

EXPOSURE DRAFT

International Labour Organization

Manual on the Measurement of Volunteer Work

Room Document

Prepared for the 18th International Conference of Labour Statisticians
to Accompany Chapter 5 of Report I, General Report to the ICLS

Preface

This *Manual on the Measurement of Volunteer Work* is intended to guide countries in generating systematic and comparable data on volunteer work via regular supplements to labour force surveys. The objective is to improve and make available data on a significant form of work that is growing in importance but that is often ignored or rarely captured in traditional economic statistics. Doing so will help to fulfill the mandate set forth in a resolution by the UN General Assembly to “enhance the knowledge base” about volunteer work and to “establish the economic value of volunteering.”

This draft *Manual* was developed at the request of the Statistics Bureau of the International Labour Organization by the Johns Hopkins University Center for Civil Society Studies, which has been involved in the measurement of the nonprofit sector and volunteer work in countries throughout the world over close to two decades. The Hopkins Center was assisted by a Technical Experts Group assembled by the ILO. This Group met at the International Labour Organization headquarters in Geneva on 4 and 5 July 2007 and communicated subsequently with the Hopkins Center via a series of memoranda and emails. The current draft has also benefited from initial testing of a draft survey module completed in three countries, Canada, Korea, and France. Desk reviews were conducted in Korea and France while in Canada, eleven cognitive interviews were also conducted.

The International Labour Organization wishes to acknowledge the contributions of the following individuals who played a significant role in the preparation of this document: Dr. Lester M. Salamon, director, Dr. Helen Tice, Dr. S. Wojciech Sokolowski, and Ms. Megan Haddock of the Johns Hopkins University Center for Civil Society Studies; Ms. Adriana Mata-Greenwood of the International Labour Organization’s Bureau of Statistics; and the Members of the Technical Experts Group, including (in alphabetical order): Edith Archambault, University of Paris1 (France), Jacqueline Butcher de Rivas, Mexican Center on Philanthropy (CEMEFI) (Mexico), Elizabeth Davis, Australian Bureau of Statistics (Australia), Bengt Oscar Lagerstrom, Statistics Norway (Norway), Winnie Mitullah, University of Nairobi (Kenya), Yandiswa Mpetsheni, Statistics South Africa (South Africa), Tae-Kyu Park, Yonsei University (Korea), Justin Davis Smith, Institute for Volunteering Research (United Kingdom), Ato Mekonnen Tesfaye, Central Statistical Authority (Ethiopia). Observers to the Technical Experts Group included: Lorna Bailie, Statistics Canada (Canada), Mr. Tom Dufour, Statistics Canada (Canada), Robert Leigh, United Nations Volunteers.

The ILO sees the measurement of volunteer work as an important part of its commitment to the concept of “decent work” as a means of promoting human agency, dignity, and self-respect.

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CHAPTER 1

INTRODUCTION

- 1.1 Volunteer work is a crucial renewable resource for social and environmental problem-solving the world over. Despite the enormous scale of such work and the contributions it makes to the quality of life in countries everywhere, however, little sustained effort has gone into its measurement.
- 1.2 With these facts in mind, the UN General Assembly passed a resolution in 2001 calling on member governments to “enhance the knowledge base” on volunteering and to support efforts to “measure” its contributions (UN General Assembly, 2001).
- 1.3 The United Nations Statistics Division subsequently issued a *Handbook on Nonprofit Institutions in the System of National Accounts* that recommends including the value of volunteer work in the satellite accounts on nonprofit institutions that countries produce.
- 1.4 The purpose of this *Manual* is to recommend a methodology to guide countries in generating the systematic and comparable data on volunteer work required to carry out these mandates. This methodology was developed by a team of analysts working through the Johns Hopkins University Center for Civil Society Studies under the auspices of the International Labour Organization’s Statistics Bureau and with the aid of a Technical Advisory Group composed of statistical officials and experts on volunteer work from around the world (See Preface for a list of participants).
- 1.5 The *Manual* contains six chapters in addition to this Introduction as follows:
 - a. Chapter 2 examines the rationale for measuring volunteer work and for doing so through labour force surveys;
 - b. Chapter 3 discusses the challenges involved in defining volunteer work and presents the definition proposed in this *Manual* and in the survey module it recommends;
 - c. Chapter 4 describes the basic design of the survey module being proposed to measure volunteer work;
 - d. Chapter 5 describes the target data elements this module seeks to capture and the classification system recommended to characterize the type of volunteer work performed and the field in which it is carried out;
 - e. Chapter 6 discusses recommended procedures for survey administration and reporting (To Be Completed Following ICLS); and
 - f. Chapter 7 discusses recommended procedures for valuing volunteer work (To Be Completed Following ICLS).

- 1.6 In addition to the chapters, the *Manual* includes six annexes:
- a. Annex 1 presents the recommended core survey module;
 - b. Annex 2 presents the tools for classifying volunteer work activities by occupation;
 - c. Annex 3 presents the tools for classifying informal volunteer activities by industry and occupation;
 - d. Annex 4 presents the tools for classifying volunteer work activities by industry;
 - e. Annex 5 presents a survey coding book for interviewers to accompany the recommended core survey module.
 - f. Annex 6 presents a list of references used throughout this *Manual*.

CHAPTER 2

THE RATIONALE AND STRATEGY FOR MEASURING VOLUNTEER WORK

Introduction

- 2.1 This chapter addresses three major topics:
- a. The basic rationale for measuring volunteer work;
 - b. The criteria for designing a recommended approach for such measurement; and
 - c. Why labour force surveys come closest to meeting these criteria and are therefore the recommended information collection platform here.

Why Measure Volunteer Work

2.2 The argument for creating a system to measure volunteer work rests on six major pillars:

- i. **Volunteer work is sizable and creates significant economic value.**
 - a) Volunteers constitute a far more significant share of the workforce of nations than is commonly recognized. Data generated by the Johns Hopkins Comparative Nonprofit Sector Project in 37 countries (Salamon et al, 2004) revealed, for example, that:
 - Approximately 140 million people in these countries engage in some volunteer activity in a typical year. This represents approximately 12 percent of the adult population;
 - These volunteers represent the equivalent of 20.8 million full-time equivalent paid workers, much larger than those employed by the utilities industry and just slightly less than those employed in the transportation and construction industries in the 37 countries studied¹; and
 - All told, even conservatively estimated, these volunteers make a \$400 billion contribution to the global economy. In Canada, the contribution volunteers make to the GDP is more than that of the agriculture and motor vehicle manufacturing industries (Statistics Canada, 2006).
 - b) Volunteers are an especially sizable component of the workforce of *nonprofit institutions* (NPIs). Data generated by the Johns Hopkins researchers revealed that, once converted into full-time equivalent workers, volunteers account on average for

¹ The relative position of full-time equivalent volunteer workers here is somewhat understated because the employment in the other industries has not been adjusted for part-time workers.

45 percent of the sizable nonprofit workforce in the 36 countries for which such data are available. In Sweden and Norway it is as high as 76 percent and 63 percent respectively. This is an enormous renewable resource for social problem-solving.

- c) Volunteer work is also a significant component of charitable giving. In fact, even conservatively estimated, the value of contributions of time outdistance the value of cash contributions by at least 50 percent on average.
 - d) Recognizing this, the United Nations Statistics Division's 2003 *Handbook on Nonprofit Institutions in the System of National Accounts* urges national statistical agencies to incorporate data on volunteer work into the satellite accounts on nonprofit institutions (NPIs) that countries are urged to produce (United Nations Statistics Division, 2003).
 - e) In addition to these strictly economic impacts, volunteer work has a variety of broader social impacts that deliver significant added benefits to society and to the volunteers that makes its measurement important. For example:
 - Volunteer work provides important employment training and a pathway into the labour force;
 - Volunteer work is a crucial resource for addressing the Millennium Development Goals. Recent efforts to eradicate smallpox and inoculate children against polio, for example, would not have been possible without the millions of volunteers mobilized for these efforts;
 - Volunteer work can offer services not easily provided by paid workers, such as mentoring and role models;
 - Volunteer work enhances social solidarity, social capital, political legitimacy and quality of life in a society;
 - Volunteer work can serve as a means of social inclusion and integration; and
 - Volunteer work provides a sense of personal satisfaction, fulfillment, well-being and belonging to persons who volunteer.
- ii. **A growing number of international organizations have come to recognize the contribution and importance of volunteer work.**
- a) In its 2001 Resolution reporting the results of the International Year of Volunteers, the United Nations General Assembly identified volunteering as “an important component of any strategy aimed at...poverty reduction, sustainable development, health, disaster prevention and management, and...overcoming social exclusion and discrimination” (UN General Assembly, 2001).

- b) The United Nations Development Programme's Deputy Administrator recently called attention to the "potential of volunteering and civil society" in advancing the Millennium Development Goals and took issue with a "narrow economic perspective" that "has ignored both" (Melkert, 2006).
- c) The International Red Cross and Red Crescent Societies have declared that "volunteers are at the heart of effective humanitarian assistance for millions of vulnerable people" (International Federation of Red Cross and Red Crescent Societies, 2008).
- d) In a 2008 resolution, the European Parliament identified volunteering as "perhaps our most sustainable form of renewable energy" and encouraged Member States and regional and local authorities to "recognise the value of volunteering in promoting social and economic cohesion" (European Parliament, 2008).

iii. Volunteer work is of special importance to the labour force statistical community.

- a) Volunteer work is a major component of unpaid labour, which has become a focus of increased attention by policymakers throughout the world as a major form of economic activity and economic benefits, particularly in developing countries. Indeed, a recent survey of national statistical offices and institutes conducted by the U.K. Office of National Statistics on behalf of the United Nations Statistical Commission revealed that "the non-observed economy and informal employment" was one of the "three top priority areas for labour statistics" identified by member countries as needing attention (UK Office of National Statistics, 2008).
- b) Volunteer work is a component of unpaid labour that may be easier to capture since it can be differentiated from household activity and much of it takes place through institutions that are considered to be well within the production boundary of the economy (i.e., nonprofit institutions, or NPIs).
- c) Because volunteer work not only produces tangible outputs but also gives individuals a sense of self-satisfaction and a feeling of contributing to the progress of society, its measurement is consistent with the International Labour Organization's emphasis on "decent work" as a means of promoting human agency, dignity, and a feeling of self-respect. As the Director of ILO's Bureau of Statistics recently observed: "There is no doubt that volunteer work contributes significantly to the ILO objectives. It straddles both the economic objectives...and the wider social objectives" (Young, 2007).

iv. Despite the contributions that volunteer work makes both to the volunteers themselves and to the beneficiaries of their generosity, little sustained effort has gone into the measurement of the scope, scale, or distribution of such work, and this impedes policy-making and our general understanding of labour dynamics.

- a) Efforts that have been made to measure volunteer work have been sporadic and frequently uncoordinated, leaving us without up-to-date, reliable, comparative data on the scope of this important social and economic phenomenon.
 - b) This not only limits understanding of volunteering but poses problems for the more general understanding of the labour market. As the Director of ILO's Bureau of Statistics has noted "Given its interplay and its substitution relationship with economic work, the volume and value of volunteer work is required to better understand the volume and characteristics of the participants in the labour market as well as the dynamics of the labour market, and to plan and implement labour market and other social policies" (Young, 2007).
 - c) In view of this lack of information, the UN General Assembly, in the resolution resulting from the UN Year of Volunteers, called on member countries to "enhance the knowledge base" about volunteer work and to "establish the economic value of volunteering" (UN General Assembly, 2001).
 - d) In his follow-up report to the UN Year of Volunteers in 2005, the Secretary General of the United Nations reiterated this appeal, reminding Member States that "One important recommendation to have emerged from the International Year of the Volunteer was to integrate volunteerism into national development planning." But the Secretary General also pointed out that "[a] major constraint continues to be a limited availability of specific data on volunteer contributions..." (Secretary General of the United Nations, 2005).
- v. **Not only do existing data systems fail to capture volunteer work, but also, to the extent that these data systems treat volunteer work, they do so inconsistently.**
- a) Under current 1993 System of National Accounts rules, volunteer employment is supposed to be captured at least in quantity terms for the computation of productivity rates. However, few countries actually gather such data, which likely overstates the apparent efficiency of nonprofit providers.
 - b) With regard to the valuation of volunteer work, it is at best measured only indirectly, and even then only for nonprofit institutions (NPIs) operating in the market, i.e., those units or institutions that receive the preponderance of their income from market sales at economically significant prices. For these NPIs the value of volunteer input is presumably reflected in the value of their output as measured by sales. However, many market NPIs also produce non-market output, and the existing SNA system does not capture this output. To the extent that such output is produced in part with volunteer labour, that portion of volunteer effort is not captured. Beyond this, much NPI output is produced by NPIs that are not primarily market producers. 1993 SNA makes no provision to place a value on any of that output produced by volunteers.

- c) These anomalies downplay the importance of volunteer work and understate its true contribution to societies and economies.
- vi. **Establishing a system for improving the data available on volunteer work will thus serve a variety of useful purposes:**
- a) It will document the scale of an important component of the informal labour market, and, in the process, potentially offer clues about how to document some of the other parts;
 - b) It will bring into view a sizable part of the actual labour force that is now invisible in existing labour statistics;
 - c) It will give credence and added respect to the millions of hours of volunteer work that people throughout the world contribute;
 - d) It will clarify the economic impact of nonprofit institutions (NPIs), which draw particularly heavily on volunteer labour;
 - e) It will help target, and measure the impact of, public and private interventions designed to stimulate volunteer activity;
 - f) It will make it possible to produce the full “satellite accounts” on nonprofit institutions called for in the United Nations’ *Handbook on Nonprofit Institutions in the System of National Accounts*, which recommends the inclusion of volunteers in the measurement of the economic role of NPIs; and
 - g) It will fulfill the mandates set by recent United Nations General Assembly Resolutions promoting volunteering and underlining the need for greater data on volunteer activities.

Key Criteria for Designing an Approach to Measuring Volunteer Work

2.3 In order to design an approach to measure volunteer work, it is important to start with the criteria that such an approach should be expected to meet. Five criteria in particular seemed especially important for the method of measuring volunteer work to be recommended in this *Manual*:

- a. **Comparability.** A first objective of the approach of this *Manual* is to ensure a reasonable degree of comparability in the data assembled on volunteer work in different countries. This requires developing a common approach to data collection, comparable definitions of key concepts, an agreed classification system, and agreement on at least a core set of common variables.
- b. **Feasibility.** Comparability is of only limited value if too few countries participate. Accordingly, an effort was made to find an approach that would be workable in the widest possible range of countries. This implied a need to be sensitive to regional and

cultural traditions, differences of language, and other potential impediments to participation. It also required an approach that is not too burdensome to implement.

- c. **Cost-effectiveness.** A key potential barrier to participation in surveys is cost. Accordingly, cost-effectiveness had to be a prime consideration in designing a recommended approach to measuring volunteer work. Since stand-alone surveys are expensive and time-consuming, this argued for using a supplement to an existing survey platform.
- d. **Efficiency.** Utilizing an existing survey platform is only feasible if great care is taken to avoid over-burdening the platform. This requires a strategy of maximizing the information gathered with the minimum number of questions, and exercising discipline in the range of topics required to be covered. .
- e. **Reliability.** Finally, the chosen approach to measuring volunteer work had to be capable of yielding reliable results. This required careful attention to issues of definition, possible non-response bias, prompts, recall period, and similar issues. It also necessitated testing of key terms and design decisions.

Recommended Approach: Volunteer Supplement to Labour Force Surveys

- 2.4 After careful consideration of these criteria and of alternative survey platforms, the design team in consultation with the Technical Experts Group and officials in the International Labour Organization concluded that the optimal strategy for capturing key characteristics of volunteer work consistent with the foregoing criteria would be to add a carefully designed “volunteer supplement” to national labour force surveys on a periodic basis.
- 2.5 Countries may opt to use other survey platforms, or to launch stand-alone surveys, to measure volunteer work. Indeed, a few countries currently measure volunteering using stand-alone surveys or supplements to household surveys, and an effort has been made to take account of the few existing surveys in designing the survey module suggested here, as will be outlined more fully below. Countries pursuing other approaches, however, are encouraged to consider modifying their existing surveys in ways that will allow for international comparisons. This is consistent with the suggestions of the UN Economic Commission for Europe’s Volunteer Standardization Task Force (2007) calling for greater standardization of surveys measuring volunteering.
- 2.6 Labour Force Surveys offer a particularly useful platform for measuring volunteer work for a number of reasons:
 - a. They are among the most frequent and regular of all data-collection programs;
 - b. They are household-based, making it possible to capture volunteer work that is not done through easily identified, registered organizations;
 - c. They cover all components of the population;

- d. They generally utilize relatively large samples;
- e. They gather important demographic data on respondents;
- f. They are managed by highly professional staff equipped to classify categories of work, which is important for accurate valuation of volunteer work (described in further detail in *Chapter 7*);
- g. They cover other aspects of work (paid employment, hours of work, unemployment, underemployment, and employment-related income), making the coverage of volunteer work a natural extension and making it easier for respondents to differentiate volunteer work from paid work;
- h. They already have procedures in place to handle bias and error and thus ensure reliability;
- i. They offer a highly cost-effective way to capture at least a limited body of core information about the contours of volunteer work in a country; and
- j. They have already been used successfully to collect data on volunteer work in a number of countries, including Australia, Canada, and the United States, without any negative impact on the labour force surveys and high response rates on the volunteer components. More generally, household surveys have been successfully used to gather data on volunteering in other countries as well, including Scotland, Korea, and some European Union countries.

2.7 Reliance on labour force surveys as the platform for the proposed measurement of volunteer work imposes limitations as well as according advantages, however. Most significantly, it limits the range of issues that can be explored since labour force surveys can only accord limited time to the exploration of topics other than the core employment-related matters. Nevertheless, it is possible to design a volunteer supplement that can fit comfortably within a labour force survey yet still capture a crucial core of significant information about volunteer work. The balance of this *Manual* describes the design features that make this possible, beginning with the proposed definition of “volunteer work.”

CHAPTER 3

DEFINING VOLUNTEER WORK

Introduction

- 3.1 In order to be able to measure any phenomenon, it is first necessary to define it. This task is especially challenging in the case of volunteer work for a variety of reasons:
- a. The term “volunteer” or “volunteering” is not widely understood in all parts of the world, and has a variety of negative connotations in some societies, where “forced” volunteering was a widespread practice;
 - b. In some societies, “helping” is an expectation of the culture so that volunteering is not easily identified as a distinct form of activity. Thus, even in contexts where a great deal of volunteering takes place, respondents may not recognize their own acts as something special or distinctive called “volunteer work” as opposed to being simply a normal part of life in the community;
 - c. While volunteering is generally thought to be an activity undertaken without pay, it is not uncommon to have some form of assistance for volunteers, such as meals or coverage of modest out-of-pocket expenses. This makes it necessary to differentiate such partial coverage of expenses or provision of subsistence from actual compensation; and
 - d. Generally speaking, assistance provided without pay to one’s family members is not considered volunteer work. However, the definition of what constitutes one’s family, or even “immediate family,” varies among countries and cultures.
- 3.2 The purpose of this chapter is to outline the definition of volunteer work recommended in this *Manual* for use in labour force surveys and to explain how this definition has addressed some of these challenges in defining “volunteer work.” To do so, the chapter begins with a review of some existing definitions of volunteer work already in use by selected statistical offices and international organizations. Against this backdrop it presents the definition proposed in this *Manual*. Finally, it details the critical features of this proposed definition and the considerations that led to their inclusion.
- 3.3 While there are always multiple ways to define any complex concept, the definition presented here has been vetted with a number of experts and reviewed by a Technical Experts Group and has been found to be a useful and workable way to deal with the many conceptual issues that surround this phenomenon.

Existing International Definitions of Volunteer Work

- 3.4 A number of statistical offices, international organizations, and researchers around the world have already developed surveys of volunteer activity. The definitions of such

activity utilized in these existing surveys provide useful guidance in forging a consensus definition for the work being proposed here. Some examples of these prior approaches include the following:

- a. The United Kingdom Central Statistical Office defines volunteer activity as: “Any activity which involves spending time, unpaid, doing something which aims to benefit someone (individuals or groups) other than or in addition to close relatives, or to benefit the environment” (UK Cabinet Office, 2007).
- b. Statistics Canada’s definition is: “people who perform service without pay, on behalf of a charitable or other non-profit organization. This includes any unpaid help provided to schools, religious organizations, sports or community associations” (Statistics Canada, 2006)
- c. Denmark’s statistical office defines volunteer work as “unpaid work done for nonprofit institutions” Bjarne Ibsen (1992).
- d. The U.S. Bureau of Labor Statistics considers volunteers to be “persons who performed unpaid volunteer activities ...through or for an organization....” (U.S. Bureau of Labor Statistics, 2008).
- e. In a stand-alone survey conducted in Mexico in 2005, the definition used was “Volunteer work is work a person does out of free will, that reaches out to invest time and service for the benefit of others or to a cause that is not profit-seeking, and for which there is no monetary or in-kind payment” (Butcher, 2007).
- f. The Estonian definition of voluntary activity is “the commitment of time, energy or skills, out of one's free will and without getting paid. Volunteers help others or undertake activities mainly for the public benefit and the benefit of society. Helping one's family members is not considered to be voluntary activity” (Estonian Ministry of the Interior, 2006).
- g. The United Nations General Assembly Resolution adopted on 5 December 2001 defines volunteering as: " a wide range of activities, including traditional forms of mutual aid and self-help, formal service delivery and other forms of civic participation, undertaken of free will, for the general public good and where monetary reward is not the principal motivating factor" (UN General Assembly, 2001).
- h. The United Nations’ *Handbook on Nonprofit Institutions in the System of National Accounts* defines volunteering as “work without monetary pay or legal obligation provided for persons living outside the volunteer’s own household.”

3.5 These definitions share a number of common elements emphasizing that volunteer work involves *service or activity* undertaken *without pay* for the *benefit of persons other than close relatives*. Where the definitions differ is in whether they incorporate the term

“volunteer” and in whether they include direct help to individuals or only activity done for a nonprofit or other organization.

Proposed Definition And Rationale

3.6 Building on these prior efforts as well as input from an Advisory Group of nonprofit experts and a Technical Experts Group assembled by the ILO, this *Manual* proposes the following working definition of “volunteer work”:

“activities or work that some people willingly do without pay to promote a cause or help someone outside of their household or immediate family.”

Key Features and Considerations

3.7 A number of key features of this definition, and of the activity it identifies as “volunteer work,” deserve special attention:

- a. **It involves work.** This means that the activity produces something of potential economic value for its recipient, and the recipient must be someone other than the person undertaking the activity. Playing a musical instrument for one’s own enjoyment is therefore not volunteering; but playing a musical instrument for the enjoyment of residents in a nursing home is.
- b. **It is unpaid.** Volunteer work by definition is work without monetary pay or compensation. This differentiates “volunteer work” from what the Resolution passed at the 13th International Conference of Labour Statisticians defined as “paid employment,” i.e. “persons who during the reference period performed some work for wage or salary, in cash or in kind.” However, some forms of compensation may still be possible without violating this feature of the definition.
 - i. Volunteers may receive non-monetary benefits from volunteering in the form of skills development, social connections, job contacts, social standing, and feelings of self-worth.
 - ii. Some forms of monetary compensation may also be possible without violating the definition. The test is whether the compensation can be considered to be “significant.” Not considered to be “significant compensation” and therefore permissible are:
 - Reimbursement of out-of-pocket expenses of the volunteer assignment (e.g. travel costs, costs of equipment);
 - Compensation that is largely symbolic; and
 - Stipends intended to cover living expenses of the person performing the work that are not contingent on the market value, quality or quantity of the work, or its outcome (if any).

- iii. Whether the compensation is considered “significant” or not will likely vary from place to place. In-kind provision of food in a low-wage area, for example, could constitute significant compensation. Each country should determine what level of payment should be considered “without pay,” and the survey administrators could include these decisions in the survey instructions.
- 3.8 **It is non-compulsory or non-obligatory.** Volunteer activity must involve a significant element of choice. Persons engage in these activities willingly, without being legally or institutionally obligated or otherwise coerced to do so. Court-mandated unpaid work, alternative service related to a military draft, or unpaid internships required for graduation from educational institutions would therefore be excluded. However, social obligation, such as peer pressure, parental pressure, or expectations of social groups, *does not* make the activity compulsory.
- 3.9 **It embraces both informal volunteering and formal volunteering.** Individuals can engage in volunteer activities directly with individuals (*informal volunteering*) or through nonprofit or other types of organizations (*formal volunteering*). The definition of volunteer work described in this *Manual* and embodied in the survey module accompanying it covers *both* of these types of volunteering. This is so because informal volunteering is at least as important as formal volunteering in many countries, particularly in countries or regions where there are fewer nonprofit organizations through which persons might volunteer formally.
- 3.10 **It does not embrace work done without pay for members of one’s household or immediate family.** With informal as well as formal volunteering included, it becomes especially important to differentiate between help provided to one’s own family members and help provided to persons outside the volunteer’s own household or immediate family. Only the latter qualifies as “volunteer work” under the definition adopted here. While the volunteer, or his or her family, may reap some reward from the volunteer work, someone outside the household or immediate family must also benefit. The definition of household or “immediate family” used to measure volunteer work will most likely be broader than that used to define “household” for other parts of a labour survey. Immediate family is intended to embrace “close relatives,” those for whom a person would normally feel a sense of “familial obligation.” Caring for one’s parents and grandparents as well as one’s spouse’s parents and grandparents would thus likely not be considered “volunteer work” for the purposes of this survey. The exact interpretation of this convention is likely to vary from country to country, however, and statistical agencies are encouraged to spell out the concept common in their countries and supply this to interviewers.
- 3.11 It includes volunteering done without compulsion in all three possible types of institutional settings: nonprofit organizations, government, and private businesses. As will become clear in Chapter 5 below, the proposed survey seeks to differentiate among these three possible types of institutional settings of volunteer work.
- 3.12 Examples of activities considered in-scope and out-of-scope of this *Manual’s* suggested definition of volunteer work are shown in Figure 3.1.

Figure 3.1.—Examples Of Volunteer Work Considered In-Scope And Out-Of-Scope	
In scope	Out-of-scope
Buying groceries for an elderly neighbor	Buying groceries for one's own family
Working in a soup kitchen cooking meals for the homeless	Cooking meals for one's family
Volunteering as a teacher in a public school	Helping your child with her homework
Serving on a grievance committee for a labour union	Conducting business for profit
Serving on a neighborhood clean-up committee	Cleaning one's own house or yard
Working at a voter registration drive	Voting
Distributing food, medical, or material assistance at a shelter	Driving your wife to a hospital for medical care
Serving as a deacon or usher at your church	Attending a religious service
Helping a nonprofit environmental organization gather water samples without compensation	Doing research for one's occupation
Providing legal advice at a legal services agency	Being paid for legal advice or assistance
Serving as a coach for a children's football league, including one in which one's own child is involved.	Helping your own child to practice football
Making clothes for disadvantaged children	Fixing clothes for one's own children
Constructing housing for homeless families	Fixing one's own home

CHAPTER 4

KEY FEATURES OF THE RECOMMENDED MODULE

Introduction

- 4.1 Past experience in a number of countries provides evidence that labour force surveys, and other household surveys, offer a workable, cost-effective vehicle for generating a reasonable estimate of the nature and extent of volunteer work in a country. At the same time, these country experiences also underscore the importance of a number of crucial choices in the design of the survey instruments used to measure such work.
- 4.2 Among these crucial design choices are: (a) the basic structure of the survey; (b) the range and number of prompts used; (c) the recall or reference period employed; (d) the classification used to differentiate volunteer activities; and (e) matters of wording.
- 4.3 These choices have been carefully considered in the design of the survey module recommended in this *Manual*. This chapter highlights how these matters and others have been handled in the construction of the survey module that this *Manual* recommends. The module itself can be found in Annex 1.

Overall Structure—Activity Focus

- 4.4 The survey module recommended here is structured around individual volunteer activities. That is, respondents are asked to identify any activity in which they have engaged over a specified recall period that fits the definition of volunteer work. They are then asked a series of questions about the frequency, amount of time, type of work, and auspices of each such activity in turn. This approach maintains throughout the interview the focus on what the respondent actually did on the theory that respondents may relate more easily to questions about what they did than to questions about the organizations for which they worked. In this way, the survey design team hopes to engage respondents in the survey more effectively.

Use Of The Term “Volunteering,” Or “Volunteer work”

- 4.5 The terms “volunteering” or “volunteer work” are not used in the recommended module. This is so because experience has shown that this term is understood differently in different contexts and is not helpful in eliciting positive responses. Instead, respondents are simply asked whether they have engaged in “activities or work that some people willingly do without pay to promote a cause or help someone outside of their households or immediate family.”

Prompting

- 4.6 Since volunteer work is often somewhat ambiguous and subject to cultural differences, and since it is a form of behavior that often occurs irregularly and for relatively short periods of time, the accurate recall of these activities may prove problematic for many people. To reduce this error, surveys of volunteer work often employ prompting to fix the definition of volunteering more securely in the respondent's mind, thus assisting the respondents in recalling their past behavior.
- 4.7 Two prompting methods are available to those measuring volunteer work. These are referred to in the literature as high or low "buffering." The high buffered approach uses an extensive series of yes/no questions about individual types of volunteer activity in which the respondent may have participated and asks the respondent about each of them in turn. The "low-buffered" approach asks respondents a single question about whether they have engaged in any work that fits the definition of volunteer work.
- 4.8 The high-buffered approach has the advantage of simplicity but it can significantly increase the time needed to administer the survey, and thus the survey cost, because interviewers must proceed through the entire list of prompts. In addition, too much prompting may distract or confuse some respondents, or discourage them from answering the question altogether (potentially increasing item non-response). Finally, no matter how extensive, prompting may still miss certain types of possible in-scope activity. The low-buffered approach, however, by using a single direct question with no virtually no prompts can seriously understate the amount of volunteer work by failing to fix sufficiently clearly in respondents' minds the full range of activities that are within scope of the survey.
- 4.9 Given this *Manual's* focus on integrating volunteer surveys into labour force surveys but without sacrificing reliability, the survey module recommended here opted for a compromise between these two approaches. Thus, respondents are helped to understand the focus of the module by being asked an initial yes/no question that provides some detailed illustrations of the kinds of activity that would be considered to warrant an initial "yes" answer about their engagement in volunteer activity, though without dragging them through an entire list of specific prompts. The draft survey module recommends certain types of illustrative activities but leaves it to each country to fill in culturally-relevant illustrations of in-scope activities. "Yes" responses to this initial question are then followed up with more detailed questions to identify: a) the type of activity performed; b) the institutional setting of the work performed, if any; c) the field in which the organization operates (if work was performed for an organization); and d) the duration of the work. This process is then repeated until the respondent does not report additional in-scope activities. This means that the length of the interview will be determined by the respondent's willingness to report additional activities. Experience with this form of survey prompting reveals that the overwhelming majority of respondents rarely identify more than one or two in-scope activities.

- 4.10 If the respondent gives a negative response to the question of whether they have engaged in any activity without pay during the reference period, an additional prompt is provided before the survey is terminated.

Reference Period

- 4.11 Compared to paid employment, volunteer work is often a far less frequent activity, making it possible to miss significant dimensions of it if the reference period used is too short. However, if the reference period is too long, the accuracy of the recall declines.
- 4.12 The survey module recommended in this *Manual* proposes a four-week reference period instead of the one week period common in many labour force surveys. This is consistent with the practice in many labour force surveys to use longer periods to capture other dimensions of labour force participation (e.g., unemployment). Initial testing of the module suggests that the four-week reference period should be long enough to capture irregular activity but not so long as to make recall overly difficult.
- 4.13 In addition to the four-week reference period, the survey module proposes adding an additional prompt to capture activities done only once or twice a year (e.g., around a religious holiday that may not correspond with the timing of the labour force survey).
- 4.14 In countries where labour force surveys are continuous and the volunteer supplement will be included regularly, a shorter reference period may be preferred. This is so because short reference periods offer optimal recall by respondents, and frequent administration of the module will help to ensure that infrequent activities are still captured. However, in countries where the volunteering supplement will be conducted only once a year or less, the four-week reference period recommended here will be preferable.

Classification of Occupations and Activities (Fields)

- 4.15 Because the data generated by this survey will be used in part in construction of the satellite accounts on nonprofit institutions recommended in the United Nations *Handbook on Nonprofit Institutions*, it will be necessary to gather data on the actual activities performed by the volunteers, and not simply on the types of organizations for which they might volunteer. This is best done with the aid of a classification system.
- 4.16 One of the great advantages of measuring volunteer work through labour force surveys is that these surveys use standard classifications of occupations and activities that are readily adaptable to the classification of volunteer work, and have survey interviewers that are familiar with this classification structures. Survey respondents are therefore asked for a description of each type of volunteer work they perform. These responses are then coded according to the International Standard Classification of Occupations (ISCO). A cross-walk has been created to help guide coders between likely categories of volunteer work and their corresponding best-fit standard occupational category. This approach will facilitate the task of assigning a value to this volunteer work by making it possible to use the average wage for the occupation that the volunteer is performing. Similarly, the classification of

activities used in this module will follow the standard International Standard Industrial Classification (ISIC) classification. These classifications issues will be discussed in more detail in Chapter 5 and the valuation technique will be covered in Chapter 7.

Wording and Quantity Measures

- 4.17 Although the draft module suggests specific language for identifying possible types of activity considered in-scope for the survey, countries should make necessary alterations in wording to ensure clarity and understanding in the context of the local country.
- 4.18 The draft module attempts to develop accurate measures of the quantity of volunteer time. Because people may have difficulty adding together multiple volunteer assignments, the proposed survey asks separately about the frequency of each activity and about the average duration of each activity. This two-step approach was chosen because it is easier for respondents to supply these two pieces of information and have a computer determine the total hours than to calculate the total hours during the interview.

CHAPTER 5

TARGET DATA ELEMENTS

Introduction

5.1 This chapter identifies more fully the data elements the survey module recommended in this *Manual* proposes to capture in order to provide a basic statistical portrait of volunteer work. In addition, it introduces a set of tools for classifying the core data elements, drawing on a number of existing international classification systems.

Core Data Elements

5.2 A trade-off obviously exists between the range of issues to be explored through a survey and the cost and response rate the survey entails. Previous surveys on volunteering have been either very short, gathering limited data, or quite long, exploring not only the extent and nature of volunteering but also its motivations and impacts, but at far greater cost and risk of low response rates.

5.3 Given the decision to recommend the integration of a volunteer module into regular labour force surveys, the range of topics that can be covered must of necessity be limited. In particular, the survey module recommended in this *Manual* focuses on five core variables to describe volunteer work: (a) the volunteer rate; (b) the type of work performed; (c) the number of hours volunteered; (d) the institutional setting of the work performed, if any; and (e) the field in which the volunteer work is performed. These data items were selected as the minimum needed to be able to portray the economic scale of volunteer work and to meet the requirements of integrating a picture of volunteer work into the satellite accounts on NPIs called for in the United Nations *Handbook on Nonprofit Institutions in the System of National Accounts*.

5.4 Additional data elements can be added to the proposed survey module where countries choose to do so. However, for the sake of international comparison it is not recommended that any of these five data elements be omitted. The discussion below describes these five core elements in more detail.

Volunteer Rate

5.5 The volunteer rate represents the percentage of the population that reports engaging in in-scope activities during the reference period. This rate is defined as the projected total number of “yes” responses to questions about whether or not the respondent engaged in in-scope activities divided by the total population eligible for coverage in the labour force survey, after the application of relevant weighting factors used to blow the survey sample up to the total target population.

5.6 As outlined in the recommended survey module in Annex 1, the respondent has two opportunities to provide a “yes” answer. The first opportunity comes after the introduction

and first prompt, in response to the question *During the past 4 weeks did you do any unpaid work of this kind for someone outside your own household or immediate family?* In cases where a “no” response is given to this initial question, a second opportunity to provide a “yes” response is provided by a second prompt.

- 5.7 Calculation of the volunteer rate considers only activities that meet the definition of volunteer work.

Type of Work Performed

- 5.8 The second key variable to be collected through the recommended survey module on volunteer work is the type of work performed by the volunteer. This variable is crucial to be able to assign a value to the volunteer work, a necessary step for incorporating volunteer work into the satellite accounts on NPIs called for in the UN *Handbook on Nonprofit Institutions*.
- 5.9 The module collects information about the type of work for each in-scope volunteer activity that the respondent identifies.
- 5.10 The type of work performed by the respondent is determined through a two-step process. First, the respondent is asked to describe each type of volunteer work he or she has performed. Second, the interviewer codes the type of work into its appropriate occupational classification using the ISCO-88 occupational classification.
- 5.11 Three tools are provided in the annexes to assist with classifying volunteer work performed to likely ISCO-88 categories.
- a. Annex 2A provides a list of ISCO-88 and ISCO-08 codes likely to contain volunteer work activities;
 - b. Annex 2B provides an alphabetical list of likely volunteer activities and identifies the ISCO-88 codes that correspond to them;
 - c. Annex 3 provides a list of likely *informal* volunteer activities and identifies the ISCO-88 codes that correspond to them.

Number of Hours Volunteered

- 5.12 Hours volunteered represents the duration in hours of each volunteer activity that the respondent identifies as having been performed during the reference period.
- 5.13 In addition to reporting the hours volunteered for each activity, reports on volunteer survey results should calculate the total hours volunteered, the total volunteer hours in each occupation, and the total volunteer hours in each field. These totals will be important in determining the full-time equivalent (FTE) number of volunteer workers and in calculating the economic value of volunteer work, which is needed to complete the satellite account on

NPIs called for in the UN *Handbook on Nonprofit Institutions*. The procedure for calculating the economic value of volunteer work is discussed in more detail in Chapter 7 of this *Manual*.

Institutional Setting of Work Performed

5.14 As noted in Chapter 3, the definition of volunteer work used in the survey module recommended in this *Manual* includes both *informal* volunteering (volunteering directly for individuals) and *formal* volunteering (volunteering through or for an organization). The institutional setting refers, first, to whether the volunteer work was performed for or through an organization, and second, if the latter, the type of organization through which the volunteering was performed. The institutional setting is important to determine in order to be able to complete the satellite account on NPIs and to integrate volunteer work into sectoral productivity measures.

5.15 To determine whether or not the volunteer work is formal or informal, the interviewer asks: *Did you do this unpaid work for or through an organization?* If the respondent answers “no” then the volunteer work is considered to be informal. If the respondent answers “yes” then the work is considered to be formal.

5.16 In the case of formal volunteer work, the institutional setting is identified as being one of three types: (a) a nonprofit institution; (b) a for-profit business; or (c) a unit or agency of government. For this purpose, these types of units are defined as follows:

a. **Nonprofit institutions** are defined in the UN *Handbook on Nonprofit Institutions* as:

- Organizations, i.e., institutionalized units; that are:
- Private, i.e., institutionally separate from government;
- Non-profit-distributing, i.e., do not return profits generated to their owners or directors;
- Self-governing, i.e., able to control their own activities; and
- Non-compulsory, i.e., involve some meaningful degree of freely-chosen participation.

Nonprofit institutions thus include private hospitals, social service agencies, soup kitchens, advocacy groups, religious bodies, NGOs, membership associations, and similar organizations.

b. **For-profit businesses** are entities that are: (i) capable of generating a profit or other financial gain for their owners, (ii) recognized at law as separate legal entities from their owners who enjoy limited liability, and (iii) set up for purposes of engaging in market production. Included are corporations, partnerships, cooperatives, limited

liability partnerships, notional resident units and quasi-corporations (System of National Accounts 2008, para. 4.38).

- c. **Government units** are “legal entities established by political processes which have legislative, judicial or executive authority over other institutional units within a given area” (System of National Accounts 2008, para. 4.9).

5.17 As outlined more fully in Chapter 6, and in the accompanying Coding Book in Annex 5, the identification of the type of institutional setting ideally proceeds in a number of steps. First, respondents are asked to identify the name of the organization for or through which they carried out the unpaid work, to indicate what the organization does, and then to indicate which of the three types of institutional unit it is. Then, in countries where fairly complete business registers or registration systems exist that cover nonprofit institutions as well as other institutional units, the interviewer finds the identified organization in a code book and records the type of institutional unit on the survey form.

Field of Work (Economic Activity)

5.18 The field of work refers to the industry for which the volunteer work was performed. The focus here is on the main activity of the organization(s) for which the volunteer work was performed in the case of formal volunteering, or the best-fit industry classifications in the case of informal volunteering. The purpose of identifying the field of work is to help classify the industries that harness volunteer labour. This is important for measurements of productivity among industries and for allocating volunteer work to the appropriate industries in the NPI satellite accounts called for in the UN *Handbook on Nonprofit Institutions*.

5.19 The industry classifications to be used for classifying each volunteer activity are those provided in ISIC, Rev. 4. Annex 4A to this *Manual* offers a list of ISIC, Rev. 4 industry fields most likely to be ones where volunteering occurs. Annex 4B provides a similar cross-walk from the fields most likely to be ones where volunteering occurs to the appropriate ISIC, Rev. 4 category.

5.20 In the case of *informal* volunteering, the cross-walk in Annex 3 includes a cross-walk between occupational classifications most likely to contain volunteer work and their best-fit industry classification as outlined in ISIC, Rev. 4. Coders will classify the volunteer work to the respective best-fit industry classification. Where the activity code does not correlate well with any industry code, undifferentiated services in households should be used as a default.

5.21 In cases where surveys are conducted in person, cards or prompts may be used to help respondents identify the major industry category of the organization through volunteer work is performed.

Annex 1

Recommended Core Survey Module

Step or variable	Question
START	So far I have been asking you about paid work. The next few questions are about <u>unpaid</u> work, that is, activities that some people willingly do without pay to promote a cause or help someone outside of their own household or immediate family. [Note: Reimbursement of expenses and modest honoraria do not disqualify an activity.]
PROMPT_00	Now I am going to give you some examples of the unpaid work some people do. Examples of this kind of activity include work to help someone in need, like [children, the elderly, the poor, or disaster victims]; work to clean or improve your community, like [roads, schools, health facilities, the water supply, or parks]; organizing an event, such as [a community gathering, a sporting or cultural activity, a political rally], or a religious celebration; work to publicize an issue, or to make people aware of a problem; or work for an organization that serves communities such as [a school, library, health care center, NGO, club, union, church, or association.] [Note: The specific examples of activities considered in-scope may vary from country to country, however the overall types of activities should remain the same in order to maintain international comparability.]
VOL_00	During the past 4 weeks [<i>provide dates marking the period,</i>], did you do any unpaid work of this kind for someone outside your own household or immediate family? <i>If no, go to PROMPT_10.</i>
WORK_01	Now I will ask you a few questions about the unpaid work that you did during the past 4 weeks. First, please tell me what kind of work you did. Why don't you start with the work that [you did the last/ or on which you spent the most time]. <i>[Record response verbatim and use a lookup table or code book to assign occupation codes.]</i> <i>If respondent mentions more than one type of activity, ask questions WORK_01 through WORK_02 for each activity separately, differentiating answers by a, b, c. at end of name.</i>
HOUR_A01	How many times did you do this unpaid work in the past 4 weeks? <i>[Record response verbatim and use a lookup table or code book to assign frequency codes.]</i>
HOUR_A02	How many hours did you devote to this unpaid work [on average each time/the last time] you did it? _____ <i>[Record response verbatim.]</i>
TYPE_ORG01	Did you do this unpaid work for or through an organization? <i>If no, code [informal volunteering] and go to WORK_02.</i>
TYPE_ORG02	What is the name of the organization for which you did this work? <i>[Record response verbatim and use a lookup table or code book to assign industry and sector codes. If more than one organization is mentioned – iterate loop TYPE_ORG for every organization]</i> <i>If NAME is in code book, go to WORK_02.</i>
TYPE_ORG03	<i>If NAME is not in code book, ask</i> What does this organization do? _____ (80 spaces) <i>[Record response verbatim and assign industry code based on response.]</i>
TYPE_ORG04	What type of organization is this? 1. Charity/non-profit organization/NGO/union/or religious organization 2. Business 3. Government 4. Other / Not sure <i>[Record response verbatim and assign sector code based on response.]</i>

Step or variable	Question
WORK_02	During the past 4 weeks, did you do any other kind of unpaid work for someone outside your own household or immediate family? <i>If yes, repeat questions WORK_01 through WORK_02, differentiating answers by a, b,..</i> <i>If no and respondent has answered WORK_03 with yes, go to END.</i> <i>If no and respondent has not answered WORK_03, go to PROMPT_10.</i>
PROMPT_10	When asked about volunteer work, sometimes people don't think of unpaid work they did for organizations, such as serving on boards, fundraising, office and administrative work, gathering scientific data, coaching or officiating, counseling, doing pro-bono work (like free medical care or legal advice), preparing and serving food, and transporting persons or goods. [Note: This should be a list of activities in scope but likely to be missed and will vary from country to country.]
WORK_03	During the past 4 weeks, did you do any of these things for any organizations? <i>If yes, repeat questions WORK_01 through WORK_02, differentiating answers by a, b,..</i>
END	End of survey module

Additional Questions if Survey is Annual

Step or variable	Question
SPECIAL	Additional questions if survey is annual.
SPECIAL_01	People often volunteer for special events. In the past 12 months, did you do unpaid work of this kind for a special event that you have not reported on this survey because it did not take place in the past month?
SPECIAL_02	What kind of work did you do? <i>[Record response verbatim and use a lookup table or code book to assign occupation codes.]</i> <i>If respondent mentions more than one type of activity, ask questions WORK_01 through WORK_02 for each activity separately, differentiating answers by a, b, c. at end of name.</i>
SPECIAL_03	How many times did you do this unpaid work in the past 12 months weeks? <i>[Record response verbatim and use a lookup table or code book to assign frequency codes.]</i>
SPECIAL_04	How many hours did you devote to this unpaid work [on average each time/the last time] you did it? _____ <i>[Record response verbatim.]</i>
SPECIAL_05	Did you do this unpaid work on your own or for or through an organization? <i>If on your own, code [informal volunteering] and go to SPECIAL_02.</i>
SPECIAL_06	What is the name of the organization for which you did this work the most? <i>[Record response verbatim and use a lookup table or coder to assign industry and sector codes.]</i> <i>If NAME is in code book, go to SPECIAL_02.</i>
SPECIAL_07	<i>If NAME is not in code book, ask</i> What does this organization do? _____(80 spaces) <i>[Record response verbatim and assign industry code.]</i>
SPECIAL_08	What type of organization is this? <ol style="list-style-type: none"> 1. Charity/non-profit organization/NGO/or religious organization 2. Business 3. Government 4. Other / Not sure <i>[Record response verbatim and assign sector code based on response.]</i>