is through the market that **the business world** influences access or otherwise by the poor to considerable resources which, amongst many examples, might help the promotion of volunteer activity. So the business world, apart from exercising its social responsibility, **is also a permanent interlocutor for the six types of actors** in the political plan to combat poverty, and should be expected to take responsibility for creating the conditions to enable even the poorest members of the population to gain access to the market.

Universal mission of volunteerism

At this point, we should mention the mission of volunteerism in the new century – a universal mission in which **the new paradigm** brings about radical changes in volunteering; **the mission to eradicate poverty by involving the poor as actors** in the struggle against social exclusion by mobilising the very people who are exposed to social and environmental risks.

Against this background, we can say that activation of the “volunteering system” gives rise to a widespread effect of shouldering **responsibility** that involves not only the workers in the sector but also the population at large. It therefore represents further confirmation of the emergence of the **“volunteerism society”**, the main features of which have already been illustrated.

B

Facilitating factors and hindering factors

So far, we have been dealing with the main features of the political plan to combat global poverty from the point of view of the actors concerned; now we should look at other characteristics such as the strategies and policies that it is based on. However, before doing so, we need to highlight the factors that facilitate the development of volunteering with respect to social, political, economic, religious and cultural variables, and also the factors that hinder it.

An international debate has arisen around these issues and we shall be illustrating the main viewpoints in the following sections. The evaluation made and the reference to specific national contexts are the result of documentary research, not of field research. The text also incorporates the suggestions made at the Expert Meeting in Geneva on July 4-5, 2001.

In the following pages, among the facilitating and hindering factors described, those that refer to the voluntary organisations are more frequent than those that concern the volunteering system in its broadest sense. This imbalance does not depend on the authors will but is determined by the fact that most of the documentation available is especially concerned with this specific area of volunteerism, which is often more formalised and organised and, thus, can be more easily analysed. By and large however, since voluntary organisation play a significant role within the volunteering system. The general picture resulting from the factors described can be considered representative of the whole system.

Both the facilitating factors and the hindering factors have been distributed according to a two-way matrix. One axis represents:

- **internality** – relations within the world of volunteering or parts of it;
- **externality** – relations between the volunteering world and the outside world

The other axis represents:

- **cognitive dimension** – positive and negative factors relating to the sphere of information, knowledge and their representations;
- **operational dimension** – the sphere of politics, power, resources, and organisation.

The usefulness of these matrices (one for facilitating factors, another for hindering factors) is mainly to highlight the elements that are instrumental in supporting and promoting volunteering, when designing policies. Once the various factors are grouped into four frames, a fairly homogeneous pattern of problems emerges.

Facilitating factors

MATRIX OF FACILITATING FACTORS

Cognitive area					
i n t e r n a l i t y	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;"> COGNITIVE FACTORS RELATING TO THE INTERNAL DYNAMICS OF THE VOLUNTEERING SYSTEM </td> <td style="width: 50%; padding: 5px;"> COGNITIVE FACTORS ASSOCIATED WITH THE RELATIONS OF THE VOLUNTEERING SYSTEM WITH THE OUTSIDE WORLD </td> </tr> <tr> <td style="width: 50%; padding: 5px;"> OPERATIONAL FACTORS RELATING TO THE INTERNAL DYNAMICS OF THE VOLUNTEERING SYSTEM </td> <td style="width: 50%; padding: 5px;"> OPERATIONAL FACTORS ASSOCIATED WITH THE VOLUNTEERING SYSTEM'S RELATIONSHIP WITH THE OUTSIDE WORLD </td> </tr> </table>	COGNITIVE FACTORS RELATING TO THE INTERNAL DYNAMICS OF THE VOLUNTEERING SYSTEM	COGNITIVE FACTORS ASSOCIATED WITH THE RELATIONS OF THE VOLUNTEERING SYSTEM WITH THE OUTSIDE WORLD	OPERATIONAL FACTORS RELATING TO THE INTERNAL DYNAMICS OF THE VOLUNTEERING SYSTEM	OPERATIONAL FACTORS ASSOCIATED WITH THE VOLUNTEERING SYSTEM'S RELATIONSHIP WITH THE OUTSIDE WORLD
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OPERATIONAL FACTORS RELATING TO THE INTERNAL DYNAMICS OF THE VOLUNTEERING SYSTEM	OPERATIONAL FACTORS ASSOCIATED WITH THE VOLUNTEERING SYSTEM'S RELATIONSHIP WITH THE OUTSIDE WORLD				
Operational area					
e x t e r n a l i t y					

- **Cognitive facilitating factors related to the internal dynamics of the volunteering system**

In general terms, the development of volunteering is encouraged by **clarity** of relationships at all levels within the system, together with **awareness** of the different types of actors that make up the system (from the single volunteer to more complex organisations).

Clarity and awareness is achieved primarily through better circulation of **information** on experiences, ideas and know-how, between the different organisations and the actors within the system. Secondly, it is achieved by encouraging **research** into subjects associated with volunteering in order to improve overall levels of understanding.

The importance of these factors has emerged from studies carried out in several countries, for example in Central Eastern European countries (Salamon et al., 1999), in Great Britain (Smith 1998), in Kenya (Groots Kenya, UNED-UK 1999) and in Venezuela (Navarro 1994).

- **Cognitive facilitating factors associated with relations of the volunteering system to the outside world**

A particularly important point concerns the need for all actors to contribute towards **creating an atmosphere of trust** around the volunteering world, thereby reinforcing the social capital at local levels.

In order to bring this about, the first step is to **provide more information** on the nature and potential of the volunteering system (UNV, CERFE 2001), including, non-profit and volunteer organisations, addressed to the general public and to governments and local authorities (as happens in countries such as Brazil, Chile, Costa Rica, Venezuela or Great Britain, according to reports by Salamon et al. 1999, Navarro 1994 and Smith 1998).

This flow of information must be conveyed through an efficient **communication network** that will make it possible to build, or “rebuild”, the image of volunteering while also **encouraging both philanthropy and, above all, reciprocity and mutuality** at the local level (Salamon et al. 1999; UNV, CERFE 2001). Following the example of experimental projects in Argentina (Salamon et al. 1999), this has to be put into practice with full respect for the rules of **transparency** concerning the activities carried out by organisations, especially in regard to the management of allocated funds.

In order to create such an atmosphere of trust, it is important to bear in mind the results of experience in other countries such as Egypt (Sullivan 1994) or Venezuela (Navarro 1994) where successful projects, set up by voluntary organisations, were shared with the public sector; or Morocco, Senegal (UNDP 2001) and Great Britain (Smith 1998), where efforts are concentrated on obtaining **official recognition** of the **skills acquired** by volunteers and even **including volunteering in school curricula** where possible.

Finally, it is worth remembering that **international exposure** of volunteers and voluntary groups at the local level - **in terms of access to international information and knowledge, involvement in development projects, and so on** - represents an enhancement for the various forms of voluntary action. This is true at any level and however the exposure comes about, especially for low-income communities (UNV, CERFE 2001).

- **Operational facilitating factors related to the internal dynamics of the volunteering system**

Among the factors that facilitate volunteering, it is worth pointing out some that concern relationships within the volunteering system itself, and its operations.

Capacity building

Building up a **training mentality** and running training programmes is of fundamental importance for volunteerism. Studies carried out in many countries, especially in South America and in Central Eastern Europe (Salamon et al. 1999; Navarro 1994), have shown the importance of **capacity building and training** as a way of improving the following skills: the design, management, assessment and follow-up of programmes; internal organisation; accountability; leadership; and knowledge of the English language which is increasingly important in the field of new technologies.

As was found in Brazil and in the USA (Bothwell 2001; Salamon et al. 1999), such skills also contribute towards the development of **promotional abilities** within voluntary groups, enabling them to “market” their organisations and to raise their profile in the public eye.

Changing the status of beneficiaries

Another factor that seems to encourage the development of volunteering concerns **removing the distinction between active and passive participants**, thereby changing the status of the beneficiaries of voluntary activities which entails their increasing personal involvement.

In many countries, it has been shown that the best way to improve the effectiveness and efficiency of voluntary action is to **involve the people targeted by the projects** in the decision-making process, especially in analysing needs and in choosing appropriate courses of action (UNDP 2001).

Linking up to networks

The possibility that the volunteering system has, especially when operating in low-income communities, of creating **different types of networks** is one of the most important facilitating factors. This is especially insofar as it helps towards increasing the sustainability of the organisations while also enabling them to carry out lobbying (UNV, CERFE 2001).

This can be extremely facilitated by the increasing use by all the actors of voluntary action of **Information and Communication Technology (ICT)**, in terms of both equipment and skills (UNV, CERFE 2001).

In the case of India, the presence of **high rates of social capital** turned out to be a **prerequisite** for spreading poor's voluntary action, although by itself it was insufficient. In order to activate social capital, especially at grassroots level among the poor, there is often the need for **“mediating agents”**, in other words, people from national or international NGOs, governments, local authorities, etc. (Krishna 2000, UNV, CERFE 2001).

Equally important is the **high level of cognitive capital** - widespread presence of highly educated or skilled people at the local level - which some poor communities have, for instance in Russia where such strength encouraged voluntary action and improved the ability to handle resources (UNV, CERFE 2001).

- **Operational facilitating factors associated with the volunteering system’s relationship with the outside world**

The relationship between volunteers and the outside world hinges especially upon, three main factors: political, social and religious.

Political and social aspects

Volunteering seems to spread and succeed especially where governments do the following:

- encourage **collaboration** between public and private organisations, including the business service sector, with special focus on volunteering;
- lay down **clear laws and regulations** with a certain degree of flexibility;
- adopt straight-forward **tax laws** to simplify the task of donors and beneficiaries of funds and grants;
- allocate **funds** for voluntary activities;
- enable the volunteering system to **participate** in the country's **political and democratic processes**.

The importance of such political steps has been shown in Latin American countries, as noted by Salamon et al. (1999) and Navarro (1994), in the Philippines (as in the case of Cebu, MOST), as well as in industrialised countries (Civicus 1999).

Relations with public authorities also include another important aspect relating to the enhancement, guarantee and protection of **civil liberties** and **human rights**. This contributes towards the creation of an enabling environment that is especially important for African and Middle Eastern countries (Bayat 2000; Adedeji & Otite 1997), but also in Latin America and in Asia (UNV, CERFE 2001).

Conversely, and to some extent paradoxically, regimes that violate human rights unwittingly encourage **the migration of democratic leadership** from public institutions to the world of volunteering and of NGOs (Salamon et al. 1999).

Worth remembering is that the volunteering system today has considerably more opportunities than previously, as a result of the **larger number of actors** which it can turn to, or who represent points of reference (especially international organisations and local authorities) (UNV, CERFE 2001).

Religious aspects

A country's feeling for religion, both institutional and embedded in the culture, can have positive effects on the spread of volunteering.

The Roman Catholic Church, for example, **in areas where it remained outside the political and secular establishment**, made it possible for volunteer and non-profit organisations to flourish independently, as happened for instance in the United States and in Brazil (Salamon, Anheier 1997).

Generally speaking, **religion** is one of the forces that encourages philanthropic gestures which tend to continue at a stable level over time (Latin America and the United States - Anheier, Salamon 1998; Salamon et al. 1999).

From a cultural point of view, a good example is the **Islamic popular tradition** (as distinct from the militant radical tradition). In Egypt, this tradition made it possible to set up successful inter-religious projects with Coptic Christian groups, as part of a development cooperation programme (Sullivan 1994).

Hindering factors

MATRIX OF HINDERING FACTORS

Cognitive area	
i n t e r n a t i o n a l	<p>COGNITIVE HINDERING RELATED TO THE INTERNAL DYNAMICS OF THE VOLUNTEERING SYSTEM</p>
e x t e r n a l	<p>COGNITIVE HINDERING ASSOCIATED WITH THE RELATIONS OF THE VOLUNTEERING SYSTEM WITH THE OUTSIDE WORLD</p>
Operational area	
r e l i g i o u s	<p>OPERATIONAL HINDERING ARISING FROM THE INTERNAL DYNAMICS OF THE VOLUNTEERING SYSTEM</p>
s e c u l a r	<p>OPERATIONAL HINDERING ASSOCIATED WITH THE RELATIONS OF THE VOLUNTEERING SYSTEM WITH THE OUTSIDE WORLD</p>

- **Cognitive hindering factors related to the internal dynamics of the volunteering system**

Sometimes volunteers or voluntary organisations tend to **lose sight of the original objectives**, and to reduce their sensitivity to and close contact with the community they are working with.

Paradoxically, this happens precisely at the point when subjects of the volunteering system, both individual and collective, increase their organisational ability by acquiring a **professional status**, and when they achieve **greater control and access to funds**.

The combination of a business culture and money-related issues in cultural contexts pervaded by strong religious feelings, often produces a secularisation process which is experienced by the leadership at different levels as a certain detachment from the goals set on the outstart.

Furthermore, the competition to obtain funds and grants often spurs organisations to invest increasingly large amounts of human and organisational resources in developing public communications and fund-raising strategies. If these efforts are not kept under tight control, they end up by absorbing most of the organisation's energies.

- **Cognitive hindering factors regarding relations with the outside world**

A major obstacle for volunteering is a degree of **diffidence on the part of the general public** when not adequately informed. In Central European countries for example, Salamon et al. (1999) recorded a widespread feeling of disappointment with volunteering activities, which deprives volunteering of essential human resources.

Sometimes, a similar diffidence is also found in the international community and in the development cooperation sector although examples pointing in the opposite direction also exist (see for instance UNDP or The World Bank). This takes the form of three main types of prejudice.

In the first place, there is **prejudice against the leadership**. Volunteer and community-based organisations, especially those in low-income communities, are considered to be unreliable and incapable of following through with the development projects for their country (as generally reported by IRED, 1997, and by Anheier and Salamon 1998 with reference to developing countries). This is made worse, especially in developing and Central Eastern European countries, by the legacy handed down by colonialism and authoritarian regimes, which is most evident in the lack of a well-established middle class (Anheier and Salamon 1998 and Salamon et al. 1999).

The second type of **prejudice** is fundamentally **ethnocentric** and arises from a generalised view of the southern hemisphere as being incapable of starting up mobilisation and empowerment processes within reasonable time-frames (IRED 1997 and Sullivan 1994).

Lastly, a further type of **prejudice regards members of some weaker social categories** who are generally considered to be less reliable. A particular case of such prejudice is associated with gender issues as (noted by Groots Kenya & UNED-UK 1999) when government funds allocated for women end up being managed by men or by women belonging to higher social levels.

- **Operational hindering factors arising from within the volunteering system**

There are several hindering factors that concern the low ability of some of the actors of the volunteering system to control its own operational environment. For example, they can stem from:

- an excessive or exclusive **dependence** on foreign financing institutions (as reported by Pandey 1991, Navarro 1994, Sullivan 1994 and Bothwell 2001);
- the **low ability** to manage, organise and promote internally, and to recruit and maintain their leadership, as reported by Pandey (1991) in India, Navarro (1994) in Latin America, and Schneider (1997) in the United States;
- the institutional **fragility and instability** that is often so evident in the volunteering sector; for instance, the setting up of unsuitable chains of command, or ones in which leadership turnover is carried out with difficulty (UNV, CERFE 2001);
- the exaggerated **institutionalisation** of certain volunteer organisations which leads to the risk of their becoming merely agencies for government programmes or for international organisations (UNV, CERFE 2001);
- the **bad coordination** within the volunteering system which was found, for instance, in India, Egypt and Nigeria by Pandey (1991), Sullivan (1994) and Adedeji & Otite (1997) respectively;
- the **language barrier** that prevents many community-based organisations (especially in countries with large indigenous populations) from understanding the formal and international language of fund providers or of those that deal with issues that involve the community directly, thus making it impossible for them to fully participate in the development processes (in relation to India, see Pandey 1991);
- the **tendency to reinforce primary bonds** (family and relatives) especially in low-income communities where there is an uneven social and cultural context, thereby triggering disempowerment mechanisms that affect the whole of volunteering (as recorded by Hall, 1992 and by Cress, 1993 with reference to the United States).

- **Operational hindering factors arising from relations with the outside world**

In terms of its relationships with the outside world, volunteering is constrained by three main types of obstacles.

Legal and political obstacles

These obstacles tend to create situations of conflict with volunteerism. Some of these obstacles are:

- **legislative confusion** in terms of legal provisions that are often unclear or non-existent (as highlighted by Salamon and Anheier, 1999 with reference to Latin American countries);
- the **lack of political will** in promoting volunteering and involving volunteers in social development programmes, as shown by Pandey (1991), and by Salamon and Anheier (1997);
- particular anomalies in the **political and institutional systems** that produce **abuse** of power, violation of human rights, and **corruption**. Taken together, these make up an environment that is inevitably hostile to volunteering (Pandey 1991; Sullivan 1994; Salamon, Anheier 1997; Salamon et al. 1999; Anheier, Salamon 1998; Bayat 2000);

- a tendency to equate the **political and religious spheres**, thereby reducing the possibility of organised volunteering, as is the case, for example, in the Middle East (Bayat 2000);
- the **failure to acknowledge the right to freely assemble**, and therefore failure to accept the new and much-hoped for “**right to volunteer**”. This is especially true of socially excluded subjects; and is what happens in Nigeria (Adedeji & Otite 1997), in Egypt (Sullivan 1994) and in the Middle East (Bayat 2000)..
- strong **political polarisation** in certain contexts, **especially at the local level**, slowing down or repressing the free expression of volunteering which is faced by the dilemma of allegiance (UNV, CERFE 2001);
- **lack of coordination between the different national and international actors** in drawing up and implementing development projects. This leads to fragmentation of policies and dispersion of volunteer human resources (UNV, CERFE 2001).

Logistic and infrastructural obstacles

This kind of obstacles not only produces immediate problems of survival and maintaining the quality of life (especially in low-income communities), but also **holds back the activation of social capital**.

One of these obstacles arises from the inefficient and **unequal distribution of resources** (political and economic) between the centre and the periphery, or from cities to rural areas, as pointed out by Adedeji & Otite (1997) in Nigeria, and by Hall (1992) in the United States.

Similarly, the **inadequacy or lack of road networks**, transportation, communications, and technological equipment in general, as well as of organisational, training, banking infrastructures and service facilities, prevents people from interacting to a significant degree, or at least from fully exploiting their potential. This is mainly recorded in Latin America by Salamon et al. (1999).

Social obstacles

Social obstacles include:

- the **general tendency to allow family or family relations to prevail over secondary type of relationships** which affects most organisational forms of volunteering (Bayat 2000) thus sometimes producing actual poverty traps;
- **patronage systems** that tend to keep service-oriented organisations, especially those at grassroots level, in a subordinate position with respect to public institutions or other business elites, as happened in Argentina (Salamon et al. 1999);
- a reduced access to immaterial resources (leadership, information, knowledge) due to a **small middle class** which therefore has a negative impact on the activation of volunteering in developing countries, as pointed out in the study by Anheier and Salamon (1998);
- the presence of historic legacy of **closed or strictly structured social systems** which inhibit the development of volunteerism (UNV, CERFE 2001).

C

Defining strategies and policies for combating social deprivation

The objective of this chapter is **to relate the fight against poverty and social exclusion** (which together can be called social deprivation) **to voluntary action, in particular volunteering by the poor.** It is a relatively innovative approach since many public policies for fighting poverty are formulated today without considering the contribution of volunteering, and most of these policies do not seek effective involvement of the poor as volunteers.

Before moving on to the main points of this global political plan, it will be useful **to clarify several concepts relating to poverty and social exclusion, as well as outlining the strategies and policies** by which poverty and social exclusion can be fought. In fact, this is the arena in which voluntary action can make a contribution. Later in this chapter, the themes closely linked to the volunteering/poverty connection will be examined.

Poverty

Poverty can be defined as a condition of deprivation that is relatively stable. This condition can be described in merely economic terms or by criteria close to them such as access to goods and services (basic needs) or the effects produced on the human organism (anthropometrical measures)

33 THE ECONOMIC THRESHOLDS OF POVERTY

Absolute poverty: from an economic point of view, absolute poverty is marked by a threshold of \$1 per day (in 1993 PPP).

Relative poverty: the economic threshold of relative poverty is \$2 per day (again in 1993 PPP).

The World Bank, 2000

34 THE SPREAD OF POVERTY IN THE WORLD

During the last decade, the percentage of people in the world who live on less than 1 dollar a day has fallen by 5 per cent, going from 29% to 24% of the world population. Nevertheless, owing to a significant population growth, the number of poor people has decreased by only 77 million individuals (from 1,276 to 1,198 million people).

At present, out of a world population of 6 billion people, a few less than 1.2 billion live on less than one dollar a day and another 1.6 billion people live on more than one but less than two dollars a day.

On the basis of economic indicators only, living conditions have especially improved in Asia, namely in China, over the last 10 years.

If China were not taken into account in this reckoning, there would be a 70 million increase in the number of poor people in the world, going from 916 million people in 1990 to 986 million in 1998.

In Latin America and the Caribbean islands, the percentage of poor people has remained almost unchanged during the last decade. In southern Asia, the number of poor people has increased by 27 million individuals over the last decade, even if the percentage of people who live on less than one dollar a day has fallen from 44 to 40%.

In eastern Europe and central Asia, the number of poor people has tripled during the last decade, going from 7 million people in 1990 to 24 million in 1998, mainly due to the economic and social transition process experienced in this area.

In Sub-Saharan Africa, the number of poor people has been rising continuously and has gone from 242 to 291 million people over the last decade. The situation coming out of this picture is one in which almost half of the population in Africa live in poor conditions.

World Bank, 2000

Furthermore, **poverty can be defined, from a sociological point of view, as a loss of identity, in other words, as a loss of the ability to control one's environment**, by social actors (the poor) whose reactions to such a situation differ greatly. These reactions are of one or more types.

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A SOCIOLOGICAL DEFINITION OF POVERTY

Analysing the poor as actors we arrive at a sociological definition of poverty understood as a loss of identity or a wide-ranging loss of control of one's environment. The degree of reduction or loss of identity the poor can experience is determined by factors that are not solely economic. We refer to the following three aspects of the life of an individual.

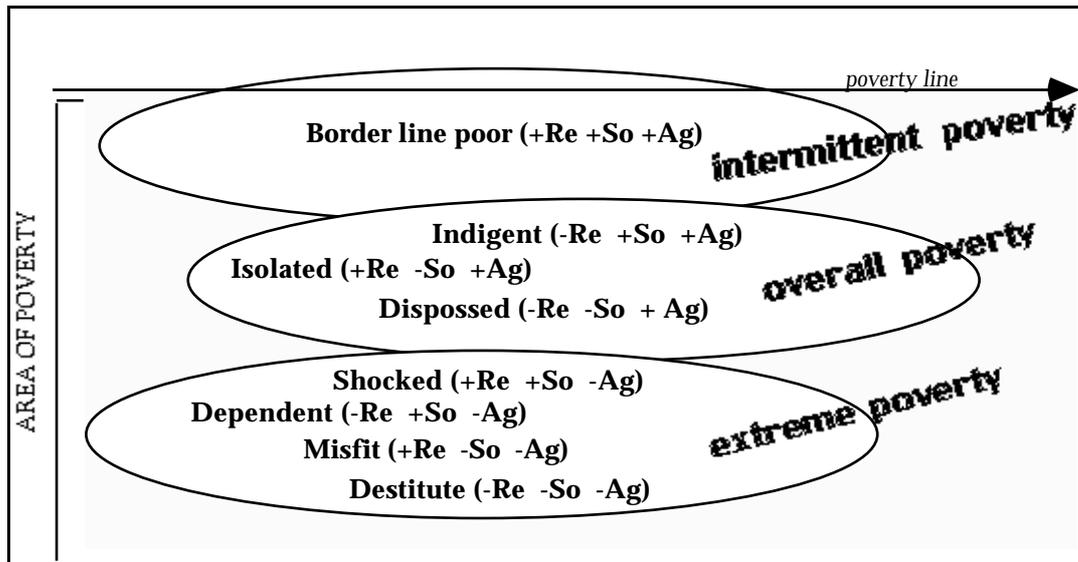
1. **Resources (Re)**, meaning the state of material deprivation linked to the scarcity of possessions and/or basic services.
2. **Sociality (So)**, which relates to the sum of the relationships established by the person with others (including collective and/or public bodies), both on an informal and on a formal social network level.
3. **Agency (Ag)**, understood, in the broadest sense, as the will and ability of the poor person to act to the management of: the daily re-building of his social role; the ability to maintain himself and his family; the building up of aims and values and the ambition to improve his social world; participation in groups and other collective entities.

CERFE, Alfonsi, 2001

The various reactions to deprivation are typical of **different forms of poverty**. At least three main types can be identified: poverty of a transitory and intermittent nature which includes people suspended between a condition of poverty and one of non-poverty; poverty linked to a condition of average distress in which, despite the deprivation, the people involved manage to mobilise themselves and can hope for a better future; and finally there are the extreme forms of poverty (not only in an economic sense) which are connected to a dramatic loss of control over one's existence. As mentioned above, voluntary action by the poor can be found in all the three forms of poverty, even though in degrees and forms varying according with the divers kind of poverty.

THE DIFFERENT TYPES OF REACTION TO POVERTY

Interpreting poverty as loss of control over one's environment (loss of identity) we find ourselves confronted with a universe differentiated by expressions of these conditions. Depending on whether or not an individual suffers from a lack of resources (Re); is endowed or not with sociality (So); manifests forms of agency (Ag) or does not, he or she will have different reactions to the challenges of deprivation. Such reactions or attitudes can be expressed graphically in terms of categories or types of poverty. A knowledge of these categories or reactions is decisive in planning efficient policies.



CERFE, Alfonsi, 2001

Social exclusion

Social exclusion, as compared to poverty, has processual nature. Social exclusion represents the path from a non-poverty existence towards a condition of poverty. **To speak of social exclusion means alluding to a process of impoverishment.**

Such a process is produced by the **accumulation and interaction** of the various social and environmental risk factors.

THE SOCIAL AND ENVIRONMENTAL RISK FACTORS

In particular, a basic table has been identified, containing 13 social risk factors.

- | | |
|----------|--|
| Factor 1 | Habitat Risk (Low quality of habitat) |
| Factor 2 | Health Risk (Low quality of disease prevention and health promotion tools) |
| Factor 3 | Employment Risk (Lack of access to employment) |
| Factor 4 | Intelligence Risk (Inadequate promotion and defence of local human resources) |

Factor 5	Crime Risk (Presence of inadequate safety conditions at local level)
Factor 6	Gender Risk (Failure to exploit female human resources)
Factor 7	Family Risk (Crisis of the family structure)
Factor 8	Communication Risk (Difficult access to communication)
Factor 9	Public Administration Risk (Inadequate quality of public administration)
Factor 10	Institutional Disorder Risk (Existence of discrimination on a religious, racial and political basis and of forms of social stigmatisation)
Factor 11	Social Security Risk (Low social security levels)
Factor 12	Social Abandonment Risk (Lack of informal social networks)
Factor 13	Consumption Risk (Lack of access to non-essential goods)
CERFE, Mastropietro, 2001	

The fundamental characteristic of the **social exclusion/ impoverishment process** is that it **effects social classes that are not poor** but which are at risk of impoverishment (for example, workers on low salaries, small shopkeepers and vendors, artisans, those who are unemployed for brief periods, or groups located at the lower limits of the middle class). These categories risk seeing their life style degenerate, for example, due to illness, economic recession or loss of employment. When more than one circumstance of this type occurs, these people become more vulnerable and risk losing their material reserves and/or social links. Little by little they tend to lose the ability to react.

The difference between poverty and social exclusion suggests the need to define a program to combat social deprivation founded on two guiding strategies:

- a prevention strategy aimed at the non-poor, to block the impoverishment/social exclusion process;
- a “caring” strategy to encourage full recovery of the human resources “disempowered” by deprivation (the poor).

Such strategies obviously have an impact also on the possibilities for the voluntary action to develop among the poor.

38	
POINTS FOR DEFINING A STRATEGIC FRAMEWORK FOR COMBATING SOCIAL DEPRIVATION	
Prevention strategy	directed at the non-poor and aimed at protecting people at risk of impoverishment
Caring strategy	directed at the poor and aimed at the recuperation of people living in poverty
CERFE, Alfonsi, 2001	

Prevention

Leading on from what has been said about social exclusion, the **prevention strategy** is aimed at protecting the non-poor community from the effects of social and environmental risk factors and is therefore mainly aimed at compensating, for example, deficiencies in the health and education services, housing, communications, quality of public administration, social security services, and preventing, as far as possible, the damage caused by natural catastrophes or shocks of a macro-economic nature. It is also worth remembering that voluntary action is especially widespread among the non-poor communities which are on the edge (although above the threshold) of poverty. A prevention strategy is, thus, also a strategy of protection and conservation of voluntary action. Moreover protection from social risks in non poor community often relies heavily on voluntary action of one form or another.

Care

The **“caring” strategy** for social illnesses such as poverty consists of actions aimed at people already living in poverty, by taking **various steps** that will respond in a relevant way to the various poverty situations.

For those forms of poverty characterised by their transitory and intermittent nature (borderline poor), it would be useful to promote policies that are linked mainly to a poverty **prevention** approach integrated with **purely economic-material forms of support** including those of a temporary type (earnings support) in order to reduce vulnerability during moments when access to employment and, in general terms, to resources is difficult.

For those who are experiencing a condition of medium suffering, (overall poverty), it would be useful to promote **empowerment and enabling environment** actions.

These consist of actions and programs able **to create a favourable environment** (within and outside the person) and able to guarantee an effective improvement in the living conditions of the poor and their families. With reference to this target, it should be possible to enact programs for job placement, professional re-qualification and enterprise creation. Empowerment actions and an enabling environment impact in an extremely favourable way also in encouraging voluntary action among the poor.

Finally, for those forms of poverty defined as “extreme”, which are characterised by a sense of adjustment and resignation to this type of life, and by a long permanence in a state of poverty that is often hereditary, the actions to be promoted should take **the form of subsidies**.

In particular, it is first of all necessary to provide **relief** for these people in order to alleviate situations of serious material, social or psychological deprivation, while at the same time promoting **long-term empowerment** policies to encourage, over time, the recovery of the will and ability to liberate themselves from such a state.

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THREE POVERTY AREAS	
THREE DIRECT POLICIES FOR COMBATING POVERTY	
Intermittent poverty area	Income sustaining policies Policies based on providing services
Overall poverty area	Enabling environment policies Empowerment policies
Extreme poverty area	Relief policies Long-term empowerment policies
CERFE, Alfonsi, 2001	

As was previously stated, policies for combating poverty and social exclusion, if they are to be effective and realistic, must be promoted and carried out by many different actors. We have already mentioned this in §A of the text, emphasising the importance, and at the same time the absolute non-exclusivity, of the volunteer system in this picture.

Now we must ask ourselves how volunteering can play its part. The UNV has already answered this question in general terms in previous documents¹². It is our task to complete the response by putting forward **several further recommendations specifically relating to voluntary action by the poor.**

We will do so in the following section, in the framework of what can be called **four ideal strategies for promoting volunteering**, that is: by encouraging increased public **awareness** of the value and potentiality of volunteering; by contributing to the creation of an **enabling environment** for the development and growth of volunteering; by working for the **empowerment** of the voluntary system on all levels; by encouraging **self-awareness** of the world of volunteering regarding its importance as a participant in the implementation of social policies.

¹² Reference is made, in particular, to: “On Volunteering & Social Development”, New York, 1999; “Below the Waterline of Public Visibility”, The Hague, 2000.

D Recommendations

In our text we have discussed the challenges faced by the world of volunteering, particularly concerning its role in the fight against poverty and social exclusion. We also took into account what has been formulated during recent years by the United Nations, and presented a number of facilitating and hindering factors. Against this background, it is possible to put forward several recommendations for specific policies aimed at strengthening voluntary action by the poor in the struggle against poverty and impoverishment processes (i.e. social exclusion), or to continue this fight through volunteerism and in particular, volunteering by the poor.

These recommendations are directed at:

- international organisations;
- national governments;
- other entities who need to put these recommendations into practice in order to ensure the efficiency of voluntary action by the poor (NGOs, local authorities, businesses, research groups, etc.).

Further recommendations, mostly directed at the UNV, concern monitoring and evaluation of the above-mentioned policies; identification and upgrading of the best practices; the circulation of information; etc.

Recommendations for international organisations

It is recommended that international organisations:

- contribute to the **creation, in an international context, of an enabling environment for the development and strengthening of voluntary action by the poor**, while stressing the necessity of involving all the actors (both within and outside the volunteering system) and all the resources available in carrying out the policies for fighting poverty and social exclusion;
- in any program or project aimed at them directly or indirectly, to consider the **poor as actors and, whenever possible, as partners and not simply as beneficiaries** of public policies, this also applies to the decisional processes, the assessment of needs and the choice of approach;
- **encourage gender mainstreaming** also in the context of the voluntary action by the poor;
- encourage, in the various countries, and even among the poor, **the right to volunteer** and what it entails (the right to assemble, to join organisations, to hold meetings, to spread and have access to information);
- encourage links to various types of **networks** by volunteer groups, especially in low-income communities;
- by encouraging awareness and capacity-building, to provide **more information to officials of international organisations** about the existence and potential of voluntary action among the poor. This will help to combat all forms of prejudice, such as the tendency to consider the leaders of low-income communities as unreliable and incapable of carrying out development projects at the local level.

Recommendations for national governments

National governments are urged to:

- contribute to the creation, **in a national context**, of an **enabling environment for the development and affirmation of voluntary action among the poor**, reaffirming the need for involvement by all the actors (both within and outside the volunteer system) and for the mobilisation of all the available resource for the enactment of policies for combating poverty and social exclusion;
- regarding any program or project aimed directly or indirectly at the **poor**, they must be considered **as actors and**, whenever possible, **as partners and not simply as beneficiaries** of public policies; this also applies to decisional processes, assessment of needs and choice of approach;
- in promoting voluntary action by the poor, to give close attention to the **gender issue**, particularly regarding the protection of women (since they are in a weaker position and often victims of strong prejudice); to the strengthening and enhancement of female leadership in sharing the responsibilities among men and women, including those involved in voluntary action;
- **reduce top-down approaches as much as possible** (as is presently the case) without in any way causing governments to renounce management of their polices for combating poverty; they must **create spaces** in which the “small” actors in low-income communities can play a leading role;
- at the same time avoid **extremist rhetoric regarding the bottom-up approach** (obviously positive in itself) that could lead to the poor wrestling alone with problems they cannot resolve by themselves or which they would resolve in an inadequate manner;
- encourage, by appropriate diffusion of information, **access by the poor to available resources**, making it easier to strengthen voluntary action among the poor;
- guarantee, even among the poor, **the right to volunteer** and all that it entails (the right to assemble, to join organisations, to hold meetings, to spread and have access to information);
- contribute to **creating a climate of trust** regarding volunteering, with particular attention to voluntary action by the poor, combating any form of prejudice regarding it;
- encourage **access to training and capacity-building** as part of the struggle against poverty and social exclusion, not only by officials and exponents of central and local public administrations and the leadership of NGOs and other civic organisations, but also the **poor** engaged in voluntary action (in particular the scarce but existing qualified human resources), also involving the schools and giving them access to information and new technologies, etc.;
- take into account the relationship between voluntary action and infrastructural networks in order to encourage **access by the poor to equipment** that enhances communication (e.g. telephones, faxes, computers, e-mail and the Internet) and to transport (bicycles, motor-bikes, etc.);
- encourage the construction of forms of **partnership and collaboration among those involved in local and non-local volunteering**, where the latter can be mediators and catalysts regarding the voluntary action of the former, especially the poor;
- by raising awareness and capacity-building, to keep **the political world and public administration informed** of the existence and potential of voluntary action by the poor, to strengthen the **political will** to promote volunteering and use it in social

development programs; to combat any form of prejudice such as considering the leaders of low-income communities to be unreliable and incapable of carrying out development projects at a local level;

- as far as possible to provide for the setting up and nourishment of appropriate **funds for sustaining the voluntary action of the poor**, to be managed jointly by the public sector and the volunteer system;
- orient initiatives for combating poverty and social exclusion in the direction of economic sustainability, **using the context of the new economy** as much as possible, through job creation and enterprise creation;
- encourage the overcoming of **linguistic barriers** that separate many grass-roots organisations (especially in countries with a strong indigenous population) from the formal, international language;
- combat anomalies and inconsistencies in the **legal and political-institutional systems** which produce, at times, a climate of uncertainty, forms of patronage, abuse of power, violations of human rights and instances of corruption that, in their entirety, constitute a hostile environment for volunteering, especially volunteering by the poor;
- encourage an encounter between volunteering by the poor and researchers, professionals and practitioners, and their respective organisations (universities, research centres, professional associations, etc.) in order to enrich volunteering with important contributions of **cognitive capital**;
- create **national observatories** of volunteering by the poor (and also more numerous observatories of the volunteer system in general) capable of supplying up-to-date information regarding this and related activities, and of monitoring what has been outlined in this document and providing further suggestions for strengthening it, etc; these observatories could also act as **focal points** for voluntary action by the poor to be promoted in every country.

Recommendations for other interested parties

As far as NGOs and other civic organisations, local authorities, the business world and researchers are concerned, the following recommendations are formulated.

NGOs and other civic organisations should

- foster in volunteering organisations and volunteerism at large a **training mentality** and related procedures for the strengthening of volunteer action among the poor (not intended only for capacity-building of the leaders and exponents of these organisations); this will “anchor” qualified human resources to their communities more strongly;
- reinforce the role of volunteering organisations and groups, **as intermediate bodies** that facilitate access by the poor to resources and therefore their potential for voluntary action;
- encourage **integration and coordination among the various types and levels of volunteering** (in particular volunteering by the poor); to encourage **cooperation** with other actors, especially those belonging to non-local volunteering who are, in a way, **catalysers of volunteering** in low-income communities (guaranteeing their autonomy but also avoiding **extremist rhetoric regarding the bottom-up approach** that could lead the poor to wrestle alone with problems they cannot solve alone or which they would resolve inadequately);

- in promoting voluntary action by the poor **NGOs and other civic organisations** must give close attention to the **gender issue**, as already mentioned with the reference to international organisations and national governments;
- regarding the relationship between voluntary action and infrastructural networks, it is important to facilitate the access, **even by the poor to equipment** such as telephones, faxes, computers, e-mail, the Internet, bicycles, motor-bikes, etc.;
- collaborate in the management of appropriate **support funds for voluntary action by the poor**, paying particular attention to the method of distribution of available resources;
- promote, especially among NGOs and civic organisations, adequate training initiatives aimed at building the necessary skills for a correct mix of economic and organisational elements and setting targets that will **avoid “forgetting” or “neglecting” the importance of voluntary action by the poor**;
- make the most of the expertise of the poor in the fight against poverty and social exclusion since they possess specific **low-cost know-how** (for building, maintenance, recycling, etc.);
- as also said with respect to international organisations and national governments, orientate the initiatives for combating poverty and social exclusion in the direction of economic sustainability, **using the new economy context**;
- **make the most of family and territorial links** deriving from traditional solidarity or new types of social responsibility, strengthening them and promoting their projection into the context of the fight against poverty as expressed by voluntary action by the poor;

Local authorities

- by raising awareness and capacity-building, make local officials aware of the existence and potential of **voluntary action by the poor, especially at the local level**;
- cooperate with NGOs and other grassroots organisations, **to facilitate access, even by the poor, to equipment** such as telephones, faxes, computers, e-mail, the Internet, bicycles, motor-bikes, etc.;
- **sustain voluntary action by the poor**, also through mediation **by local administrations**;

Business

- encourage the promotion of **philanthropy** at the local level and aim it also at **strengthening**, directly or indirectly, **voluntary action by the poor**;
- exercise responsibility towards the fight against poverty and social exclusion, e.g. by the creation of **more work opportunities** or by facilitating access to public interest services managed by the private sector, providing more resources for voluntary action by the poor;
- promote job and enterprise creation in the frame of **the new economy** for combating poverty and social exclusion in the direction of economic sustainability;
- encourage an encounter of voluntary action by the poor with the world of professionalism and its organisations (consulting firms, professional associations, etc.) with the aim of enriching voluntary action with important contributions of **cognitive capital**;
- cooperate with NGOs and local authorities for **facilitating access, also by the poor, to equipment** such as telephones, faxes, computers, e-mail, the Internet, bicycles, motor-bikes, etc.;

The research sector

- **increase scientific research** regarding subjects connected with volunteering (in particular voluntary action by the poor), with the aim of increasing awareness of it and information concerning it; highlight the positive side of voluntary action by the poor and indicate what could be the potential of a “volunteerism society” committed to the fight against poverty and social exclusion;
- encourage an encounter between voluntary action by the poor and researchers, and their respective organisations (universities, research centres, professional associations, etc.) with the aim of enriching volunteering with important contributions of **cognitive capital**;
- make the most of the expertise of the poor in the fight against poverty and social exclusion since they possess **specific low-cost know-how** (for building, maintenance and regarding recycling, etc).

Specific recommendations for the UNV

- encourage a greater **diffusion of information** among the various organisations and the various participants of volunteering, **regarding experience, ideas and know-how** connected with the actions of the poor in the fight against poverty and social exclusion. On this subject, it is necessary **to emphasise and spread the success stories** of voluntary action by the poor through the production of audiovisual material and other aids;
- regarding programs, give particular attention to the subject of voluntary action by the poor by making the **United Nations** more aware of it (and through it, governments), focusing on the main volunteering organisations and/or those having anything to do with **volunteering**;
- encourage the **creation of national observatories and one or more regional or global observatories of voluntary action** by the poor that are capable of supplying updated information regarding this and related subjects in order to monitor what has been set out in this document, and to supply further suggestions for strengthening voluntary action, etc.; these observatories could also act **as focal points** for voluntary action by the poor and could be instituted on a regional and international level.

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VOLUNTEERISM IN POVERTY REDUCTION STRATEGY**
Geneva 4-5 July 2001

List of participants

- AZIZAH DARGOUTH MEDIMEGH, Cabinet de Prospectives Sociales (Tunisia)
- ROOMI S. HAYAT, Institute of Rural Management (Pakistan)
- THIerno KANE, UNDP Consultant, former CONGAD Coordinator (Senegal),
- VUKANI MTHINTSO, Deputy Director of Department of Social Development, Poverty Relief Program (South Africa);
- SHEELA PATEL, SPARC (India)
- DIMITRY RABKINE, Director of the Center for Public Relations and Community Development, Institute of Research on Problems of Non-profit in Newly Independent States (Russia)
- HUGETTE REDELGELD, Vice President International Movement ATD Fourth World (France)
- GERARD VAN RIENEN, International Co-ordinator Social Policy, Ministry of Health, Welfare and Sport (Netherlands);
- LUCIA RUIZ, PGU-Habitat Latin America e Caribe/CIUDAD (Ecuador);
- JUSTIN DAVIS SMITH, The National Centre for Volunteering (United Kingdom);

UNV

- WILLIAM ANDRIANASOLO, UNV Headquarter – Bonn
- RICHARD CAMPANARO, UNV Representation Office for North America
- ALAN DINGLE, UNV Editorial consultant
- ROBERT LEIGH, Chief of Representation Office for North America, UNV

CERFE

- GIANCARLO QUARANTA, President
- ALFONSO ALFONSI, Deputy President
- GABRIELE QUINTI, Deputy General Director
- CRISTINA BRECCAROLI
- FEDERICO MARTA