This document offers a history of the ILO Manual on the Measurement of Volunteer Work, which was developed by the Center for Civil Society Studies and the International Labour Organization, in cooperation with an International Technical Experts Group (TEG). The TEG was composed of labor force statisticians and volunteering experts, including representatives of:

- University of Paris-Sorbonne
- University of Nairobi
- Yonsei University, South Korea
- Institute for Volunteering Research, UK
- CEMEFI, México
- United Nations Volunteers
- INSEE, France
- Statistics Norway
- National Statistical Office, Korea
- Central Statistical Authority, Ethiopia
- Statistics South Africa
- Australian Bureau of Statistics
- IBGE, Brazil
- Central Statistical Office, Poland
- Statistics Canada
- OECD, France
- Statistics New Zealand
- El Colegio de México

The TEG met twice in Geneva (July 2007 and October 2010), and communicated via a series of memos. This document provides a complete record of the communication with the TEG.
Development History

Report on
the First Meeting of the Technical Experts Group
ILO headquarters in Geneva, Switzerland
4-6 July 2007
Background

In April 2007, the International Labour Organization (ILO) and the Johns Hopkins Center for Civil Society Studies (JHU/CCSS) entered into a Memorandum of Understanding under which ILO authorized JHU/CCSS to produce a draft of a possible ILO Manual on the Measurement of Volunteer Work through official labour force surveys and a suggested draft Volunteer Measurement Survey Module for possible discussion and consideration by the 18th International Conference of Labour Statisticians scheduled to convene in Geneva, Switzerland in December 2008.

As part of the process of developing this Manual, JHU/CCSS agreed to work with a Technical Experts Group (TEG) composed of labor force statisticians and volunteering experts chosen jointly by ILO and JHU/CCSS (for a list of TEG members, see Attachment A). The charge to this TEG was to provide expert advice and input regarding:

- The definition of volunteer work and its characteristics; The definition of volunteer work and its characteristics
- The treatment of volunteer work in the measurement of economic activity;
- The measurement of the volume of volunteer work and its characteristics through labour force surveys;
- The methodology for valuation of volunteer work;
- The design of a Manual for the measurement of volunteer work; and
- The testing of volunteer work measurement through household-based surveys in selected countries.

The first meeting of this TEG took place at ILO headquarters in Geneva, Switzerland, on 4-6 July 2007. In attendance were:

Edith Archambault, University of Paris1-Sorbonne, MATISSE, France
Tae-Kyu Park, Yonsei University, South Korea
Jacqueline Butcher de Rivas, CEMEFI, México
Ato Mekonnen Tesfaye, Central Statistical Authority, Ethiopia
Robert Leigh, United Nations Volunteers
Lorna Bailie, UNECE Experiment Task Force, Statistics Canada, Canada
Tom Dufour, Statistics Canada, Canada
Elisabeth Davis, Australian Bureau of Statistics, Australia
Yandiswa Mpetsheni, Statistics South Africa, South Africa
Bengt Oscar Lagerstrom, Statistics Norway, Norway
Overview

_Sylvester Young, Director of the ILO Statistical Bureau_, welcomed the group and warmly endorsed the effort to capture volunteer work in labor force statistics. He noted that the ILO is a “rights-based organization” and as such is concerned with promoting “decent work,” which is work that has meaning and contributes to the well-being of society. In this sense, an activity can be considered to be “work” whether it produces an economic return or not. This makes “volunteer work” a form of work that is appropriately a focus for ILO concern. Yet under existing national accounting rules only volunteer work that leads to the production of goods is considered relevant, but not volunteer work that produces services. By focusing on all volunteer work, this project therefore offers the possibility of creating a more complete picture of meaningful work in society. Although there may be difficult conceptual and empirical issues involved, we should not shy away from the challenge. After all, the role of statistics is precisely to shed light on unknown aspects of social reality and bring them into view.

_Robert Leigh of the United Nations Volunteers_ also strongly endorsed the effort, noting that it could fulfill the U.N. General Assembly resolution passed at the conclusion of the 2001 Year of the Volunteer calling on countries to begin to measure the value of volunteer work as a way to call attention to this important resource for achieving the Millenium Development Goals.

_Lester M. Salamon, director of the Johns Hopkins Center for Civil Society Studies_, outlined the work that Johns Hopkins has done to document the extent of volunteer activity in countries throughout the world and identified the following major objectives of this first TEG meeting:

1. To secure TEG approval of the _general concept_ of incorporating measurement of volunteer work in labour force surveys;
2. To review and approve the draft _Manual working outline_;
3. To review and approve a _working definition_ of volunteer work;
4. To identification the _principal data items_ on volunteer work to target;
5. To assess preliminarily some of the major _data collection platform and instrument design issues_;
6. To reach tentative agreement on _pilot test procedures_; and
7. To review and approve a _working timetable_ for the project and a date for a second TEG meeting.
Key Decisions

In the course of this meeting, the Technical Experts Group reached a number of decisions about the proposed *Manual on the Measurement of Volunteer Work*, and on the survey module that could be developed to implement it. In particular:

1) **Suitability of Labor Force Surveys for Measuring Volunteer Work**

*TEG members generally endorsed the concept of using a module on volunteer work in regular labour force surveys as a platform for measuring volunteer work.*

Among the advantages of Labor Force Surveys (LFS) for this purpose are the following:

- Their regularity—labor force surveys are among the most common data gathering programs in the world. Most countries conduct such surveys at least annually and many have rolling monthly or quarterly samples to account for seasonal variations;
- Their comprehensiveness—most cover the entire population over age 15;
- Their robustness—sample sizes are usually large;
- Their precision—strong technical input based on highly developed international norms is common; and
- Their household focus—which makes it feasible to capture informal behavior such as volunteering.

At the same time, there are a number of challenges in using LFSs to capture volunteer work and these must be borne in mind when designing a survey module:

- There are considerable variations in LFS methodologies. For example, Norway uses telephone interviews whereas South Africa uses face-to-face interviews (For further detail see Attachment C);
- The periodicity of the surveys varies: Norway and other European countries conduct labor force surveys on a rolling, monthly basis; South Africa conducts its LFS twice a year; and Ethiopia does so only every five years. This is potentially problematic because volunteer work likely has greater seasonal variations and other irregularities, requiring a periodicity greater than a year to capture the full extent;
- LFS commonly use a one-week reference period for measuring employment, but because it is more infrequent, volunteer work may require a longer reference period;
- The LFS concept of employment requires a minimum duration of one hour during the reference period. This may be too restrictive for volunteer work;
- LFS’s commonly use “proxies” to obtain answers for others in the household, which can pose particular problems for assessing volunteer activity since the proxies may lack information about the volunteer work of other household members;
- Since countries are at different points in their measurement of volunteer work, it will be important to target types of audiences for the projected survey module on volunteer work: those starting at or near zero effort to gauge volunteer work, those with some past effort, and those with ongoing programs. It will also be important to
be sure that the LFS module does not conflict with other ongoing work to measure volunteering where such other work is taking place.

In addition, it was noted that other players are involved in setting standards for Labor Force Surveys and should be made aware of this work. This includes Eurostat, OECD, and some of the United Nations Economic Commissions, especially those for Latin America and Africa.

2) Manual Working Outline

*TEG members generally endorsed the suggested Working Outline for the proposed ILO Manual on Volunteer Work (See Attachment B)*

Among comments offered by TEG members were these:

- Adriana Mata noted that the proposed structure of this *Manual* is similar to that of other *Manuals* that the ILO publishes;
- Edith Archambault emphasized that the section on “why measure volunteering?” should mention not only that volunteering creates economic value, but also that volunteering also creates paid work. This is not only because NPI entrepreneurs often begin as volunteers and become paid workers but also because volunteer work often provides experience and training that equips individuals for later paid jobs; and
- The topics related to instrument design will ultimately need to be fleshed out and a sample instrument included to offer guidance.

3) Defining Volunteer Work

*General agreement was reached on a definition of volunteer work as “work done without monetary pay or compensation for the benefit of person’s outside the volunteer’s own household without legal compulsion.”*

Several features of this definition are especially noteworthy:

- The activity must involve “work,” which is to say it has some economic value for someone other than the performer. Playing a musical instrument for one’s own enjoyment is therefore not volunteering.
- The work must be unpaid, though insignificant reimbursement of expenses, and provision of modest honoraria, may not disqualify an activity. However, if a person receives in-kind compensation in a low-wage area, the activity is most likely not volunteering;
- While the volunteer or his or her family may reap some reward from the volunteer work, someone outside the household must also benefit. The definition of “household” will follow LFS conventions;
- The work must be non-compulsory and non-obligatory and involve a significant element of choice, even if a social obligation is involved. Court-mandated unpaid
work, alternative service related to a military draft, or unpaid internships required for graduation from educational institutions should be excluded.

- Both formal volunteer work (i.e. volunteering to or through an organization) and informal volunteer work (i.e. volunteer work done directly for individuals outside the household and not to or through an organization) are included;
- Not considered in the definition are the institutional settings in which the work is performed (all settings are included, whether through or for an organization or not, and whether the organization is nonprofit, government, or for-profit) or the motivations of the volunteer.

Other definitional criteria were also identified, but no decision was made on them. Included here were:

- Duration: The LFS standard criterion of a minimum of one hour per week was suggested as a possible defining feature of volunteer work as it is of paid work;
- Frequency: There was some sentiment for including a requirement that the work involved must have some degree of regularity or frequency in order to be considered truly volunteer work. A person who helped an elderly person cross a street one time may not appropriately be considered a volunteer. The general sense here was that the concept of clarifying that “one-off” activities should not be included could be incorporated into the definition or interviewer instructions.

4) Data Elements

*Broad agreement was reached on a core set of target data elements for measuring volunteer work in labor force surveys, with the understanding that countries could add other elements if they wish and on the assumption that the surveys already capture important demographic characteristics of the volunteers.*

The core data elements identified for inclusion in a core volunteering module include:

- Number of volunteers;
- Hours volunteered;
- Locus of volunteering—directly for individuals or for or through an organization. If the latter, whether the organization is a nonprofit, a government agency, a mutual or cooperative, or a for-profit corporation;
- Main fields of volunteering (e.g. health, education, social services, recreation); and
- The types of work done in each field.

5) Data Collection Platform and Instrument Design

A number of potential issues associated with the use of Labor Force Surveys to measure volunteer work were identified. These included:
a. Coverage of particular population groups (e.g. the young and the old);

b. Timing of surveys in relation to holidays, seasons, or other special events;

c. Frequent of surveys;

d. Optimal recall period;

e. Sufficient space to permit prompts and screens

f. Administration method (i.e. telephone vs. face-to-face

g. Appropriate training of interviewers

h. Location of the volunteer work questions on the LFS and space limitations regardless of the location.

**Overall, TEG members felt that the advantages of using Labor Force Surveys to measure volunteer work outweighed any possible disadvantages and that most of the potential problems could be overcome. In particular:**

- Based on ILO meta data on LFS surveys, it appears that existing survey programs are well suited to measuring volunteer work: most are continuous or have sub-annual frequency, recall periods are short (typically a week), and face to face interviews are common. These are all desirable features for capturing volunteer work;

- Prompts will be needed to elicit meaningful responses from respondents. A simple one-question query such as: “Have you done any volunteer work over the past month?” will not suffice given the vagueness of the term “volunteer work” in the minds of most respondents. However, long lists of prompts are not needed. Several prompts can be bundled in a single threshold question with one or two follow-ups to ensure that respondents understand the range of activity being probed;

- Although there are some potential problems with coverage of the young and the old, the Manual might mention that it is desirable to have a low minimum age and no maximum age;

- Even with surveys conducted on an annual basis, the reference period for volunteer work should be shorter—a week or a month. Reference periods of a year are likely to be inaccurate;

- Due to the seasonality of volunteer work, it would be desirable to include questions on volunteering on every iteration of LFS’s that use a repeat design to the extent this is feasible;

- Face-to-face interviewing is ideal for volunteering surveys, but telephone surveys can work as a second-best solution;

- Interviewing proxies, as is frequently done in LFS’s will pose special problems for gauging volunteer hours since proxies are less likely to have reliable information about volunteer work than paid work of other household members. One way to minimize this problem is to use the technique South Africa employs for informal sector enterprises—getting the name of the person doing the volunteering (if it is not the “responsible adult” doing the rest of the interview) and interviewing that person about the volunteer work. This will require training of interviewers.
6) Pilot Testing

The TEG agreed that testing of the proposed volunteering module be undertaken but endorsed a “modular” approach to such testing, involving different types of tests for different aspects of the survey. These different types could include actual field tests of on response-related issues, focus groups to gauge qualitative content of questions and prompts, and desk-based responses to queries addressed to statistical agencies that have already conducted surveys of volunteer work.

Among the issues that will need to be addressed in the pilot testing are these:

- Impact of the volunteering module, if any, on the response rate, cost, and feasibility of labor force surveys;
- The value added to labor force surveys of attaching a module on volunteer work (e.g., positive glow that volunteering questions might add to the labor force survey by giving respondents an opportunity to discuss their public-service activities);
- Consequences of different reference periods on respondent recollection of extent of volunteer work;
- Consequences of different types of prompts or questions for identifying the amount, nature, and valuation of volunteer work;
- Non-response bias in volunteering surveys;
- Consequences of using proxy respondents on the identified volume of volunteer work.

Several TEG members indicated a willingness to test aspects of the draft volunteering module:

- Portions of the module could be included in one of the regular waves of the Norwegian labor force survey;
- The draft survey could be tested in the March running of the South African labor force survey;
- Canada might be able to accommodate some testing in its labor force survey and could comment on prompts based on its experience.

7) Valuing Volunteer Work

TEG members generally concluded that a replacement cost approach was the best approach for valuing volunteer work. This requires the inclusion of questions on the activities that volunteers perform and/or the field or industry in which the work is performed.

More specifically:

- Ideally, the reference wage assigned to volunteer work should be the average wage paid by nonprofit institutions in the country for the type of work done by the volunteer in the given industry;
• If this level of detail is unavailable, a first fall-back could be the average wage in the industry in which the volunteer work is done. A second fall-back could be the average wage for the occupation corresponding to the work that the volunteer performs;
• To obtain information on the field or industry in which the volunteer work takes place, respondents can be asked the kind of work they do with respect to informal volunteering, and name of the organization or the kind of work the organization does in the case of formal volunteering;
• It may be necessary to take account of output-based valuations in addition input-based methods, as is done with the valuation of household work since efficiency may be lower for volunteer workers.

8) Classifying Volunteer Work

*TEG members generally concurred with Hopkins’ suggestion to use ISIC or its local equivalent to classify volunteer work by industry, and ISCO or its local equivalent to classify volunteer work by occupation. This will have the benefit of minimizing staff training time and making it easier to compare volunteer work with paid work.*

To facilitate this, the proposed Manual will include correspondence tables between the Volunteering Toolkit Inventory of Core Questions and ISCO and ISIC, between ICATUS and ISCO and ISIC, and between the International Classification of Non-Profit Organizations (ICNPO) and ISIC, preferably at the 4-digit ISIC level. Information will also be presented on ISIC classes likely to contain NPIs, since NPIs are more frequent in certain parts of the ISIC, which may be less familiar to interviewers and coders.

9) Survey Administration and Reporting

*The TEG felt that use of the Labor Force Survey platform could minimize some of the more significant survey administration and reporting problems. In particular:*  
• The fact that Labor Force Surveys are mandatory in many countries may reduce the non-response bias problem;
• Those conducting labor force surveys will already be sensitized to some of the issues involved in determining the activities and industry of the volunteer work;
• At the same time, care will need to be taken to prepare surveyors to understand the definition of volunteer work being used, to handle the prompts likely to be required to elicit the appropriate responses, and to handle the problem of proxy respondents.

10) Agenda for Future Work

*The TEG agreed on a basic timetable for future work as follows:*  
• Final version of Manual outline (August 2007)
• Draft of recommended survey form (September 2007)
• Put invitation out for field testing (October 2007)
• Country testing completed (January 2008)
• Draft of ICLS chapter (March 2008)
• Final ICLS chapter (May 2008)
• First draft of Manual (May 2008)
• Second meeting of TEG to review Manual (May 2008)
• Final draft of Manual for room document (November 2008)
• Draft of protocols (February 2009)

It was agreed that the first two dates are firm, even though the later ones may be subject to revision. It was also agreed that JHU would provide drafts and working documents to TEG members on a private web site for download.

Other steps agreed to included the following:

• Sylvester Young indicated that he would submit the ICLS chapter as an information item for advice. The volunteer work section will explain the main thrust of collecting volunteering data through the LFS. He will put the TEG on official observer status for the ICLS meeting. Other invitees include other ILO departments, ACTEMP and labor groups.
• Robert Leigh suggested that we identify early on which countries/people are likely to be champions of the effort. Also, he will look into bringing corporate social responsibility and union volunteer programs to the ICLS. He also suggests that country experts in the JHU network make the case to local labor statisticians involved in the ICLS.
• Megan Haddock suggested that for our next meeting we should invite representatives from other relevant ILO departments;
  • JHU/CCSS will collect LFS questions on paid work to use as examples for structuring our questions on unpaid work drawing on the ILO Manual on LFS as well as Eurostat’s manual.
  • JHU/CCSS will look into the implications of the 1-hour criterion used to qualify work in the rest of the LFS as suggested by Ato Mekonnen Tesfaye (Ethiopia).

Lester Salamon of Johns Hopkins and Sylvester Young of the ILO expressed their gratitude to the participants for their enormously helpful input and assistance. Lester Salamon reviewed the objectives of the meeting and indicated his strong feeling that all of the original objectives were met, and then some. The only exceptions were some lingering questions about permissible compensation and required regularity in the working definition of volunteering.

The meeting adjourned at 12:30 p.m. on Friday, July 6.
JOINT ILO-JHU/CCSS TECHNICAL EXPERTS GROUP ON MEASURING VOLUNTEER WORK

July 4-6, 2007 MEETING PARTICIPANTS

Ms. Edith Archambault
University of Paris1-Sorbonne
Centre d'economie de la Sorbonne
MATISSE, MSE, 106 Bd de l'Hospital
F-Paris CEDEX 13 75647
Tel : +33-1-44 07 8339
Fax: +33-1-44 07 83 36
E-mail: archamb@univ-paris1.fr

Ms. Jacqueline Butcher de Rivas
Board of Directors, CEMEFI
Cerrada de Salvador Alvarado #7 Colonia Escandón
México, D.F., México 1800
Tel : +55 5276-8530
Fax: +55 5515-5448
E-mail: rivasjb@prodigy.net.mx

Ms. Elisabeth Davis
Assistant Director
Family and Community Statistics Section
Australian Bureau of Statistics
Locked Bag 10
Belconnen ACT 2616, Australia.
Tel: +61 2 6252 7880
E-mail: elisabeth.davis@abs.gov.au

Mr. Bengt Oscar Lagerstrom
Senior Adviser, Division for Sample Surveys
Statistics Norway
Kongensgate 6
PB 8131 DEP
N 0033 OSLO 1, Norway
Tel: +47 2109 4783
Fax: +47 2109 4996
E-mail: bengt.oscar.lagerstrom@ssb.no

Mr. Ato Mekonnen Tesfaye
Social Statistics Department
Central Statistical Authority CSA
Addis Ababa, Ethiopia
Tel: +251-1-559 336
Fax: +251-1-560 099
E-mail: mekonent@yahoo.com

Mr. Tae-Kyu Park
Professor, Department of Economics

Yonsei University
134 Shinchon-dong
Sudaemun-gu
Seoul 120-749, South Korea
Phone: 82-2123-2475
Cell: 010-6328-1457
Fax: 82-2-313-5331
Email: tkpark@yonsei.ac.kr

Ms. Yandiswa Mpetheni
Statistics South Africa
De Bruyn Park Building
Private Bag X44
Pretoria, 0001, South Africa
Tel: +27 12 310 8911
E-Mail: yandiswam@statssa.gov.za

Observers

Mr. Robert Leigh
Senior Policy Specialist
United Nations Volunteers
Hermann-Ehlers-Str. 10
D-53153 Bonn, Germany
Tel: +49-228-815-2107-Direct / 49-228-815-2217
Cell: +49 646-361-5781
Fax: +49-22-8-815-2952
Email: robert.leigh@unvolunteers.org

Ms. Lorna Bailie,
Director, Special Surveys Division
Statistics Canada
Room 2300 Main Bldg.
150 Tunney's Pasture Driveway
Ottawa, K1A 0T6, Ontario, Canada
Tel: +613 951 0837
Fax: +613 951 7333
E-mail: Lorna.Bailie@statcan.ca

Mr. Tom Dufour
Chief, Health and Volunteer Surveys
Statistics Canada
26-A R.H. Coats Building
Ottawa, K1A 0TS Ontario, Canada
E-mail: Tom.dufour@statcan.ca
From JHU:

Mr. Lester Salamon  
Director, Center for Civil Society Studies  
Johns Hopkins University  
3400 N. Charles Street  
Baltimore, MD 21218  
Tel: (+410) 516-5463  
Fax: (+410) 516-7818  
Email: lsalamon@jhu.edu

Ms. Helen Tice  
Senior Research Associate  
UN Nonprofit Handbook Project  
Center for Civil Society Studies  
Johns Hopkins University  
3400 N. Charles St.  
Baltimore, MD 21218, USA  
Tel: 410-516-2897  
Fax: 410-516-7818  
Email: Helen.tice@jhu.edu

Mr. Wojciech Sokoloski  
Senior Research Associate, Comparative Nonprofit Sector Proj.  
Johns Hopkins University  
3400 N. Charles Street  
Baltimore, MD 21218  
Tel: (+410) 516-4056  
Fax: (+410) 516-7818  
Email: sokol@jhu.edu

Ms. Megan Haddock  
UN Handbook Project Coordinator  
Center for Civil Society Studies  
Johns Hopkins University  
3400 N. Charles Street  
Baltimore, MD 21218  
Tel: (+410) 516-3957  
Fax: (+410) 516-7818  
Email: megan.haddock@jhu.edu

From ILO:

Adriana Mata Greenwood  
Bureau of Statistics  
International Labour Office  
4, rte des Morillons  
1211 Geneva 22  
Switzerland  
Tel: +41 (22) 799 60 40  
Fax: +41 (22) 799 69 57  
Email: mata@ilo.org

Members not able to attend:

Mr. Justin Davis Smith  
Director  
Institute for Volunteering Research  
Regent's Wharf  
8 All Saints Street  
GB - London N1 9RL  
Tel: +44 845 305 6979  
Fax: +44 20 7520 8910  
E-mail: Justin.Davis-Smith@volunteeringengland.org

Ms. Winnie Mitullah  
University of Nairobi  
Institute for Development Studies  
Gandhi Wing, 5th Floor, Main Campus,  
University Way  
PO Box 30197  
Nairobi  
Kenya  
Tel: +254 20 318262 ext 28177, +254 20 247968  
Fax: +254-2-22-2036  
E-mail: wvmitullah@swiftkenya.com
MANUAL ON VOLUNTEER WORK

WORKING OUTLINE

Preface
Acknowledgements

CHAPTERS

1. Introduction: Purpose/Rationale
2. Defining Volunteer Work
3. Target Data Elements on Volunteer Work
4. Data Collection Platform and Instrument Design
5. Survey Administration and Reporting
6. Valuing Volunteer Work
7. Classifying Volunteer Work

ANNEXES

1: Recommended Core Survey Instrument
2: Country Experiences in Measuring Volunteer Work
3: Glossary
4: References
SAMPLE LABOR FORCE SURVEY EXPERIENCE

Participants in the Technical Experts Group represented a range of experiences with the conduct of labor force surveys. In particular:

Bengt Oscar Lagerstrom (Norway): The sampling frame is the population register and covers the whole country’s population ages 15-74 every week. Respondents are counted as employed if they performed one hour of paid work during the reference week or unpaid work in a family business. The interview is by telephone, with a few by computer-aided personal interview. There is a rolling sample in which eight groups of approximately 3000 people rotate for two years, with each group being a representative sample. The LFS is a good platform for collecting data on volunteer work. The reference period is a week. This survey is based on Eurostat recommendations for the methodology, which is considered the ideal.

Yandiswa Mpetsheni (South Africa): The LFS covers those 15 and above, although employment, etc. are reported only for those 15-64. Currently the survey is conducted twice a year, for two weeks in March and in September, but it is changing to a continuous quarterly survey conducted for one week. Interviews are face to face, and the sampling unit is the dwelling. The last time the questions on volunteering were asked 1.5 million people engaged in volunteer work in the last twelve months; prompting was by an activity list, and using the exit interview sample. She thinks it would be very worthwhile but doesn’t know about getting the funding. Sample 33,000 dwelling units regardless of the number of households. Although it does currently measure volunteering, she thinks it is inadequate because it has a 12-month recall period. Classification is just on some sample occupations. They try to talk to head of household, but end up talking to a responsible adult and proxy for everyone else. South Africa is in the process of redesigning its LFS, and it has dropped the existing question on volunteer work in the process.

Ato Mekonnen Tesfaye (Ethiopia): In Ethiopia, people construct roads, schools, etc., once a year, so a 12-month reference period will be necessary to capture this information. The national LFS has taken place every five years, but it is moving to a continuous measurement program reporting three times a year. Coverage is national urban and rural persons eighteen years and older. Interviews are face to face. Reference periods are 1 week and 12 months. Enumeration areas for population censuses cover all persons, with proxy responses for 25,000 households. Everyone in the household is covered 10 and older – a responsible adult responds for everyone else. Interviewer is advised to call back regarding number of hours because this is particularly difficult to report for other people. Reporting levels are national, regional, and major urban areas. Unpaid workers in household enterprises are included, but voluntary work for another household is not. The 1 hour criterion is not restrictive enough for volunteer work. The LFS can add a module only once a year, in March.
Elisabeth Davis (Australia): For 2006, Australia has both a time use and a voluntary work survey. The Australian Survey of Voluntary work covers the population 15 years and older, and it is captured using proxy respondents in dwelling units, beds in hospitals, etc. in a multi-stage sample. There are 8 month panels for the monthly survey covering a specific set of days. A supplementary survey uses the outgoing rotation group. The interview process is computer-aided interviewing, which begins with face to face and switches to CATI. The sample is 32,000 households. Unpaid work includes family businesses as well as voluntary work, with a filtering question to separate them.

Lorna Bailie (Canada): Canada has done its survey of volunteer work both as a stand-alone RDD survey and as a LFS supplement.
This memo contained the first draft of the proposed survey module. A summary of responses from the TEG is included.
MEMORANDUM

To: Joint JHU-ILO Technical Experts Group on the Measurement of Volunteer Work
Re: Draft LFS Volunteer Work Survey Module
Date: December 20, 2007

Dear Technical Expert Group Colleague:

I am writing to seek your help on two aspects of the work we have under way to devise a consensus approach to measuring volunteer work through labor force surveys.

Proposed Draft Module

First, as a follow-up to the first meeting of the Joint JHU-ILO Technical Experts Group on the Measurement of Volunteer Work held in Geneva in July 2007, I am pleased to attach for your review and comment a draft of the survey module our team has developed for the measurement of volunteer work as a supplement to regular labor force surveys. We would appreciate it if you could confirm your receipt of this memo, and reply with comments no later than January 25, 2008. This will give us an opportunity to take account of your comments in time to begin testing the module in the field, which we hope to commence by mid-February.

We are particularly interested in your reactions to a number of key features of this module:

- The basic conceptualization of volunteer work that it uses;
- The overall structure and length of the instrument;
- The notion of “immediate family” it uses to help differentiate volunteer work from help to one’s family;
- The method suggested for classifying volunteer work and allocating it among fields;
- The reference period suggested;
- Any language issues that will need to be flagged;
- Any other matters that seem important to you.
Module Testing

I hope you will also consider this memo an invitation for your organization to participate in the testing of this draft module, either in whole or in part. We are particularly interested in testing a number of key features of this module, including (in order of importance):

1. The proposed reference period;
2. The proposed prompts;
3. Extent of non-response and possible non-response bias;
4. The consequences of proxy responses; and
5. Suitability of key terminology (e.g. “household,” “without compensation”).

Testing procedures for each topic may vary from desk/expert reviews to focus group and small sample implementation experiments. We understand that we already have expressions of interest from officials in Canada, Australia, South Africa, Norway, Italy, Israel, and Argentina but are hoping to receive confirmation of this. We are also eager to know whether other Technical Expert Group countries would be willing to assist with testing. A document on “Testing Issues and Procedures” will be circulated to you under separate cover, but a preliminary indication of willingness to participate in the testing would be helpful now.

Module Assumptions

In the balance of this memo, we outline the assumptions that have guided our work in drafting this module and the key structure and design features of the document and the rationale for them. We then present the draft module and several annexes.

So far as the key assumptions are concerned, we have tried in designing the proposed module to adhere to the key strategic decisions reached in our Technical Experts Group session in July 2007. More specifically, this has meant that we have made the following assumptions in designing the module:

- **Supplement to the LFS**: This module has been designed as a supplement to existing Labour Force Surveys, which has informed our decision-making, particularly with regard to overall length, reference period, classification of work activity, classification of field, and wording of the questions. We assume that each country will use this module as a guide to harmonize the language with that of their existing survey, however.

  We have received inquiries about the possibility of using this module as a supplement to other household surveys. Our current feeling is that we are supportive of this solution where a supplement to the LFS is not possible and as long as it is understood that this module was not specifically designed for that purpose.

- **Use existing international standard for coding wherever possible**: Consistent with the first point above, we have suggested using ISCO-88 and ISIC, Rev. 4, respectively, for coding occupation and industry of volunteer work. Annexes 2, 3, and 4 of the survey module contain lists of codes likely to contain volunteering work from these existing
classifications and identifies various cross-walks that will make it possible to classify volunteer work into its appropriate industry and occupation category.

- **Maximize information gathered with minimum number of questions:** Adding supplemental modules to the LFS can be expensive and risks increasing the non-response rate. To minimize this risk, our proposed module attempts to keep the number of required questions to a minimum to reduce both cost and non-response rates. Statistics agencies may always lengthen the module to seek additional detail if that option is available.

- **Minimize recall error:** Unlike 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 (e.g. a week). However, if the reference period is too long, the accuracy of the recall declines.

In countries where labor force surveys are continuous and the volunteer supplement will be included each time the survey is administered, these problems can be solved with a reference period of a week. However, it seems unlikely that volunteering supplements will be conducted every month in very many countries. Our proposed solution to this dilemma is therefore to compromise by using a **four-week reference period**, which should be long enough to capture irregular activity but not so long as to make recall overly difficult. In addition, we propose 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 labor force survey).

This approach seems consistent with general LFS practice. Although our tabulations of the ILO’s LFS metadata\(^1\) indicates that one week is the dominant reference period for employment, with 100 percent of countries using it, this is not the case for two other data items. In the case of “seeking work,” only 31.7 percent of countries use the week as the reference period; for “availability for work,” only 48.6 percent of countries use the week as the reference period. Because volunteer work, especially formal volunteering, is likely to be less frequent than going to a typical job, asking about the week may miss significant activities that are regular but do not occur in the LFS survey week. On the basis of this information alone, the choice of a one month reference period seems like it would fit within the average LFS structure.

(We have prepared a Note that provides more detail on the advantages and disadvantages of various reference period options that we would be happy to distribute to you if you are interested).

- **Does not rely on the term “volunteer”**: While the term volunteer is mentioned in the introduction to the the module, the draft module does not rely on the term “volunteer” to elicit responses. This is so because experience has shown that this term carries a great deal of baggage and is understood differently in different context. Accordingly, following

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\(^1\) International Labour Organization, 2007.
our Technical Experts Group discussion, the module asks about: “activity willingly
undertaken without pay to advance a cause or produce a benefit that primarily helps
someone other than members of your household or immediate family.”

A couple features of this proposed definition deserve further comment, however:

- As discussed at the Technical Experts Group meeting, we understand “without pay”
  here to mean without regular wages or compensation. However, insignificant
  reimbursement of expenses and provision of modest honoraria may not disqualify an
  activity. However, if a person receives in-kind compensation in a low-wage area, the
  activity is most likely not volunteering;
- We have proposed to define “volunteering” as involving assistance to persons not
  only outside the “household,” but also outside the “immediate family.” This
  extension seems necessary because, unlike paid labor, the beneficiary of the work is
  part of the definition and including work done for family members who do not live
  within the same household (e.g. brothers, sisters, parents, grandparents) may broaden
  the concept too much. Accordingly, we propose to exclude from true voluntary work
  such work that is done by kin that are within “three degrees of separation” from a
  person (e.g. your brother’s wife’s sister is within three degrees of separation from
  you, making help given to her not a form of volunteer work).

- Captures formal and informal volunteering: This module captures both volunteering
  that people do “for or through an organization.” (sometimes called “formal
  volunteering”) and volunteering that they do personally outside of organizations
  (sometimes called “informal volunteering). This is consistent with the decisions reached
  in the TEG meeting. Also consistent with the thrust of the TEG discussion, the draft
  module asks about the volunteer work done outside of organizations first and asks about
  the institutional auspices of the work subsequently. This was thought most likely to
  engage respondents in the survey.

- Should not replace existing volunteer surveys: This module is meant to inform, rather
  than replace, existing surveys that measure volunteering. We encourage countries
  currently measuring volunteering, via LFS supplement or other method, to consider
  modifying their existing surveys in ways that will allow for international comparisons,
  however. In this regard, JHU is participating with the UNECE Volunteer Standardization
  Task Force, an effort underway to harmonize existing volunteer surveys.

Key Module Structure and Design Features

With these assumptions in place, we have designed a draft survey module with the
following key features:

1) Introductory orientation statement. The module begins with a version of the
   introductory statement used in the recent survey on volunteer work in Mexico to identify
the focus of the supplement. The statement includes examples of both “helping” (informal volunteering) and “volunteer work for organizations” (formal volunteering). This general statement is intended to fix in respondents’ minds a broad concept of “activity willingly undertaken without pay to advance a cause or benefit people who do not belong to your household or immediate family.”

2) Use of type of activity to structure the module. The rest of the module is structured by volunteer activity or type of work, with (1) an initial question “did you do any unpaid work of this kind for someone outside your own household or immediate family?” following the introductory statement and (2) subsequent questions prompting about the type of activity or work, the frequency and duration of such work, and whether the work was done for or through an organization and, if so, what kind.

This structure differs from the approach frequently used in surveys focusing only on “formal volunteering,” which have used the type of organization volunteered for as the organizing principle. The approach suggested here is commonly used in surveys of informal volunteering, however, and this ordering of the questions seems to be a natural progression, as it maintains throughout the interview the focus on what the respondent did. In addition, respondents may relate more easily to questions about what they did than to questions about the organizations for which they worked.

This approach is also consistent with the sense of the UNECE-JHU Workshop to Measure Volunteer Work, which concluded that asking first about activities likely to elicit a positive response would engage respondents in the survey more effectively and potentially boost response rates. For example, in Mexico, half the unpaid work is “helping” (informal volunteering) rather than volunteering for an organization (formal volunteering). In Australia, 41.7 percent of those who did not volunteer for organizations did volunteer informally. In fact, the absolute number of people who engaged in “helping” but did not volunteer formally was larger than the number of people engaged in “helping” who also volunteered formally.

3) Assessing the quantity of volunteer time. The draft module uses a two-stage question about time spent volunteering, asking first about the frequency of the activity and then about the hours spent per occurrence. We chose this two-step approach because it seemed that respondents would find it easier to supply these two pieces of information than to perform during the interview the mental arithmetic required to calculate the total hours.

4) Ascertaining the type of work: The type of work performed by the respondent is determined from a description of the work elicited from the respondent by the interviewer. This information is then coded according to the ISCO occupational classification. A cross-walk will be created to help guide coders between likely categories of volunteer work and their corresponding best-fit occupational category;

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2 See Butcher (2007).
5) **Ascertaining the field or industry in which the work was done:** The approach used to determine the field or industry in which volunteer work is done differs for informal and formal volunteering.

   a) **Informal volunteering:** In the case of informal volunteering (i.e. volunteering done individually without an intervening organization), a cross-walk is being constructed between occupational classifications most likely to contain volunteer work and their best-fit industry classification as outlined in ISIC, Rev. 4 (see Annex 2). Coders will then classify the volunteer work to the respective best-fit industry classification. Where the activity code does not correlate well with any industry code, ISIC code 9700 (Activities of household as employers of domestic personnel) might be used as a default;

   b) **Formal volunteering:** In the case of volunteer work for organizations, respondents will also be asked about the work they do and this will be coded as noted above. In addition, however, respondents will be asked to identify the organization for or through which they carry out the activity. Interviewers will then use code books or look-up tables to identify the industry of the organization. In the event code books are not available, show cards or prompts could be used to identify the major industry category of the organization.

6) **Number of activities:** The module is open-ended with respect to the number of activities that the respondent may report. Respondents will thus be prompted to identify additional activities that meet the criteria of the module until they run out of activities during the reference period. This means that the length of the interview will be determined by the respondent’s willingness to report additional activities. If the experience of Australia and Canada is a guide, this will not lead to excessively long interviews. As Table 1 illustrates, 87.6 percent of respondents in Australia and 78 percent of respondents in Canada volunteered for one or two organizations only, which means that for the vast majority of respondents the survey module can be answered in 3-4 minutes.

<table>
<thead>
<tr>
<th>Table 1. Number of organizations volunteered for (Percent of respondents)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
</tr>
<tr>
<td>One</td>
</tr>
<tr>
<td>Two</td>
</tr>
<tr>
<td>Three or more</td>
</tr>
<tr>
<td>Three</td>
</tr>
<tr>
<td>Four or more</td>
</tr>
</tbody>
</table>


Table 1 refers only to formal volunteering, and the number of instances of informal volunteering per respondent may well be larger. It is only formal volunteering that requires additional questions about the name and industry of the organization, however.
7) **Prompts for respondents reporting no activities that meet the criteria of the module:**
For respondents who answer “No” to the initial question about involvement in-scope activities, the draft module contains a general prompt offering examples of activities that should be considered in answering this supplement and the respondent is asked again whether he or she has done any of these activities.

8) **Capturing less frequent volunteering.** Although the reference period is the four weeks immediately preceding the administration of the survey, a set of supplementary questions is provided in Annex 1 to capture less frequent events, especially in countries in which the module is administered only annually. This is necessary because helping activities can be seasonal in nature, making it possible that the timing of the survey can affect the estimates significantly.

The proposed module reflecting these considerations follows. I look forward eagerly to your comments on these materials so that we can move on to the next phase of this work.

In the meantime, on my own behalf and that of my colleagues, my best wishes to you for the holiday season and the New Year.

With best regards,

Lester M. Salamon
Director
### LFS Module
Structured by Type of Work, Using 1-Month Recall Period

<table>
<thead>
<tr>
<th>Step or variable</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>START</td>
<td>The next few questions are about unpaid volunteer work, that is, activity willingly undertaken without pay to advance a cause or produce a benefit that primarily helps someone other than members of your household or immediate family. It can be any kind of help, both to individuals directly and to or through clubs, organizations or associations. Examples of such unpaid work include teaching someone to read, organizing events in your community, organizing a party for the school or church, coaching a sports team, helping out at the local Red Cross/Red Crescent, working in a soup kitchen, giving free medical services at a clinic, attending someone who is sick, working for a local political group, helping with construction for the community, and helping your neighbors with work in their home or health-related or personal care. [This should be a list of activities in scope but likely to be missed and will vary from country to country.]</td>
</tr>
<tr>
<td>VOL_00</td>
<td>During the past [4 weeks/reference period], did you do any unpaid work of this kind for someone outside your own household or immediate family? If no, go to WORK_03.</td>
</tr>
<tr>
<td>WORK_01</td>
<td>What kind of work did you do? [Record response verbatim and use a lookup table or coder to assign occupation codes.] 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.</td>
</tr>
<tr>
<td>HOUR_A01</td>
<td>How many times did you do this unpaid work in the past [4 weeks/reference period]? [Record response verbatim and use a lookup table or coder to assign frequency codes.]</td>
</tr>
<tr>
<td>HOUR_A02</td>
<td>How many hours did you typically devote to this unpaid work each time you did it? [Record response verbatim.]</td>
</tr>
<tr>
<td>TYPE_ORG01</td>
<td>Did you do this unpaid work for or through an organization? If no, code [informal volunteering] and go to WORK_02.</td>
</tr>
<tr>
<td>TYPE_ORG02</td>
<td>What is the name of the organization for which you did this work the most? [Record response verbatim and use a lookup table or coder to assign industry and sector codes.] If NAME is in coder, go to WORK_02.</td>
</tr>
<tr>
<td>TYPE_ORG03</td>
<td>If NAME is not in coder, ask What does this organization do? ___ (80 spaces) [Record response verbatim and assign industry code based on response.]</td>
</tr>
<tr>
<td>TYPE_ORG04</td>
<td>What type of organization is this? 1. Charity, non-profit organization, NGO, or religious organization 2. Business 3. Government 4. Other [Record response verbatim and assign sector code based on response.]</td>
</tr>
<tr>
<td>WORK_02</td>
<td>During the past [4 weeks/reference period], did you do any other kind of unpaid work for someone outside your own household or immediate family? If yes, repeat questions WORK_01 through WORK_02, differentiating answers by a, b,.. If no and respondent has answered WORK_03 was yes, go to END. If no and respondent has not answered WORK_03, go to WORK_03.</td>
</tr>
<tr>
<td>WORK_03</td>
<td>When asked about volunteer work, sometimes people don’t think of unpaid work they did for schools, religious organizations, sports or community associations, such as serving on boards, fundraising, office and administrative work, coaching or officiating, counseling, preparing and serving food, and transporting persons or goods. During the past [4 weeks/reference period], did you do any of these things for any</td>
</tr>
</tbody>
</table>
### Step or variable | Question
--- | ---
organizations? [This should be a list of activities in scope but likely to be missed and will vary from country to country.]
*If yes, repeat questions WORK_01 through WORK_02, differentiating answers by a, b, c.*

**END** | End of survey module

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### Annex 1

**Additional Questions**

<table>
<thead>
<tr>
<th>Step or variable</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPECIAL</td>
<td>Additional questions if survey is annual.</td>
</tr>
<tr>
<td>SPECIAL_01</td>
<td>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?</td>
</tr>
</tbody>
</table>
| SPECIAL_02 | What kind of work did you do?  
*Record response verbatim and use a lookup table or coder to assign occupation codes.*  
*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.* |
| SPECIAL_03 | On average, how many hours did you devote to this unpaid work each time you did it?  
__________ *Record response verbatim.* |
| SPECIAL_04 | Did you do this unpaid work on your own or for or through an organization?  
*If on your own, code [informal volunteering] and go to WORK_02.* |
| SPECIAL_05 | What is the name of the organization for which you did this work the most?  
*Record response verbatim and use a lookup table or coder to assign industry and sector codes.*  
*If NAME is in coder, go to WORK_02.* |
| SPECIAL_06 | If NAME is not in coder, ask  
What does this organization do? _____ (80 spaces)  
*Record response verbatim and assign industry code.* |
| SPECIAL_07 | What type of organization is this?  
5. Charity, non-profit organization, NGO, or religious organization  
6. Business  
7. Government  
8. Other  
*Record response verbatim and assign sector code based on response.* |

**END** | End of survey module
### ANNEX 2
Cross-Walk between ISCO-88 and ISIC, Rev. 4 Codes
for Assigning Industry Classifications to Informal Volunteering Activities

<table>
<thead>
<tr>
<th>ISCO</th>
<th>ISCO Description</th>
<th>ISIC</th>
<th>ISIC Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>913</td>
<td>DOMESTIC AND RELATED HELPERS, CLEANERS AND LAUNDERERS</td>
<td>9700</td>
<td>Activities of households as employers of domestic personnel</td>
</tr>
<tr>
<td>915</td>
<td>MESSENGERS, PORTERS, DOORKEEPERS AND RELATED WORKERS</td>
<td>9700</td>
<td>Activities of households as employers of domestic personnel</td>
</tr>
<tr>
<td>916</td>
<td>GARBAGE COLLECTORS AND RELATED LABOURERS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3310</td>
<td>Primary education teaching associate professionals</td>
<td>851</td>
<td>Pre-primary and primary education</td>
</tr>
<tr>
<td>3320</td>
<td>Pre-primary education teaching associate professionals</td>
<td>851</td>
<td>Pre-primary and primary education</td>
</tr>
<tr>
<td>3330</td>
<td>Special education teaching associate professionals</td>
<td>854</td>
<td>Other education</td>
</tr>
<tr>
<td>3340</td>
<td>Other teaching associate professionals</td>
<td>854</td>
<td>Other education</td>
</tr>
<tr>
<td>3370</td>
<td>Other teaching associate professionals</td>
<td>854</td>
<td>Other education</td>
</tr>
<tr>
<td>3380</td>
<td>Other teaching associate professionals</td>
<td>854</td>
<td>Other education</td>
</tr>
<tr>
<td>3460</td>
<td>Social work associate professionals</td>
<td>88</td>
<td>Social work activities without accommodation</td>
</tr>
<tr>
<td>3315</td>
<td>Secretaries</td>
<td>931</td>
<td>Sports activities</td>
</tr>
<tr>
<td>4115</td>
<td>Secretaries</td>
<td>931</td>
<td>Sports activities</td>
</tr>
<tr>
<td>4121</td>
<td>Accounting and bookkeeping clerks</td>
<td>8211</td>
<td>Combined office administrative service activities</td>
</tr>
<tr>
<td>4190</td>
<td>Other office clerks</td>
<td>6920</td>
<td>Accounting and bookkeeping services</td>
</tr>
<tr>
<td>5131</td>
<td>Child-care workers</td>
<td>8211</td>
<td>Combined office administrative service activities</td>
</tr>
<tr>
<td>5133</td>
<td>Home-based personal care workers</td>
<td>889</td>
<td>Other social work activities without accommodation n.e.c.</td>
</tr>
<tr>
<td>5142</td>
<td>Companions and valets</td>
<td>9700</td>
<td>Activities of households as employers of domestic personnel</td>
</tr>
<tr>
<td>6113</td>
<td>Gardeners, horticultural and nursery growers</td>
<td>9700</td>
<td>Activities of households as employers of domestic personnel</td>
</tr>
<tr>
<td>7231</td>
<td>Motor vehicle mechanics and fitters</td>
<td>8130</td>
<td>Landscape care and maintenance service activities</td>
</tr>
<tr>
<td>8322</td>
<td>Car, taxi and van drivers</td>
<td>4520</td>
<td>Maintenance and repair of motor vehicles</td>
</tr>
<tr>
<td>9131</td>
<td>Domestic helpers and cleaners</td>
<td>4921</td>
<td>Urban and suburban passenger land transport</td>
</tr>
<tr>
<td>9141</td>
<td>Building caretakers</td>
<td>9700</td>
<td>Activities of households as employers of domestic personnel</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8110</td>
<td>Combined facilities support activities</td>
</tr>
</tbody>
</table>
References


## Cover Note Comments

### MODULE TESTING

| Archambault | INSEE unlikely to test. Willing to test on focus group. |

### SUPPLEMENT TO THE LFS

| Archambault | Supplement to the LFS is feasible in France. The questionnaire of the French LFS is very long, so additional questions would be acceptable. Be careful as the information on the French LFS on the ILO website has not been recently updated and it is obsolete. |
| Toppe | *Preliminary findings from current research:* when the survey topic is volunteering the cooperation rate is suppressed and the estimate of the volunteering rate is inflated. That is, the (preliminary) results suggest that volunteers are more likely to cooperate in a survey about volunteering, driving up the volunteering rate. Our comparison was to a survey topic related to labor force participation, so the comparison to your work is direct. There was a much higher cooperation rate for the labor force survey than for the volunteering survey, and the estimated volunteering rate for the labor force survey was lower regardless of how the volunteering questions were asked. Therefore, I think your approach to keeping your survey as a supplement is a wise one. |

### USE EXISTING INTERNATIONAL STANDARD FOR CODING WHEREVER POSSIBLE

| Archambault | **Occupation:** The French survey uses a PCS classification more detailed (especially for social work) but consistent with ISCO-88. Be careful that in small NPOs with no paid staff, volunteers do everything and have no specialized tasks; however it is quite different of household chores.  
**Industry:** Similarly, the French NAF is an adaptation of NACE Rev1 to France. It is more detailed (especially for social services) but consistent with ISIC Rev4. Annex 2 outlooks activities of building and repairing houses or roads or providing electricity or water that are common areas of volunteering in developing countries and in some areas of industrialised countries. It outlooks also the volunteer work of board and committee members. To use efficient crosswalks tables is a major issue of this module. |

### MAXIMIZE INFORMATION WITH MINIMUM NUMBER OF QUESTIONS

| Archambault | Length of the draft module is quite acceptable. French statisticians will implement it if it is compulsory or at least highly recommended by ILO.  
| Davis | Timing: a little longer than the current voluntary work survey on the ABS GSS, if it is direct interview time rather than clerical |

### MINIMIZE RECALL ERRORS – Reference period

<p>| Archambault | Generally speaking I agree with the choice of a four-week reference period. In France, as in most European countries, labor force surveys are continuous including holidays. So the reference period is not a major issue and may be a week. (In the three Giving and Volunteering surveys that we ran for the JHCNP, we used “last month” and “last year” as the reference periods and we dropped the results of last year because they where of poor quality comparing to the “last month” results). |</p>
<table>
<thead>
<tr>
<th><strong>Toppe</strong></th>
<th>The proposed reference period of one month will underestimate volunteering some times of the year and overestimate it at others. Much volunteering occurs around the holidays, so a survey done then will result in a higher volunteering estimate than one done, say, in the summer. You will need to find a way to estimate this effect if you keep to the one month time period. The time effect is something we have in our research, but even preliminary data are not available to help with this issue. The reference period should be specific. Instead of asking about the last four weeks, ask “during the month of ____?”. That time period is more easily recognized by people.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Butcher de Rivas</strong></td>
<td>Four weeks is a good reference period. It will be more accurate, but you may miss seasonal activities. I would ask on a yearly basis. Many informal activities are once or twice a year. I see this is managed in the ANNEX 1.</td>
</tr>
<tr>
<td><strong>Davis</strong></td>
<td>The four weeks reference period appears to be a good compromise between respondents' memory and a period that is suitably long to collect most of the voluntary activity. [In the ABS 2006 voluntary work survey, information was captured in a series of questions about frequency, extending to several times a year and less frequently. The aggregated four week period captured 68% of volunteers, but 94% of the hours worked.] The follow-up reminder about activities which may have been missed overcomes possible forgetting; but could it operate as a leading question? As your paper acknowledges, a four-week reference period can potentially miss substantial blocks of time done earlier in the year, or special working campaign days. This can be followed up by the Annex module if required; or it can be traded off in the interest of a more compact module which captures most of the activity of interest. — I could not see in Annex 1 a frequency to accompany 'How many hours ...each time you did it' to calculate hours effectively.</td>
</tr>
<tr>
<td><strong>Dufour</strong></td>
<td>By the way, I like the 4 week reference period.</td>
</tr>
<tr>
<td><strong>Tesfaye</strong></td>
<td>Using one month/4 weeks/ as a reference period is justifiable. However, the clause 'this is not the case for two other data items. In the case of “seeking work,” only 31.7 percent of countries use the week as the reference period; for “availability for work,” only 48.6 percent of countries use the week as the reference period.' is not much relevant here. Because seeking work and availability for work refer to measurement of unemployment not employment.</td>
</tr>
<tr>
<td><strong>SEASONALITY</strong></td>
<td>We observed also that if there is marked seasonal variations for giving (December is the climax because of income tax deductibility rules more than Christmas), it is not the case for volunteering except a drop during school vacations. The French are not very religious and there is few holydays specific volunteering.</td>
</tr>
<tr>
<td>Author</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Archambault</td>
<td>The word <em>travail bénévole</em> or volunteer work, more common than 20 years ago.</td>
</tr>
<tr>
<td>Archambault</td>
<td>It is unlikely that in the given definition the term “advance a cause” (in French <em>defendre une cause</em>) is clear.</td>
</tr>
<tr>
<td>Archambault</td>
<td>The term “activity” is too large and “work” more common. The question here is to say whether or not we rely on the so-called ‘third party criterion’ used in the economic literature to separate work from leisure: do I volunteer when I demonstrate across the streets to advance a cause or do volunteer only the organizers or security groups of the demonstration? According to the third party criterion, it is the second option because I can pay somebody to organize or secure the demonstration but not to demonstrate instead of me.</td>
</tr>
<tr>
<td>DEFINITION</td>
<td>The definition is too “charitable” (helps) oriented and does not refer enough to expressive volunteer activities, for a European point of view.</td>
</tr>
<tr>
<td>Toppe</td>
<td>As to terminology, I think “…willingly undertaken without pay to advance a cause or produce a benefit…” is too formal and is likely outside the vocabulary levels of many of the potential respondents, especially in less-developed countries. Same for “…activity undertaken without pay to advance a cause…” I think you need to put these concepts into less formal language.</td>
</tr>
<tr>
<td>Tesfaye</td>
<td>mention common occurrences first, in this case “produce a benefit that primarily …”</td>
</tr>
<tr>
<td>Tesfaye</td>
<td>working for the community should be mentioned; working voluntarily on road construction, cleaning water source is to benefit the whole community including oneself. Exclude activities done as part of learning process (eg working in school garden during school time/period, serving students during break times etc), as part of religious requirement (evangelizing, worshiping, serving during devotion times, teaching on Sunday school and other activities which are not normally paid, etc). These has to be explained somewhere in the definition or other places</td>
</tr>
<tr>
<td>Tesfaye</td>
<td>Thus, I suggest: ‘activity willingly undertaken without pay to produce a benefit that primarily helps someone other than members of your household or immediate family or that helps the community or that advance a cause’</td>
</tr>
<tr>
<td>Tesfaye</td>
<td>We may include some explanation to exclude activities done as part of learning -process or as part of religious requirement</td>
</tr>
<tr>
<td>Butcher</td>
<td>Just a note. The American Red Cross speaks of activities “beyond your normal responsibilities”. We in Mexico revised this definition among many and chose: “Volunteer is the person that by choice, and without pay, engages in an activity beyond family obligations in serving others for the benefit of society at large”.</td>
</tr>
<tr>
<td>Archambault</td>
<td>OK to consider that the reimbursement of expenses and modest (with a low limit of modest) honoraria do not disqualify an activity <em>including</em> modest in-kind compensation such as free meals in a low-wage and large unemployment country or area</td>
</tr>
<tr>
<td>Tesfaye</td>
<td>Modify 2&lt;sup&gt;nd&lt;/sup&gt; and 3&lt;sup&gt;rd&lt;/sup&gt; sentences of first bullet would be more appropriate if it is modified as follows: ‘However, reimbursement of expenses and provision of insignificant honoraria may not disqualify an activity.’</td>
</tr>
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<td>---</td>
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</tr>
<tr>
<td>Tesfaye</td>
<td>In kind compensation wherever it is (low, medium or high wage areas) is economic activity; thus, modify 3&lt;sup&gt;rd&lt;/sup&gt; sentences of first bullet would be more appropriate if it is modified as follows: ‘However, if a person receives in-kind compensation in a low-wage area, the activity is most likely not volunteering’</td>
</tr>
<tr>
<td>Butcher de Rivas</td>
<td>It has to be <strong>not</strong> their main source of income.</td>
</tr>
</tbody>
</table>

**IMMEDIATE FAMILY**

<table>
<thead>
<tr>
<th>Archambault</th>
<th>Outside the immediate family is spontaneously understood by the respondent and is clearer than outside the household, because there are households larger than immediate family in some countries. I am sceptical about the three degrees of separation.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Butcher de Rivas</td>
<td><em>People here make the choice of what they think is family. In Latin countries some may consider even godparents as family. This is OK because what we are looking for are exactly activities beyond what individuals consider are their normal responsibilities.</em>) I do not think you need to explain the degrees of separation issue. The person will do that for you, it each context it will be different.</td>
</tr>
<tr>
<td>Davis</td>
<td>This is one area that will sit uneasily in Australia. Apart from among Indigenous Australians, where there can be detailed responsibilities within a range of relationships, parents, children and siblings would be seen as immediate; cousins, aunts and uncles, and second/third cousins are not seen as immediate unless there is a friendship relationship. The three degrees of separation described are too complex to work out in the field (should respondents ask! For the most part, they will reply based on their own sense of who are immediate.)</td>
</tr>
</tbody>
</table>

**CAPTURES FORMAL AND INFORMAL VOLUNTEERING**

<table>
<thead>
<tr>
<th>Archambault</th>
<th>I agree with this point, including the order of the questionnaire to reduce the number of non respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Davis</td>
<td>The draft module appears to be well in keeping with common tendency of thinking at the July 2007 Geneva meetings. The more fluid relationships developing between the household and market sectors reinforce the need to gain a picture of all unpaid work in the community. It is likely that the terminology in Australia in the medium term will retain 'voluntary work' for work through organisations, but that need not prevent collection of information about unpaid activities on an internationally comparable basis.</td>
</tr>
<tr>
<td>Davis</td>
<td>Need to clarify between two fields of work that could be seen as unpaid community work, although often carried out within one's household. These are caring for people because of disability, and fostering children. Both of these go beyond the usual expectations about household responsibilities in a western society, and make a solid contribution to the wider community. Participants in each of these probably see themselves as involved in a specialised field of their own. How do these mesh with the broad voluntary</td>
</tr>
</tbody>
</table>
work concept? Fostering in Australia fits the definition of formal unpaid work: it is organised through agencies, voluntary, and any payment is for the costs of the child, not for the nurturing work. However, we have little evidence from the survey that it is reported as voluntary work.

**SHOULD NOT REPLACE EXISTING VOLUNTEER SURVEYS**

| Archambault | Agree. |

**TREATING INTERNATIONAL VOLUNTEERING**

| Tesfaye | Need to clarify as additional assumption: Formal volunteering done for or through organization within one’s own country is different from that done internationally in terms of work arrangement, reimbursement/compensation, hours of work, etc. Unless clearly stated and separately treated, international volunteers working in developing countries may confuse with non-volunteers. Besides it might be important to have separate statistics for these groups of workers. |

**INTRODUCTORY ORIENTATION STATEMENT**

| Toppe | While we thought that using the long introduction would help people better understand what we meant, that appears not to be the case: there was no difference between the volunteering rates for the long intro version and the basic version. It was only when we prompted about specific behaviors one at a time that we saw an increase in the volunteering rate. In terms of implications for your work, it might be that the long introduction is not as significant as you would hope. 

Prompts that ask about specific things people might have done resulted in higher volunteering rates than asking a single question. Of specific interest to you is that one of the manipulations we did was to give a long introduction to a basic question, which is what you suggest. The (preliminary) results suggest that this approach is no more effective – it does not increase the estimated volunteering rate – than just asking the standard U.S. Bureau of Labor Statistics question. While we thought that using the long introduction would help people better understand what we meant, that appears not to be the case: there was no difference between the volunteering rates for |

| Toppe | In your introduction to the survey, you have a long list of formal volunteering examples preceding a relatively few examples of informal, yet you ask about informal first. I’d suggest you break the introduction into two pieces. The first would introduce the concept of helping and then ask the helping question. Then introduce the concept of (formal) volunteering, followed by the volunteering questions. Regardless of the survey topic, prompts that ask about specific things people might have done resulted in higher volunteering rates than asking a single question. Of specific interest to you is that one of the manipulations we did was to give a long introduction to a basic question, which is what you suggest. The (preliminary) results suggest that this approach is no more effective – it does not increase the estimated volunteering rate – than just asking the standard U.S. Bureau of Labor Statistics question. While we thought that using the long introduction would help people better understand what we meant, that appears not to be the case: there was no difference between the volunteering rates for |
the long intro version and the basic version. It was only when we prompted about specific behaviors one at a time that we saw an increase in the volunteering rate. In terms of implications for your work, it might be that the long introduction is not as significant as you would hope.

<table>
<thead>
<tr>
<th>Archambault</th>
<th>This statement has to vary from country to country, of course. However it could orient the responses and has to be balanced across the diverse industries (the Mexican example seems to have a health oriented bias).</th>
</tr>
</thead>
<tbody>
<tr>
<td>Butcher de Rivas</td>
<td>This will depend on how many questions finally will be added to the Labour Surveys. I am counting 11 plus the prompting. The prompting is essential to this kind of questioning. The explanation of what we consider volunteer work needs to be there. It can be as long as suggested by you here. Maybe a couple phrases shorter. Our experience shows that it was sufficient and clear and that respondents understood this introduction. Our survey expert said it worked well. It was designed so that socioeconomic level/ and or/ education were not relevant. The elements that have to be there are: a) done for others outside of family (people here make the choice of what they think is family. In Latin countries some may consider even godparents as family. This is OK because what we are looking for are exactly activities beyond what individuals consider their normal responsibilities). I do not think you need to explain the degrees of separation issue. The person will do that for you, it each context it will be different.</td>
</tr>
<tr>
<td>Davis</td>
<td>Preamble: as it stands, too long to retain attention in an interview; however, it appears that the idea is to adapt this for relevance and usefulness.</td>
</tr>
<tr>
<td>Dufour</td>
<td>I remember the discussion about this question, and I remember how it was successful in Mexico. However, I can't help but feeling that this intro and question combination is far too long. Seems likely to me that a respondent would 'tune out' part way through, or refuse to continue with the survey (this might be less of an issue in a mandatory survey, such as the LFS). I do, however think that it is well expressed, and that you would be measuring the concept appropriately. When it is tested, I think it will be important to test it as part of a larger survey, not just on its own.</td>
</tr>
</tbody>
</table>

**STRUCTURING THE MODULE BY ACTIVITY**

| Mata | Develop an activity list to structure the module at the national level |
| Archambault | It is the unique way to unify informal and formal volunteering and it is the easiest for the respondent. Of course prompts have to be not too many and to reflect a worldwide practice of volunteering and not to stick to the Anglo Saxon pattern induced by the countries included in the testing group. Don’t forget that in European countries half of the volunteer time goes to culture, sports and recreation and much more in Nordic countries. |
| Butcher de Rivas | The activity list to structure the module is a good idea because it includes both formal and informal activity. The main mistake in many volunteer surveys it to choose from a list of organizations. Here you get a description of activities, but further questions bring you to the organizations. |
| **Davis** | The value of approaching unpaid work through activity-based questions in the first instance has several advantages.  
— It does not discourage anyone from participating in the survey module.  
— It has the capacity to measure both formal and informal unpaid work in the community in the previous 4 weeks, which can then be channeled through further questions to achieve any further differentiation required. |
<table>
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<th></th>
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</thead>
<tbody>
<tr>
<td><strong>ASSESSING QUANTITY OF VOLUNTEER WORK</strong></td>
<td></td>
</tr>
</tbody>
</table>
| **Tesfaye** | Using two-stage approach is very good idea. In the note on page 5, under stage 2, you suggested asking hours spent per occurrence, while in the structure /HOUR_02/ it seems we are asking typical /average/? hour devoted each time?  
My suggestion is to measure the hours spent during the last occurrence for the sake of simplicity and recall lapse error. Telling the typical hour will require some kind of calculation on the part of the respondent, which may result in a data that may not show the reality. |
| **Archambault** | OK of course on the two-stage question. It is the unique way to unify informal and formal volunteering and it is the easiest for the respondent. Of course prompts have to be not too many and to reflect a worldwide practice of volunteering and not to stick to the Anglo Saxon pattern induced by the countries included in the testing group. Don’t forget that in European countries half of the volunteer time goes to culture, sports and recreation and much more in Nordic countries.  
What about irregular activities? On the hour spent in informal activities it is sometimes difficult to determine it, as in household work because of simultaneous activities (I care the child of my neighbour with mine or I have to go shopping for my family and my disabled neighbour at the same time). |
| **Davis** | It captures hours spent on the activities. Currently, the ABS survey captures hours spent for different organisation types, but several activities may be done for an organisation. Either approach allows valuation, but for the draft module it would be primarily occupation-based rather than industry-based valuation. The hours and organisation questions appear to flow naturally. |
| **Archambault** | **Prompts for the respondents reporting no activities that meet the criteria of the module**: The results of the survey are very sensitive to these prompts and if the list is too large, 100 percent of the population volunteers. The aim of this prompts is to capture irregular but maybe frequent volunteering.  
**Capturing less frequent volunteering**  
Some prompts may precise special events (for instance: tsunami, forest fire, telethon, Christmas…). Too many questions and/or prompts may induce double counting and over measurement of volunteering. |
| **Mata** | Is there an example of an occupation for which no industry exists? This would certainly be an oversight of ISIC, I would think. |
ASCERTAINING THE FIELD OR INDUSTRY

<table>
<thead>
<tr>
<th>Author</th>
<th>Note</th>
</tr>
</thead>
</table>
| Tesfaye | i) Just for clarity can we modify 2nd sentence under a): *Coders will then classify the volunteer occupation to the respective best-fit industry classification.*  
ii) why do we use code 9700 as a residual? |
| Tesfaye | i) omit the first sentence of the paragraph—it has no added value  
ii) modify the 2nd - 4th sentences as per the instruction in the Structure:  
Respondents will be asked to provide the NAME of the organization for or through which they carry out the activity. Coders will then try to give industry code based on list prepared prior to the survey. If the respondent does not tell the NAME of the organization or if the NAME of the organization does not exist in the list prepared in advance, respondents will be asked to identify the major activity (product/service) of the organization and coders will use industry code book to identify the industry of the organization. |
| Davis | Organisation information: This part acts as a minimum dataset. It will not affect the valuation of hours, but it may affect attribution of the value of unpaid work to particular industries. Again, this may be seen as an acceptable trade-off.  
Informal Volunteers: Owing to the productivity issue (informal volunteers do not work with the same intensity and qualification than paid workers), it is maybe simplest and less misleading to assign all informal volunteering to ISIC code 9700 (this proxy is used in the measurement and valuation of household work)  
Formal Volunteers: OK. But recall that ISIC is not fit for many activities of NPOs and so the NEC category is too large. And there is little improvement with new classifications of SCN93 rev 1 |
| Davis | Using an electronic trigram coder to classify types of organisations to a fairly small set of types and to sector in the 2006 General Social Survey was reasonably effective, but there was still a substantial amount of office coding for organisations not on the list. In this situation, the draft module proposes asking the respondent to provide the information about what the organisation does. If there is no match in the coder, this is a time-efficient method., There may be some loss of quality, as the respondent may describe the type of activity they are familiar with the organisation doing, but it may not be the primary function of the organisation.  
For interviewers to code activities to ISCO in the field with a paper look-up list appears to be quite difficult. There would need to be quite a substantial list of keywords in a logical (alpha?) order, matched to codes. This was said to be included in one of the annexes, but annexes 3 and 4 did not appear to be available for examination in the message.  
For language and other comments, it would be better for us to do some testing first to determine how well the module is understood, and how it flows. |
| Toppe | Preliminary findings from current research: when the survey topic is volunteering the cooperation rate is suppressed and the estimate of the volunteering rate is inflated. That is, the (preliminary) results suggest that volunteers are more likely to cooperate in a survey about volunteering, driving up the volunteering rate. Our comparison was to a survey topic related to labor force participation, so the comparison to your work is direct. There was a much higher cooperation rate for the labor force survey than for the volunteering survey, and the estimated volunteering rate for the labor force survey was lower regardless of how the volunteering questions were asked. Therefore, I think your approach to keeping your survey as a supplement is a wise one. |
# MODULE COMMENTS

## START

| Mata | After the introduction is made in the question START, the interviewer should be made to stress that the survey is interested in identifying (a) activities that are done for others outside of household and immediate family (b) that they should be unpaid. The way it is now these two criteria are hidden in the text and may not be retained by respondents. |

## VOL_00

| Mata | Question VOL_00 should then specify what is meant by (a) "unpaid" - i.e., that it includes insignificant reimbursements and then this should be very clearly explained to the interviewers themselves - I am not sure it is clear to anybody; and by (b) "immediate" family - i.e, the three degrees of separation criterion; with examples for each. |

## HOUR_A02

| Mata | For question HOUR_A02 it may be necessary to provide some guidance on what to do when the respondent cannot give a typical figure, in this case the least worst being to provide an average (I guess). |

| Tesfaye | Using two-stage approach is very good idea. In the note on page 5, under stage 2, you suggested asking hours spent per occurrence, while in the structure /HOUR_02/ it seems we are asking typical /average?/ hour devoted each time? My suggestion is to measure the hours spent during the last occurrence for the sake of simplicity and recall lapse error. Telling the typical hour will require some kind of calculation on the part of the respondent, which may result in a data that may not show the reality. |

## WORK_01

| Mata | Question WORK_01 should provide additional clarification, e.g., what were the most important activities or please describe the actual work done (perhaps with some examples). Interviewers should be well trained to not allow vague replies that mean nothing, e.g., cleaning, selling, etc. |

| Dufour | Not sure how this loop would work - perhaps I'm missing something, but I think the question needs to be modified to work in a CAI environment. Wouldn't you want to capture the number of activities first, then roster through them? ('Now tell me about ACTIVITY 1...') It seems that if someone says more than one activity here, you would have to capture each activity, and then you might have a tough time keeping the respondent focused on the correct activity. In this format, Work_02 doesn't seem to work either because you've been told several activities in Work_01. Also, I know how you handle the same activity for more than one org, but is there a provision to deal with the same activity, formally and informally? |

## Work_02

| Dufour | One note: In Canada, we know that a few do a lot - if you don't cap the |
number of activities, there will be some respondents (not many, but some) who loop from Work_01 to Work_02 numerous times. This would be time consuming and burdensome, and I'm sure the LFS folks would have concerns.

<table>
<thead>
<tr>
<th>Tesfaye</th>
<th>I suggest to use this question to know the number and type of different additional volunteer activities done during the reference period. Collecting detailed questions (HOUR_A01 through TYPE_ORG03) will take space in the questionnaire and will be cumbersome.</th>
</tr>
</thead>
<tbody>
<tr>
<td>WORK_03</td>
<td>Do people who go through Work_01 to Work_02 skip Work_03? Do informal volunteers go there? To guard against double counting, should we explicitly say to exclude previously mentioned activities (or hours)?</td>
</tr>
</tbody>
</table>
| TYPE_ORG02 | - Write 'name' in Capital letter  
- The word coder should be changed to code book |
| TYPE_ORG03 | - The word coder should be changed to code book |
| Archambault | Why not proposing the test countries officials to do a double coding:  
- According to ISIC or its national version  
- According to ICNPO  
IDIC is a poor classification for NPOs and if it is easy to have a crosswalk from ICNPO to ISIC, the reverse is not true, because the right information is lost in a NEC category |
| TYPE_ORG4 | I’m not sure the term NGO will be familiar to most people. Also, I think you should change “government” to “government or public school” (or some other such term). |

Archambault: Often in my country people don’t know if the organisation they work for is a NPO or a government entity for large organizations (hospitals for instance). Add “Don’t know”?

Be careful also that between public organizations and the volunteer working for it, there are very often in-between NPO (in France, it is the case for parent-teachers associations in public schools, of religious or cultural organizations in hospitals, of firemen associations for volunteer firemen working with paid firemen, of associations of prison visitors or teachers for volunteering inside jails…) So the assignation of volunteering to public or NPS is uneasy.

Another issue is the case of persons paid by a corporation or by central or local governments and working totally or partially in a NPO. It is often the case for employees near the retirement to trend them to volunteer after retirement. Though they are paid employees, they may consider themselves as volunteers
Memo #2 to the Technical Experts Group  
August, 2008

Summarizes the review of our initial draft survey and outlines changes made to the draft module in response.

Identifies four issues that could not easily be resolved without actual testing and identifies three possible testing methods.

Asks members of the TEG to indicate which issue or issues they would be willing to test and with what procedure.

A summary of responses and comments from the TEG is included.
MEMORANDUM

To: Joint JHU-ILO Technical Experts Group on the Measurement of Volunteer Work
Re: Testing the LFS Volunteer Work Survey Module
Date: August 11, 2008

Dear ILO Volunteer Measurement Technical Expert Group Colleague:

I am writing to seek your help in testing the revised draft of the Volunteer Work Survey Module developed as part of our cooperative project with the International Labour Organization.

We believe it is important to undertake this testing before the forthcoming International Conference of Labor Statisticians (ICLS), which is scheduled to convene on November 24, 2008, in Geneva. This will allow us to provide assurances to the assembled labor statisticians that our approach has been tested and validated in a reasonable cross-section of places.

Once you have had a chance to review this memo, we would ask you to complete the attached Volunteer Survey Testing Response Form indicating which issue or issues you would be willing to test in your country and which method or methods you are able to use in these tests. Please return this form to Megan Haddock at Megan.Haddock@jhu.edu by September 1, 2008.

To help you understand our testing strategy and the rationale that lies behind it, this memo proceeds in three steps: first, it summarizes what we learned from the review of our initial draft survey and outlines the changes we made to the draft survey form in response to the suggestions we received; second, it identifies four issues that could not easily be resolved without actual testing and identifies three testing methods that could be applied to each; finally, it asks you to indicate which issue or issues you are willing to test and with what procedure.

Five attachments are also included with this memo. Attachment A provides the revised draft volunteer survey module that has resulted from our responses to suggested revisions. Attachments B-1, B-2, B-3, and B-4 provide further detail on the four issues we have identified for testing and on the testing methods we recommend for each.
I. Comments on Proposed LFS Survey Module and Resulting Modifications

As you will remember, in December 2007 we requested your comments, as well as the comments of other experts, on a draft Volunteer Survey Module incorporating the suggestions we received at our July 2007 Technical Experts Group meeting in Geneva. In this section we analyze these comments and indicate how we propose to respond to them in the final survey module (for a full presentation of the comments we received, see our project’s website at: www.jhu.edu/ccss/volunteering).

1) Overall endorsement of basic approach

Altogether, we received comments on the draft survey form from 7 statistical offices and other observers representing 6 countries in all. Overall, the responses were highly supportive both of the overall structure of the module and of many of the detailed features. Everyone was in agreement with the basic concept of connecting a volunteer supplement to regular labor force surveys, with the four-week reference period, with structuring the volunteer module by activity, with the proposed variables for measurement, with our approach for assessing the volume and value of volunteer activity, and with the inclusion of both informal and formal volunteer work in the survey module. Also, with the exception of a few clarifications provided below, everyone was in agreement with the proposed conceptual definition of volunteering.

2) Suggestions for improvement

Although there was general support for the draft survey instrument, a number of concerns also surfaced. Below we summarize these concerns and indicate how we have addressed them in a re-draft of the survey instrument.

a) The length and wording of the first question

Most significantly, several reviewers encouraged us to tighten up the opening question, reduce the detail of the prompts provided, and make various changes in the wording to avoid losing the attention of respondents.

In response to this set of suggestions, we have taken the following steps:

- Shortened and reworded the introductory START question to better retain respondents’ attention and reduce possible cultural bias;
- Separated out the prompting language from the initial START question;
- Shortened the prompting language.

b) Definition of immediate family

Most respondents thought our attempt to define what the survey intended by its reference to “the immediate family” in our definition of volunteer work was too complicated and would not work. Especially problematic was the proposed “degrees of separation grid.”
Rather, most preferred to trust respondents to correctly interpret the idea that volunteer work is something that lies beyond the “normal responsibilities” one has for one’s family, with the understanding that the exact definition of these “normal responsibilities” might vary from country to country (and perhaps family to family).

In response, we have removed the degrees of separation language from the proposed module. However, since the definition of family is likely to vary from country to country, we propose that the survey administrator translate the country’s understanding of immediate family (i.e., normal obligation) into the degrees of separation shown in the grid as an aid to comparative researchers and include these decisions in the descriptive material accompanying the results.

c) Without Pay

The original survey module defined volunteering as “work without pay,” but went on to indicate that some compensation would not disqualify an activity from being volunteer work so long as the compensation was below regular pay scales for the activity in question. Reviewers generally agreed with this principle but felt that additional emphasis was needed to reinforce the idea that reimbursement of expenses and modest honoraria, including modest in-kind compensation, do not disqualify an activity from being considered volunteer work.

In response to this concern, we have added language clarifying this point and will also emphasize this point in the proposed Manual on the Measurement of Volunteer Work Through Labour Force Surveys (working title) that will accompany the survey module. We have also decided to include this language in one of the tests described later in this memo. In the end, however, the Manual may recommend that each country determine what levels of payment should be considered “without pay,” and the survey administrators could include these decisions in the descriptive material accompanying the results.

d) Number of Reported Activities

One reviewer expressed concern that the proposed module is too open-ended regarding the number of activities that volunteers may report. The reviewer’s concern centered on the time that could be required to administer the survey to the occasional “super volunteer,” whose extended activities would require extensive survey administration time and resources.

We are reluctant at this point to set a limit to the number of activities the survey should allow a respondent to identify. There are several reasons for this:

- Volunteering surveys conducted by the Australian Bureau of Statistics and Statistics Canada suggest that an open-ended opportunity for respondents to identify volunteer activities will not lead to excessively long interviews overall: 87.6 percent of respondents in Australia and 78 percent of respondents in Canada identified one or
two volunteer activities only, suggesting that for the vast majority of respondents the
survey module can be answered in 3-4 minutes.

- While the Australian and Canadian examples suggest that few respondents engage in
more than two types of volunteer activities, these surveys focused only on formal
volunteering. Since we plan to cover informal volunteering as well, more information
is needed before deciding on an arbitrary cut-off point;
- This is therefore one area where field testing will be needed before a conclusion is
reached.
- Based on this testing, we may propose that countries use a question of the following
form after a certain number of responses have been registered: “You’ve already
identified X activities. If you have any more, please tell me about the one on which
you spent the most time.”

e) Supporting documents

Additional information regarding classification, activity, and industry coding was
requested.

In response to this request, we have developed the following aids to module
implementation, which will be included in the Manual (copies of these aids can be found
on the project web site: www.jhu.edu/ccss/volunteering).  

- A Code Book for the survey module;
- An index of volunteer activities coded to ISCO-88;\(^1\)
- An index of NPI industry descriptions coded to ISIC, Rev. 4;\(^2\)
- A copy of the Volunteering Toolkit with Suggested ISCO and ISIC Codes;
- A list of 2-digit ISCO codes likely to contain volunteers;
- A list of 2-digit ISIC codes likely to contain NPIs; and
- A coding list for informal activities.

f) Phrasing and wording of individual questions

Respondents had several suggestions, in addition to those already mentioned, for
rewording and tightening of the language throughout the module.

In response, we have made the following modifications to the draft module:

- Modified the question in WORK_01 to be less abrupt and to suggest starting with the
most recent or most time-consuming activity;
- Modified the list in WORK_03, drawing on the list removed from START;
- Modified HOUR_A02 to replace “typically” with either “on average” or perhaps “the
last time you did it;”

\(^1\) This is a preliminary version for comment. It will be converted to ISCO-08 for the final version.
\(^2\) This is a preliminary version for comment. It will be revised when the Index for ISIC, Rev. 4 becomes available.
• Modified TYPE_ORG04 to change item 4 to “Other / Not sure” in response to suggestions that some people may not be able to identify the legal type of organization they volunteered for, or in cases where respondents participated in “community-building” activities.

• Modified WORK_02 so the next to last line reads “If no and respondent has answered WORK_03 with yes, go to END.”

• In Annex 1, added a new SPECIAL_03 that reads “How many times did you do this unpaid work in the past 12 months? [Record response verbatim and use a lookup table or code book to assign frequency codes.]” and renumber existing SPECIAL_03 – 07.

• In Annex 1, replaces WORK_02 with SPECIAL_02 throughout.

• Replaced “[4 weeks/reference period]” with “4 weeks” throughout.

• Replaced “coder” with “code book” throughout.

3) Revised Survey Form

Based on these suggestions, a revised Volunteer Survey Module has been prepared and is included as Attachment A to this memo.

II. Survey Testing Issues and Procedures

In this section we outline the key issues we propose to subject to further testing, the types of tests to be considered, and the process we hope testing countries will use to report on the tests they undertake. Appendices B-1, B-2, B-3, and B-4 then provide further detail on the issues and the recommended testing procedures for each.

The Issues

Our review of the literature and our discussions with the Technical Experts Group suggest four issues that seem likely to have the greatest potential impact on the reliability of the results obtained from the proposed surveys of volunteering, and that we therefore feel should be subjected to testing:

1. The initial cues designed to identify in-scope activities;
2. The prompts provided to help respondents recall in-scope activities;
3. The reference or recall period over which respondents are asked to recall their in-scope activities; and
4. The respondent rule utilized in the survey, i.e., whether respondents are asked to respond for themselves only or for other members of their families.

3 All of these documents, along with other related materials, are available on the website we have created for this project: www.jhu.edu/ccss/volunteering.
Testing Methods

We have identified three possible methods for testing these issues and gathering relevant data: (1) desk or expert reviews; (2) focus groups; and (3) sample surveys. These three methods are described briefly below:

a) Desk/Expert Reviews. Desk/Expert reviews involve the work of one person, or a team of people, who review the proposed module without performing any field work. In cases where data on volunteering are already available, experts might re-examine the data focusing on one or more testing issue and report these results. In cases where data are not available, desk/expert reviews would involve a thorough qualitative analysis of the survey module in the light of the reviewers’ technical knowledge.

The advantage of desk reviews are that they are inexpensive compared to field testing options and usually can be completed more quickly. In cases where data are available, testing the module can shed new light on existing survey data, which may be useful not only for this Project but also for the country involved in the testing. The disadvantage is that, in the absence of data, results may be highly subjective.

b) Focus Groups. Focus group testing involves bringing together small groups of people, typically 6-12 participants, asking them to complete the relevant test survey module, and then querying them about the features of the module about which we are trying to gather information. Reactions of group participants are closely monitored by the moderator. The size and composition of a focus group must be conducive for discussion among participants as well as for effective monitoring of the group dynamics. An important aspect of focus group assembly is the selection of the right participants, i.e., those who are in a position to provide relevant information.

c) Representative sample survey. Because neither desk surveys nor focus groups provide truly representative test results, a third form of testing is desirable wherever possible. This third form involves testing a particular issue by administering the testing instrument to a sub-set of the regular LFS sample. This can be done either by adding special supplements to regularly administered surveys, or by special sessions conducted separately from the regular LFS administration. The size of these sub-sets should be sufficient for statistical hypothesis testing, and include enough respondents engaged in the activities in scope. Research shows that typically less than 25-30 percent of the general population engage in volunteering activities. Therefore, the sample must be sufficiently large (at least 1,000 or more) to include enough volunteers to make statistically valid comparisons among them feasible. Where alternate language is being tested, tests should be designed in such a way that some respondents get one version of the survey module and others get a second version.
Defining the Core Variables to be Tested

To ensure consistency, the core variables to be tested are defined as follows:

1. **Volunteering rate**: the number of respondents who volunteer divided by the sample size;
2. **Duration of volunteering**: the total number of hours volunteered during the reference period;
3. **Number of volunteering activities**: the total number of different volunteer work activities performed during the reference period as defined by the ISCO codes;
4. **Time needed to administer the volunteering survey module**: the measured average minutes required per respondent to complete the survey.

Reporting Procedures

If you are able to test any or all of the four issues, please report on outcomes by providing narrative answers to the questions posed in the respective attachment for each issue you are testing. In cases where data are collected or re-analyzed, please also provide the microdata in a standard format (ASCII text or Excel with a metafile describing the structure of the data, or an SPSS or SAS data set containing variable and value definitions). In cases where the microdata cannot be shared, please provide the sample size (n), the mean (average), and standard deviation for each of the variables being tested.

Country Participation

Each issue, and the suggested methods for testing it, is described in more detail in the attached Appendices (Appendices B-1 to B-4). While each issue has a suggested method for testing it, there may be other acceptable methods for doing so. Please do not hesitate to suggest adaptations to these testing methods if doing so will improve the results or allow you to overcome barriers to testing in your country. If you are interested in participating in the testing of one or more of these issues, please contact the Center for Civil Society Studies in writing to confirm your participation. A response form is attached to this memo for your convenience. Please be sure to indicate which issue your country will test, the proposed method for doing so, and an expected timeline for completing the testing in your country.

Conclusion

The work of designing a valid way to measure volunteer work entails an enormous responsibility since this may be one of the few opportunities to introduce this topic into the process of labor force surveys. We are therefore eager to take full advantage of this opportunity to bring forward a module that is both conceptually sound and able to be incorporated successfully into the labor force survey process.

You have already provided much useful assistance in this process. I hope very much that you will now be able to assist us further by subjecting certain remaining facets of the module we
have created to further testing. I thank you in advance for whatever help you are able to provide with this testing effort.

Sincerely,

[Signature]

Lester M. Salamon

Cc: Sylvester Young, International Labour Organization
    Flavia Pancieri, United Nations Volunteers
    Ivo Havinga, United Nations Statistics Division
**Volunteer Survey Testing Response Form**

Please return this form by September 1, 2008 via email or fax to Megan Haddock
Email: [megan.haddock@jhu.edu](mailto:megan.haddock@jhu.edu)
Fax: +1-410-516-7818

Country: ______________________________

<table>
<thead>
<tr>
<th>Issue</th>
<th>Testing Method</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>Desk</td>
</tr>
<tr>
<td>1) Initial cue</td>
<td></td>
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<tr>
<td>2) Prompts</td>
<td></td>
</tr>
<tr>
<td>3) Recall period</td>
<td></td>
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<tr>
<td>4) Respondent rule</td>
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</tbody>
</table>

Comments:

Completed by: _______________________________
Email address: _______________________________
## The Revised Module on the Measurement of Volunteer Work

<table>
<thead>
<tr>
<th>Step or variable</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>START</strong></td>
<td>So far I have been asking you about paid work. The next few questions are about unpaid volunteer work, that is, activities that some people willingly do without pay to promote a cause or help someone outside of their households or immediate family. [Note: Reimbursement of expenses and modest honoraria do not disqualify an activity.]</td>
</tr>
<tr>
<td><strong>PROMPT_00</strong></td>
<td>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.]</td>
</tr>
<tr>
<td><strong>VOL_00</strong></td>
<td>During the past 4 weeks [provide dates marking the period.], did you do any unpaid work of this kind for someone outside your own household or immediate family? <em>If no, go to PROMPT_10.</em></td>
</tr>
<tr>
<td><strong>WORK_01</strong></td>
<td>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]. <em>[Record response verbatim and use a lookup table or code book to assign occupation codes.]</em> If respondent mentions more than one type of activity, ask questions <strong>WORK_01</strong> through <strong>WORK_02</strong> for each activity separately, differentiating answers by a, b, c, at end of name.</td>
</tr>
<tr>
<td><strong>HOUR_A01</strong></td>
<td>How many times did you do this unpaid work in the past 4 weeks? <em>[Record response verbatim and use a lookup table or code book to assign frequency codes.]</em></td>
</tr>
<tr>
<td><strong>HOUR_A02</strong></td>
<td>How many hours did you devote to this unpaid work [on average each time/the last time] you did it? <em>Record response verbatim.</em></td>
</tr>
<tr>
<td><strong>TYPE_ORG01</strong></td>
<td>Did you do this unpaid work for or through an organization? <em>If no, code [informal volunteering] and go to <strong>WORK_02</strong>.</em></td>
</tr>
<tr>
<td><strong>TYPE_ORG02</strong></td>
<td>What is the name of the organization for which you did this work? <em>[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 <strong>TYPE_ORG</strong> for every organization]</em> If NAME is in code book, go to <strong>WORK_02</strong>.</td>
</tr>
<tr>
<td><strong>TYPE_ORG03</strong></td>
<td>If NAME is not in code book, ask What does this organization do? ____ (80 spaces) <em>[Record response verbatim and assign industry code based on response.]</em></td>
</tr>
<tr>
<td><strong>TYPE_ORG04</strong></td>
<td>What type of organization is this? 1. Charity/non-profit organization/NGO/union/or religious organization 2. Business 3. Government 4. Other / Not sure <em>[Record response verbatim and assign sector code based on response.]</em></td>
</tr>
</tbody>
</table>
| **WORK_02**      | During the past 4 weeks, did you do any other kind of unpaid work for someone outside
<table>
<thead>
<tr>
<th>Step or variable</th>
<th>Question</th>
</tr>
</thead>
</table>
| your own household or immediate family?  
*If yes, repeat questions WORK_01 through WORK_02, differentiating answers by a, b,...*  
*If no and respondent has answered WORK_03 with yes, go to END.*  
*If no and respondent has not answered WORK_03, go to PROMPT_10.* |
| 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?  
*If yes, repeat questions WORK_01 through WORK_02, differentiating answers by a, b,...* |
| END | End of survey module |

**Annex 1**

**Additional Questions if Survey is Annual**

<table>
<thead>
<tr>
<th>Step or variable</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPECIAL</td>
<td>Additional questions if survey is annual.</td>
</tr>
<tr>
<td>SPECIAL_01</td>
<td>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?</td>
</tr>
</tbody>
</table>
| SPECIAL_02 | What kind of work did you do?  
*Record response verbatim and use a lookup table or code book to assign occupation codes.*  
*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.* |
| SPECIAL_03 | How many times did you do this unpaid work in the past 12 months weeks?  
*Record response verbatim and use a lookup table or code book to assign frequency codes.* |
| SPECIAL_04 | How many hours did you devote to this unpaid work [on average each time/the last time] you did it?  
*Record response verbatim.* |
| SPECIAL_05 | Did you do this unpaid work on your own or for or through an organization?  
*If on your own, code [informal volunteering] and go to SPECIAL_02.* |
| SPECIAL_06 | What is the name of the organization for which you did this work the most?  
*Record response verbatim and use a lookup table or coder to assign industry and sector codes.*  
*If NAME is in code book, go to SPECIAL_02.* |
| SPECIAL_07 | If NAME is not in code book, ask  
What does this organization do? ____ (80 spaces)  
*Record response verbatim and assign industry code.* |
| SPECIAL_08 | What type of organization is this?  
1. Charity/non-profit organization/NGO/or religious organization  
2. Business  
3. Government  
4. Other / Not sure  
*Record response verbatim and assign sector code based on response.* |
| END | End of survey module |
Testing Issue 1:
Effects of Conceptualization and Wording of the Initial Cues for Capturing In-Scope Activities

The Issue. The proposed survey module centers on respondents’ understanding of the central concept as conveyed in the opening START and PROMPT questions. It consists of an initial cue aiming to elicit recall of behavior in scope (volunteering), and a few follow up questions about selected attributes of that behavior. The follow-up questions are straightforward, and most respondents should be able to grasp and correctly interpret them without any difficulties. However, the initial cue is subject to a wide range of interpretations by various types of respondents. Failure on the part of the respondent to understand the initial cue may have a significant impact on the module reliability.

There are several possible bases for misunderstanding the initial cue. First, the literature suggests that volunteering encompasses a wide range of activities, some of which may fall outside the scope of the definition accepted in the proposed model. What is more, some of the activities considered in-scope here may not be generally recognized as volunteering by some people or in some settings. This can be exacerbated by the fact that some of these activities or the words used to describe them may be emotionally charged and evoke a negative response. Improper conceptualization or wording may “load” the question and introduce bias. As a result, some respondents may erroneously fail to report activities that are in scope, or report activities that are out-of-scope.

Complicating things further is that fact that for many people volunteer work has low salience. People may either perform it infrequently or perhaps consider it a part of everyday routine that does not warrant any special attention (e.g., helping someone in need or doing mundane community upkeep tasks). Consequently, they may fail to recall these activities when asked in a survey.

Beyond this, the definitional criteria of volunteer work proposed in the survey – i.e., that it be activity not focused on the “immediate family” and be “without pay” – may also be subject to different interpretations. The concept of “immediate family” varies among cultures, and it is very difficult to specify universal rules. Similarly, what normally constitutes “pay” or “employment compensation” also varies among local areas.

Given the importance of this issue, we need your help in testing the proposed conceptualization and wording of the initial cue prior to module implementation. The key assumption underlying this test is that despite their variety and different emotional connotations, the activities in scope of this survey module can be effectively represented by a small number of concepts that are neither too general nor too specific, free of emotional bias, and easily grasped by the general population. Based on prior experience in a number of countries, we have assembled a short list of concepts that clearly denote different types of activities that are widely considered to qualify
as volunteer work, and collectively cover the entire range of the activities that are in-scope of this module. The purpose of this test is to determine how well these concepts can elicit adequate recall of the in-scope activities by respondents. In-scope is defined as activities that meet criteria specified by the definition of volunteer work adopted for this survey module. Most of these criteria can be determined in advance. For the more difficult ones (e.g., the meaning of “immediate family” and “regular pay,” we suggest that survey administrators in the test countries determine how these terms are understood in your country before undertaking the test.

**Objective.** The objective of this test is to determine the rates of in- and out-of-scope activities recalled in response to the proposed list of conceptual cues.

**Suggested testing methods and procedure.** Representative sample survey and/or focus group.

The respondents are administered Test Module 1 (see attachment), asking whether they recall performing activities specified by each cue during the reference period. For every “yes” answer, a series of filter questions is asked in order to determine if the reported activity is in scope. At the end, respondents are asked to recall any other activities not mentioned in the test module that they think may be in scope. Again the same filters are administered if any activity is reported in response to that cue.

**Suggested decision rules:** Generally speaking, the cues that produce the greatest share of “yes” responses that prove to be “in-scope” once the filter questions posed in Test Module 1 are answered are the most effective ones. The greater the share of in-scope activities elicited by a particular cue, the more reliable that cue. The greater the share of out-of-scope activities in response to a cue, the less reliable that cue.

**Reporting:** Please briefly describe the methodology used in the test (number of participants and selection procedure if focus group; sample sizes, sampling methods, target population, and estimation and hypothesis testing procedures if sample survey). Please answer the following questions and provide available supporting documents.

1. What were the “yes” response rates to each cue listed in Test Module 1?
2. What were the in-scope response rates to each cue listed in Test Module 1?
3. What were the out-of-scope response rates to each cue listed in Test Module 1?
4. Did these rates vary among different socio-demographic groups? If so, how?
5. Did respondents seem to understand the questions being posed in the focus groups or post-test debriefing?
6. Did you notice any perceptible attitudes regarding particular questions or concepts?
7. In your opinion, did any of the cues work particularly well or particularly badly in eliciting recollection of in-scope activities in your country? Why?
**Test Module 1:**
**LFS Volunteering Module Instrument**
**Concepts and Wording Test**

<table>
<thead>
<tr>
<th>Step or variable</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>START_00</strong></td>
<td>So far I have been asking you about paid work. The next few questions are about unpaid volunteer work, that is, activity that some people willingly do without pay to promote a cause or helps someone outside of their households or immediate family. It can be any kind of work for which you received no pay, such as helping individuals or working for an organization, clubs, associations, or the community. I will now read you a list of examples this kind of unpaid work. If you did any of these activities in the last 4 weeks, please say “yes” as I read the list.</td>
</tr>
</tbody>
</table>
| **ACT_01**       | Some people help others in need, like [children, the elderly, the poor, or disaster victims]. During the past 4 weeks, did you help someone who was not a member of your immediate family without being paid? Y/N  
If “no” go to ACT_02  
[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.] |
| **FILTER_10**    | Whom did you help/work for?  
Record verbatim |
| **FILTER_20**    | Did you receive or expect to receive anything in exchange for your help/work? Y/N  
If “no” go to ACT_02 |
| **FILTER_21**    | What did you receive or expect to receive for your help/work? Record verbatim |
| **FILTER_22**    | What is the approximate value of what you received or expect to receive for your help/work? Record value in currency units. |
| **FILTER_30**    | Were you required by authorities, employment or other obligations to do perform this help/work? Y/N  
If “no” go to ACT_02 |
| **FILTER_31**    | What was that requirement or obligation?  
Record verbatim |
| **ACT_02**       | Some people work to clean or improve their communities, like [roads, schools, health facilities, the water supply, or parks]. Did you do this kind of work without being paid during the past 4 weeks? Y/N  
If “yes” iterate FILTER_10 through FILTER_31, if “no” go to ACT_03 |
| **ACT_03**       | Some people help organizing an event such as [a community gathering, a sporting or cultural activity, a political rally, or a religious celebration]. During the past 4 weeks did you help with this kind of work without being paid? Y/N  
If “yes” iterate FILTER_10 through FILTER_31, if “no” go to ACT_04 |
| **ACT_04**       | Some people work to publicize an issue, or make people aware of a problem. During the past 4 weeks did you do this kind of work without being paid? Y/N  
If “yes” iterate FILTER_10 through FILTER_31, if “no” go to ACT_05 |
| **ACT_05**       | Some people work for an organization that serves communities, such as [a school, library, health care center, NGO, union, club, church, or association]. During the past 4 weeks did you work for any such organization without being paid? Y/N  
If “yes” iterate FILTER_10 through FILTER_31, if “no” go to ACT_06 |
| **ACT_06**       | Is there any other type of work or help you provided to someone outside your immediate family without being paid during the past 4 weeks? Y/N  
If “no” – got to END. |
| **ACT_61**       | Please tell me what kind of work or help you did.  
Record verbatim, and for each answer iterate FILTER_10 through FILTER_31 |
| **END**          | End of survey |
Testing Issue 2:  
Effects of Prompting (Recall Reinforcement) Techniques  
on Capturing In-Scope Activities

The Issue. Volunteer work is a type of behavior that is often ambiguous and lacking salience. The literature suggests that prompting often helps respondents to recall or identify volunteering activities. But while useful, prompting also has its costs. First, additional prompts increase the time needed to administer the survey, and thus the survey cost. Second, too much prompting may distract or confuse some respondents, or discourage them from answering the question altogether (potentially increasing item non-response).

Two prompting methods are available to survey designers. These are referred to in the literature as high or low “buffering.”

The proposed module uses the “low-buffered” approach, asking respondents an initial yes/no question about a broad range of activity that meets the definition of volunteer work, following up yes responses with more detailed questions to identify the exact activity in which the respondent is involved, and iterating this sequence until the respondent does not report additional activities. If the respondent does not recall any activities in response to the initial cue, s/he is prompted once more to provide an answer before the survey is terminated.

The “high-buffered” method involves breaking the initial long question into several simpler “yes/no” questions about individual possible types of in-scope activities, and then continuing with follow up questions for each activity initially reported by the respondent. That solution, however, can add to the survey administration time and thus increase its cost.

Objective: The objective of this test is to evaluate the effects of using low-buffered and high-buffered approaches by comparing the results obtained using both approaches.

Variables to be tested. (a) the volunteering rate, (b) the duration of volunteering, (c) number of volunteering activities, and (d) the time needed to administer the volunteering survey module – captured by two prompting techniques being tested.

Suggested testing methods: Focus group or representative sample survey.

Suggested procedure: Respondents are randomly assigned to two groups, each of which is administered a different prompting method as described above, keeping the four-week reference period constant:

- Group 1 – low-buffered prompting method (Test Module 2--attached),
- Group 2 – high-buffered prompting method (Test Module 3--attached).
Their answers are recorded in a microdata set, and group membership is flagged.

**Suggested decision rules for representative sample survey method**: Compare the two Test Groups according to the four variables described above. Generally speaking, the greater the rate, duration or number of activities obtained by a given prompting method, everything else being equal, the more accurate the recall associated with that prompting method. However, the less time it takes to answer the questions included in the Test Module, the better time efficiency of the respective prompting method.

**Suggested decision rules for focus groups**: If the number of observations does not warrant statistical hypothesis testing outlined above, the analysis should focus on qualitative indicators of cognitive difficulties experienced by respondents during the testing procedure, such as difficulty understanding the questions, difficulty providing relevant answers, need for repetition of questions, etc. Generally speaking, the fewer cognitive difficulties the better the prompting method.

**Reporting**: Please briefly describe the methodology used in the test (sample sizes, sampling methods, target population, and estimation and hypothesis testing procedures), and answer the following questions.

1. How did the volunteering rate vary between the test groups?
2. How did the average duration of the reported activities vary between the test groups?
3. How did the number of reported activities vary between the test groups?
4. Was there any variation between the proportion of informal and formal volunteering conducted by the two groups?
5. How did the two different test variants affect the time required to administer the module?
6. Was there any variation in the response rate between the two groups?
7. In your opinion, did the high-buffered approach yield significant enough differences in capturing the amount or character of volunteer work to justify the greater time required?
   Which of the two prompting methods do you think would work best in your country? Why?
### Test Module 2
LFS Volunteering Module Instrument
Four-week reference period, low-buffered prompting

<table>
<thead>
<tr>
<th>Step or variable</th>
<th>Question</th>
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<tbody>
<tr>
<td><strong>START</strong></td>
<td>So far I have been asking you about paid work. The next few questions are about unpaid volunteer work, that is, activities that some people willingly do without pay to promote a cause or help someone outside of their households or immediate family. [Note: Reimbursement of expenses and modest honoraria do not disqualify an activity.]</td>
</tr>
<tr>
<td><strong>PROMPT_00</strong></td>
<td>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.]</td>
</tr>
<tr>
<td><strong>VOL_00</strong></td>
<td>During the past 4 weeks [provide dates marking the period], did you do any unpaid work of this kind for someone outside your own household or immediate family? If no, go to PROMPT_10.</td>
</tr>
<tr>
<td><strong>WORK_01</strong></td>
<td>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]. [Record response verbatim and use a lookup table or code book to assign occupation codes.] 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.</td>
</tr>
<tr>
<td><strong>HOUR_A01</strong></td>
<td>How many times did you do this unpaid work in the past 4 weeks? [Record response verbatim and use a lookup table or code book to assign frequency codes.]</td>
</tr>
<tr>
<td><strong>HOUR_A02</strong></td>
<td>How many hours did you devote to this unpaid work [on average each time/the last time] you did it? [Record response verbatim.]</td>
</tr>
<tr>
<td><strong>TYPE_ORG01</strong></td>
<td>Did you do this unpaid work for or through an organization? If no, code [informal volunteering] and go to WORK_02.</td>
</tr>
<tr>
<td><strong>TYPE_ORG02</strong></td>
<td>What is the name of the organization for which you did this work? [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] If NAME is in code book, go to WORK_02.</td>
</tr>
<tr>
<td><strong>TYPE_ORG03</strong></td>
<td>If NAME is not in code book, ask What does this organization do? [Record response verbatim and assign industry code based on response.]</td>
</tr>
</tbody>
</table>
| 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?
|                     | If yes, repeat questions WORK_01 through WORK_02, differentiating answers by a, b,..  
|                     | If no and respondent has answered WORK_03 with yes, go to END.
|                     | If no and respondent has not answered WORK_03, go to PROMPT_10. |

| 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?  
|                     | If yes, repeat questions WORK_01 through WORK_02, differentiating answers by a, b,.. |

| END                 | End of survey module |
**Test Module 3:**

**LFS Volunteering Module Instrument**

*Four-week reference period, high-buffered prompting*

<table>
<thead>
<tr>
<th>Step or variable</th>
<th>Question</th>
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<tbody>
<tr>
<td><strong>START</strong></td>
<td>So far I have been asking you about paid work. The next few questions are about unpaid volunteer work, that is, activities that some people willingly do without pay to promote a cause or help someone outside of their households or immediate family. [Note: Reimbursement of expenses and modest honoraria do not disqualify an activity.]</td>
</tr>
<tr>
<td><strong>PROMPT_00</strong></td>
<td>Now I am going to read you a list of examples of the unpaid work some people do. If you did any of these activities during the past 4 weeks, please say “yes” as I read the list. [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].</td>
</tr>
<tr>
<td><strong>PROMPT_01</strong></td>
<td>Did you help someone in need, like [children, the elderly, the poor, or disaster victims]? Y/N</td>
</tr>
<tr>
<td><strong>PROMPT_02</strong></td>
<td>Did you work to clean or improve your community, like [roads, schools, health facilities, the water supply, or parks]? Y/N</td>
</tr>
<tr>
<td><strong>PROMPT_03</strong></td>
<td>Did you help to organize an event, such as [a community gathering, a sporting or cultural activity, a political rally, or a religious celebration]? Y/N</td>
</tr>
<tr>
<td><strong>PROMPT_04</strong></td>
<td>Did you work to publicize an issue, or to make people aware of a problem? Y/N</td>
</tr>
<tr>
<td><strong>PROMPT_05</strong></td>
<td>Did you work for an organization that serves communities such as [a school, library, health care center, NGO, union, club, church, or association]? Y/N</td>
</tr>
<tr>
<td><strong>PROMPT_06</strong></td>
<td>When asked about volunteer work, sometimes people don’t think of such activities as [serving on boards, gathering scientific data, coaching, or doing pro-bono work] During the past 4 weeks, did you do any of these things for any organizations? Y/N [Note: This should be a list of activities in scope but likely to be missed and will vary from country to country.]</td>
</tr>
<tr>
<td><strong>WORK_01</strong></td>
<td>Now I will ask you a few questions about the unpaid work that you just told me that you did. Let’s start with X [read the first activity reported by respondent]. Could you tell me what kind of work you did? [Record response verbatim and use a lookup table or code book to assign occupation codes.]</td>
</tr>
<tr>
<td><strong>HOUR_A01</strong></td>
<td>How many times did you do this unpaid work in the past 4 weeks? [Record response verbatim and use a lookup table or code book to assign frequency codes.]</td>
</tr>
<tr>
<td><strong>HOUR_A02</strong></td>
<td>How many hours did you devote to this unpaid work [on average each time/the last time] you did it? __________ [Record response verbatim.]</td>
</tr>
<tr>
<td><strong>TYPE_ORG01</strong></td>
<td>Did you do this unpaid work for or through an organization? If no, code [informal volunteering] and go to WORK_02.</td>
</tr>
<tr>
<td><strong>TYPE_ORG02</strong></td>
<td>What is the name of the organization for which you did this work? [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] If NAME is in code book, go to WORK_02.</td>
</tr>
<tr>
<td><strong>TYPE_ORG03</strong></td>
<td>If NAME is not in code book, ask What does this organization do? ____ (80 spaces) [Record response verbatim and assign industry code based on response.]</td>
</tr>
<tr>
<td>Step or variable</td>
<td>Question</td>
</tr>
<tr>
<td>------------------</td>
<td>----------</td>
</tr>
</tbody>
</table>
| 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  
*Record response verbatim and assign sector code based on response.* |
| WORK_02          | *Iterate items WORK_01 through TYPE_ORG04 for all activities listed in response to PROMPT questions and then ask:*  
During the past 4 weeks, did you do any other kind of unpaid work for someone outside your own household or immediate family?  
*If yes, repeat questions WORK_01 through TYPE_ORG04 for all activities mentioned by respondent*  
*If no, go to END.* |
| END              | End of survey module |
Testing Issue 3:
Effects of Reference Period on the Captured Rate and Duration of In-Scope Activities

The Issue. Unlike paid employment, volunteer work is often an infrequent activity, which makes accurate recall of the instances and characteristics of that activity challenging. Research suggests that the accuracy of recall depends not only on the frequency and intensity of volunteering, but also on the length of the reference period. If the reference period is too long, the accuracy of the recall declines. If the reference period is too short, however, some of the target activities may be left out-of-scope and thus missed by the survey. Alternatively, respondents may mistakenly place the behavior that took place earlier (or later) within the scope of the reference period (so-called “telescoping”). The literature also suggests using variable reference periods, depending on the frequency or intensity of the target behavior.

Our proposed survey module proposes a four-week reference period. We are aware that many countries use a one-week reference period for their regular labor force surveys. Some analysts believe that a one-week period will miss too much volunteer activity because of its infrequent character.

To assess this, we have devised a test to estimate what difference a one-week vs. a four-week reference period makes in the extent and nature of volunteer activity recalled by respondents.

Objective: The objective of this test is to evaluate the effects of using four-week and one-week reference periods on the volunteering rate, duration of volunteering, number of activities captured, and the time needed to administer the labor force survey module. Theoretically, a shorter reference period is more likely to produce accurate recall of high intensity activities, while a longer reference period is more likely to produce accurate recall of low intensity activity.

Variables to be tested. (a) the average weekly volunteering rate, (b) the average weekly duration of volunteering, (c) the average weekly number of volunteering activities, and (d) the time needed to administer the volunteering survey module – captured by module variants using the two reference periods being tested. Note: The values obtained for the 4-week reference period must be divided by 4 to arrive at estimates of weekly averages.

Suggested testing method: Representative sample survey. Where data are available, Focus Groups or Desk/Expert Reviews may be used as a substitute, although the statistical hypothesis testing described in this section may not be possible.

Suggested procedure: Respondents are randomly assigned to two groups, each of which is administered a survey with a different reference period as described above, keeping everything else constant:

- Group 1: 4-week reference period (Test Module 2),
- Group 2: 1-week reference period (Test Module 4);
The answers are recorded in a microdata set, and Test Group membership is flagged. The number of respondents in each group must be sufficiently large to yield an adequate number of volunteers for additional analysis described below. Since volunteering rates in most countries are likely to be below 30 percent, we suggest that each group have at least 1,000 respondents (more if the rate is expected to be substantially lower).

Post-analysis of the responses will be conducted as follows: Each of the test groups is divided into two subgroups based on the reported intensity of volunteering of the respondents. Subgroup A in each test group will include respondents who reported low intensity of volunteering activity (defined as no more than 3 instances of activity in scope, as per answer to item HOUR_A01 in the survey instrument). Subset B in each test group will include respondents who reported high intensity of volunteering activity (defined as participating in 4 or more instances of activity in scope).

The results for the two subgroups are then compared to each other to identify any differences with respect to four variables: volunteering rate, number of activities, the reported weekly average duration (in hours) of these activities, and time to administer the survey. The weekly average is used to control for differences in the duration of reference periods.

Suggested decision rules: If no significant differences appear in volunteering rates or quantities between each of the pairs of subgroups then either recall period can be used depending on which is most consistent with normal labor force survey practice. If one or another or both of the predicted differences surface (i.e. short recall period provides a fuller recall of high-intensity activities and longer recall period provides a fuller recall of low-intensity activities) countries will have a basis for adjusting their results depending on which recall period is ultimately used.

Reporting: Please briefly describe the methodology used in the test (sample sizes, sampling methods, target population, and estimation and hypothesis testing procedures), fill in the following table, and briefly analyze the results. On the basis of the results, please give us your opinion about which of the two recall periods you would favor for the volunteering survey module and the reasons for this.

<table>
<thead>
<tr>
<th>Variable</th>
<th>Subgroup A: Low Intensity</th>
<th>Subgroup B: High Intensity</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1-week</td>
<td>4-week</td>
</tr>
<tr>
<td>Volunteering rate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average duration of activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time to administer survey</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Test Module 2: LFS Volunteering Module Instrument
### Four-week reference period, low-buffered prompting

<table>
<thead>
<tr>
<th>Step or variable</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>START</strong></td>
<td>So far I have been asking you about paid work. The next few questions are about unpaid volunteer work, that is, activities that some people willingly do without pay to promote a cause or help someone outside of their households or immediate family. [Note: Reimbursement of expenses and modest honoraria do not disqualify an activity.]</td>
</tr>
<tr>
<td><strong>PROMPT_00</strong></td>
<td>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.]</td>
</tr>
<tr>
<td><strong>VOL_00</strong></td>
<td>During the past 4 weeks [provide dates marking the period.], did you do any unpaid work of this kind for someone outside your own household or immediate family? If no, go to <strong>PROMPT_10</strong>.</td>
</tr>
<tr>
<td><strong>WORK_01</strong></td>
<td>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]. [Record response verbatim and use a lookup table or code book to assign occupation codes.] If respondent mentions more than one type of activity, ask questions <strong>WORK_01</strong> through <strong>WORK_02</strong> for each activity separately, differentiating answers by a, b, c. at end of name.</td>
</tr>
<tr>
<td><strong>HOUR_A01</strong></td>
<td>How many times did you do this unpaid work in the past 4 weeks? [Record response verbatim and use a lookup table or code book to assign frequency codes.]</td>
</tr>
<tr>
<td><strong>HOUR_A02</strong></td>
<td>How many hours did you devote to this unpaid work [on average each time/the last time] you did it? __________ [Record response verbatim.]</td>
</tr>
<tr>
<td><strong>TYPE_ORG01</strong></td>
<td>Did you do this unpaid work for or through an organization? If no, code [informal volunteering] and go to <strong>WORK_02</strong>.</td>
</tr>
<tr>
<td><strong>TYPE_ORG02</strong></td>
<td>What is the name of the organization for which you did this work? [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 <strong>TYPE_ORG</strong> for every organization] If <strong>NAME</strong> is in code book, go to <strong>WORK_02</strong>.</td>
</tr>
<tr>
<td><strong>TYPE_ORG03</strong></td>
<td>If <strong>NAME</strong> is not in code book, ask</td>
</tr>
<tr>
<td></td>
<td>What does this organization do? ____ (80 spaces) [Record response verbatim and assign industry code based on response.]</td>
</tr>
<tr>
<td><strong>TYPE_ORG04</strong></td>
<td>What type of organization is this?</td>
</tr>
<tr>
<td></td>
<td>5. Charity/non-profit organization/NGO/union/or religious organization</td>
</tr>
<tr>
<td></td>
<td>6. Business</td>
</tr>
<tr>
<td></td>
<td>7. Government</td>
</tr>
<tr>
<td></td>
<td>8. Other / Not sure</td>
</tr>
<tr>
<td></td>
<td>[Record response verbatim and assign sector code based on response.]</td>
</tr>
</tbody>
</table>
| 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?  
*If yes, repeat questions WORK_01 through WORK_02, differentiating answers by a, b,..*  
*If no and respondent has answered WORK_03 with yes, go to END.*  
*If no and respondent has not answered WORK_03, go to PROMPT_10.* |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>PROMPT_10</td>
<td>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.]</td>
</tr>
</tbody>
</table>
| WORK_03 | During the past 4 weeks, did you do any of these things for any organizations?  
*If yes, repeat questions WORK_01 through WORK_02, differentiating answers by a, b,..* |
| END | End of survey module |
### Test Module 4:
**LFS Volunteering Module Instrument**
One-week reference period, low-buffered prompting

<table>
<thead>
<tr>
<th>Step or variable</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>START</td>
<td>So far I have been asking you about paid work. The next few questions are about unpaid volunteer work, that is, activities that some people willingly do without pay to promote a cause or help someone outside of their households or immediate family. <strong>[Note: Reimbursement of expenses and modest honoraria do not disqualify an activity.]</strong></td>
</tr>
<tr>
<td>PROMPT_00</td>
<td>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.] <strong>[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.]</strong></td>
</tr>
<tr>
<td>VOL_00</td>
<td>During the past week [provide dates marking the period], did you do any unpaid work of this kind for someone outside your own household or immediate family? <strong>If no, go to PROMPT_10.</strong></td>
</tr>
<tr>
<td>WORK_01</td>
<td>Now I will ask you a few questions about the unpaid work that you did during the past week. 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]. <strong>[Record response verbatim and use a lookup table or code book to assign occupation codes.]</strong> 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.</td>
</tr>
<tr>
<td>HOUR_A01</td>
<td>How many times did you do this unpaid work in the past week? <strong>[Record response verbatim and use a lookup table or code book to assign frequency codes.]</strong></td>
</tr>
<tr>
<td>HOUR_A02</td>
<td>How many hours did you devote to this unpaid work [on average each time/the last time] you did it? __________ <strong>[Record response verbatim.]</strong></td>
</tr>
<tr>
<td>TYPE_ORG01</td>
<td>Did you do this unpaid work for or through an organization? <strong>If no, code [informal volunteering] and go to WORK_02.</strong></td>
</tr>
<tr>
<td>TYPE_ORG02</td>
<td>What is the name of the organization for which you did this work? <strong>[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]</strong> If NAME is in code book, go to WORK_02.</td>
</tr>
<tr>
<td>TYPE_ORG03</td>
<td><strong>If NAME is not in code book, ask</strong> What does this organization do? ____ (80 spaces) <strong>[Record response verbatim and assign industry code based on response.]</strong></td>
</tr>
<tr>
<td>HEADERS</td>
<td>TEXT</td>
</tr>
<tr>
<td>---------</td>
<td>------</td>
</tr>
</tbody>
</table>
| WORK_02 | During the past week, did you do any other kind of unpaid work for someone outside your own household or immediate family?  
*If yes, repeat questions WORK_01 through WORK_02, differentiating answers by a, b,...  
If no and respondent has answered WORK_03 with yes, go to END.  
If no and respondent has not answered WORK_03, go to PROMPT_10. |
| 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?  
*If yes, repeat questions WORK_01 through WORK_02, differentiating answers by a, b,... |
| END | End of survey module |
Testing Issue 4: 
Effects of Respondent Rule on Capturing Volunteering Activity.

**The Issue.** Respondent rule in the survey protocol determines who can answer questions pertaining to a particular individual queried by a survey. A self-response protocol only allows for individuals to answer for themselves. A proxy-response protocol allows other members of the household to answer questions pertaining to a particular household member, if contacting that member is not feasible or required.4

Protocols allowing proxy responses are frequently used in household surveys as a cost saving measure. The literature suggests that proxy-reporting may be as accurate as self-reporting, if the proxy reporter has shared the reported experience with the person whose behavior is being reported. Research shows that the effects of proxy-responses on the accuracy of employment and unemployment rates, hours, and earnings reported in labor force surveys are negligible vis á vis that of self-responses. However, studies of proxy-response accuracy in other areas (e.g., health or crime victimization surveys) are inconclusive.

There is reason to believe that the respondent rule may have a significant effect on the accuracy of reported volunteer activity. On the one hand, volunteering is often a less “salient” activity than paid work, and proxy-respondents may simply have insufficient knowledge about the extent to which other members of the household engage in this activity. On the other hand, volunteering is often perceived as a socially desirable behavior and thus may be over-reported when self-reported, but not when reported by proxy.

We assume that most labour force surveys will use proxy responses for their volunteering module just as they do for the rest of the labour force survey. It is therefore important to determine what the direction and extent of any distortion this might introduce in the specific context of measuring volunteer work. We believe this can be done by using a group process as described below.

**Objective:** The objective of this test is to evaluate the effects of self-reports and proxy-reports of volunteering on the volunteering rate, duration of volunteering, and number of activities captured.

**Variables to be tested.** (a) the volunteering rate, (b) the duration of volunteering, (c) number of volunteering activities, and (d) the time needed to administer the volunteering survey module – captured by two prompting techniques being tested.

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4 Proxy response must be distinguished from answering questions about shared experiences. Asking one spouse whether the other spouse worked during the reference period involves proxy response. However, asking either spouse about the state of household finances does not involve proxies, since each spouse has a direct experience of that situation (albeit their experiences may vary considerably).
**Suggested testing method:** Focus Groups involving all members of several households and repeated measures of their volunteering activities. Households with different socio-economic backgrounds should be used to evaluate the potential effect of socio-economic status on the reliability of proxy responses in the area under investigation.

**Suggested procedure:** In the first phase, the members of the selected households are interviewed independently of each other. Using the draft survey module, the interviewer asks each respondent to report his/her own volunteering activity as well as volunteering activity of other adult members of that household (proxy reporting). In the second phase, members of the same household are brought together to collectively produce the best estimate of every household members’ volunteering activity (number of instances during the reference period, duration, and the number of activities).

The responses obtained in the second phase can be considered the best estimate of the volunteering activity in that household, and used as a benchmark to evaluate both self- and proxy- responses obtained in the first phase. The self-and proxy- responses obtained in the first phase are compared to the estimates produced in the second phase.

If cost is a consideration, a simplified version of this procedure may involve only the first phase, and comparisons made of proxy responses to self-responses. The drawback of this approach is that it does not allow an evaluation of the accuracy of self-responses, and thus possibly confounds the effect of respondent rule with possible effects of self-reporting bias (i.e., over-reporting of socially desirable activities or under-reporting of unpopular ones.)

**Suggested decision rules:** Generally speaking, the closer the rate, duration or number of activities reported in the first phase to those ascertained in the second phase, the greater the reliability of proxy reporting. If the two respondent rules used in phase one differ between each other in their proximity to the results obtained in the second phase, the rule that produced the lesser difference is more reliable, and thus preferable to the other. If both substantially deviate from the second phase results, differences should be quantified and used as estimators of bias.

**Reporting:** Please briefly describe the procedure used in the test (selection of participants, measurement techniques used), and answer the following questions.

1. How did the volunteering rates in self- and proxy reports vary from those ascertained in the second phase through group interaction?
2. How did the average duration of volunteering activities in self- and proxy reports vary from those ascertained in the second phase through group interaction?
3. How did the number of volunteering activities in self- and proxy reports vary from those ascertained in the second phase through group interaction?
4. Was there any variation between the proportion of informal and formal volunteering between self- and proxy reports?
5. In your opinion, did the two respondent rules tested here yield significant enough differences in capturing the amount or character of volunteer work to recommend one over the other?
6. Which of the two respondent rules do you think would work best in your country? Why?
Summary of Test Results and Comments Received On the 2008 Draft of the Proposed Manual on the Measurement of Volunteer Work and Accompanying Survey Module (updated June 2009)

Edith Archambault, TEG Member, University of Paris1-Sorbonne, France

I have made a critical reflection on to the Volunteer Testing Memo, August, 11, 2008 and the supporting documents included in the very clear and useful project web site.

Testing Issue #1: The initial cues designed to identify in-scope activities

There is a real progress of language and clarification in this second version of the questionnaire. The START transition/question is much clearer and shorter, that it wise. However the treatment of this question needs some clarification on the borderlines between voluntary work and leisure, voluntary and paid work, informal volunteering and domestic work.

• Voluntary work/leisure

The borderline between volunteering and simple participation in a membership organization has to be clearly drawn especially inside the culture and recreation and civic, political and advocacy industries, with examples of inside/outside the scope activities. The examples in the memo are too simple (for instance: play piano for oneself or in a charitable event. What about to play piano inside an amateur quintet, to accompany a choir?) What is volunteering in a self-help group? The final question is what is the Handbook position on the third party criterion? Does this criterion fit with the activities that imply miltating?

• Voluntary/paid work

The question is simpler in developed than in developing countries.

In developed countries the existence of a labor contract including the level of the compensation is clear for paid employees. However there are grey zones outside reimbursement of expenses and modest honoraria (that would be proportionate to the duration and intensity of volunteering): local exchange trading schemes, barter or with a specific currency; time banks, a system through which people can do voluntary work to assist others and thereby ‘bank’ hours which they may later use to be helped themselves; full time voluntary civil service, full time voluntary work in relief and development international activities with pay at the minimum level.

Does the questionnaire clearly capture the volunteering of the founder of a nonprofit organization, the social entrepreneur? Is there also volunteering of the same nature at the beginning of a business?

In developing countries, there is the grey zone of informal economy that mixes paid work, in-kind compensation, local exchange; traditional harvest volunteering for the neighbours in rural areas (with reciprocity); help to the neighbours and domestic work if the independent worker is a woman. Unpaid work is frequent in this informal economy especially for women and youth or children.

• Informal volunteering/ domestic work.
The fact that informal volunteering is included is theoretically interesting but it complicates the methodology of the survey. The issue of the different size of the household according to regions and of the definition of the immediate family is solved rather well. However it is difficult to define what are the “normal responsibilities” one has for one’s family because sociologists have clearly shown that it is variable according to the gender, social class, geographical proximity and so on. Do we rely on legal obligations?

Another issue is linked to joint volunteer and domestic activities (I care my neighbour child in the same time as mine, as my neighbour is working on the labor market and I don’t). We have also not to accept as informal volunteering the exchange of services that are a better organization of domestic work : for instance, I drive the two children to the swimming pool on Fridays and my neighbour will drive both to the football club on Saturdays). If the counterpart is not inside the reference period, this confusion may happen.

I don’t agree with the inclusion of the time spent to fostering a child in volunteer time proposed by E. Davis, because it is a very complex issue (what is the reward? Bias according to the local laws encouraging or not fostering...) and it is a huge number of hours nearer domestic work than volunteering.

For informal volunteering as for domestic work, the ISCO codes are not fit. Maybe the classification of activities of the time-use surveys is better. Informal volunteering is indeed nearer domestic work than paid work. Conversely, formal volunteering occupations are nearer the labor market’s ones.

Testing Issue #2: The prompts provided to help respondents recall in-scope activities

The lists of prompts 00 and 10 cover a wide range of activities in the main industries. The wording is less “charitable” and less service oriented than the initial questionnaire and therefore more universal. The translation is a very important issue. For instance there is no exact translation in French of the word “community.”

However the US bias could be found again in the 8.18.2008 Volunteering toolkit. Why so many activities on emergency response (that happens happily rarely) and on community peace keeping (with activities near denouncement or to give place for the members of riffle clubs?) and so few on education (where are the activities of parents-teachers and other peri-school organizations or adult education or training), on social services that are not only assistance but also prevention, advice, follow-up, mediation...and these activities address not only the poor, elderly and so on (without immigrants?) but also the whole population ( family planning or counselling).

Why promotion of commerce and not promotion of tourism, fair trade, ideas, artists....

Testing Issue #3: The reference or recall period over which respondents are asked to recall their in-scope activities

As said in the LFS module 1, the recall period on four weeks/last month is right. The European LFS is continuously run, therefore the exceptional volunteering is visible. In France, every household is asked six times on a quarterly basis. The first and last questionnaire is asked face to face, the other surveys are run by phone calls.
Some issues have to be clarified on the duration of volunteering:

- Is the transport time to the place of volunteering included, as in time-budget surveys, or excluded?
- How to deal with the fact that the respondents and organizations in most countries do not exactly count the duration of volunteering and the trend of respondents to round up the number of hours, because volunteering is socially valuable?
- The two stage questions HOUR 01 and HOUR 02 on frequency and duration of work give the duration of volunteering over four weeks. But how many weeks per year is the average FTE volunteer working? The same time than FTE average paid employee? Or less: in France, many volunteers do not work during school vacation while paid employees do? This is a crucial issue because an heterogeneous treatment of the annual duration of volunteering has a great impact on the comparability of the number of FTE volunteers and the money value of volunteering.

**Testing Issue #4: The respondent rule utilized in the survey, i.e., whether respondents are asked to respond for themselves only or for other members of their families**

On this issue, I have nothing to say a priori and I am waiting on the results of the tests. In my country in the face to face questionnaires of the current LFS, every adult of the household is asked on his/her position on the labor market while during the phone calls, the respondent gives the changes of position of for every member of the household, comparing to the first or last questionnaire.

_Tae Kyu Park, TEG Member, Yonsei University, Korea_

Methodology: desk/expert review

**Testing Issue #1: The initial cues designed to identify in-scope activities**

Korean experts would point out that there would some difficulties to tell the volunteering activities that could defined from those that could not be defined as volunteering work because employees of the volunteering works have been often pushed strongly or even ordered by the organizations, especially in case of governmental or public sector organizations. Most of interviewees with experiences of volunteering responded in-scope activities, but some responded out-of-scope activities even though percentage of those respondents is low.

**Testing Issue #2: The prompts provided to help respondents recall in-scope activities**

According to the past experiences from volunteering survey in Korea, low-buffered prompting method is appropriate because this method takes shorter time to conduct for each interviewee and therefore, this method can derive more accurate responses from the interviewees. The high-buffered prompting method taking longer time is likely to derive responses of more questionnaires, but the quality of responses of survey would be much lower than by the low-buffered prompting method. Comparing strong and weak points of the two methods, low-buffered method is recommended.

**Testing Issue #3: The reference or recall period over which respondents are asked to recall their in-scope activities**
In Korea, volunteering participation rate is low, about 16%, compared to Western countries and a fairly large proportion of those with volunteering experience are not regular volunteering participant, who is defined to be participating more than once a month. Therefore, 4-week reference period is much more appropriate in case of Korea. If 1-week reference period were used, volunteering rate and volunteering duration would be very lower in Korea and it would be difficult to derive more accurate facts about volunteering in Korea.

**Testing Issue #4: The respondent rule utilized in the survey, i.e., whether respondents are asked to respond for themselves only or for other members of their families**

Comparing self-reports and proxy reports, self-reports would derive more accurate responses from volunteering survey. If proxy reports were used, there would exist questionnaires that interviewees could not even respond about his/her family members. In Korea, still volunteering participation rate is low and volunteering is not popular among general public yet and, in Korean society, communications among family members are not very active and, therefore, family members are not well aware of other members' volunteering activities and volunteering duration other than the fact that his/her family members are participating in some volunteering work. Therefore, self-reports are recommended in Korea. And volunteering surveys carried out during the past years have used self-reports.

**Brendan Mai, Project Manager**  
**Productivity and Satellite Accounts Development Statistics New Zealand**  
*(response to a question about the definition of immediate family posed by JHU staff)*

Regarding the question of family, Statistics NZ are currently developing a Family Survey. This will look at relatives outside of the household, but we don't currently have a further definition of family beyond the statistical standard of family nucleus (i.e. parent / child in the same household). We still only talk about specific roles (such as grandparent), and 'other relatives', and focus on people identifying specific relationships, rather than narrowing it down to a concept of immediate family.

You may be aware of a UNECE Taskforce on Households and Families, which aims to produce a set of survey modules for use across countries identifying emerging household and family types. Again however, this doesn't define family beyond the nucleus, except for allowing specific roles to be identified.

In a more specific NZ context, the indigenous people of our country - the Maori - have quite a different culture when it comes to volunteering for 'family' as a cultural obligation. This is the topic of the Mahi Aroha report released by OCVS last year [http://www.ocvs.govt.nz/documents/reports/mahi-aroha.pdf](http://www.ocvs.govt.nz/documents/reports/mahi-aroha.pdf)

Mahi aroha is the concept of carrying out voluntary activity while working within a group, for the mutual benefit of the members of the group. It is work performed out of love, sympathy or caring, and through a sense of duty.

Given the way you have defined ‘immediate family’, the concept of mahi aroha extends the scope of immediate family, as within Maori society, there is a normal obligation to do unpaid work for the wider community. However, the first priority will be to undertake this mahi aroha for the person's nuclear family.
This may all be fine and perhaps the definition of immediate family could include the 'wider community' in a case such as this, but it does need careful attention.

Comments provided by
Eivind Hoffmann, Statistics and Analysis Division, Norwegian Directorate of Immigration
(former senior statistician at the ILO’s Bureau of Statistics)

A. To the proposed definition and the explanatory comments included in the draft Manual:

The draft Manual proposes the following working definition of “volunteer work”:

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

To me it would seem that without changing the intended meaning or scope the following wording would have the advantage of being both more complete and more easily understood, as well as being closer in style to other definitions used for statistics on the world of work:

(2) activities performed willingly by a person for little or no payment in cash or kind, to promote a cause, support a not-for-profit activity or institution, or to help someone outside of their own household or immediate family, and that could have been remunerated as part of a market transaction.

B. To key features and considerations

A number of key features of these alternatives deserve comments:

**Length:** (1) has the advantage of being shorter than (2), but the latter is closer to the standard international definitions used for labour statistics, stylistically, e.g. by referring to ‘a person' rather than to 'some people'.

**Both involve work.** This means that the activity produces something of potential economic value for its recipient, and that the recipient must be someone other than the person undertaking the activity or a member of his/her immediate family or household. However, (2) makes an explicit reference to the possibility of replacing the volunteer work by goods or services purchased in a market, and this is a necessary condition for defining them as work.

**Both includes that the activity is essentially unpaid.** Volunteer work should be activities performed with little or no payment in cash or kind. The comments to (1) seem to exclude all payments in cash without limiting payments in kind. It would seem more logical to allow for limited payments in either form, especially as the comments to (1) says that "some forms of compensation may still be possible without violating this feature of the definition", and examples given (on p. 13) of the forms that such compensation may take.

**Both definitions include the term 'willingly'** to signal that the activities are non-compulsory or non-obligatory. However, the meaning of this deserves further discussion than that given in the draft. It would in particular be helpful to have guidance, e.g. through examples of where to draw the line
between "institutional obligation and other coercion" on the one side and "social obligation, such as peer pressure, parental pressure, or expectations of social groups" on the other, in different types of contexts and societies. E.g. on what side of this borderline will fall (i) the threat of 'fines' that are imposed on members of housing cooperatives that cannot participate in cleaning and maintenance activities of common grounds; or (ii) the threat of expulsion of a child from a school team or school orchestra if one of the parents do not participate in activities that are designed to contribute to the financing of its activities?

Both definitions embrace both informal and formal volunteering, e.g. for individuals (informal volunteering), as well as for causes and non-profit or other types of organizations (formal volunteering), but (1) does not make clear that 'cause' is intended to include (formal) organisation. The explanations to (1) make this clear but do not limit the organisations to non-profit ones. It would, however, seem reasonable and warranted to include a reference to non-profit organisations in the definition, as the large majority of the relevant activities linked to organisations certainly will take place there, and to include only in the explanatory notes any examples activities undertaken on behalf of for-profit institutions that it may be reasonable to regard as volunteer work. The explanatory notes should also elaborate on the considerations that have resulted in the scope of volunteering to include activities done without compulsion in government organisations as well as in private businesses, and not only in not-for-profit organisations and institutions.

Neither definition embraces work done without pay for members of one’s household or immediate family, and no further comments on this seems to be needed.

C. Comments to the recommended survey module

To the Introduction

I agree with the conclusion that labour force surveys, and other household based surveys and censuses offer workable, cost-effective vehicles for generating reasonable estimates of the nature and extent of volunteer work in a country. To the list of crucial elements and choices in the design of the survey instruments used to measure such work ((a) the basic structure of the survey; (b) the range and number of prompts used; (c) the recall or reference period employed; (d) the classifications used to differentiate between volunteer activities; and (e) matters of wording of questions and prompts to respondents, and instructions to interviewers) one should add (f) tools and procedures used to code responses to the classifications when these are not represented by pre-coded alternatives.

To the overall Structure

I agree that the survey module on volunteer work should be structured around individual volunteer activities, and that using the terms 'volunteering' or 'volunteer work' in the survey questions or prompts would not assist the respondents to provide the type of answers that would serve the objectives of the module. Attaching the module to an existing survey vehicle has many advantages, and these are particularly present when that vehicle is a labour force survey (LFS): (i) experienced staff that will be following relevant and standard procedures for data collection and processing; (ii) 'free' information about any other relevant (work related) activities; (iii) the sample size usual sampling strategies will facilitate comparisons between groups as well as over time, and (iv) thereby making it possible to monitor the development of volunteering among persons in different groups. These advantages would
seem to outweigh any disadvantage from having limited possibilities for exploring certain aspects of volunteering, e.g. motivation.

To the reference Period

While I have no particular opinion concerning the recommended reference period (4 weeks) I would have thought that it might be possible to recommend to use pilot surveys and experiments to determine the optimal reference period, as it should be possible to construct estimation procedures for e.g. annual estimates that may be adjusted to any reasonable reference period used, in particular if prompts for special events /activities are used. The recommendation to use another, shorter reference period when the module is repeated frequently than when it is used at longer intervals seems to rest on a misleading parallel between the situation of individuals and the situation for groups of persons for which the situation of a group of persons for which estimates are calculated. (Members of the group may only be interviewed once, even if the survey module is used frequently.) To prompt for possible participation in relevant activities that may be linked to special events would seem to be warranted for all reference periods.

(Note that it is misleading, but reflects a common misunderstanding, to state that the use of a four week reference period “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)”. The main qualifying characteristics for a person to be classified as ‘unemployed’ (without employment, available for work and having looked for work) all refer to one (normally the last) week, with the qualification that the act of looking may have been undertaken during a (the last) four week period.)

As formulated the suggested questions and the explanatory notes to them seem to rule out that more than one type of volunteering activity may have been carried out during the reference period, although it seems to be recognized that there may have been more than one episode of volunteering. This assumption must certainly be unwarranted, and it would therefore be relevant to inquire whether all episodes represented the same type of activity (for the respondents with more than one) and, if so, ask questions about tasks undertaken and type of activity/context for each of the different types. It may of course be possible to limit such questions to the ‘main episode’ (e.g. in terms of hours or according to the respondent’s own assessment), but that may tend to bias the results against certain types of volunteering activities. The use of prompt cards for questions about tasks and type of activity is not likely provide relevant replies to these questions, nor will the use of pre-coded response alternatives be helpful, as these categories are likely to be too broad to be of much use in the analysis of results. The forthcoming UN Handbook on economic characteristics in population census, and the existing Technical Report on the same subject, will have recommended question formulations.

D. To the classification and coding of type of task (occupation) and type of activity (field)

To make use of existing standard classifications for coding the tasks undertaken during one or more volunteering episode is strongly supported, see e.g. comment (i) on the advantages of attaching the module to an existing survey vehicle. However, it is difficult to understand why in such situations it is recommended to (i) limit the number of possible coding outcomes to ‘crosswalks’ to the international standard classifications of occupations (ISCO) and type of activity (ISIC) rather than to use the corresponding national classifications, and why the coders should not use their standard procedures for such coding. Even with a separate ‘volunteering’ survey will one run the risk that the use of the suggested ‘crosswalks’ and the recommended coding procedures may (i) bias the results (as not all
possible alternatives will have been considered when coding) and lead to an unnecessary large number of coding mistakes through the use of inadequate coding procedures. See e.g. the forthcoming UN Handbook (or the Technical Report) referred to above for descriptions of recommended coding practices. Note that the national classifications and the coding instruments usually used for coding ‘occupation’ and ‘type of activity’, e.g. in a LFS, may have to be extended slightly to make certain that all relevant tasks and types of activities and units involved in volunteering can be coded correctly.

E. To questionnaire design, wording and quantity measures

The sequence of questions and prompts suggested in Annexes 1 and 5, and their wording, does not seem optimal:

- The starting prompt would seem rather long, and the reference to what ‘some people’ may be ‘willing to do without pay to promote a cause ……” would seem to be rather abstract and difficult to relate to the respondent’s possible activities. Especially as it does not seem to be followed by a question, but with an even longer prompt (prompt 00). It would be better to reformulate the starting prompt to relate directly to the situation of the respondent and to lead right into the first question (vol 00, which is not about volume!);
- A reply of ‘yes’ to this question (and any prompts) should be followed by (a) question(s) to establish the number of relevant episodes during the reference period, i.e. question (hour_A01, which is not about hours).
- The introductory sentence in (work_01) does not seem necessary or helpful, and the rest of this question should be asked for each of the episodes identified, as should the questions about the number of hours.
- As indicated above the prompts for special events may need to be included also for survey modules that are more frequent than annual.
- The reply/ies to the question/s about the hours for each episode should be recorded as given, any ‘coding’ to groups (as suggested in Annex 5) should be done during the tabulation of results.
- As indicated above it is not evident why ‘government’ will be a relevant (institutional) sector category (cf. annex 5).

F. To volunteer Rate

The explanation of this concept is not very clear. It would seem appropriate to define the volunteer rate as “representing the percentage of the population that reports engaging in in-scope activities during the reference period”, and it would seem correct to calculate it as the number of respondents who gives at least one “yes” in responses to questions about whether or not the respondent engaged in in-scope activities, divided by the total population eligible for coverage in the survey module, after the application of relevant weighting factors used to the survey sample responses.

G. To number of hours volunteered

It would seem appropriate to include in the Manual guidance on how to calculate (or extrapolate) the total hours volunteered, the total volunteer hours in each occupation, and the total volunteer hours in each field (type of activity) for reference periods that are longer than those used in the survey module, e.g. for a year, if 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.
1. **Background**
The Institute for Policy Studies at Johns Hopkins University (JHU), in cooperation with the International Labour Organization has developed a *Volunteer Work Survey Module*. The Institute is soliciting input from world statistical agencies to provide feedback as well as to test and evaluate the proposed questions. The Institute wishes to eventually adapt a set of questions on unpaid volunteer work to be appended to existing labour force surveys. Special Surveys Division (SSD), Statistics Canada asked the Questionnaire Design Resource Centre (QDRC) to conduct some qualitative testing on a series of draft questions about unpaid work contained in the survey module.

2. **Study Objectives**
In a memorandum to technical expert groups in August 2008, JHU representatives requested assistance to test a revised draft of the *Volunteer Survey Work Module*. The memo outlined three specific testing strategies (desk or expert reviews, focus groups and sample surveys). The memo expressed an interest in having any testing completed by November 2008.

The Special Surveys Division was interested in assisting JHU with this endeavour; however time and resource constraints did not allow for the conduct of any of the proposed testing strategies. The SSD in consultation with the QDRC, proposed that a small number of cognitive interviews be conducted. The JHU representatives welcomed the idea and they established a short set of study objectives based on the revised test strategy.

The objectives of the testing included:
- Obtaining feedback from respondents on their overall impressions of and reactions to the proposed content and questions.
- Testing the cognitive processes of respondents in answering the questions
  - respondents’ understanding of the concepts, terminology, questions and response categories.
  - the availability of the information requested; respondents’ ability to recall.
- Testing respondents’ ability and willingness to answer the questions on behalf of other household members.
- Testing the ‘respondent-friendliness’ of the questionnaires.

3. **Methodology**
The proposed methodology for this study was one-on-one, in-depth interviews. A total of twelve (12) English cognitive interviews were scheduled to take place over two days in Ottawa, Ontario. Interview participants were administered a brief set of labour force questions followed by a set of questions from the proposed *Volunteer Survey Work Module*.

Among the desired test objectives, Johns Hopkins University was particularly interested in the effectiveness of ‘high-level’ versus ‘low-level’ question prompting. Each interview participant was administered either a ‘Low-buffer’ module or a ‘High buffer’ module of questions on unpaid work.
The interviewer asked each participant these questions on a face-to-face basis. After completing the test questions, the interviewer conducted a retrospective discussion with each participant. The follow-up interview explored in detail participants’ understanding of the questions as well as what they were thinking about as they provided their responses. Their ability to recall and provide data, the flow of questions, the appropriateness and completeness of the response categories and the respondent-friendliness of the questionnaire were also assessed.

All cognitive interviews were conducted in a focus group facility equipped with a one-way mirror for observation. Each interview was observed by one or two representatives from the Special Surveys Division. Each one-on-one interview participant received $60 at the end of the session to cover any expenses they may have incurred as a result of participating in the study.

3.1 Recruiting of participants
All recruitment of study participants carried out by an external contractor, under contract to the QDRC according to specifications provided by the QDRC in consultation with Special Surveys Division. Participants were recruited two to three weeks prior to the cognitive interviews.

Recruitment took into consideration the following types of characteristics:
- Mix of ages
- Mix of males and females
- Mix of education levels
- Mix of labour force statuses
- Mix of household income levels
- Mix of household sizes

Eleven (11) of the proposed twelve interviews were conducted on October 22nd and 23rd, 2008. Each interview took approximately 40-45 minutes to complete.

4. Study Limitations
It should be noted that there are limitations to any study that uses research methods such as cognitive interviews or focus groups. Since the research is qualitative, findings and conclusions are not necessarily representative of all respondents in the survey population.

Although the study participants were not a statistically representative sample of the general population, they did represent a reasonable variety of the types of respondents who would participate in a national survey on paid and unpaid activities.

The study results are only representative of the people who participated in the study. Their usefulness can be realized in terms of the problems and issues that the testing identified. The findings and observations contained in this report provide important insights into respondent’s reactions to the questions that were tested, the ease of completion and the accuracy of their responses.

Further testing is highly recommended.
5. Findings and Observations
Johns Hopkins University prioritized several testing issues to explore with participants. Of particular interest to JHU is whether respondents consistently interpret unpaid work activities that are ‘in-scope’ for the survey purposes.

5.1 General
• In general, both the low-buffer and high-buffer questions seemed to help participants to recall events for the reference period. For the six “low-buffer” participants, the interviewer did not ask Prompt_10 without having first administered the Work_01 through Work_02 loop at least once.

• Participants easily provided answers to either set of prompts; however, some respondents were not certain whether their responses were what the survey was looking for. It is unclear how effective the questions are at triggering the desired “in-scope” activities.

• At least two participants hesitated or stumbled over the term: ‘need’ in Prompt_01. When asked what the term meant to them as asked in the survey, the respondents equated it specifically with “financial need” or being “underprivileged”. One of them suggested that the phrase: ‘providing help’ might be less limiting in scope.

• A few participants found questions such as Prompt_00 and Prompt_10 (low buffer) to be long when read aloud. One respondent said: “It’s a little monotonous as your trying to remember...too many points on one question ...would be better broken into 3-4 parts...easier to answer...” During the follow-up interview, another participant said that he was “zoning out” during the reading of the questions due to their length. A third respondent indicated that while the interviewer was reading Prompt_05 (high buffer) she did not hear the latter part of the question: “...... For me when someone starts asking a question I start thinking while they are reading...” Because she was reflecting on an earlier mentioned activity, she omitted a second type of unpaid work that was revealed during the follow-up discussion.

• Following one test interview (high buffer), the participant’s first comment was that he felt the list of prompts was clear, but he thought the question-order was problematic. He later realized that it wasn’t so much the question order, but the list of prompts combined with a data collection methodology where he could only hear the list as it was being read, he could not see the list. The participant said: “If you are doing it verbally and you (the respondent) don’t sort of leap in there and say this one is as close as I’m going to get, so I better to say “yes” now....” The participant served as a board member at a sports club. He answered “yes” to both Prompt_03 and Prompt_06. While he felt that the response to Prompt_06 was more accurate, he said “yes” to prompt 3 because it related to sports and he didn’t know (aural only) what the subsequent questions would be

• A few respondents found Prompt_02 (high buffer) to be confusing. One tried to explain this by saying: “it seemed very specific (compared to the others) ... particularly the mention of water”

5.2 Unpaid work
• In general, participants seemed to understand the term: ‘unpaid work’.

• Only two participants made any reference to having received compensation for their volunteer activities: One indicated that as part of a church program she cooks a meal for 50 people on a
weekly basis. Although compensated for the cost of food, she volunteers her time and cooking talents. The second respondent noted that he was an adjunct professor in engineering. He had edited a professional journal in the past 12 months for which he received a small nominal fee. Both participants included these activities when answering the module questions.

- At least two other participants specifically balked at the term: ‘work’ in the context of the posed questions. Both participants were active formal volunteers. One said: “I don’t think of this as work, ‘activity’ is a better word... ‘work’ has a connotation here that I don’t agree with”.

5.3 Outside the household
- When explored with participants, this term seemed to be quite clear. Any participant who reported directly helping someone in the past 4 weeks indicated that the recipient was someone outside their own household such as a neighbour, an acquaintance or even a stranger.

- Note: None of the interviewed subjects made any reference to a household member who might have needed help or assistance. It is unclear from the small number of interviews conducted, how someone who was directly helping another household member might have answered either set of questions.

5.4 Immediate family
- When asked what the term ‘immediate family’ meant to them, most participants considered their spouse, children, grandchildren, parents, parents-in-law, brothers and sisters.

- In general, participants felt that helping or assisting immediate family members was something distinctly different than helping ‘others’. A few indicated that helping a family member was an “obligation” or done out of a “sense of duty”.

- When asked, participants did not consider ‘volunteering’ to include helping or assisting immediate family members.

- Note: Two participants answering the ‘low-buffer’ questions mentioned helping a son and a father-in-law on the third time through the ‘work loop’ – even though the prompt was explicitly read as “During the past 4 weeks did you do any other kind of unpaid work for someone outside your own household or immediate family”. It was unclear, why each participant failed to screen out their family member on the third iteration of the loop.

- One participant indicated that he had volunteered a day of his time at his son’s fifth grade class to assist the teacher with a special activity. The participant viewed this as helping through the school (organization). Under special events, another participant said she assisted her daughter to canvass for a charity. Both participants considered their contribution was made to the organization and not the family member.

5.5 Recall of unpaid activities
- Participants had no difficulty recalling the type(s) of unpaid activities they had done regardless of whether asked the low or high buffered questions.
• Most participants felt that the 4-week reference period was quite appropriate. A few retired participants, actively engaged with formal volunteer activities, consulted their day-timers or calendars as recall aids.

• In general, participants felt that a 1-week reference period would be too short. They indicated that we would miss key information for persons who might have “taken a week off”, or those who may serve on committees or boards that meet only once a month.

• While some respondents said that it would be easier to recall the number of times and hours spent for the past week, they also felt the overall quality of the collected data would suffer if such a short window was used.

5.6 Tell me what kind of work you did (WORK_01)
Without knowing the specific data requirements for the Volunteer Work Survey Module, it is difficult to assess how well the respondents’ verbatim responses to the low-buffer and high-buffer prompts correspond to the desired survey objectives and information needs. The interviewer instruction for WORK_01 states: “Record response verbatim and use a lookup table or code book to assign occupation codes”.

• How well does the verbatim response map to an occupation code in the proposed survey module? “I work in the church office as a volunteer”. The participant was asked what ‘activities’ or ‘tasks’ she did in the church office. She replied: “…I answered the phone, photocopying, sending faxes, receptionist for appointments with our priest, assistant …anything a secretary or office administrator would do”.

• The question wording and question structure differences between the high and low buffer prompts may also influence the response type and level of detail offered by respondents. That is, WORK_01 (low-buffer prompt) simply asks “Please tell me what type of work you did”. The respondent has more freedom to create a response for this line of questioning, than for WORK_01 where the request for “kind of work” is framed in the context of a particular “type of work” (i.e., PROMPT_01 to PROMPT_06).

• Neither the low buffer nor the high buffer prompts ask specifically for the “tasks” or “activities” performed. How well does this “freedom of interpretation” map to the survey objectives and ultimately the measure of what is in or out of scope?

• Further, the question structure for both sets of prompts assigns the “in-scope / out of scope” decision making to the interviewer.

• See the Excel spreadsheets for the verbatim responses.

5.7 How many times did you do this unpaid work in the past 4 weeks? (HOUR_A01)
• Those who performed an activity on a regular basis such as daily, weekly or monthly, could easily report the number of times in a 4-week period.
• Other participants found the question more difficult to answer. For example, a few participants had done fundraising for a charity. They said that they spent a little bit of time over many occasions. For them, it was easier or more natural to simply report the number of hours they spent.

• Respondents’ verbatim answers did not always jive with the desired response category (i.e. the number of times in the past 4 weeks). For example,
  o “one morning a week”
  o “Well the meeting is once a month, but there’s always preparation in advance”
  o “I imagine 8 hours in total”
  o “3 times a week over that period”
  o “At least once a week, sometimes twice a week”
  o “I can give you the hours”
  o “eighteen hours I guess over 4 days”

• In these situations, participants could typically provide an answer, but it required probing and clarification by the interviewer to ensure the recorded answer satisfied the specific data query.

5.8 How many hours did you devote to this unpaid work on average each time you did it? (HOUR_A02)

• While participants were usually able to answer the question, they did not always hear or interpret “on average each time”. The interviewer had to repeat or clarify this detail on several occasions during testing.

• A few respondents said that it was easier to estimate the time spent than the number of times. They explained this was due to the activity being performed at irregular intervals: “…I would work on it a bit then leave it and come back to it … I’ll integrate the time spent into my day…”

• A few participants did not pick up on the average each time. They provided a total estimate.

• Participants felt that providing an estimate of ‘average time spent’ was a better indicator than the number of hours devoted the ‘last time’ one did the unpaid work.

• A few indicated that it might be easier to recall the amount of time spent the last time you did an activity, but wondered about the accuracy. One participant said “… If you do it this way, then definitely ask the number of times to get some sort of overall picture…” Another respondent noted: “…It’s easier for me to tell you… but depending on which time it was, it might not be representative of what you might be looking for…I think it’s better to average it out…”

5.9 Did you do this work for or through an organization? (TYPE_ORG01)

• Several participants - notably retired persons who were active ‘formal’ volunteers - said they found the question to be clear and straightforward. However, this was not the case for other participants. Some were uncertain how to best answer the question. For example,
  o One participant who raised money for breast cancer said: “I did it on my own, it was my initiative … they don’t know what I did to raise the money, we just make the donation at the end”
Another respondent volunteered her time to teach a martial art. She answered: “my school is connected with the [martial art] federation, but my teaching is directly with my school ...so I’d say it’s not through an organization...”

A third volunteered her time tutoring disabled university students: “Well, I guess you could say that I did it through [name of organization], but I did it because I wanted to help...”.

Another participant mentored new employees at his office. He indicated this was not part of his job description; he just did it of his own initiative to help newcomers. He was uncertain whether his corporation would be considered ‘an organization’.

Two other participants who had volunteered their time at a school and university were not certain whether these institutions were ‘organizations’.

- The question wording lacked clarity for at least one participant: “…for or through’.... What the heck does that mean?...”

- One participant interpreted the question to mean the following: “Any work of this nature that I have done has involved an organization ... (it probably) ...depends on ones circumstances, most of what I have done has been FOR an organization like my council at church, or on a board, as opposed to THROUGH ...depends on who is the most obvious beneficiary of the help or contribution”

- Strictly from a question design perspective, TYPE_ORG_01 is confusing on two fronts. First, as phrased, it may not be obvious to a respondent that the question is asking for a “yes/no” response. The response categories could just as easily be: ‘for an organization’ and ‘through an organization’. Second, the question does not provide respondents with an explicit choice. That is, only one of two possible answers is presented to the respondent (for or through an organization). The fact that one might do the work ‘on their own’ is implied. This may add to the question’s lack of clarity for respondents. At least one participant picked up on this point and mentioned it during the follow-up discussion.

5.10 Formal and informal volunteering
It was not clear to all participants that the scope of the questions included both formal volunteering as well as directly helping others. While some participants felt that directly helping others was an important concept, these acts were not consistently interpreted as ‘volunteering’.

- Some participants felt that the questions were more focused on formal volunteering because the questionnaire uses terms such as: ‘organization’ and ‘volunteer’. These respondents felt words such as “helping” were more indicative of informal volunteering. It was noted by a couple of respondents that the questionnaire does not ask a direct question on helping others.

- Other respondents readily thought of informal volunteer activities as they reflected on the questions. For example, one participant when asked Prompt_00 (low buffer) first thought of directly helping his neighbour, not his formal volunteering. He explained this by saying that it wasn’t a function of the amount of time spent doing it; rather he viewed the ‘formal’ volunteering as “a part of my routine … so it didn’t stand out as much in my mind”.

A few only considered directly helping others during the follow-up interview: “When thinking about your activities ... (helping a neighbour up the street, elderly) ohh this is definitely volunteering ... I did think of these things, but didn’t mention them ... it’s also being neighbourly ... didn’t really consider these things first”

One ‘high buffer’ participant said that she did not consider direct helping in the scope of prompt-00 to prompt_06. She helped the elderly in the mall, but did not mention this activity. “Doing something on my own is not included in how you worded those questions... had there been a specific question, I would have reported the times that I help older people in the mall ...”

Another participant (low buffer) said: “I was more focused on volunteering for organizations” In her opinion, if she were just helping someone directly she was uncertain whether she would consider that as a part of time spent “volunteering”

A ‘high buffer’ participant observed that the line of questioning seemed more oriented towards organization-based volunteering. He made reference to his Grade 11 daughter who was raking leaves for an elderly neighbour as a part of a compulsory credit program for school. Even though not under the auspices of an organization, he felt this was certainly volunteering.

At least two participants found it difficult to “draw a line” between their formal volunteer activities and whether they were done “through an organization” or because of their own sense of altruism.

5.11 Special Events

When asked Special_01, participants easily switched from a 4-week recall period to a 12-month period. Some respondents focused only on the ‘12-month’ period and did not fully consider the term: ‘special event’. These participants tended to respond with unpaid activities that simply did not fall in ‘4-week window’. Part of this confusion may be attributable to a verbose question for respondents to process. The question also makes two explicit references to a reference period and less emphasis on the special event.

Participants did not consistently interpret the term: ‘special event’. For some, a special event meant something that happened once-a-year, or perhaps even quarterly such as a charity marathon or golf tournament, a Christmas bazaar, or a telethon to raise funds, or a food drive.

Others were less clear on what to consider a special event. They mentioned things such as being part of a social committee at work, or additional time spent towards ongoing volunteer activities such as tournaments for sporting organizations. “something that you don’t normally do”

One participant reported an activity because she viewed the monthly venue as being “special” (i.e. outside the norm of her regular day-to-day activities).

Another was uncertain whether a political rally should be included or not.

5.12 Accuracy of Proxy Responses

In general, participants said that they knew whether or not another household member was engaged in volunteer activities.
A couple of senior participants said that they and their spouses shared the same unpaid work interests. Because of this fact, they felt that they could answer the posed questions on behalf of their spouse and vice versa.

However, most participants did not feel that other household members could accurately answer the detailed questions. In particular, parents felt that they could report for their children; however they did not think that (adult) children had any idea of the type of unpaid work that they might do or the amount of time they spent doing an activity.

A few participants also noted that the ability to report for other household members could depend on the type of activity. For example, one participant noted that his wife volunteered her musical talents at their church. He knew specifically when and how long her music practices were. His activities involved serving on a board and organizing events. He said to his wife, his work was just “a giant pile of papers”. He said that she would have no idea of the time he spent making telephone calls or writing e-mails.

Similarly, another respondent indicated that both she and her husband volunteered their time to the same charity. However, her husband’s activities involved time on the computer and e-mailing people. She said that she would not be able to answer questions about the number of times or the hours spent for her spouse.

A third participant split his volunteer activities between helping an organization as well as directly helping neighbours. He felt that his adult son who lives with him might be able to answer approximately for his formal activities, but the son would have absolutely no idea of how many times, the number of hours spent, or even what the respondent had done informally helping others.
Memo #3 to the Technical Experts Group
September, 2009

Updates the TEG on the plan for completion of the Manual.

Identifies a number of recent developments, including summarizing the results of testing the draft module.

Outlines a number of outstanding issues and proposals for dealing with them.

A summary of responses and comments from the TEG is included.
MEMORANDUM

To: Joint JHU-ILO Technical Experts Group on the Measurement of Volunteer Work
Re: Next Steps in Preparation of ILO Manual on the Measurement of Volunteer Work

Date: September 15, 2009

Dear Joint JHU-ILO Technical Experts Group Member:

I am writing to bring you up to date on our plans for completion of the Manual on the Measurement of Volunteer Work to be issued by the International Labour Organization, and to outline the role we are hoping you will play in this process as a member of the Technical Experts Group that the ILO has established to oversee this effort.

To do so, the memo first identifies a number of recent developments that will shape the next steps in the preparation of this Manual and then outlines a number of outstanding issues that must be resolved and our proposals for dealing with them.

We are asking you and the other members of the Technical Experts Group to review these issues and proposed solutions and respond to them via email by October 31, 2009. Based on your responses, we will then prepare a revised version of the Manual in advance of the final meeting of the Technical Experts Group. We hope funding will become available from the ILO in order to convene this meeting in January 2010, and will contact you as soon as we have confirmation of this.

I. Recent Developments

In the two years since our last meeting, there have been several important developments in this project. Three of these developments deserve special mention here:

1) Completion of Draft Manual

In the first place, following our July 2007 meeting in Geneva, we developed a draft of the first five chapters of the proposed Manual on the Measurement of Volunteer Work and of
a survey module suitable for insertion in regular labor force surveys. This draft was posted on our web site and distributed to members of the Technical Experts Group and other interested parties for comments and testing.

2) Field Tests

Second, the proposed survey module was tested in several different settings. In particular:

- TEG members from France and Korea conducted desk reviews of the proposed module;
- 11 cognitive interviews were conducted by the Questionnaire Design Resource Centre of Statistics Canada;
- Comments were submitted by other statistical officials, including Eivind Hoffmann (former senior statistician at the ILO’s Bureau of Statistics) and officials from Statistics New Zealand;
- A review session was organized during the most recent conference of the Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA) at which the academic community was invited to comment on the instrument.

These sessions surfaced a number of very helpful comments about the structure and phrasing of the draft survey instrument.

[Copies of the test report from Canada, desk reviews from Korea and France, and other comments we received are attached to this memo and will also be available on our website].

(http://www.ccss.jhu.edu/index.php?section=content&view=9&sub=12&tri=75)

3) International Conference of Labor Statisticians (ICLS)

Finally, and perhaps most importantly, the draft *Manual on the Measurement of Volunteer Work*, and the survey module that accompanied it, were presented at the 18th International Conference of Labor Statisticians held in Geneva on November 28-December 5, 2008 and received quite robust support. The Working Group that convened to consider this *Manual* was chaired very effectively by TEG member Ms Y. Mpetsheni (South Africa) and attracted over 100 delegates. The Working Group, and ultimately the full Conference, overwhelmingly endorsed “the importance of measuring volunteer work in order to acknowledge the significant contribution of volunteer work in disaster assistance, rural education and other programmes.” In addition, the Working Group emphasized that “the measurement of volunteer work was also important for labour
statistics, as one of the objectives of these statistics was to measure all aspects of labour.\(^1\)

At the same time, several generally helpful comments and suggestions were made during the Working Group session.

The task before us now is to decide how to respond to the ICLS comments and the results of the pilot tests, and to complete the remaining chapters of the proposed Manual. To that end, the next section of this memo summarizes the major issues that have arisen and the suggested remedies we propose. Before we build these suggestions into a redrafted Manual, however, we would like your reactions to what we are proposing. Once we have assembled the TEG responses, we will integrate the consensus decisions into a redrafted Manual that we will circulate to you and use as the basis for our final review meeting tentatively scheduled for mid-January, 2010.

II. Major Issues and Proposed Resolutions

Much of the remaining work on the *Manual on Measuring Volunteer Work* will focus on the following seven key topics that either were not addressed fully in the initial draft of the *Manual* or that attracted comments or queries from ICLS participants or pilot testers.

1. The definition of volunteering;
2. The Survey platform: use of labor force surveys versus other household surveys
3. Survey instrument design
4. Data elements
5. Survey administration and reporting
6. Valuing volunteer work
7. Annexes and additional useful information

The discussion below first identifies what the issue or issues are with each of these topics and then identifies our proposed resolution and the rationale for it.

**Issue 1: Proposed definition of volunteering**

Fortunately the ICLS confirmed that a standard definition of volunteering making a clear distinction between paid and volunteer work is important for international comparability. However, concerns were voiced about several features of the definition proposed in the draft *Manual*. Five features of the definition and of the *Manual’s* elaboration of it in particular attracted comments, as noted below:

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Sub-issue 1A: Volunteering as a form of work but not employment

- **The Issue:** Several delegates wanted to be sure that (1) volunteering is clearly identified as a form of work as opposed to leisure or an incidental add-on to some other activity; but (2) that it is differentiated from employment so as not to confuse unemployment statistics by counting volunteers as “employed.” One suggestion for handling the former of these distinctions was to specify that a person must volunteer a minimum amount of time to be considered volunteer work—e.g. one hour per week as is done with the definition of “work.”

- **Proposed resolution:** We propose to respond to this concern by deleting the word “activity” from our original definition and retaining the word “work,” but including language in the Manual highlighting the importance of these distinctions. We do not recommend using a minimum time cut-off to define volunteer work because we fear it would have the potentially negative effect of undercounting a significant amount of volunteer work, particularly episodes that are individually short but that are conducted regularly. Surveys in Australia, the US, and the European Time Use surveys show that many people volunteer for less than 52 hours a year (or less than 1 hour a week on average). However, we propose to insert additional clarification regarding incidental activity vs. volunteer work in Section 3.7 of the draft Manual to emphasize that the activities being measured would qualify as “work” in the ILO usage except that they are done willingly without pay for possibly less than one hour at a time.

Sub-issue 1B: Inclusion of both formal and informal volunteer work

- **The Issue:** The ICLS supported the Manual’s approach to capture both the volunteer work that people do “for or through an organization” (formal volunteering) and the volunteer work that they do directly for individuals outside of organizations (informal volunteering). However, members of the Working Group noted that the definition should clearly distinguish between these two types of volunteer work for reporting purposes and also differentiate among types of institutional units.

- **Proposed resolution:** We propose to respond to this concern by mentioning both types of volunteering in the basic definition that leads off the proposed survey module. We also propose to add language to the draft Manual in Sections 3.9 and 3.10 to underscore the importance of ensuring that formal and informal volunteering are clearly separable in the data for proper sectoral allocation in the SNA system.

Sub-issue 1C: Compensation of volunteers

- **The issue:** The Working Group at the ICLS agreed that some form of compensation had to be allowed in the definition of volunteering because volunteers are often supplied with meals, lodging, transportation, and supplies. Such cash or in-kind payments should not be seen as wages (although it was mentioned that, in some cases, they could be higher than average wages in the region). One suggestion was to restrict the compensation to what
was necessary to eliminate any significant barriers to participation in volunteer work. Another suggestion was to specify a level of “sacrifice” required to qualify an activity as true “volunteer” work (e.g. that any compensation be no more than one third of what the volunteer could earn in other available pursuits).

- **Proposed resolution:** While both suggestions get at the spirit of the concept, the first seems more operational in the field. Language in paragraph 3.7b.ii. of the draft *Manual* could thus be modified to include a reference to the distinction between “pay” or “compensation” and mere reimbursement of costs associated with the volunteer work. Another approach, discussed under section 5C below would be to add a filter question for compensation that might disqualify an activity from being called volunteering.

**Sub-issue 1D: Volunteering under Compulsion**

- **The issue:** The ICLS Working Group agreed that an activity that is compulsory by law cannot be volunteer work, but that activities that are encouraged by social pressure are still within scope unless the social pressure involves tangible penalties for non-participation or has the force of law. In addition, organizational requirements, such as a requirement that students engage in community service prior to graduation should not disqualify an activity from being considered volunteer work, so long as the other criteria apply. However, there were requests for specific examples of activity that would fall outside of these boundaries.

- **Proposed resolution:** Examples of activities that would not be considered volunteer work include election of national service in lieu of mandatory military service, and community service mandated by court order. Language will be added to paragraph 3.8 of the draft *Manual* to accommodate these examples. Additional discussion of a filter question for compulsory activity is discussed in section 5.C. of this memo.

**Sub-issue 1E: Immediate family**

- **The issue:** The definition in the current draft of the *Manual* excludes assistance provided to one’s “immediate family” from volunteering. This differs from the unit of analysis generally used in labor force surveys, which is the household. The rationale for this was the feeling that assistance provided to one’s mother or father, who are part of one’s immediate family but may not necessarily live in the same dwelling with one, should not be included as volunteering. However, ICLS delegates pointed out that there is no common definition of one’s “immediate family.” One suggestion was to specify this in the *Manual* using the concept of “degrees of separation.” to define this concept more precisely.

- **Proposed resolution:** Based on discussions with officials in several statistical agencies, we have concluded that applying a definition of immediate family to this process would be arbitrary at this point. Accordingly, we propose to use the concept of the “household” to mark the boundary between what is included in volunteering and what is not. Work
done with little or no pay for members of one’s household would not be considered volunteer work, whereas such work done for persons not living in one’s household would be included. Language in paragraph 3.10 of the draft Manual will be modified to accommodate this change.

For those countries wishing to determine what portion of the volunteering they were measuring was really being performed for members of respondents’ families outside their household, a filter question such as the one provided below could be included in the module:

<table>
<thead>
<tr>
<th>FILTER_01</th>
<th>Was this unpaid work performed for a member of your family?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>[if yes, go to FILTER_02, if no, go to…]</td>
</tr>
<tr>
<td>FILTER_02</td>
<td>Does this person live in your same household?</td>
</tr>
<tr>
<td></td>
<td>[record yes or no]</td>
</tr>
</tbody>
</table>

**Proposed new definition of volunteer work**

The changes and clarification identified above would leave us with a changed definition of “volunteering” as noted in the table below:

<table>
<thead>
<tr>
<th>Definition in Draft Manual</th>
<th>“activities or work that some people willingly do without pay to promote a cause or help someone outside of one’s household or immediate family.”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposed revised definition</td>
<td>“…work willingly performed for little or no payment to provide assistance or promote a cause either through an organization or directly for someone outside one’s own household.”</td>
</tr>
</tbody>
</table>

This revised definition clarifies several concerns. First, it is more specific about who is doing the volunteer work. Second, it makes the question of compensation less problematic. Third, introduces a distinction between “formal” and “informal” volunteering, and draws attention to the institutions where most volunteer work is likely to occur. This definition also removes the reference to the “immediate family.”

**Issue 2: Survey platform: Use of Labor Force Survey (LFS) versus other household surveys**

- *The issue*: The ICLS Working Group felt that attaching a volunteering module to a regular LFS, while having enormous advantages, can also pose difficulties given the other demands on the LFS and their particular features, such as the use of proxy responses, that may understate the extent of volunteer work. The Working Group therefore agreed that the proposed Manual should indicate that LFSs have been used to measure volunteer work successfully in a number of countries, but leave open the option for countries to use other household surveys, as long as the surveys are conducted regularly and are not restricted to volunteer work but cover other aspects of work, to avoid undesirable “selection bias.”
**Proposed resolution:** Retain decided preference for use of Labor Force Survey as the platform for the volunteering module but acknowledge the possibility of using other household surveys under certain conditions.

The entire structure of the proposed *Manual* and the draft module that has grown out of it assumes the use of Labor Force Surveys as the platform for this data-gathering. The *Manual* outlines the reasons for this. They include considerations of efficiency; technical prowess; minimization of selection bias since these surveys are often more likely to be mandatory and to be covering other aspects of labor; presence of questions that will offer needed identifying information on the occupation, education, and residence of respondents; and use of interviewers skilled in translating descriptions of work into standard occupational categories. This default assumption has informed the entire structure of the module—its length, the reference period used, the variables covered, the proposed occupational classification of volunteer work; and the wording of many of the questions. While there are limitations to the use of an LFS for measuring volunteer work (e.g. the fact that such surveys typically rely on proxy respondents), we are aware that there are ways around these limitations (e.g. in the U.S. the volunteer component attached to the labor force survey departs from the proxy response mode when asking about volunteer work and quizzes individual household members directly).

It is clear, however, that much as we think Labor Force Surveys provide the best vehicle for administering the module on volunteer work, it seems clear that the *Manual* will need to address as well the pluses and minuses of using other survey platforms, such as general social surveys and time use surveys.

**Issue 3: Proposed module and instrument design**

We received several comments regarding the proposed module, including the following:

**Sub-Issue 3A: Inclusion of proposed module**

- **The issue:** Some participants in the ICLS Working Group objected to having a draft survey instrument included within the proposed *Manual* and preferred simply an identification of target variables in the text. Others, however, indicated that having some suggested language could help ensure comparability of results and provide assistance to statistical offices that are not as experienced in the measurement of volunteer work. It was pointed out that ILO manuals frequently do include examples of questions that can and have been used for measuring the various concepts and that ultimately countries have considerable leeway in phrasing questions in ways that make the most sense for capturing the target phenomena in their language and setting.

- **Proposed resolution:** We intend to move forward with the production of a sample module that will be included in the text in order to provide some guidance to those statistics officials for whom it would be useful, and we will add language to the *Manual* in
Chapters 1, 2, and 4 emphasizing that this module can be modified to preserve it meaning in local contexts. As mentioned earlier, we think it would also be useful to include in the Annex, or on an accompanying CD, copies of the questionnaires on which the Manual work is based, such as surveys from Australia, Canada, France, Mexico, or the United States.

**Sub-Issue 3B: Introductory orientation statement vs. prompts**

- **The issue:** The ICLS version of the module begins with a statement that includes examples of both informal and formal volunteering, and is intended to fix in respondents’ minds a broad concept of volunteer work. Several members of the ICLS Working Group, the Canadian testers, and other respondents felt that this statement is currently too lengthy and suggested that a questionnaire that prompts respondents on a variety of types of volunteer activity separately would yield better estimates than long questions with examples, especially in surveys where interviewing is conducted by telephone. This is consistent with international experience revealing that the inclusion of prompts affects the reported level of volunteering.

- **Proposed resolution:** We are convinced by the Canadian pilot test that the long introductory question is not workable, especially in telephone interview situations. We therefore propose to develop a shorter lead-in question followed by a reasonable list of individual prompt questions followed by a catch-all prompt question.

**Sub-Issue 3C: Filter questions**

- **The issue:** A suggestion was made to include filter questions to check on at least one, and possibly two, features of the basic definition: 1) whether the volunteer work is a result of legal or other compulsion; and 2) whether the volunteer work involves compensation that exceeds the amount defined as within scope as discussed earlier.

- **Proposed resolution:** As noted above, additional language providing greater conceptual clarity regarding issues of compulsion and compensation will be added to the text of the Manual as guidance to interviewers. Adding filter questions to the module may be important in some contexts, particularly in countries that employ mandatory national service in lieu of military service, or regularly mandate community service by court order. However, these questions may not be relevant in every context and will depend a great deal on the local environment. Therefore, we recommend that a placeholder for filter questions be noted in the Manual, and suggested filter questions identified in Chapter 4, but not that such questions be included in the sample module. Suggested language for these filter questions could be:
Sub-Issue 3D: Reference period

- The issue: Except for countries that conduct monthly labor force surveys and plan to include the volunteer module each month, the draft Manual recommends a four-week reference period as the best compromise to take account of the infrequent nature of volunteering and the problem of accurate recall over periods longer than four weeks. Participants in the ICLS Working Group agreed with this proposal, but indicated that LFS’s generally use a one-week reference period and that mixing reference periods can confuse respondents.

- Proposed resolution: We believe that the Manual’s current approach remains the most reliable and do not wish to propose shortening or extending the reference period. We note that the US and Canada (in a previous version of their volunteering survey) used an LFS platform to measure volunteer work but included a different reference period for the volunteer questions without causing confusion.

Issue 4: Data Elements

Fortunately, the Working Group endorsed the data elements that the Manual proposed to collect on volunteer work. At the same time, the Working Group made a number of useful suggestions that we believe deserve attention. These are outlined below:

Sub-issue 4A: Additional data items

- The issue: A number of participants in the ICLS Working Group, especially those from countries already conducting surveys on volunteer work, indicated interest in going beyond the minimum set of variables proposed in the Manual to include questions about other characteristics of volunteer work, such as motivations for volunteer work, social context of volunteer work, and factors that can enhance the volunteer experience.
• *Proposed resolution:* The *Manual* does mention that statistics agencies always have the option to lengthen the module to seek additional detail, but does not provide any additional language or examples of topics that could be included. Therefore, we will add 1-2 paragraphs to the end of Chapter 5 highlighting topics that could be included in an expanded data set and offer examples of questions that have been used to tap these additional topics in other volunteering surveys.

**Sub-issue 4B: Volunteer rate**

• *The issue:* We received a suggestion to re-word paragraph 5.5 to clarify how the volunteer rate is to be calculated since there are many ways to do this.

• *Proposed resolution:* We propose to recommend a uniform measure for the volunteer rate. Our current thought is to compute it as the number of persons volunteering as a share of the adult population of the country, defined by the ILO as those persons aged fifteen years and older.

**Sub-issue 4C: Calculating the number of hours volunteered**

• *The issue:* In the current version of the survey, respondents are first asked to provide information about the number of times they volunteered in a particular activity, and then asked how many hours they conducted that activity each time they did it (either on average or the last time the activity was conducted). The rationale for splitting the questions in this way is to reduce error by doing the calculation of total hours for the respondent.

However, the cognitive interviews conducted in Canada revealed that some respondents found the two-part time question confusing. This was particularly true for volunteers who conducted activities that were spread out throughout the course of a day rather than during a specified time period, such as responding to emails, making phone calls, or fundraising. Therefore, it was suggested that it would be more helpful for the interviewers to ask for the total hours volunteered first, then try to break down the questions into two parts if the respondent has trouble.

• *Proposed resolution:* We agree that the Canadian approach is likely to be useful. A sequence of questions such as that below could be inserted into the survey module:

•
HOUR_A01
I would like to determine the total number of hours you did this unpaid work in the last four weeks. Do you recall approximately how many hours you devoted to this unpaid work?
[If yes, record number of hours given, then go to TYPE_ORG01. If no, or unsure, go to HOUR_A02]

HOUR_A02
If you do not recall the total number of hours, could you perhaps recall how many times you did this activity in the last four weeks?
[Record response verbatim and use lookup table or code book to assign frequency codes]

HOUR_A03
And how many hours did you devote to this unpaid work the last time you did it [or on average each time you did it]?
[Record response verbatim]

Sub-Issue 4D: International volunteer work

• The issue: The ICLS Working Group pointed out that it would be useful to be able to differentiate between domestic and international volunteer work, something that the current draft does not attempt to do.

• Proposed resolution: Capturing international volunteering is likely to be difficult. Foreign volunteers working inside a country are not likely to be captured in the host country’s sampling frame. Similarly, those working abroad are not likely to be captured in surveys in their own country unless they happen to be contacted shortly after they have returned home (since the proposed reference period is the prior month). It therefore does not make sense to ask the domestic vs. international question for each type of volunteer work since this will lengthen the survey process considerably with little likely pay-off. At the same time, we propose to include a model question for use by statistics offices wishing to capture international volunteering. That question, which would come right after the last ORG question, could be phrased as follows:

INTL_01
Did you do this unpaid work abroad [or outside this country]?
[Record response verbatim]

Issue 5: Additional chapter on survey administration and reporting

• The issue: The chapter on survey administration and reporting still needs to be drafted.

• Proposed resolution: This chapter will discuss the implications of seasonality, protocols and training of interviewers, examples of volunteer work, decision rules, sensitizing interviewers to cultural features of volunteer work, handling of non-respondents, interviewer characteristics, table structure, and access to data. A draft will be sent out for your review at a later time.
Issue 6: Chapter on valuing volunteer work

- The issue: The chapter on valuing volunteer work still needs to be drafted.

- Proposed resolution: This chapter will center on the use of replacement cost methods for calculating the value of volunteer work. A draft will be sent out for your review at a later time.

Issue 7: Updating existing annexes and adding additional useful information

- The issue: The tables, crosswalks, and other tools in the Annex have been significantly revised since they were introduced in 2008. These revisions came in the context of a request we received from the UN Statistics Division to draft a sub-chapter in its Companion Guide for implementing ISIC Rev. 4 and CPC Ver. 2. Fortunately, this means that the coding tools will be similar in both documents. One respondent expressed concern that the Manual would limit the number of possible coding outcomes to ‘crosswalks’ to the international standard classifications of occupations (ISCO) and type of activity (ISIC) rather than to use the corresponding national classifications.

- Proposed resolution: Include revised Annexes and modify language in the Manual to make clear that national versions of these international classification systems can be used where there is close correspondence to the international systems.

Final Thoughts

With the tentative approval of the ICLS, the road for revision and final publication has been cleared. Without your contributions to date we would not be here. We greatly appreciate your suggestions and advice as we move forward with the next draft of the Manual on the Measurement of Volunteer Work and look forward to receiving your comments before October 31 so that we will be able to produce a revised draft well in advance of the final meeting of our TEG, tentatively planned for mid-January 2010.

Sincerely,

Lester M. Salamon
Director

CC: Sylvester Young, ILO; Adriana Mata-Greenwood, ILO; Mae Chao, United Nations Volunteers; Members of the UNECE Experiment Group; Eivind Hoffman, Norwegian Directorate of Immigration (ILO retired); Statistics New Zealand; Ivo Havinga, UNSD
## Summary of Comments received regarding September 15 memo to TEG

<table>
<thead>
<tr>
<th>Issue</th>
<th>In favor</th>
<th>Not in favor</th>
<th>Comments</th>
</tr>
</thead>
</table>
| **Sub-issue 1A:** Volunteering as a form of work but not employment | 100 % percent agreement with making the line between volunteering, work/employment, and leisure | 1 against no minimum time requirement | 1) Reminder that only formal volunteering for NPIs can be used for the NPI satellite account  
2) Pointed out that there is yet no way to determine regularity criterion  
3) Including the word work in the definition has strong support. One strong voice against the loss of the word “activity” voiced. It has important implications for the European Year of Volunteering.  
4) Re-organization of the Key Criterion section recommended accommodating these suggestions. |
| **Sub-issue 1B:** Inclusion of both formal and informal volunteer work | 5 of 6 comments support measurement of both | 1 would prefer not to measure it but accepts this approach as long as they are clearly distinguished | 1) All respondents heavily emphasized the importance of making very clear distinctions between the two  
2) 2 comments suggesting questions about whether or not the organization is registered  
3) 1 comment suggesting alternative titles for formal and informal given their use for labour concepts |
| **Sub-issue 1C:** Compensation of volunteers | no problems with reimbursement of expenses | General agreement about low levels of compensation, but this is clearly still a cause for concern | 1) A generic definition could include reference to low levels of compensation that act as symbolic expressions of gratitude for work undertaken. This would cover small payments, or small amounts of government support (fostering, for example). |
| **Sub-issue 1D:** Volunteering under compulsion | Agreement on legal compulsion | Two voices of strong disagreement regarding not counting community service requirements prior to graduation | 1) Clarification requested regarding two situations: Corporate Social Responsibility environment where an employee is pressured by their employer to work as a volunteer over the weekend. Many schools in South Africa also take their school children out for a day to volunteer their time to clean up a river or some such activity. My feeling is they are not really ‘voluntary’ and therefore should be excluded.  
2) Clarification requested on how the definition of voluntary work treats unpaid work done for a for-profit organisation, other than a family business?  
3) Clarification requested regarding employment concepts: specifically regarding circumstances when unpaid individuals, like apprentices, are considered employed even when they are unpaid.  
4) Clarification requested regarding the issue of employment promotion schemes could be clarified in the volunteering manual. What is the correct treatment for people participating in such schemes, who are not paid wages and salaries? |
| Sub-issue 1E: Immediate family | 3 very supportive, 1 moderately supportive | Concerns about the implications for “family” and “household” voiced. | 1) Filter questions are useful because formal volunteering is inflated in developed countries and deflated in societies where multiple generations live in the same household.  
2) Communal living situations complicate this question.  
3) Fostering is also complicated, especially in the case of the millions of aids orphans in South Africa |
| Proposed new definition of volunteer work | General support for the new definition. | Disagreement with use of the term “little payment”  
One preference for retaining immediate family | 1) The definition does not capture work that improves the lives of non-humans, i.e. animals and/or the environment which is voluntary work performed outside the household, not for or through an organisation. In this case the beneficiary is the environment not a human being or animal. Statistics NZ suggest covering these types of cases by adding “… family, including the wider community and the environment”.  
2) It is not clear that this definition covers self-help groups or mutual aid groups and it should. |
| The survey platform: use of labour force surveys versus other household surveys | Strong agreement | | 1) An issue to consider is that asking for the main voluntary organisation only will miss out on a lot of volunteer activity because many volunteers work so for more than one organisation. (MH: unclear why it was interpreted this way)  
2) Challenge in Europe is only scheduling inclusion of the module at all – most modules have already been determined for years to come. |
<p>| Sub-issue 3A: Inclusion of proposed module | Strong agreement | | Caution against developed country bias. |
| Sub-issue 3B: Introductory orientation statement vs. Prompts | General agreement | 2 suggested to keep the introductory longer question when applying the questionnaire face-to-face and put appropriate prompts when through the telephone as suggested. | Example of Canada should not be generalized. In more dense countries, household surveys are run by face to face interviews; in such situations showing cards may be more useful. Examples have to be chosen in collaboration between statisticians and representatives of civil society. |
| Sub-issue 3C: Filter questions | General agreement | Wording suggestions have been provided | |
| Sub-issue 3D: Reference period | 2 supportive, and actually prefer 1 week | 2 disagree and prefer a year | |
| Sub-issue 4A: Additional data items | 1 supportive | 1 suggested alternative | Alternative: perhaps additional questionnaire could be offered to sample those who reported they volunteered in order to minimize burden on LFS |
| Sub-issue 4B: Volunteer rate | | | Wording changes were suggested |</p>
<table>
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<tr>
<th>Sub-issue 4C: Calculating the number of hours volunteered</th>
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<th>Cautioned against rounding error for socially desirable behaviour.</th>
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<tr>
<td>Sub-issue 4D: International volunteer work</td>
<td>1 supportive</td>
<td>2 not in favor</td>
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<tr>
<td>Updating existing annexes and adding additional useful information</td>
<td></td>
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Comprehensive Comments

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<tr>
<th>General position on the 'Manual on the Measurement of Volunteer Work'</th>
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<tr>
<td><strong>Statistics New Zealand</strong>: There is no unambiguous source of regular volunteering data compiled and published by Statistics NZ. Questions on volunteering and/or unpaid work have been included in the quinquennial Population Censuses since 1986 and while this source provides a good snapshot of the extent of volunteering, the data is quite limited. In contrast, Time Use Surveys capture considerable detail on time spent on volunteering activities, type of activity etc. The Time-Use Survey data is of high quality, but has only been conducted twice - in 1998/99, and presently. More recently, Statistics NZ conducted its first General Social Survey (GSS). The GSS was a household sample survey conducted during 2008 which is intended to provide information on key social and economic outcomes in a single dataset. It included brief questions on voluntary and unpaid work, without capturing detail (for example, as suggested in Ch 5 <em>Target Data Elements</em> in the Manual). None of these sources capture the full range of regular information one might need to be fully informed on voluntary/unpaid work and its relationship to paid work (and the Target Data Elements are a good guide to what is needed) and so we believe there is scope for a different channel through which to capture volunteering data. However, as you note, there is a danger that a regular survey vehicle such as a quarterly household labour force survey will become too &quot;cluttered&quot; if too much detail on volunteer work is attempted to be collected using it. This may have adverse impacts on respondent burden and jeopardise the quality of traditional outputs. Specific volunteer modules and/or Time Use Surveys may be more appropriate to capture the detailed data needed. Your suggested Target Data Elements do seem to be a good compromise and attempt to not overload the HLFS. However, we would need to test such an addition before fully endorsing it. The point is, that while, in principle, we support the inclusion of a volunteering module within the HLFS, there are many practicalities that would need to be worked through to ensure existing outputs were not jeopardised.</td>
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<tr>
<td>We strongly support the development of the manual itself and commend you and your team for the initiative you have taken and the work done to see the project through. Clarification of employment / work / volunteering concepts and definitions and their international standardisation will be a major achievement.</td>
</tr>
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<td><strong>Mike Locke</strong>: I found a virtue of the early proposals was their simplicity. I’m anxious that some of the sophisticated technicalities being developed in some of the responses will make the survey harder to operationalise. I’d prefer to be simple and to recognise that there will be tolerances or latitudes in the data and its analysis because it won’t be possible to be totally exact about definitions.</td>
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<td>Above all, I hope you will get it up and running. We could pick over technical details for ever. The main thing is to have an acceptable survey tool that can produce useful data. I suggested in conversation with one of our government departments that 2011 - as both the European Year of Volunteering and the UN IYV 2001+10 – would be appropriately marked by introducing either the survey or its first reports.</td>
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1 It should be noted that the ideas and suggestions forwarded in this review do not reflect the views of Central Statistical Agency of Ethiopia as I am no more working there.
### The definition of volunteering

#### Sub-issue 1A: Volunteering as a form of work but not employment

**Statistics New Zealand:** In general we support both issues outlined in the memorandum as well as the proposed resolution. It is important to have a clear distinction between voluntary work, leisure activities and paid work. As such, the wording needs to impose clear boundaries between those three different types of activities.

Misinterpretation of this could have a significant impact on labour force statistics. According to current labour force definitions, volunteers could additionally be categorised as any of: employed (in either paid work, or unpaid work within a family business or farm), unemployed, not in the labour force. It is crucial that those existing definitions (and therefore the number of people classified within them) are not impacted by the overlaying volunteering framework.

In addition to this, formal volunteering can be undertaken for either a non-profit institution, a Government institution, or a private institution. Only volunteering for a non-profit institution is in scope of a Non-Profit Institutions Satellite Accounts, and so it is important to distinguish who the volunteering was done fr.

Statistics NZ also supports the view to include all voluntary work rather than having a threshold of one hour per week that needs to be exceeded to qualify for unpaid work. Our existing surveys which capture unpaid work data do not have the one hour threshold.

**Archambault:** I agree on work (and not leisure) but not employment (and not reduced unemployment statistics). The term activity was not clear enough to separate volunteering and pure participation as a member or client. I agree also with the rejection of one hour per week, because short and regular volunteering exists (for instance, opening and shutting an office once a week) as well as long volunteering but occurring once a year (fundraising for a telethon).

**Verduzco:** I read that in the “Proposed solution” one can read that in the manual it is specified that the “work” (instead of activity which I agree) should be accomplished with some regularity, however there is no prompt for that in the recommended core survey module and from what is asked there, one cannot obtain this particular trait which is of great importance according to our experiences.

**Mekonnen Tesfaye Damessa:** The concern raised by ICLS delegates is real. On the proposed resolution:

1. It is a good idea to retain the word ‘work’ and delete the word ‘activity’. This way the question will not sound to include any activity that may not be real work. In Ethiopia, I far as I remember, translated version of definitions of work did not use the word ‘active’ mainly for the same reason. We use the term in the manuals, though.

2. I will go for ‘a minimum cut-off time’. Otherwise, it will be difficult to differentiate incidental add-on to some other activities and short, occasional or one time activities from a work that produce service/good which is sufficient enough to be included in GDP. For instance, on my way to home, if I helped someone cross a road or carry his/her luggage for few minutes, I should not be considered as engaged in volunteer work. It is rather incidental add-on to my way to home. Doing this activity frequently, on purpose, to help people may count as volunteer work. These two situations can be identified by the amount of time spent on the activity.

Since our reference period for volunteer work is 1 month, setting 1 hour cut-off per month will

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2 It should be noted that the ideas and suggestions forwarded in this review do not reflect the views of Central Statistical Agency of Ethiopia as I am no more working there.
have little negative effect of undercounting, while helping to filter incidental ad-ons and minor activities done for very short duration.

3) I agree with your suggestion of inserting additional clarification in the manual. I believe that it is a good idea to present features of volunteer work in relation to employment and leisure activities. In connection with this, I would like to see minor re-organization of “KEY FEATURES AND CONSIDERATION”. Specifically, points “a. It involves work” and “b. It is unpaid” can stand by themselves and deserve their own section. Thus, the numbering of the section may look something like this:

3.7 It involves work
3.8 It is unpaid
3.9 It is non-compulsory or non-obligatory
3.10 . . .

4) As to section 3.7 a., I suggest the following modification:

**It involves work:**

This means that it involves activities that produce goods and/or services which bring something of potential value for its recipients. Two points need special attention:

i) Volunteering is work, not leisure
   The activity/work being measured should contribute to the production of goods and services boundary as defined in the System of National Account (SNA) except that they are (intended to be) supplied only to units other than their producers. Thus, playing musical instrument for one's own enjoyment is not a work and hence not “volunteer work”; but playing a musical instrument for the enjoyment of residents (without payment) in a nursing home/community is.

ii) Volunteering is work but not employment
   volunteers' satisfy the definition of persons 'at work' set by the ILO except that they perform the wok willingly not for pay, profit or family gain. When the work is performed for payment, profit or family gain it becomes employment, provided that the work is done over a cut-off time per reference period. For example, Working on own farm falls in SNA production boundary (and hence is a work) but it is not volunteering; whereas, assisting an elderly neighbor in their farms without pay or exchange of labor is. Another example: working as a nurse with Red Cross for wage is employment while willing serving the needy without pay, under Red Cross, is volunteering.

**Russell:** I fully agree with the proposed resolution of not putting a cut off time for volunteer work. Frequently a few phone calls by an influential person can be very effective although taking less than an hour. As soon as volunteering is measured in time alone this then becomes the measure of value also, which is certainly not valid.

**Jacqueline Butcher:** 1) I agree strongly on leaving in the word “work” and the added comments into the Manual
   2) Other two important points made by Mekonnen Tesfaye Damessa are: volunteering is work that is not paid, it is not recreation or leisure, and it is not formal employment. This will help clarify the concept.

**Mike Locke:** I would regret the loss of the word ‘activities’ alongside ‘work’ in the primary definition. The Citizenship Survey for England uses ‘activities’ and I would hope to maintain at least that much comparability.

Adding to a discussion on including the word ‘activities’ that the European Year 2011 has recently had its title amended to the ‘European Year of Voluntary Activities promoting active citizenship'. My
understanding is that this is based (a) the legislative basis for the Year can then rest on the existing legislative provision for ‘active citizenship’ (rather than establishing a basis for ‘volunteering’) and (b) there was some question raised about whether ‘volunteering’ as a term was recognised in some countries. I understand a more accessible title may be used as well.

I was just reading the current document and noted: ‘(3a) The term "voluntary activities" refers to all forms of voluntary activity, whether formal, non-formal or informal, which are undertaken of a person's own freewill, choice and motivation, and are without concern for financial gain. They benefit the individual volunteer, communities and society as a whole. They are also a vehicle for individuals and associations to address human, social or environmental needs and concerns, especially when they are asked to face emergency situations that can involve society as a whole, and are often carried out in support of a non-profit organisation or community-based initiative. Voluntary activities do not replace professional, paid employment opportunities, but add value to society by having social and cultural aims.’


The procedures are going through the governance structures of the European Commission currently, and so there may be changes.

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<tr>
<th><strong>Sub-issue 1B: Inclusion of both formal and informal volunteer work</strong></th>
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<tr>
<td><strong>Statistics New Zealand:</strong> Clear boundaries are essential to distinguish between formal and informal volunteer work, and report separately on both. We therefore support the proposed resolution.</td>
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<tr>
<td><strong>Archambault:</strong> would prefer not to include informal volunteer work, a less clear concept than formal volunteering, the only one useful for filling the NPI satellite account. However, I understand the preoccupation of ILO to measure all forms of work. At least <strong>clearly separable</strong> is a second best.</td>
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<td><strong>Verduzo:</strong> I agree also in clearly distinguishing volunteer work accomplished either in a formal or in an informal organization as well as differentiating this kind of work accomplished by an individual, however in the “Proposed solution” there is only mention of formal and informal work but there is no mention of the work accomplished by an individual.</td>
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| **Mekonnen Tesfaye Damessa:**  
  1) I think, inclusion of the two types of volunteering in the definition is not that much important because this is probed in the Questionnaire and discussed the manual.  
  2) If we have to mention it, we better not use the term “formal/informal” because this kind of classification is already used for other concepts such as formal/informal sector, and formal/informal employment. Cross-tabulating type of volunteering with these variables will create some confusion for users. |
| **Russell:** Agree with proposed resolution but possibly worth mentioning that in South Africa and various other countries in the region there is a substantial difference between formal (registered) and informal (unregistered) organisations. With organisations such as USAID only recognising formal organisations and therefore also only acknowledging volunteering for formal organisations, this distinction becomes important. Perhaps in certain countries where this is an issue following the prompt on type of organisation for which volunteering is done we should ascertain whether or not that organisation is registered or not. Alternatively in the question dealing with type of organisation the first classification of ‘charity/non-profit/NGO/union/or religious organization” should have an extra box classifying it into registered or unregistered. |
Jacqueline Butcher:  
The issue of formality/ informality should be addressed and I see will be so. I think that if you have covered these differences so that they can be registered in the survey data. Adding language in the rest of the *Manual* will also be helpful.

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<th>Sub-issue 1C: Compensation of volunteers</th>
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<td><strong>Statistics New Zealand:</strong> A very careful approach is required with this definition, including the setting of any thresholds or boundaries. What can be seen as compensation may vary significantly in different countries. Statistics NZ supports the view to include, in general, any compensation such as reimbursements of costs that does not increase the volunteer's personal assets and only covers the volunteer's personal expenses. It could furthermore include meals or on-site accommodation as long as it is a requirement to keep the volunteer going and as long as it is required to allow the volunteer to fulfil his/her duties. As many other countries, New Zealand also have specific cultural activities that need to be considered. For example, in the Maori culture, some activities are undertaken where gifts (&quot;koha&quot;) are made in receipt of the voluntary work. In cases where the koha exceeds the expenses incurred, and is paying for the service, it would not be in scope of volunteering. In New Zealand, Inland Revenue (the NZ tax department) have compiled some guidelines on payments and gifts in the Maori community. Statistics NZ has the opportunity to use these guidelines when determining whether the work is voluntary or not. A generic definition could include reference to low levels of compensation that act as symbolic expressions of gratitude for work undertaken.</td>
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<tr>
<td><strong>Archambault:</strong> The term of level of “sacrifice” seems to be too judeo-christian. Eliminate significant barriers to volunteer work seems more secular and more linked with what is done for political volunteering such as a mayor or other representatives. Pure reimbursement of costs associated with volunteer work is not at all a compensation (conversely no reimbursement of the costs paid by the volunteer is a donation by the volunteer, and it is income tax-deductible in France).</td>
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<tr>
<td><strong>Verduzco:</strong> I agree with the proposed solution</td>
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| **Mekonnen Tesfaye Damessa:**  
1) Referring to the Manual’s Section 3.7 b “It is unpaid” bullet # iii, I have the following concern: The suggestion that each country should determine what level of payment should be considered “without pay” may not be feasible in all countries. In some countries, there may not be responsible body to determine this level.  
2) The term ‘without pay’ in the title of Section 3.10 “It does not embrace work done without pay for members of one’s household or immediate family” is unnecessary. This is because volunteer work does not include anything done for family: be it household chores (non economic activity) or economic activity. The focus here is not ‘pay/non-pay’ - rather ‘household/out-side household’ status. |
| **Russell:**  
Presumably in the case of grants received from the Government for volunteer work it is admissible as these tend to be very small? |
| **Jacqueline Butcher:**  
As far as compensation, it must be left clear that if some money is received for volunteer services it cannot constitute the main income of the individual. Then it becomes a wage. |
| **Mike Locke:**  
Similarly, I would regret very strongly the phrasing ‘little payment’. Volunteering should be defined as ‘no payment’. You would need to recognise reimbursement of expenses. But I don’t think there should be a gap referred to as ‘little payment’ through which other kinds of payment – perhaps felt to be ‘little’ in particular circumstances – could be included. |
### Sub-issue 1D: Volunteering under compulsion

**Statistics New Zealand:** In general Statistics NZ support the JHU proposal, however, there were two issues of concern.

Firstly, how does the definition of voluntary work treat unpaid work done for a for-profit organisation, other than a family business?

In terms of labour force statistics, the ILO states that "according to the international definition of employment, being “at work” meant having contributed to the production of goods and services as defined by national accounting, in exchange for a wage or salary, in cash or in kind, for at least one hour during the reference period". However, there is at least one exception from this need for compensation for employment to be recognised. The ILO manual on concepts and methods states that "apprentices who are not paid or are simply receiving financial compensation or an allowance unrelated to the work performed may be included among the employed on the basis of whether or not they are associated with the productive activities of an enterprise. If such apprentices contribute to the production of goods and services, they should be classified as employed". Statistics NZ would appreciate clarification on this issue in the volunteering manual.

Secondly, the issue of employment promotion schemes could be clarified in the volunteering manual. The ILO guidelines clarify the rules on the measurement of employment and unemployment in this area. Rules 10a and 10b imply that if “work for dole” is undertaken within the context of the enterprise, it should be measured as employment, "as it could be assumed that participants, like apprentices, were associated with the production of goods and services of the enterprise". The Statistics NZ LFS Field Manual generally follows this rule, with schemes where the participant is employed by a specific organisation treated as employment, whereas general community work isn't. We would appreciate clarification of the correct treatment for people participating in such schemes, who are not paid wages and salaries.

**Archambault:** OK

**Verduzzo:** I cannot agree in that community service prior to graduation should not be considered as “compulsory”; it is compulsory since if students do not do that they cannot graduate. This is the case in Mexico for graduation and students themselves consider this work as compulsory.

**Mekonnen Tesfaye Damessa:**
Can the “Any unpaid work done while in prison” included as one example of activities that would not count as volunteer? In counties like Ethiopia, inmates in prison camps are expected to engage in construction of houses, correction center farms, etc.

**Russell:** I am not sure what we would do in a Corporate Social Responsibility environment where an employee is pressured by their employer to work as a volunteer over the weekend. Many schools in South Africa also take their school children out for a day to volunteer their time to clean up a river or some such activity. These examples also need to be clarified. My feeling is they are not really ‘voluntary’ and therefore should be excluded.

**Jacqueline Butcher:** I do not agree that work that students engage in such as community service to obtain a degree be considered volunteer work. You will find NUMEROUS studies that take this point into consideration. Especially in Latin America, this is one of the differences between volunteer work and other activities. It is clear that students do not undertake this as volunteer work, do not see it this way and would not respond to a survey if asked. If you DO consider this as volunteer work, the numbers will not be accurate on volunteer activity.
**Sub-issue 1E: Immediate family**

**Statistics New Zealand:** No further comments. We agree with the proposed resolution.

**Archambault:** It is wise to return to the SNA concept of household because immediate family is unclear. But don’t forget that this decision will reduce informal volunteering in the countries where more than two generations, plus relatives, live in the same dwelling. Conversely it inflates also the informal volunteering in developed countries (my informal volunteering for instance increases a lot by this wording thanks to caring my grandchildren during school vacations…). So the two proposed filter questions are useful.

**Verduzo:** I agree with the proposed filters 01 and 02 following the definition of volunteer work.

**Mekonnen Tesfaye Damessa:**

1) Considering work done (without pay) for one’s parents as volunteering seems senseless from moral point of view. In my country, where there is no a institutionalized home caring service at all, many people will have to take care of their parents in their homes. After all, it is an obligation that one has to do; it is not something you do it if you want and ignore it if you do not want. Note that there is a penalty for failing to do this service like, curse, denial of inheritance, being bad example to own children etc.

2) Counting work done without pay for one’s parents as volunteer work would probably inflate the volume of volunteering. As I said above, many people have to support their parents during several occasions: repairing houses and fences, helping in household chores, fetching water, collecting firewood, dealing with local authorities, handling social matters, caring during illness, to mention a few. Also, it is very common to see grandmothers staying temporarily in their daughters/sons house during the last days of pregnancy as well as during the first 2-3 weeks after delivery to take care of the mother and the newborn. Children who spent 1-2 month for vacations with grandparents mostly participate in household chores.

3) Can we distinguish between household chores and other major activities done without payment in parents (or immediate families) house and count only the major activities as volunteering. Labor force surveys treat these two cases separately when they are done for own consumption.

**Russell:** This however begs the question what is the definition of a household. In the case of hostels where an entire family may live in a single bed sharing a room with another family in the bed next to them, household would not apply. Also people who migrate to the urban areas and can’t find accommodation may well end up living with strangers in a single house or even room. A third frequent example is where a family will send a child away to stay with a strange family in the urban area to access better schooling; the child then returns home over school holidays and is very much part of the nuclear family or household. The definition of household used most frequently here is “those people who live together with you on this stand at least three days a week and who eat out of the same pot of food as you” This at least includes other family members who are staying on the same stand as the family but living in a different dwelling e.g. shack or outbuilding but would not include the child living elsewhere during term time or the hostel situation referred to above.

There is also a problem with *immediate family/household* in Southern Africa where we have over three million orphans affected or infected with HIV/Aids. If it wasn’t for those volunteering to foster these children they would have nowhere to go as the government has never made provision for them. In the case of fostering one’s own nieces, nephews and grandchildren this should not be classified as volunteering. But when a single mother or even a couple take in, two or even three orphans of different ages and look after them, this surely has to be volunteering. Often these families are virtually destitute themselves and still open up their homes to these children who often come with considerable ‘baggage’ as one can imagine. This makes the suggested definition of household considerably more...
difficult, as these children, although not related, would most certainly be seen as part of the household. These foster care parents may also, if they have applied, be receiving a government grant. This should not however be seen as payment as it is very little, in the region of 50 - 100 dollars a month which would not fully cover the cost of a child’s food let alone clothes and other needs.

**Jacqueline Butcher:**
This is a VERY important question. Statistitians feel more comfortable with the word household. This will create confusion, but I see your point. We had this discussion when we were creating our own survey and chose family instead. The question you plan to add with the two filters may solve the problem partially.

I do not like the way this will be done, but I understand it. The point being that in developing countries, a lot of work is done towards members on one’s family and they do not necessarily live in the same household. The definition of household is one where the main wage earner is the head of the household. When one refers to family, each of us has the idea of what family means. For someone in Berlin, it can be the persons that live with him. For others it will mean bloodline, and for others it will mean the godparents of my children, as well as my mother father and children. As long as it is clear. What you are doing here, however is defining for the future because this is the first time we will be really measuring this work. Once this is place, I hope the rest will not be lost.

**Proposed new definition of volunteer work**

**Statistics NZ** agrees with the proposed definition rather than the prior version of it. We would also like to add a comment regarding some voluntary activities that probably would not be covered by this definition although we would consider it as voluntary work. The definition does not capture work that improves the lives of non-humans, ie animals and/or the environment. Examples of both situations are as follows. a) A stranded whale could be helped by a household member just for the purpose of helping the animal. This does not necessarily involve any organisation or particular group and it is voluntary work performed outside the own household. The beneficiary is an animal. b) Cleaning the beach could be done by an individual due to own pleasure to do something good for the environment. Again, this would be voluntary work performed outside the household, not for or through an organisation. In this case the beneficiary is the environment not a human being or animal. Statistics NZ suggest covering these types of cases by adding “...family, including the wider community and the environment”.

**Archambault:** there is a real improvement in the new definition, more easy to apply by the statistical agencies because it is written in a style more familiar to statisticians.

**Verduzo:** I do not like the new wording “for little (...) payment” because that is vague. What is “little payment”? What if we put instead “...work willingly performed for no payment of wages to provide assistance...”?. At least this would be clear and does not lead to confusion.

**Mekonnen Tesfaye Damessa:**
I prefer not to mention “little payment” in the definition because the issue of payment is secondary when we think of volunteering. The manual can clarify the inclusion of work done willingly with little (high for that matter) payment made to reimburse costs.

2) The word “little payment” does not necessarily mean mere reimbursement. It may mean reduced payment and confuse with actual employment/work done to promote product or attract customers.

3) If we have to mention payment in the definition, we better put it after ‘no payment’. The most important feature of volunteer work is that it is ‘not done for payment or profit or family gain’. Mentioning ‘payment’ around the beginning of the statement may degrade the value people associate with volunteering.
**Russell:** As I believe that it is very important that the definition of volunteering is sensitive to poorer countries and people, I do have a concern that self-help volunteering is not included. I realise this is a controversial point but in relation to extreme poverty and HIV/Aids, it often can make the difference between surviving and not surviving. The self-help groups of people who get together to help each other cope with cancer or some other terminal illness is surely no different from people who volunteer to serve on a rate payers association or parents association to make their community or the school of their children better. In the case of self-help groups, members similarly benefit while also benefiting others. This is particularly important in developing countries where social capital is becoming better recognised for the mutual benefits it offers, particularly in areas of extreme poverty. The UN also recognised self-help organisations in their classification system. I do not however believe that the proposed new definition is going to capture this aspect of volunteering and therefore does require a prompt of some kind. If we don’t specifically address it, in some instances it might be included while most others it won’t, for this reason it is important that it is dealt with one way or another. This does to some extent open up a can of worms however for example should the definition of volunteering equate the book clubs of wealthy housewives with the burial societies of the extreme poor, vulnerable to HIV/Aids and unable to bury their family members without this kind of mutual support?

**Jacqueline Butcher:** Same concern. Once we leave out the part of “family” in the definition, this will take on a different course. We will have to keep on looking for ways to clarify what happens outside of that household. I may be assisting my mother, and this will count as volunteer work because she is family, but maybe does not live in my household, maybe she does. I do not see why you can’t leave the immediate family part on, but this is your decision, as long as you are conscious of it.

**The survey platform: use of labour force surveys versus other household surveys**

**Statistics New Zealand:** We agree with the proposed resolution. Whether or not it is doable to include additional information such as the occupational classification should be decided by each country individually. Most important is that the amount of questions is at a comfortable level and that the respondent burden is as minimal as it can be kept without waiving a lot of necessary information. The supplement module should also be in line with the labour force survey, in particular regarding the age groups included and the reporting times (one week, one month, etc.).

An issue to consider is that asking for the main voluntary organisation only will miss out on a lot of volunteer activity. The Statistics NZ Non-Profit Institutions Satellite Account showed that 46% of volunteers did so for more than one organisation.

**Archambault:** The Labor Force Survey is no doubt the best because of its rich basic information and of the correlations that can be done between the qualification of the volunteer in his/her paid job and the tasks done during volunteer time. The limitation of proxy respondents does not exist in France (and I think in many European countries) because the same household is interviewed 6 times (once each quarter) and the initial and final face to face interviews are for all the persons 15 and over living inside the household (the intermediary interviews by a proxy respondent by phone).

The main issue in Europe is that Eurostat already decided what will be the supplements to LFS till 2014. So intensive lobbying at Eurostat is needed.....

The second best platform is Living Conditions of Households survey, with variable supplements already scheduled by Eurostat as well. The Third best is Time use surveys, with the risk of heavy under estimation of formal and informal volunteer time.

**Verduzco:** agree
### Proposed module and instrument design

**Sub-issue 3A: Inclusion of proposed module**

**Statistics New Zealand:** No further comments. We agree with the proposed resolution.

**Archambault:** It is very useful to have a sample module, even if it has to be changed in local context. Copies of the questionnaires already used by statistical offices could help also especially if they are in the local language.

**Verduzzo:** agree

**Russell:** I fully agree with the inclusion of a proposed module especially as it has included experiences and expertise from a wide range of countries. I think it would be difficult for a single Stats department to come up with this kind of considered effort, although obviously they should be able to make relevant country specific changes where appropriate. However the inclusion of the module does then put more responsibility on the team preparing it to ensure that it is not biased toward developed countries where all but one of the surveys on which it was based were conducted. It needs to ensure that the often more complex situations on poorer countries in continents such as Africa, South America and Asia are accommodated as far as possible.

**Sub-issue 3B: Introductory orientation statement vs. Prompts**

**Statistics NZ** agrees with the proposed resolution. Our experience in cognitive testing has been similar to that of the Canadians. In the Time-Use Survey, we now use a fairly short question, and then go through many prompts to trigger recall on the types of volunteer work undertaken.

**Archambault:** OK for a shorter lead-in question, but the example of Canada has not to be generalized. It is a very large country with sparse population and very expensive travels. In more dense countries, household surveys are run by face to face interviews; in such situation the interviewer can give examples by showing cards. These examples have to be chosen by a collaboration between statisticians and representatives of civil society. Statisticians indeed are not familiar of the field and they have generally a vision of the NPS through the lens of the sectors of national accounting. The result is that they think first to membership organizations or charities included in NPISH, more than to market organizations, considered as businesses, such as culture and recreation organizations, or organizations mainly financed by public money, considered as government (disabled facilities or services for instance). Volunteering is high in all these organizations and may be overlooked without such a collaboration.

**Verduzzo:** I see very clear that a long definition (with some examples) through a telephone survey may not be workable but we have to consider (as many surveyors do) that questionnaires (surveys) through a telephone conversation are of a lower quality (and cost) than when accomplished directly face-to-face. My suggestion would be to keep the introductory longer question when applying the questionnaire face-to-face and put appropriate prompts when through the telephone as suggested. When we were going to apply our questionnaire in Mexico, we tested that many times and it was based on that that we included the introductory longer question followed by another small question: Is this clear to you or would you like me to repeat the examples? In many instances people were telling us to repeat the examples and that was excellent because we knew that they were getting at the point. The second group of filters on page 9, filters 01, 02 and 03 are vague: one needs to be specific, concrete when asking, otherwise problems of meaning arise immediately. I would leave only filter 01 of the first paragraph and skip the other two: In paragraph first, Filter 01 (was this unpaid work) “mandatory” and skip the word ““authorities” because if that is mandatory we do not need to know who or what mandated that.
**Jacqueline Butcher:** I am glad Canada piloted the survey and it all depends on how you prompt people. I am happy you have still decided to use a prompt even though it is shorter. It is important in societies that do not have a clear concept of volunteering. Many people volunteer and they do not know that this is what they are doing. “Volunteering” is not an understood worldwide concept.

**Sub-issue 3C: Filter questions**

**Statistics New Zealand:** No further comments. We agree with the proposed resolution.

**Archambault:** OK, but the number of filters has to be limited

**Russell:** The proposed rephrasing of FILTER 01 should possibly include the CSI context where forced volunteering is becoming considerably more prevalent by phrasing it as follows:

Was this unpaid work required by authorities, such as part of the mandatory national service, by court order or by an employer?

FILTER 03 needs a qualifier to make sense: *If answer was not given in currency units ask: What is the approximate value* ....

**Sub-issue 3D: Reference period**

**Statistics NZ** agree with the proposed resolution to make the recall period 4 weeks. However, our recommendation is that this only applies when identifying the **number** of volunteers / volunteering incidents. Statistics NZ support a recall period of 7 days for identifying the actual hours volunteered. In our opinion, 4 weeks is too long a recall period for actual hours, and the benefits of a 7 day recall period outweigh the costs.

**Archambault:** OK, but this is not useful when the LFS is run continuously all over the year. A one week reference period is enough in this case.

**Verduzco:** I remember the discussions about using a short period of time of 4 weeks, however we need to fully realize that one is going to register volunteer work and the problem is that we cannot know the extent to which we are limiting our knowledge, or do we know? In our case in Mexico we would have taken away from our knowledge a lot. I know your fears and the fears of many others but since I graduated as sociologist and demographer under the supervision of Harley Browning who successfully got “Life histories” through surveys which is something I inherited from him in my own works, I know that people (us also) remember a lot of what they do in their lives especially when doing something meaningful as working or doing voluntary work; isn’t it meaningful?, don’t we need to take a personal decision for doing it? I agree that if we make a questionnaire through the telephone we are very much restricted in many ways but we all know that this kind of surveys are less trustable in several respects.

**Jacqueline Butcher:** I know that you will be leaving the one month reference period. I still think it is too short a time. There are many volunteer activities that take place once or twice a year. How will we grasp these volunteers and these activities?

**Data elements**

**Sub-issue 4A: Additional data items**

**Statistics NZ:** No further comments. We agree with the proposed resolution.

**Archambault:** LFS is really a very long survey and additional data items may be discouraging and unproductive. Why not a two steps process, where an additional questionnaire is proposed another time to a sample of volunteers identified by the first survey?
**Sub-issue 4B: Volunteer rate**

**Statistics NZ**: We agree with the proposed resolution and support the view to have a clear definition. We have given some consideration to including child volunteers, but we know that their volunteering rates would be very low, and they are not included in the labour force. This would make it difficult to accurately measure child volunteering.

**Archambault**: This wording is odd. Firstly, the volunteer rate is calculated on the sample of the survey and then it is extrapolated to the whole population of the same age and over than the sample of the survey, to obtain the number of volunteers. This age in LFS may depend of the age at which school is no more compulsory.

**Sub-issue 4C: Calculating the number of hours volunteered**

**Statistics NZ**: do not fully support the proposed resolution. Our recommendation is that the recall period for hours volunteered be only 7 days, not 4 weeks. This 7 day recall period has two advantages (for New Zealand, anyway)

- It is likely to provide a more accurate response. Four weeks is a considerably long recall period for the number of hours volunteered
- It matches the recall period of the NZ Labour Force Survey

However, we would consider pilot testing a number of options, including the 4-week recall period. Statistics NZ definitely require separate totals for hours worked in formal unpaid work, and in informal unpaid work. A further level of disaggregation would be ideal, however, we recognise that this will increase the respondent burden and possibly compromise the accuracy of the estimates.

**Archambault**: The proposed sequence is better than the preceding one. But be aware of rounding up the hours for socially valued behaviour. Fortunately, it may compensate the oblivion...

**Sub-issue 4D: International volunteer work**

**Statistics NZ**: does not support the proposed resolution to include a question on international volunteer work. The main reason for this decision is that there will likely be few or no responses, and the data will be of low quality. Also, if a respondent has volunteered overseas, we would need further information on the duration of their trip, the type of work they were doing and how many hours they volunteered for. This would significantly add to the respondent burden. The voluntary work would not be in New Zealand’s production boundary as the production takes place outside NZ’s economic borders. So ideally we would be measuring the economic activity of foreign-resident volunteers in NZ.

**Archambault**: If this question is asked, why not extend there the recall period to last year or last three years, because in such case there is no oblivion?

**Russell**: I think this is a good solution to a difficult problem

**Additional chapter on survey administration and reporting**

**Statistics NZ**: No comment.

**Chapter on valuing volunteer work**

**Statistics NZ**: No comment.

**Updating existing annexes and adding additional useful information**

**Russell**: I agree with the concern of the respondent who felt the international classification of type of activity doesn’t always correspond with national classification. What we have found useful is to use the international classification and then code the answer a second time using if necessary more than one national code. In this way by cross analysing the two codes it becomes possible to use both coding systems and help the local country better understand the meaning of the international codes in their own country. This ensures that it remains both internationally relevant while still being nationally relevant.
Memo #4 to the Technical Experts Group
March, 2010

Summarizes and responds to the comments that TEG members made on the proposals in Memo #3.

Outlines a revised version of the survey module reflecting the results of a pilot test.

Outlines the final steps in the development of the Manual.
MEMORANDUM

To: Joint JHU-ILO Technical Experts Group on the Measurement of Volunteer Work
Re: Next Steps in Preparation of ILO Manual on the Measurement of Volunteer Work
Date: March 26, 2010

Dear Joint JHU-ILO Technical Experts Group Member:

I am writing to follow up on all of the helpful comments we received following our September 15, 2009, memo to you outlining our proposed responses to the comments we received from the International Conference of Labor Statisticians on the initial draft of the Manual on the Measurement of Volunteer Work. I also want to bring you up to date on our plans for completion of the ILO Manual on the Measurement of Volunteer Work.

To do so, the memo first summarizes and responds to the comments that TEG members made on the proposals we set forth in our September 15 memo. Next, we outline a revised version of the survey module reflecting the results of a pilot test of the first draft module. Third, this memo outlines the next steps that will be taken in the final phase of the development of this Manual.

The feedback you provided moves us very far towards consensus on the concepts underlying the ILO Manual. Though this process has required more time than we had expected, we now feel prepared to complete a revised draft of the Manual with the confidence that both statisticians and members of the volunteering community will find this document acceptable.

A complete revised version of the Manual will be distributed to you for review early in April. At the same time, we are trying to pin down the dates for a final meeting of the Technical Experts Group. Our hope is to convene this meeting in late April or early May assuming the required funding can be secured in time, and we will contact you as soon as we have confirmation of this. In the meantime, feel free to convey to us any comments you have on this memo or on the final draft of the Manual. Ideally, we would like to have these comments prior to April 25.

As a reminder, copies of previous memos, comments offered by the TEG and international experts, meeting reports, and the first draft of the Manual can be found on our
I. Major Issues and Proposed Resolutions

As you may recall, the September 15, 2009, memo identified seven (7) issues that needed to be addressed in the final revision of the Manual and it sought advice from the Technical Experts Group on the suggestions we made to resolve these issues. Those issues were:

1. The definition of volunteering;
2. The Survey platform: use of labor force surveys versus other household surveys
3. Survey instrument design
4. Data elements
5. Survey administration and reporting
6. Valuing volunteer work
7. Annexes and additional useful information

Overall, the comments received were supportive of the suggestions we made. The discussion below summarizes these TEG responses and outlines how we are proposing to deal with them.

Issue 1: Volunteering as a form of work but not paid employment:

The Issue: To be covered in labor force surveys, volunteering must be clearly identified as a form of work yet sufficiently differentiated from employment so as not to confuse unemployment statistics by counting volunteers as “employed.” Some ICLS participants felt that the draft Manual’s use of the word “activities” in the definition of volunteering obscured this identification of volunteering with work.

September 15 proposal: We proposed to respond to this concern by deleting the word “activity” from our original definition and retaining the word “work,” but including language in the Manual highlighting the importance of these distinctions. We did not recommend using a minimum time cut-off to define volunteer work. But we proposed to insert additional clarification regarding incidental activity vs. volunteer work in Section 3.7 of the draft Manual to emphasize that the activities being measured would qualify as “work” in the ILO usage except that they are done willingly without pay for possibly less than one hour at a time.

TEG response: While all members of the TEG agreed on the importance clearly identifying volunteering as a form of work, and clearly differentiating it from employment, one TEG member argued strongly for retaining the word “activities.” The reason for this is that the word “activities” has important implications for volunteer groups, especially in Europe, because it signals that volunteering can involve more than “service” functions. Reflecting this, Europe will celebrate 2011 as its ‘European Year of Voluntary Activities promoting active citizenship.’

Proposed resolution: As noted later in this memo, we have managed to find a way to retain both the words “work” and “activities” inside the definition.
Issue 2: Inclusion of both formal and informal volunteer work

The Issue: ICLS Working Group members noted that the definition should do a better job of clearly distinguishing informal and formal types of volunteer work for reporting purposes and also differentiate among types of institutional units hosting formal volunteers.

September 15 proposal: We proposed to respond to this concern by mentioning both types of volunteering in the basic definition that leads off the proposed survey module. We also proposed to add language to the draft Manual in Sections 3.9 and 3.10 to underscore the importance of ensuring that formal and informal volunteering are clearly separable in the data for proper sectoral allocation in the SNA system.

TEG response: TEG members concurred on including both formal and informal volunteer work, on clearly identifying these two types of volunteer work in the definition, and on reporting on them separately in the data. There were, however, two questions that were raised in relation to this issue.

1) Identifying registered organizations: A suggestion was made to include a checkbox in the survey to indicate whether or not the organizations identified in the survey are also officially registered with government ministries. Identifying registered organizations holds special importance in some countries, and is very useful in developing satellite accounts on nonprofit institutions.

Proposed resolution: Despite its usefulness, we do not agree that including a checkbox for respondents represents the best approach because respondents are not likely to know whether the organization for which they volunteered is registered with the authorities or not. Furthermore, whether or not the organization is registered does not in itself determine whether the volunteering is formal or informal. While there is a great deal of overlap between formal volunteering and registered organizations, it is still true that in many countries many formal organizations are still not registered due to administrative and other problems.

Instead, we will make it more explicit in the text that conducting this survey could be helpful to countries in improving their administrative records and in building and expanding their business registers and building satellite accounts, and that coders should note whether or not the organizations are registered when they code them.

2) Volunteering for the benefit of non-humans: The definition proposed in the September 15 memo does explicitly mention that it captures work that improves the lives of non-humans, such as animals or the environment. Examples of both situations provided in comments on the memo are: a) A stranded whale could be helped by a household member just for the purpose of helping the animal. The beneficiary is an animal, and b) Cleaning the beach could be done by an individual for his/her own pleasure in order to do something good for the environment. Again, this would be voluntary work performed outside the household, not for or through an organization. In this case the beneficiary is the environment not a human being or animal.
**Proposed resolution:** Although work is defined as something that can only be conducted for people and organizations, and not by who or what they benefit, we nevertheless agree that volunteering that benefits animals, the environment, and the community should be considered in-scope and classified as informal volunteer work.

We therefore propose to change our definition from the earlier versions that referenced “someone outside of one’s own household” to one that references “others outside of their own household,” and add text in the criteria section to underscore that volunteer work can benefit a wide assortment of actors, and that it is the work, not the beneficiary, that defines volunteer activity.

**Issue 3: Compensation of volunteers**

*The issue:* The ICLS Working Group agreed that some form of compensation had to be allowed in the definition of volunteering because volunteers are often supplied with meals, lodging, transportation, and supplies. Such cash or in-kind payments should not be seen as wages (although it was mentioned that, in some cases, they could be higher than average wages in the region). A variety of suggestions were offered about balancing the levels of compensation against the type of work, the level of sacrifice for the volunteer, and the location of the volunteer work.

*September 15 proposal:* We proposed emphasizing the distinction between “pay” or “compensation” and reimbursement of costs associated with the volunteer work, and proposed changing language in paragraph 3.7b.ii. of the draft Manual accordingly. We also suggested offering an optional filter question for compensation that might disqualify an activity from being called volunteering.

*TEG response:* The responses we received from TEG members overwhelmingly agreed that volunteer work should be unpaid, but that reimbursement of expenses is acceptable. The phrase “little or no compensation” was considered by many respondents to be too confusing.

*Proposed resolution:* We agree with the comment about the phrase “little or no compensation” and propose to remove the phrase from the definition of volunteering.

Two additional questions regarding compensation were raised in the comments we received and we would like to respond to them below:

1) **Gifts of appreciation:** A question was raised regarding the offering of gifts in return for volunteer work. The suggestion was made to add additional language indicating that receipt of moderate gifts which are symbolic expressions of gratitude for work undertaken does not disqualify an activity from being considered true volunteering.

The example came from New Zealand: in the Maori culture, gifts ("koha") are made in receipt of volunteer work. In cases where the koha exceeds the expenses incurred, and is paying for the service, it would not be in scope as volunteering. In New Zealand, Inland
Revenue (the NZ tax department) has compiled some guidelines on payments and gifts in the Maori community. Statistics NZ has the opportunity to use these guidelines when determining whether the work is voluntary or not.

**Proposed resolution**: We propose to add this caveat about gifts to the *Manual*, indicating that receipt of modest gifts not disqualify an activity from being treated as volunteering.

2) **Treatment of apprentices**: Additional information was requested about the treatment of unpaid apprentices, who contribute to the production of goods and services as defined by national accounting, but are not paid. The ILO manual on concepts and methods states that "apprentices who are not paid or are simply receiving financial compensation or an allowance unrelated to the work performed may be included among the employed on the basis of whether or not they are associated with the productive activities of an enterprise. If such apprentices contribute to the production of goods and services, they should be classified as employed”.

**Proposed resolution**: Where international standards exist in defining who is considered to be employed, these workers should not be considered volunteers to avoid double-counting. Thus, apprentices should not be counted as volunteers.

**Issue 4: Volunteering under Compulsion**

*The issue*: The ICLS Working Group agreed that an activity that is compulsory by law cannot be volunteer work, but that activities that are encouraged by social pressure are still within scope unless the social pressure involves tangible penalties for non-participation or has the force of law. In addition, organizational requirements, such as a requirement that students engage in community service prior to graduation should not disqualify an activity from being considered volunteer work, so long as the other criteria apply. However, there were requests for specific examples of activity that would fall outside of these boundaries.

*September 15 proposal*: We stated that examples of activities that would not be considered volunteer work include choice of national service in lieu of mandatory military service, and community service mandated by court order.

*TEG response*: The TEG agreed with the ICLS Working Groups’ position. However, there were two particular activities requiring further clarification:

1) **Student volunteering**: There was some disagreement with our suggestion that students who volunteer as a result of a requirement for graduation should be counted as volunteers. In many countries graduation is compulsory and therefore non-participation is illegal and its consequences are severe.

2) **Corporate volunteering**: Similarly, with corporate-social responsibility trends on the rise, more companies are encouraging workers to volunteer. Some businesses provide incentives for workers to do so, such as offering paid time-off or organizing employee-
group activities. Others, however, make explicit that participation is a requirement, and the consequences for non-participation are severe (such as being fired).

**Proposed resolution:** Since unpaid work done under legal compulsion is not considered volunteer work, in countries where graduation is a legal requirement, and volunteering is a condition of graduation, the service work done without pay in fulfillment of this condition cannot be considered true volunteering, though national implementers of the Manual can decide whether the student volunteering in their country rises to this level of a legal requirement.

Similarly, cases where employers offer incentives to volunteer, but do not require it as part of the employment, should be considered in-scope.

Language will be added to paragraph 3.8 of the draft Manual to accommodate these examples. Additional discussion of a filter question for compulsory activity is discussed in section 5.C. of this memo.

**Issue 5: Immediate family**

*The issue:* The first draft of the definition of volunteer work stipulated that to be considered volunteer work, the work in question had to be directed to someone outside of one’s “immediate family.” This was done because the unit of analysis more commonly used in labor force surveys—i.e. the “household”—may be too narrow, leaving open the possibility that help to one’s aunts, uncles, parents and grandparents could end up being included in volunteering data, thus substantially exaggerating the scale of volunteering that occurs. However, ICLS delegates pointed out that there is no common definition of “immediate family.” One suggestion was to specify this in the Manual using the concept of “degrees of separation.” to define this concept more precisely.

*September 15 proposal:* Based on discussions with officials in several statistical agencies, we concluded that applying a definition of immediate family to this process would be arbitrary at this point. Accordingly, we proposed to use the concept of the “household” to mark the boundary between what is included in volunteering and what is not. We also proposed to include an optional filter question for those wishing to determine what portion of the volunteering they were measuring was really being performed for members of respondents’ families outside their household.

*TEG response:* TEG members expressed general agreement with our decision to move to the concept of household to mark the boundary between what is included in volunteering and what is not. There were some expressions of discomfort, however, with including volunteering for family members outside of the household and the potential consequences this has for inflating or deflating the rates of informal volunteering. We sympathize with the feeling, however we feel constrained in our effort to remain in line as much as possible with existing international labor force survey standards. It is our hope that employing the option of the filter question about the respondent’s relationship to the beneficiary, as has been used in Australia, will help to add clarity to the issue. One additional issue was raised concerning immediate family:
1) **Foster parenting:** The suggestion was made to include foster-parenting as a volunteer activity. This is of particular importance in countries where millions of AIDS orphans, or victims of natural disasters, are taken in by non-family members. Government reimbursement for fostering is minimal in these cases, and most countries do not consider it to be a wage.

**Proposed resolution:** The minimal payment for foster-parenting would not disqualify foster-parenting from being considered volunteer work because it rarely fully covers the costs incurred to the foster parents. However, the international treatment of the term “household” includes non-relatives and makes it difficult to include foster-parenting as a form of volunteering.

There is one circumstance where foster-parenting can be considered to be volunteering. This is where foster-parenting is a short-term activity, for a few days or weeks, and there is a clear understanding that the child will not stay with the foster family once permanent care is found. In this case, the work could be considered volunteering because the service is being provided to a person outside the household. Where the child stays long-term, however, that child becomes a member of the household and shares all of the same resources, thus disqualifying the care from being treated as volunteer work.

However, even in cases where the foster-parenting is a short-term activity, calculating the hours volunteered by the foster-parents is complicated because it is difficult to separate out those hours volunteered from those spent doing other household activities.

To resolve this question, we propose that foster-parenting be coded separately. Further, we do not suggest that the hours reported in short-term foster care be included in the total hours volunteered. However, reports on volunteering could identify foster-parenting as an activity related to volunteer work and could usefully report it to add value to any report on civic participation.

**Issue 6: Definition of volunteer work**

The comments we received have given us new perspective on the definition of volunteer work. As noted above, concerns were raised about the terms “work” and “activities,” the question of payment, the beneficiaries of volunteer activity, and the question of compulsion. In carefully considering all of the suggestions offered, we have taken **one more stab at revising the definition.** Our suggested revision is highlighted in grey in the table below:
This revised definition clarifies several concerns:

- First, it removes the term “little payment” to make the question of compensation less problematic;
- Second, it uses the term “non-compulsory” instead of “willingly” to emphasize the influence of outside factors rather than the individual’s personal preferences;
- Third, because work can only be conducted for people and organizations, this definition does not address the intended beneficiary of the work performed (environment, animals, wider community, people, etc.) or confine it any particular form of action (e.g. providing assistance or promoting a cause). However, because the nuance of this distinction is easily confused, we hope that introducing the term “others” will help to reduce the impression that volunteering must benefit only people or organizations;
- Fourth, it does not rely on examples to explain the definition (such as “to provide assistance or promote a cause”);
- Fifth, it retains both the words “activity” and “work.”

**Issue 7: Introductory orientation statement vs. prompts**

*The issue:* The first draft of the module presented to the ICLS began with a fairly long introductory statement that included examples of both informal and formal volunteering. This was done to fix in respondents’ minds a broad concept of volunteer work. Several members of the ICLS Working Group, the Canadian testers, and other respondents felt that this statement was too lengthy and confused respondents. Instead, they suggested that a questionnaire that prompts respondents on a variety of types of volunteer activity separately would yield better estimates than long introductory statements with a laundry list of eligible types of activity, especially when telephone surveys are being used. This is consistent with international experience revealing that the inclusion of prompts affects the reported level of volunteering.

*September 15 proposal:* Convinced that the long introductory question was not workable, especially in telephone interview situations, we set out to develop a module with a shorter lead-in question followed by a reasonable list of individual prompt questions followed by a catch-all prompt question. (The revised survey module is included in Attachment A).
TEG response: TEG members agreed with our decision to develop a shorter lead-in question followed by a reasonable list of individual prompt questions followed by a catch-all prompt question. However, one respondent warned us against generalizing the Canadian testing experience to the rest of the world, pointing out that in more dense countries, household surveys utilize face to face interviews. In such settings, this respondent noted, showing cards may be more useful, with examples chosen in collaboration between statisticians and representatives of civil society.”

Proposed resolution: We agree with this observation and plan to suggest in the text that “show cards” may be a useful tool in many countries, and that working in collaboration with local volunteering experts is a good way to choose relevant examples. We will include this suggestion in the revised text of the Manual.

Issue 8: Filter questions

The issue: Several members of the ICLS Working Group suggested adding filter questions to the survey to check on: 1) whether the volunteer work is a result of legal or other compulsion; and 2) whether the volunteer work involves compensation that exceeds the amount defined as within scope.

September 15 proposal: We proposed language for filter questions that could be added to the module as an option for countries where local context makes their inclusion relevant. The language for the filter questions would be identified in Chapter 4, but would not be included in the sample module. Additionally, we proposed adding language to the text to provide greater conceptual clarity regarding issues of compulsion and compensation.

TEG response: Most TEG members agreed that including filter questions as an option would allow statisticians to check on features that may have particular relevance in their countries. Some respondents expressed concern, however, that doing so would add too much length to the module.

Proposed resolution: We will emphasize in the text that the inclusion of filter questions by statistical offices is optional, and depends only on local ability to incorporate these questions into the survey platform.

Issue 9: Reference period

The issue: Except for countries that conduct monthly labor force surveys and plan to include the volunteer module each month, the draft Manual recommended a four-week reference period as the best compromise to take account of the infrequent nature of volunteering and the problem of accurate recall over periods longer than four weeks. Participants in the ICLS Working Group agreed with this proposal, but indicated that labor force surveys generally use a one-week reference period and mixing reference periods can confuse respondents.

September 15 proposal: In our September 15 memo, we proposed to retain the 4-week reference period. We noted that the US and Canada (in a previous version of their volunteering survey)
used an LFS platform to measure volunteer work and included a different reference period for the volunteer questions without causing confusion.

**TEG response:** The one month reference period held some support among TEG members; however, some respondents found it to be too long and preferred a week reference period, and others found it to be too short and preferred the 12 month reference period.

**Proposed resolution:** We still believe that the Manual’s current approach remains the most reliable and do not wish to propose shortening or extending the reference period. The text of the Manual does indicate when shortening the reference period to a week is a reasonable option, and also offers a supplement for countries implementing surveys once annually that allows them to cover special volunteering activities.

II. Revised Module Structure and Design Features

A revised draft of the Module on the Measurement of Volunteer Work reflecting the decisions outlined above has been prepared and is attached to this memo as Attachment A. This revised draft was informed by cognitive testing in Canada, desk reviews in France and Korea, and by comments provided by international experts.

The revised module remains structured by type of volunteer activity with its focus on what the respondent did, and it retains its approach in assessing the quantity of volunteer time, the type of work, and the industry or field in which the work was done. Clarifying wording changes were also made and are not outlined here. The following key features have been modified:

1) **Introductory orientation statement and prompts:** As noted above, the results of the testing indicated that the original longer introductory question was not particularly helpful and sometimes confusing. Questions and concerns arose about the choice of wording, the examples chosen, and the ability of respondents to remain engaged while being read a long laundry list of items.

At the same time, to avoid losing the benefit that a longer introductory statement provides by fixing the concept of volunteer work in the mind of the respondent, the revised module retains the use of examples in a set of prompts later in the module. Doing so has the dual effect of bringing the respondent quickly into the survey and allowing respondents with a clear idea of what is being asked to respond quickly, while retaining the possibility of providing further explanation for those respondents who don’t have a clear picture of what the focus of the survey really is on.

Respondents who answer “No” to the initial shorter question about involvement in in-scope activity are told that they will be read a list of broad types of activity, and are asked to provide yes or no answers to each question. Respondents are then asked for further detail about all of the activities for which they provided a “yes” answer.
III. Final Thoughts and Next Steps

There have been two developments at the ILO to report. First, in May 2009, the ILO created a new Department of Statistics to replace the Bureau of Statistics. The Chief Statistician of the new Department is Mr. Rafael Diez de Medina, and he is now the chair of our TEG. Our former chair, Sylvester Young, retired from the ILO at the end of 2009. We are grateful to Mr. Diez for committing to carry on the work to develop the Manual on Volunteer Work and express our gratitude once again to Mr. Young for giving us the opportunity to engage with ILO on this project.

Secondly, we have added a new member to our TEG Group: Sławomir Nałęcz, the Deputy Director of the Social Surveys Division of Poland’s Central Statistical Office, which recently announced it would undertake a national estimate of the nonprofit sector and volunteer work in Poland. Our questionnaire has been adapted to the needs of Poland’s CSO, and is being tested in the field as you read this memo. The questionnaire will be administered at the national level this summer. We look forward to learning more from the Polish experience and hope the Polish experience will inspire other European countries to take on similar work in preparation for the 2011 European Year of the Volunteer.

Dr. Nałęcz will replace Mr. Ato Mekonnen Tesfaye, who has left the CSO in Ethiopia and is no longer able to participate in his official capacity.

With many of the tough issues resolved, we are now very close to completing the Manual on the Measurement of Volunteer Work. Without your contributions to date we would not have gotten to this point and I am deeply grateful to you for the enormous assistance you have provided to us. I hope you will look carefully at this memo and let us know whether you are willing to accept the conclusions we have reached on the issues that remained outstanding. We will then be in a position to put the final stamp of approval on the final draft of this Manual and submit it to ILO for a final review and issuance.

As mentioned earlier, we will be in contact with you shortly about a possible final meeting of the TEG. In the meantime, my thanks again for all your help throughout this process.

Sincerely,

Lester M. Salamon
Director

CC: Megan Haddock, JHU/CCSS, Mr. Rafael Diez de Medina, ILO; Adriana Mata-Greenwood, ILO; Mae Chao, UNV; Members of the UNECE Experiment Group; Eivind Hoffmann, Norwegian Directorate of Immigration (ILO retired); Statistics New Zealand; Ivo Havinga, UNSD
## Recommended Core Survey Module
(February 2010)

<table>
<thead>
<tr>
<th>Step or variable</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>START</strong></td>
<td>So far I have been asking you about paid work. The next few questions are about unpaid non-compulsory work that you did, that is, time you gave without pay to activities performed either through organizations or directly for others outside your own household.</td>
</tr>
</tbody>
</table>

[Note: Work is understood here to be an activity that could, in principle, be done for pay.]  
[Note: Reimbursement of expenses does not disqualify an activity.]

<table>
<thead>
<tr>
<th>WORK_01</th>
<th>In the last four weeks [provide dates marking the period] did you spend any time on this kind of unpaid activity?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>[If yes, proceed to WORK_02. If no, proceed to PROMPT_01]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WORK_02</th>
<th>Please tell me what kind of unpaid work you did. Please mention as many activities as you can remember. Why don’t you start with the unpaid work that [you did most recently/ or on which you spent the most time].</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>[Record response verbatim and use a lookup table or code book to assign occupation codes.]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HOUR_01</th>
<th>I would like to determine the total number of hours you did this [repeat back to the respondent the first activity they reported, then repeat HOUR_01 through TYPE_ORG04 for each additional activity mentioned] in the last four weeks. Do you recall approximately how many hours you spent on this unpaid activity?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>[If yes, record number of hours given and go to TYPE_ORG01. If no, or unsure, go to HOUR_02]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HOUR_02</th>
<th>If you do not recall the total number of hours, could you perhaps recall how many times you did this activity in the last four weeks?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>[Record response verbatim and use lookup table or code book to assign frequency codes]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HOUR_03</th>
<th>And how many hours did you spend doing this unpaid work the last time you did it [or on average each time you did it]?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>[Record response verbatim]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TYPE_ORG01</th>
<th>Did you do this unpaid work for or through an organization?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>If no, code [informal volunteering] and go to WORK_03.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TYPE_ORG02</th>
<th>What is the name of the organization for which you did this unpaid work?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>[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. If NAME is in code book, and go to WORK_03.]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TYPE_ORG03</th>
<th>If NAME is not in code book, or if no code book is used, ask</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>What does this organization do? ____ (80 spaces)</td>
</tr>
</tbody>
</table>

[Record response verbatim and assign industry code based on response.] |

<table>
<thead>
<tr>
<th>TYPE_ORG04</th>
<th>I will now read you a list of four types of organizations. Please tell me which of these types best describes the organization for which you worked.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>A. Charity/non-profit organization/NGO/union/or religious organization</td>
</tr>
<tr>
<td></td>
<td>B. Business</td>
</tr>
<tr>
<td></td>
<td>C. Government</td>
</tr>
<tr>
<td>Step or variable</td>
<td>Question</td>
</tr>
<tr>
<td>-----------------</td>
<td>----------</td>
</tr>
</tbody>
</table>
| D. Other / Not sure | [Record response verbatim and assign sector code based on response.]
| | [If respondent mentions more than one type of activity, ask questions HOUR_01 through TYPE_ORG04 for each activity separately. Then proceed to WORK_03] |
| WORK_03 | Is there any other unpaid non-compulsory time you gave without pay to activities performed either through organizations or directly for others outside your own household [provide dates marking the period]?
| | [if yes, go to WORK_02. If no, proceed to END] |
| PROMPT_01 | Sometimes people don’t think of some activities as unpaid work. I will read you a list of examples of this kind of activity. If you gave any time without pay to these activities during the past 4 weeks [provide dates marking the period], please respond with a “yes” to each of these as I read them. Otherwise say “no.” |
| PROMPT_02 | Did you do any unpaid work for a community organization, such as fundraising, providing administrative support, or serving on the board of a school, library, health care center, NGO, club, union, church, or association?
| | ___yes/____no |
| | [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.] |
| PROMPT_03 | Did you clean or improve your community, such as pick up rubbish, or work to improve the water supply, parks, or roads?
| | ___yes/____no |
| PROMPT_04 | Did you organize an event, such as a community gathering, a sporting or cultural activity, a religious celebration, or a political event to make others aware of an issue?
| | ___yes/____no |
| PROMPT_05 | Did you provide any unpaid assistance to persons outside of your household, such as the elderly, children, the poor, or disaster victims, prepare and serve food, or transport persons or goods?
| | ___yes/____no |
| PROMPT_06 | Did you conduct any unpaid coaching or officiating, counseling, or provide any free medical care or legal advice, gather information or scientific data?
| | ___yes/____no |
| PROMPT_07 | [If respondent says yes to any one of questions in PROMPT_02 to PROMPT_06, say:
You said that you [read back the examples provided for the questions they responded yes to: 1. worked for a community organization, 2. worked to clean or improve your community, 3. worked to organize an event, 4. provided assistance to persons outside of your household, and/or 5. Provided coaching, counseling, medical legal, or food or transport services.]
Ask questions WORK_02 through TYPE_ORG04 for each activity. If no, proceed to END] |
| END | End of survey module |
### Additional Questions if Survey is Annual

<table>
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<tr>
<td>SPECIAL</td>
<td>Additional questions if survey is annual.</td>
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</table>
| SPECIAL_01       | People often do unpaid non-compulsory work just a few times a year for special events. In the past twelve months, did you give any time without pay to activities performed either through organizations or directly for others outside your own household for a special event that you have not reported on this survey because it did not take place in the past four weeks?  
If yes, proceed to SPECIAL_02. If no, proceed to END. |
| SPECIAL_02       | Please tell me what kind of unpaid work you did. Please mention as many activities as you can remember. Why don’t you start with the work that [you did most recently/ or on which you spent the most time].  
[Record response verbatim and use a lookup table or code book to assign occupation codes.] |
| SPECIAL_03       | I would like to determine the total number of hours you did this [repeat back to the respondent the first activity they reported, then repeat SPECIAL_03 through SPECIAL_09 for each additional activity mentioned] in the last twelve months. Do you recall approximately how many hours you spent on this unpaid activity?  
[If yes, record number of hours given, then go to SPECIAL_06. If no, or unsure, go to SPECIAL_04] |
| SPECIAL_04       | If you do not recall the total number of hours, could you perhaps recall how many times you did this activity in the last four weeks?  
[Record response verbatim and use lookup table or code book to assign frequency codes] |
| SPECIAL_05       | And how many hours did you spend doing this unpaid work the last time you did it [or on average each time you did it]?  
[Record response verbatim] |
| SPECIAL_06       | Did you do this unpaid work for an organization?  
If no, code [informal volunteering] and go to END. |
| SPECIAL_07       | What is the name of the organization for which you did this work?  
[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]  
If NAME is in code book, and go to WORK_05. If NAME is not in code book, ask |
| SPECIAL_08       | If NAME is not in code book, or if no code book is used, ask  
What does this organization do? ____ (80 spaces)  
[Record response verbatim and assign industry code based on response.] |
| SPECIAL_09       | I will now read you a list of four types of organizations. Please tell me which of these types best describes the organization for which you worked.  
A. Charity/non-profit organization/NGO/union/or religious organization  
B. Business  
C. Government  
D. Other / Not sure  
[Record response verbatim and assign sector code based on response.]  
[If respondent mentions more than one type of activity, ask questions SPECIAL_03 through SPECIAL_09 for each activity separately]. |

**END**  
End of survey module