

# MEASURING VOLUNTEERING: A Practical Toolkit



**2 0 0 1**  
**International Year**  
**of Volunteers**



INDEPENDENT SECTOR



UNITED NATIONS VOLUNTEERS

A joint project of INDEPENDENT SECTOR and United Nations Volunteers

# Project partners

The INDEPENDENT SECTOR Research Program aims to produce a body of knowledge necessary to accurately define, chart, and understand the US nonprofit sector and how it can be of greatest service to society. Its activities include research, publications, events, and a major website for researchers and practitioners: NonProfit Pathfinder ([www.NonProfitPathfinder.org](http://www.NonProfitPathfinder.org)). Research over 20 years includes administering and analyzing national household giving and volunteering surveys in the United States, offering technical advice to researchers and practitioners on giving and volunteering in more than 40 countries.

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The United Nations Volunteers is the UN organization that supports sustainable human development globally through the promotion of volunteerism and the mobilization of volunteers. It serves the causes of peace and development through enhancing opportunities for participation by all peoples. It is universal, inclusive and embraces volunteer action in all its diversity. It values free will, commitment, engagement and solidarity, which are the foundations of volunteerism.

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- **International Association of Volunteer Effort**

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# Foreword

*Measuring Volunteering: A Practical Toolkit* is the product of collaboration between United Nations Volunteers and INDEPENDENT SECTOR. It responds to the expressed wishes of many countries for support in putting a figure on the economic contribution of volunteering. The International Year of Volunteers 2001 provides an excellent context for this work to be undertaken and for the results to be disseminated widely. We would like to express our deep appreciation to the many organizations and individuals who, in the first instance, inspired our two organizations to prepare a toolkit, and who then provided valuable ideas on its content.

It has been said that the history of volunteering is written in invisible ink. It is our hope that everyone concerned with volunteerism who consults the Toolkit finds it to be of considerable help in giving shape and form to the contributions that citizens make to their societies through voluntary action.



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# Preface

Voluntary action is an important part of virtually every civilization and society, or so we think, because not every country has statistics to show what an important contribution volunteering makes to their economy. Limited information on how to undertake research on volunteering has also prevented those eager to begin studies. This was the context for meetings organized in March 1999 by the US-based nonprofit organization INDEPENDENT SECTOR and by INDEPENDENT SECTOR and the United Nations Volunteers in September 2000. Researchers and practitioners from ten countries pooled their expertise to produce this practical toolkit on measuring volunteering. We hope this publication will raise awareness of the importance of volunteering, and assist countries worldwide in undertaking measurement studies on national, regional, and local volunteering.

The *Measuring Volunteering Toolkit* is a practical guide on the study of volunteer behavior and is full of useful background and knowledge that will empower countries, particularly developing countries, to produce their own empirical data to underpin policy measures related to volunteering.

We hope you find this toolkit of value and would be delighted to receive any comments you may have on its usefulness. Contact INDEPENDENT SECTOR Research by telephone at (202) 467-6100, via email to [SusanH@IndependentSector.org](mailto:SusanH@IndependentSector.org), or via the web at [www.IndependentSector.org](http://www.IndependentSector.org); contact United Nations Volunteers by sending email to [rona@unv.org](mailto:rona@unv.org).



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# Chapter 1:

## Why measure volunteering?

This toolkit explains how to promote volunteering by carrying out a comprehensive survey of its extent and nature. The guidance offered is based on experience from several different countries (see the front of this book for details of the advisory group). However, it must be emphasized at the outset that measuring the quantitative dimensions of volunteering (that is, its extent and nature) does not give the whole truth about the *value* of volunteering; its qualitative aspects, such as the impetus it gives to the stability and cohesion of society, must also be taken into account, even though they cannot be measured in a comparable way.

A quantitative survey of volunteering is valuable because it can:

- Show government and other potential stakeholders that volunteering makes an important contribution to society and therefore deserves their support.
- Provide accurate and up-to-date data that will enable policymakers to make informed decisions about volunteering.
- Encourage citizens to volunteer by demonstrating the social and personal benefits that volunteering can bring.
- Educate the media and the private, public, and nonprofit sectors about volunteering.
- Demonstrate links between national and community service.
- Provide information that organizations can use to improve their volunteer programs and benefit the people who volunteer in them.

The toolkit takes the form of a practical, jargon-free guide intended to be useful to a broad range of audiences. These may include:

- Policymakers in national, regional, and local government
- Researchers in academic institutions
- Grantmaking trusts and foundations
- Volunteer-involving organizations in the private, public, and nonprofit sectors
- Community-based organizations

- Nonprofit resource centers and networks
- The media
- Educators

Some of these audiences will be more familiar with the principles of conducting population surveys than others. It is therefore possible that certain users of this toolkit may already be familiar with some of the guidance it offers.

The principal aim of this toolkit is to describe what is involved in conducting a *national* survey of volunteering. However, the techniques described are applicable whether the planned research covers a neighborhood, a province, a country or a region. The toolkit is being published as part of the United Nations International Year of Volunteers in 2001, but this should not be taken to imply that carrying out a survey of volunteering is merely a one-time effort; to be really useful, it should become a regular commitment.

## I. WHY IS IT IMPORTANT TO RESEARCH VOLUNTEERING?

Because volunteering achieves two important results:

- It helps to create a stable and cohesive society.
- It adds value to the services that governments provide.

### Helping to create a cohesive and stable society

By bringing people together to act for the good of the community, voluntary action creates bonds of trust and encourages cooperation; in other words, it creates social capital. If the people who volunteer happen to be of different ethnic origins, religions, and economic status, the fact of their acting together can help to increase social harmony. Voluntary participation in public affairs—for example, as elected local representatives or as spokespersons of community-based organizations—can also help to create a politically literate public, which is important for the preservation of democratic principles.

People who are powerless as individuals can get things done when they volunteer together as a community: for example, those who take part in the management of well-digging, road-building and low-cost housing projects, or the unemployed people who set up self-help groups to find paid work.

Volunteering also helps to bring in out of the cold groups of people who are excluded from mainstream society: for example, by volunteering, unemployed people can acquire skills that will help them to find paid work and retired people can feel that they still have a role to play in society.

Finally, volunteering has been shown to promote good health and emotional well-being.

### **Adding value to the services that governments provide**

Many of the tasks that people undertake voluntarily—such as giving advice, digging a well, looking after children, building a community center in a town, helping in the classroom—are valuable supplements to the services that governments provide. Volunteer effort is essential to community policing and conflict resolution, and plays an important role in the monitoring of the weather and the natural environment. And people often respond spontaneously to emergencies and natural disasters by giving voluntary help.

The volunteering carried out through nonprofit organizations in the USA has been estimated to be equivalent to 9 million full-time jobs. A survey carried out in the UK suggested that volunteering was worth around £40 billion per annum, making it the third largest contributor to the nation's Gross Domestic Product. In Canada, out of the 24 million people aged 15 or older, 7.5 million volunteer.

A survey can also be used to make a case to potential funders for “investing” in people who volunteer. A recent survey of the economics of voluntary activity in three European countries found that volunteer-involving organizations received a rate of return of between 100 and 1300 percent on the money they invested in those who volunteered for them.

### **An invisible resource**

Yet despite the social and economic benefits of volunteering, empirical data about it is scarce in most parts of the world. Because few surveys have been carried out, little is yet known about how many people are involved in volunteering, what they do, what motivates them, and how valuable their contribution is. Obtaining reliable information about volunteering is essential if this valuable resource is to be developed to its full potential.

One complication is the fact that there are two main types of volunteering: unmanaged and managed. Unmanaged volunteering is the spontaneous and sporadic helping that takes place between friends and neighbors—for example, child care, running errands, and loaning equipment—or in response to natural or man-made disasters. It is the dominant form of volunteering in many cultures. By contrast, managed volunteering takes place through organizations in the nonprofit, public, and private sectors, and tends to be more organized and regular.

Although volunteering can be cost-effective, it is not completely cost-free. If managed volunteering in particular is to be effective, it requires an infrastructure at the local and the national level—for example, local volunteer centers and national electronic networks of organizations—that will enable the people who volunteer to be trained and placed in appropriate activities. A particularly valuable way for governments to help volunteering is to contribute to the support of such an infrastructure. The number of state-sponsored schemes to promote volunteering is increasing: for example, the National Volunteer Development Scheme in Nepal, the Corporation for National Service in the US, and the Active Community initiative in the UK. There is also a growing awareness of how to create the environment in which more spontaneous forms of unmanaged volunteering can flourish and of how this type of volunteering can be promoted.

If governments can make themselves better informed about the people who volunteer, they are likely to become more aware of how the legislation they introduce across a wide range of policy areas can affect, both directly and indirectly, how citizens give their time. For example, legislation on unemployment benefits, income tax, retirement age, and the length of the working week could all have a potentially adverse effect on volunteering—just as programs to decentralize social

welfare services or to improve the national information technology networks could all have a positive effect.

### **Educating public opinion**

The results of a survey can also be used to raise awareness of volunteering among the general public.

Some volunteer-involving organizations suffer from a shortage of people coming forward; others have problems in mobilizing certain sections of the population, such as young people or older people. If, via the local and national media, citizens can be made more aware of the rewards of volunteering—such as the chance to meet new people, to acquire new skills, and to feel a sense of achievement—these problems may be eased. Furthermore, the public can be made more aware of the often-overlooked contribution that people who volunteer make to their communities.

Once users have conducted one survey of volunteering, the information they have gathered can provide a basis for comparison with the findings of future surveys. In this way they can measure *trends* in, say, the mobilization of voluntary action; this is more useful than a single set of findings, as it enables them to estimate the impact of any new measures that may have been introduced in response to the original survey findings.

### **Improving the practice of volunteer-involving organizations**

A survey that can show what kind of people volunteer, why they volunteer and how they got to hear about the need for voluntary help can provide vital evidence for volunteer-involving organizations seeking to improve their mobilization and support of people who volunteer. Nonprofit organizations that rely heavily on paid staff because they do not believe voluntary staff could have an appropriate role may also be persuaded to change their minds if they are shown evidence of what people who volunteer can really achieve; in this way, they can involve in their activities sections of the population that are often excluded, such as older people or those with disabilities.

## **2. WHAT EXACTLY SHOULD A SURVEY MEASURE?**

People give their time voluntarily in every country of the world, and the kind of volunteering they engage in is to some extent conditioned by their social, cultural, political, and economic environment. For example, the word “volunteering” itself can mean different things to different people: Studies have shown that activities ranging from giving blood to working for a political party to taking part in religious ceremonies are all regarded as volunteering in one culture or another. Fundamentally, however, a Kenyan farmer who volunteers is likely to have the same motivations as a Washington, DC, lawyer who volunteers: to give help to others and at the same time to derive some personal benefits.

The aims of this toolkit are to encourage users:

1. To design a survey that will be valid for measuring voluntary activity across an entire country.
2. To present the results in a form that will be useful to policymakers, practitioners, and researchers in that country—and, if possible, in other countries of the world.

The toolkit attempts to create a national consensus on volunteering by proposing that there are fundamental characteristics common to all types of voluntary activity. Such a consensus is obviously important for the credibility of a survey. If users tried to measure volunteering without first having agreed on a broad definition appropriate to the social and cultural context of their country, and if their findings suggested that there was little volunteering in certain places, this is just as likely to have been because they were using an inappropriate definition as because there genuinely was little activity. So the aim here has been to construct a core definition that is broad enough to include the wide variety of volunteering traditions found within a country, but not so broad that it has lost all precision.

Users in any country can employ this core definition in conjunction with an assessment of local circumstances to help them decide which of the many forms of volunteering it would be most useful (and feasible) for them to survey. It is up to them to use

their local knowledge to give the survey a local “flavor” that will make it relevant to the target audience.

It is particularly important to find some way of measuring unmanaged volunteering. Previous surveys of voluntary activity have mostly been carried out in industrialized countries and have tended to neglect unmanaged volunteering in favor of managed volunteering through organizations.

### Three criteria for volunteering

The three criteria given below are broad enough to include virtually all forms of volunteering found around the world, yet they effectively distinguish volunteering from other forms of behavior that may superficially resemble it.

**1. *It is not undertaken primarily for financial gain.*** If the monetary reimbursement that people receive for the work they do is equal to, or greater than, the ‘market value’ of the work, this cannot be regarded as volunteering. However, anyone who volunteers should certainly have all legitimate expenses arising out of their activities reimbursed by the organization that involves them; this is important, as it prevents them from being out of pocket as a consequence of their involvement—and therefore helps to ensure that people with limited financial resources are not excluded from volunteering.

**2. *It is undertaken of one’s own free will.*** Free will is a basic tenet of voluntary action, but people who volunteer seldom do so entirely voluntarily: They are usually under some pressure, either from their peers or from their own feelings of social obligation. However, this criterion does help to distinguish genuinely voluntary volunteering from situations where there is explicit external coercion of the individual: for example, where schools require pupils to volunteer; where the employees of a company with an official volunteering scheme are required to take part (and the “volunteering” is entered on the person’s employment record); or where governments offer young men the chance to do community service as an alternative to military service.

**3. *It brings benefits to a third party as well as to the people who volunteer.*** This criterion helps to distinguish volunteering from a purely leisure activity such as playing football (although playing football to raise funds for a good cause might fall within the definition). This toolkit adopts a broad interpretation of beneficiaries: It includes friends, neighbors, and such

abstract notions as “society” or “the environment,” only excluding the immediate family of the person who volunteers. This enables mutual aid and participation in a political party or single-issue campaign to be treated as forms of volunteering that are just as valid as providing services.

These three criteria provide ample space for the full range of volunteering. It would be a mistake to insist that volunteering can only take place through an organization of some kind—nonprofit, governmental, or private—as such a criterion would exclude a great deal of mutual aid as well as the vast amount of unmanaged help that goes on between neighbors and friends.

Similarly, it is not suggested that volunteering should always involve a substantial, regular, and long-term commitment, as this criterion would ignore the sporadic nature of much volunteering, managed and unmanaged.

### The four types of volunteering

By applying the above criteria to the myriad activities that make up volunteering, it has been possible to propose four basic types of voluntary activity. These are intended to be working definitions only, and in practice there is considerable overlap between them. Each of the types of volunteering listed below can be managed (that is, carried out through an organization) or unmanaged (that is, carried out as loosely organized or spontaneous community action or as an individual initiative).

**1. *Mutual aid (also called self-help).*** In many countries of the world, mutual aid is the dominant system of social and economic support for much of the population: In Kenya, for example, the *harambi* tradition is vital in the provision of health care, water, and education; in India, villagers jointly manage resources, such as forests and wells, and jointly repair roads. Mutual aid is also widespread in industrialized countries, particularly in the form of organizations set up by a group of people all affected by the same problem, such as unemployment or a specific illness. Although self-help meets the three criteria outlined above, its practitioners rarely describe what they do as “volunteering.”

**2. *Philanthropy or service to others.*** People give service to the community as a whole—for example, by visiting,

befriending, teaching, and mentoring others—rather than to a specified group to which they themselves belong. Much of this type of volunteering is carried out through nonprofit and statutory organizations, and is therefore more widespread in industrialized countries, where such organizations are more numerous.

*3. Campaigning and advocacy.* People volunteer out of a desire for social change and social justice: for example, activism in an environmental movement; advocacy on behalf of people with disabilities; a group of tenants lobbying for improvements to be made to a housing estate; or the worldwide campaign to ban landmines, which is estimated to have involved 300 million volunteers in a hundred countries.

*4. Participation and self-governance.* People become involved in the processes of governance: for example, as committee members of their village water and sanitation project, as elected local representatives, or as members of government consultative bodies. This type of volunteering is found in all countries, but it achieves its most developed form in those with a strong tradition of civic society.

## Adding the detail

The three criteria and four types described above are offered as the basic building blocks for a definition of volunteering that is appropriate to a specific setting, whether it be a neighborhood, a province or an entire country. These are the bare outlines, but it is up to users to add the details that are specific to the volunteering culture of that setting. They will need to ask themselves questions like:

- Is there a distinctive tradition of unmanaged volunteering/mutual aid? Conversely, does managed volunteering exist to any large extent? Users will need to know something of the social history of voluntary action in the area they are surveying.
- How much influence does the dominant religion (or religions) have on volunteering? Some religious traditions regard altruistic behavior, such as volunteering and giving money, as something to be kept private—which presents an immediate problem for anyone wishing to conduct a survey of volunteering.
- How much interest do national and local government already take in volunteering?

- How much interest does the business sector take in volunteering?
- Is it culturally appropriate to talk to women and young people?

Armed with a culturally appropriate definition of volunteering, users will now be ready to ask how much of it takes place, who does it, and what kind of tasks are involved.

The following chapters will show how users can employ these general principles to plan, design, and carry out a survey of volunteering in their country or other chosen area. To be effective, a survey must be methodical, so Chapter 2 looks in detail at the all-important planning process.

# Chapter 2:

## Planning the research

Carrying out a survey of volunteering, whatever its scope, is a complex exercise that demands careful forward planning. Three basic principles should, it is suggested, inform the planning process:

*1. Establish why the survey is needed.* Make sure that information about volunteering is really needed; identify the people who might use such information; and define the objectives of the survey with the needs of those users in mind.

*2. Do not reinvent the wheel.* Profit as much as possible from the experience of others before organizing new research. This means using (i) existing sources of information about volunteering, and (ii) institutions that regularly conduct research into volunteering (see Appendix II: Useful resources on volunteering).

*3. Treat the survey partly as an adventure and partly as a business venture.* Users should balance the intellectual challenge of exploring unknown territory by means of a survey against the need to deliver usable results. On the one hand, if a survey is not motivated by some kind of exploratory urge, its target audience might not regard the findings as particularly novel. On the other hand, users need to take the time to assemble their resources, design their survey, and devise a strategy, or they will fail to meet their objective.

Based on the above principles, this chapter proposes a planning process consisting of four stages:

1. Decide on the purpose of the survey: What “product” will be created?
2. Look at the existing sources of information about volunteering, and decide on how to collect the new material needed to obtain a useful picture of volunteering.
3. If desired, look for institutions or individuals interested in collaborating on a survey. There are many advantages to carrying out research of this kind in partnership with others: For example, it makes possible the sharing of expertise and resources.
4. Identify and assemble the resources needed to carry out the survey.

### I. DECIDE ON THE PURPOSE OF THE SURVEY

A survey is not just about gathering information for its own sake; it must deliver a specific “product.” The findings will not be self-explanatory. They must be organized into a coherent report designed to meet the needs of specific audiences.

Users must therefore look at their objectives and their resources and decide upon what kind of “product” they can realistically deliver. However, they should not let the research methods they have decided to use determine the nature of this final product. Research methodology is a means to an end, not an end in itself. The choice of method should depend on what the final product is going to be, not the other way around.

Deciding on the final product should involve the following steps:

- Identifying the people who will use the information produced by the survey: for example, policymakers, government officials, nonprofit sector staff, the academic community, grantmaking foundations, the media, civic leaders and activists, and people who volunteer.
- Identifying the specific type of information each of these users needs: For example, the government might want to know where the problem areas are in supporting volunteering, the media may want to know about the extent of volunteering, and the nonprofit sector may be more interested in the motivation of the people who volunteer.
- Identifying the form of dissemination that will best meet those needs: for example, written reports, executive summaries, books, pamphlets, data sets, web pages, seminars, press conferences, and community workshops.
- Planning the creation of those products by listing the successive stages involved, the deadlines for completing each stage, and the resources needed at each stage; personnel, office space, equipment, supplies, and travel budget must all be included.

- Identifying the people who will produce and distribute the product: the writers, editors, graphic artists, web page designers, publishers, and printers.
- Drawing up a dissemination strategy: identifying special events—such as conferences, public meetings and exhibitions—that can provide a platform for publicizing the survey and marketing its products; organizing (or co-organizing) such events; and enlisting the cooperation of the media.

## II. CHECK EXISTING INFORMATION

Before committing themselves to a survey, users should first check on whether any or all of the information they are seeking has already been collected by other bodies in the course of their regular data-gathering: for example, by government statistical agencies, national volunteer-involving organizations, youth organizations, charitable trusts, market research agencies, the media, or political parties. They should also study any surveys of volunteering that have been carried out in other neighborhoods, provinces, or countries to see if they can provide any help with the design of their own survey.

Users should consult the experts about where information on volunteering is located: It may, for example, be found in nonprofit sector publications, academic studies, government publications, and press reports. Users should then carry out a thorough review of these sources as part of their planning. This should enable them to do three things:

1. To identify the existing sources of information relevant to their survey.
2. To gain access to that information.
3. To work out how the research will fill the gaps in the information.

### Identifying the existing sources

There may be information already available on specific aspects of volunteering: For example, government ministries of health, education, and social welfare may be able to provide data about the people who volunteer in their areas of responsibility; local government may have carried out surveys in their locality; nonprofit organizations may have information

about the people who volunteer in their chosen field of action.

Taken individually, these sources may contain only some of the information needed to construct a broad picture of volunteering. They may target only certain types of volunteering (e.g., social welfare) or certain types of people who volunteer (e.g., young people). For example, the World Values Survey, last carried out in 1995, asked respondents if they volunteered for a specified list of volunteer-involving organizations. The responses to this question would have enabled users to estimate the percentage of the population who volunteered, but not the total amount of volunteering they did.

These sets of information from different sources will need to be combined to create the bigger picture. The same information may well appear in more than one source, so users should take care not to record it more than once, as this could distort their findings.

### Gaining access to information

Users should now prepare a list of information sources, preferably giving a separate page to each source. The following details should be recorded:

- The name of the source (e.g., National Population Census)
- The name of the organization that gathered the information (e.g., National Statistical Office)
- The period covered by the information (e.g., 1998)
- The format of the information (e.g., computer file)
- Physical location of the information and how to gain access to it (e.g., name and address of the institution where the information is stored; the fee, if any, required to gain access)
- A brief description of the contents, scope, and structure of the information (e.g., a survey of a representative sample of the population: 2–3,000 cases; data on volunteering: area of volunteering, frequency of volunteering during last year, demographic profile of people who volunteer)

## Filling the gaps in the information

There are basically four ways of doing this:

**1. Extrapolation.** Users can extrapolate from the information already available. If, for example, they already know the total number of people in the area under study who volunteered during the past year, they could try to discover the average amount of time each person spent on volunteering by carrying out a rapid survey of a small number of organizations or even by asking local experts. This will enable them to make an estimate of the total amount of volunteering.

**2. Targeted surveys.** If it is known that volunteering in one part of the area under study has very different characteristics from volunteering in another part, using extrapolation would be unwise, as it might produce distorted results. A better solution is to carry out a medium-sized survey that targets, for example, a number of specific fields of voluntary activity or geographical localities; this would still require fewer resources than a full-scale survey.

**3. Omnibus surveys.** Commercial research firms and government statistical agencies sometimes offer “omnibus surveys” that enable customers to add a series of questions to an existing questionnaire (which typically asks about a wide range of social and demographic variables, plus questions chiefly of interest to commercial clients). These would give users access to the large population samples that such surveys can usually assemble, but the disadvantage is that the number of questions, and thus the amount of detail that can be obtained, is limited.

**4. Full-scale surveys.** However, if the existing information is incomplete or of poor quality, the only option is to carry out a full-scale survey. This kind of survey requires a sample that is representative of the population being studied and sufficiently large to minimize sampling error (that is, the extent to which the sample is *un*representative of the population). Users will also need to find some way of ensuring an adequate response rate to their questions and an adequate quality of responses. For these reasons, a survey can require substantial resources and time.

## III. FIND PARTNERS

Research often benefits from a partnership approach. In the case of a survey, it could enable users to profit from the expertise of others and to spread the burden of finding resources. Users should therefore aim to involve the various groups of people who will be using the information produced by the survey: for example, policymakers, government officials, nonprofit sector staff, academics, civic leaders, and people who volunteer. These groups can provide valuable help with the planning and implementation of the survey and with the dissemination of its results.

One of the most important stages in planning is to identify groups and individuals that might be interested in studying volunteering and secure their cooperation. The best way to do this is to set up an advisory committee as early as possible.

An advisory committee is a group of people whose skills and experience are useful to the survey and whose status in local society can give it legitimacy. Since each of these people will only be able to provide insights into certain aspects of volunteering, users should try to ensure that the members of the committee represent a broad cross-section of different interests.

Here are some general suggestions for interest groups that might be a source of members for the advisory committee:

- Government agencies responsible for public services that typically involve people who volunteer: e.g., ministry of the interior, ministry of health and social services, ministry of education and culture
- Government agencies responsible for the collection of statistical data: e.g., the census bureau, office of national statistics
- The nonprofit sector: e.g., volunteer-involving organizations, charitable foundations, international NGOs (non-governmental organizations)
- The private sector: e.g., companies or financial institutions that have social responsibility policies or are known to promote good causes
- Representatives of professional associations, trade unions, industry associations, and research associations
- Youth organizations

- Research institutions, especially those members of staff who concentrate on the nonprofit sector or on fields where volunteering is widespread, such as health, social services, education, labor relations, economic development, the environment, or human rights
- Molders of public opinion: e.g., media commentators, politicians, and writers
- Religious leaders

It is also a good idea to invite representatives of major funding agencies to serve on the advisory committee. Quite apart from its immediate practical contribution to the success of the survey, an advisory committee helps to build bridges between different interest groups that could prove useful for future joint ventures.

The main roles of an advisory committee include:

- Advising on the general characteristics of the survey, such as its scope or the expected outcomes
- Acting as a link between the research team, key institutions (government, the nonprofit sector, research institutions, business, the media, organized religion, etc.), and the community at large
- Helping to find the necessary resources
- Helping to give the survey legitimacy
- Helping to disseminate the results

Members of the advisory committee should be visibly involved in the key events marking the progress of the survey: the fundraising, the official launch, the press conferences, and the publication of the report.

## IV. ASSEMBLE THE RESOURCES

The resources needed to carry out a survey of volunteering can be divided into three broad categories:

**1. Human.** The people whose skills and experience are needed to achieve the objectives.

**2. Organizational.** An administrative framework that will enable users to coordinate the work of the people involved in the survey and their interaction with other institutions and with the public.

**3. Material.** The funds required to pay the people working on the survey and to obtain the equipment, office space, and supplies they need.

The success of the survey depends upon users being realistic about what they can achieve with the resources at their disposal.

To make their survey as cost-effective as possible, users can:

- Carry out a joint survey with another organization or organizations (see below).
- Choose the most economical research method (see Chapter 3).

Here are some suggestions for how to strike a sensible balance between objectives and resources:

- Draw up at least two alternative plans for the survey. Plan A should be for achieving all the objectives that users would *ideally* like to meet. Plan B should be for meeting the minimum objectives that will produce satisfactory results.
- Identify the resources needed to carry out Plans A and B. Look first at different ways of carrying out each plan: For example, method 1 might be hiring a private research firm; method 2 might be cooperating with a research institution or a government agency; and method 3 might be setting up a special task force to design and carry out the survey. Then calculate the amount of resources each method might require.
- Investigate the conditions, if any, imposed by the potential providers of funding: For example, some may fund research by a public or nonprofit agency, but not by a commercial firm or a task force. Other providers may restrict their funding to specific fields of activity (or may require these fields to be added to the survey as a condition of funding). There might also be special requirements regarding the final product: Specific institutions or people may have to be involved in creating it, or the needs of specific audiences may have to be addressed.
- Match the available resources with those required under specific plans. Choose the best plan that can be achieved with the resources at hand; this means that, if users find that they are spending too much, they can still scale the plan down to a lower level. But if they opt for the minimum plan, they may

have insufficient room to maneuver without sacrificing the quality of their research.

When seeking supporters, users should look for:

1. *Institutions that can carry out the survey as a part of their regular activities*

Examples might include:

- *Government agencies responsible for collecting statistical data.* These agencies could be encouraged to add a few questions about volunteering to existing national surveys.
  - *Universities and research institutions.* Users could collaborate with these institutions and thus share the cost; the institutions may also be able to offer students or people who volunteer to help conduct the survey.
  - *Commercial research firms.* These carry out various types of research, including omnibus surveys, in return for a fee. An omnibus survey costs considerably less than a stand-alone survey; if users are from a nonprofit organization, they may be able to negotiate a reduced fee.
2. *Institutions interested in volunteering that have the resources to fund a survey, but not the desire to carry it out*

Certain institutions may be more interested in commissioning others to carry out a survey of volunteering than in carrying it out themselves. Examples might include:

- *Human service agencies*, such as hospitals, social services departments, and churches, that might be interested in adding value to their services by involving people who volunteer
- *National nonprofit organizations* that involve people who volunteer
- *Charitable foundations* with a known interest in voluntary activity
- *Political organizations*, such as political parties, advocacy groups, and human rights organizations, that are interested in stimulating popular support for their causes, or perhaps in mobilizing more members

- *Business organizations*, especially large corporations that are interested in public relations and in developing links with the community
- *The mass media*, such as the press or television

An effective way of obtaining the support of these institutions is to offer them public recognition: for example, by listing them prominently in the survey report or by inviting them to sit on the advisory committee.

If users succeed in attracting support from a major institution, the question may well arise as to who “owns” the survey and its products: Is it the major funder or the partnership jointly? This is a matter that sometimes needs delicate negotiation.

Once users are sure of their funding and have drawn up their business plan, they are now in a position to set up a team and begin the task of designing the actual survey—which is the subject of the next chapter.

# Chapter 3:

## Designing the survey

This chapter offers advice on how to design the survey instrument; that is, the actual list of questions that users will put to respondents in a survey of volunteering.

The most important criteria for any survey are that it should be *reliable* (that is, it records the information correctly) and *valid* (that is, it records the right kind of information). This chapter, therefore, explains how to avoid the following problems:

- Problems of reliability caused by inadequate sampling
- Problems of reliability caused by imperfect information
- Problems of validity caused by ambiguity over what constitutes volunteering

The minimum requirement for a survey is that it should record the *extent* and *distribution* of volunteering; in other words, how much time people give and the type of voluntary action they choose. However, for certain purposes—such as designing a campaign to encourage people to volunteer—it can be equally important to discover what kind of people volunteer, what motivates them to get involved, and what rewards they get out of their volunteering. The final section of this chapter looks at how to survey these subjective aspects of volunteering.

### I. BASIC PRINCIPLES

How a survey is designed will depend to a considerable extent upon the complexity of what is being studied. Even so, it is sensible to keep the survey instrument as simple as possible to ensure as high a response rate as possible. If tempted to ask a large number of questions, users should ask themselves, “Do we *really* need all this information?” Shorter surveys are more likely to generate good responses.

As with other types of population research, the study of volunteering presents practical difficulties in that many of its most important characteristics cannot be observed directly. So it is necessary to use indirect methods:

1. Instead of observing the entire population, observe only a selected part of it, known as a “sample.”
2. Instead of observing the volunteering itself, rely on the respondents’ reports of their own activities and motives.

The indirectness of these methods can, however, undermine (1) the reliability of the measurement and (2) its validity.

#### Reliability

Researchers can pose a threat to the reliability of the survey by making sampling errors. Observation based on samples is reliable only when the sample has the same composition as the population as a whole. But that is not invariably true. Each time the researchers draw a sample, its composition changes. Sometimes it is close to that of the population, sometimes it is not. As a consequence, each sample yields a different measure of what the researchers are trying to survey.

The respondent can pose a threat to reliability by having a less-than-perfect memory. Our recollection of an event is affected by the length of time that has passed and our attitude to the event; we usually recall things that happened recently more accurately than those that happened some time ago, and we recall things we regard as important more clearly than those we consider unimportant.

#### Validity

The problem of validity arises when researcher and respondent have different ideas about what is being investigated. As shown in Chapter 1, volunteering is an ambiguous term; not everyone will necessarily agree that a particular activity is volunteering.

Consider the following examples:

- Property maintenance, such as taking part in the management of one’s apartment block or a community clean-up campaign

- Participation in social movements, such as environmental or human rights campaigns and those dealing with gender issues
- Participation in activities related to one’s job that are expected by the employer yet are outside one’s job description or regular working hours, such as community outreach or fundraising campaigns
- “Neighborly help”— that is, more or less spontaneous acts of helping neighbors, friends, or colleagues (e.g., child care, supporting people living with HIV/AIDS, helping flood victims)

Since not everyone regards these activities as “volunteering,” some respondents will include them in their reports and others will not. This may lead to the under-reporting of volunteering, thus undermining the validity of these self-reported measurements.

Following are a few suggestions on how to avoid the following problems:

- Problems of reliability caused by inadequate sampling
- Problems of reliability caused by imperfect information
- Problems of validity caused by ambiguity over what constitutes volunteering

## II. PROBLEMS OF RELIABILITY CAUSED BY INADEQUATE SAMPLING

Survey techniques based on sampling have by now been more or less perfected and generally do not pose any serious problems. As already noted, the key to success in using these techniques is to choose a representative sample that allows users to make an accurate estimate of a population parameter. “Representative” here means that each element of the population has a known probability of being selected for the sample, although that probability may or may not be the same for each element. Knowing that probability allows researchers to address the problem of unreliability by simply estimating its range. In other words, although they cannot eliminate fluctuations from their measurements, they can at least estimate their range. By estimating the range of error to be, say, plus or minus 3 percent of a given value for the parameter in question, researchers are saying that their

estimates of that parameter would change each time they repeated their measurement by drawing a different sample, but that most of the time the range of that change would be no more than plus or minus 3 percent.

Estimating the likely range of error is the solution to the unavoidable problems of reliability associated with sample-based techniques. It depends upon the researcher’s ability to choose a sample of the population whose elements have been selected with a known probability. To do this with accuracy requires a knowledge of the entire population from which the sample is drawn. For this reason, sample-based techniques have been most successful in places that have effective statistical systems providing a range of information about the population and its geographic, demographic, and socioeconomic distribution. If users are in such a place, they should perhaps think about delegating the task of drawing a representative sample to a specialist agency, leaving them free to concentrate on the design of the survey.

However, users in places where comprehensive statistical information does not exist face two challenges:

- Inadequate information about the population and its distribution makes it difficult to assemble an adequate “sampling frame”—the list from which the sample to be used in a survey is drawn.
- The absence of alternative sources of information can lead to inadequate sampling, because no independent verification of the results is possible.

The following section is intended primarily for users in places where there is no strong tradition of conducting surveys. Many cities, provinces, and countries have a range of institutions that carry out surveys, including government statistical agencies, universities, and private research firms. Users in those places are encouraged to use these institutions to assemble their samples—hence they may simply skip this section.

### Defining the sampling frame: three approaches

Developing the sampling frame is perhaps the most important task in designing a survey. It involves identifying the population of respondents, or “units of observation,” from which the survey sample will be

drawn. Without an adequate sampling frame, users cannot be sure that the units of observation have been chosen randomly; that is, that all elements have a known probability of being selected to the sample. This means that they cannot use the survey results to estimate the broader dimensions of volunteering.

The effectiveness of the sampling frame will depend on (1) what the unit of observation is and (2) how accurately those units have been recorded locally or nationally. Users should choose the unit of observation that can not only provide the most reliable information about volunteering, but that can also be selected from a reasonably complete inventory of elements representing this unit.

There are two kinds of units of observation: individuals and various groupings of individuals (such as couples, households, organizations, communities, or nations). The unit used most frequently in surveys is individuals. This is because most surveys set out to discover people's opinions, preferences, or beliefs, and asking individuals is the most reliable—and often the only—way to find this out.

However, volunteering is largely a social activity. Thus it can be observed by other people, who may keep a record of their observations. Therefore users are not limited to investigating individual respondents, but can use other sources of information about their behavior. These other sources may include information about households, organizations, and geographically defined communities.

*Person- or household-based sampling frame.* Volunteering is also an individual act, and therefore individual people are often chosen as the unit of observation for surveys of volunteering. This will only work if users have a fairly comprehensive list of all individuals (for example, from official records) and the people on that list can be easily contacted. If this is not the case, another unit of observation from which they can draw their sample is the household, which is usually easier to contact than an individual. Each member of a household usually has some idea of what the other members have been doing (although the information they can provide is not always wholly reliable). Even if a comprehensive list of households does not exist, the number of them in a particular area can be estimated fairly accurately by direct observation.

*Organization-based sampling frame.* A great deal of volunteering takes place through some kind of organization, such as a local nonprofit group, a church, a hospital, a neighborhood association, or a cooperative. Like households, organizations tend to be more permanent than individuals, and are therefore easier to contact. More importantly, organizations usually keep written records of their activities, and these can be a more reliable source of information than the human memory. When measuring volunteering, a survey of organizations can be a useful alternative to a population survey—although, of course, it will fail to detect the vast amount of volunteering that does not take place through an organization.

To develop a sampling frame of organizations, users need a comprehensive list of the organizations in the area under study. For example, many government agencies maintain inventories of nonprofit organizations, cooperatives, and religious bodies. If there are no official lists of certain types of organizations, such as informal groups, users should try to make a reasonable estimate of their number.

If no comprehensive list of organizations is available, users can sometimes construct a sampling frame from several different sources. Government agencies often compile lists of organizations active in the fields over which they have jurisdiction, such as health, social services, education, or economic development. Another possible source is the directories of organizations compiled by “umbrella bodies,” particularly in the health, education, and nonprofit sectors. There may also be directories of private-sector organizations.

Because these various sources of data may overlap, users must cross-check them carefully to avoid duplicates.

*Geographically defined communities.* Finally, a geographically defined community can be a useful unit of observation when surveying volunteering. Users can measure the amount of volunteering that takes place within the boundaries of a sample of communities, and then use that information to estimate the amount of volunteering in the entire area under study. To enable a sample of this kind to be drawn, however, it must be possible to divide the area into identifiable types of geographical community. Fortunately, government agencies or market research firms have often developed

geographical information systems (GIS) that divide areas into small geographical units, such as administrative subdivisions, postal codes, school districts, or communities sharing similar socioeconomic characteristics (income level, employment, settlement type, etc.). A list of all such geographic entities constitutes the sampling frame from which a sample of communities is drawn, preferably by the method of stratified sampling (see below).

If users choose communities as their unit of observation, they must be able to measure adequately all the volunteering taking place within the boundaries of the selected communities. They could survey all the households in these communities, but that might be costly and impractical. Or they could survey all the organizations that serve as conduits for volunteering, such as government agencies, nonprofit organizations, cooperatives, churches, community associations, etc. These organizations can be identified through the “snow-balling” technique, which involves the following:

- Compiling an initial list of organizations that may serve as conduits for volunteering in the target areas, using official registries, directories, and contacts with knowledgeable individuals working in the neighborhoods
- Carrying out a systematic survey of all the organizations thus identified, seeking information about the volunteering activities they sponsor and also about any other organizations in the same neighborhood engaged in similar tasks
- Adding the new organizations to the list of respondents
- Surveying these additional organizations to determine the amount of volunteering they sponsor and to identify additional organizations in the neighborhood engaged in similar tasks
- Repeating the same process until no new organizations are discovered

## Selecting a sample

Once users have identified the sampling frame for a survey, they are ready to draw a sample from it. The basic rule is that every unit of observation should have a known probability of being included in the sample. That probability may be the same for every respondent in the sample, or it may differ according to the type of respondent. The reason for assigning a greater probability of being selected (known as “over-

sampling”) to types of respondent that may represent only a small minority of the population is to ensure that a sufficient number of them are included in the sample. For example, the number of people from a specific ethnic minority may be very small, yet their habits of volunteering and giving could well be very different from those of the rest of the population, so users need to include a sufficient number of such individuals in the sample. Yet, because of the rarity of people from this ethnic minority, it is quite possible that a small sample may not include any such individuals. In these cases, the individuals in question must be assigned a greater probability of being selected than the rest of the population.

Two basic techniques are available for selecting samples: simple random sampling and stratified random sampling.

*Simple random sampling* involves selecting units of observation (individuals, households, organizations, or communities) at random directly from the sampling frame. This approach works best where (1) there are no great differences between the units being sampled or (2) where all the groupings are large enough for users to be confident that enough of them will be included in the sample to make generalizations about them possible. Obviously, the larger the sample, the more likely this is to be the case. However, where the sample size is limited, for whatever reason, or where there are types of unit that are few in number but are important to include, then simple random sampling should not be the preferred approach.

*Stratified random sampling* works best where the population can be divided into distinct subgroups and arranged according to which group they belong to. For example, if the population of an area consisted of two large religious groups (say, Protestants and Catholics) and two much smaller ones (say, Rastafarians and Buddhists), and if the volunteering behavior of each group differed from that of the other groups, users would want to make sure that each group was adequately represented in the sample. To achieve that, they would need to “stratify” the sampling frame: that is, divide it into subgroups according to religion, and then draw a proportional share of respondents from each subgroup. So if the area had a population of 1 million, of whom half a million were Catholics, 400,000 were Protestants, 60,000 were Buddhist, and 40,000 were Rastafarians, and users wanted to select a sample of 1,000 respondents (giving a probability of selection

for each respondent of 0.1 percent), they would select 500 Catholics, 400 Protestants, 60 Buddhists, and 40 Rastafarians.

Simple random sampling can be used if the units of observation are individuals or households, and if users know little about how the population is distributed by subgroups. If they are using geographical communities as units of observation, stratified sampling seems more appropriate, as the characteristics of geographical areas are usually known and can thus be used to divide the sampling frame into distinctive groups. Organizations can be sampled by means of either method, depending on the characteristics of the group of organizations being studied. A large group of relatively similar organizations can be sampled by the simple random method, whereas a smaller group of highly diverse organizations requires the stratified method—provided a sampling frame is available that will enable users to classify all the organizations into homogenous groups according to such characteristics as field of activity, legal status, foreign or domestic origin, rural or urban location, or affiliation with a particular ethnic, religious, or political group.

### **III. PROBLEMS OF RELIABILITY CAUSED BY IMPERFECT INFORMATION**

Unlike the problems discussed in the preceding section, which primarily arise from the techniques used by researchers, those discussed in this section originate mainly from the source of the information: the respondent. They occur in situations where respondents do not have reliable records of the behavior under investigation, and where the information they provide is therefore affected by the passage of time, by their attitudes toward the subject of the survey or the researchers themselves, or by the shortcomings of their memories.

A typical situation is where respondents cannot adequately recall all their volunteering acts or their duration, especially if the time frame is quite broad (e.g., the last few years). Narrowing the time frame might improve their ability to remember, but could also raise another problem: the fact that responses may differ according to when the researchers ask the question. Volunteering is not necessarily a regular activity, but often depends upon the circumstances: for example,

the time of year (certain seasons may demand greater volunteer input) or the recent occurrence of a natural disaster. Thus, if users wanted to estimate a typical amount of volunteering per year, they might get different responses according to when they carried out the survey. If most volunteering takes place in the spring and the survey takes place in the winter, respondents may not be able to remember how much volunteering they did. If the researchers tried to correct this by narrowing the time frame and asking about volunteering during the past month, the results would be even more misleading.

This problem may be less severe if the unit of observation is the organization, because organizations typically keep some form of written records. However, these records might be unreliable for other reasons: for example, if the organization is under heavy pressure to mobilize people to volunteer, or is simply not very competent at keeping records.

Another threat to reliability can be the absence of a “survey culture.” In some places, surveys and polls are now so common that most potential respondents will know what the purpose of interviews is and what kind of information questionnaires expect them to provide. However, in places where surveys are rare, this “survey culture” may not have had a chance to develop. Some people may therefore mistrust surveys and refuse to take part in them. This is a particularly serious problem when measuring volunteering, for participation in a survey is itself a form of volunteering, and those who refuse may well be the people who do not volunteer either. As a result, the sample will contain a disproportionate percentage of people who volunteer, leading to an overestimate of the total amount of volunteering in the country.

Secondly, for people unaccustomed to being the subjects of research, participation in a survey may be such an exceptional event in their life that it distorts the information they give. For example, respondents who wish to please or impress researchers may give them the information they think they want to hear.

Finally, respondents have a widely observed tendency to exaggerate when reporting behavior that is considered socially or politically desirable, such as attending religious ceremonies, and to downplay behavior seen as undesirable. This tendency has obvious relevance to a national survey of volunteering.

There is no standard method for dealing with unreliability caused by the respondent; users will have to find solutions to meet the specific circumstances. There are, however, some rules of thumb:

- Start by obtaining some general information about the pattern of volunteering, especially its seasonal fluctuations. Conduct the interviews immediately after the volunteering “season,” while respondents can still remember clearly what they did. Alternatively, the interviews could be scheduled for different seasons to cancel out the effect of these irregular patterns of volunteering.
- Keep the questions simple and specific. Rather than asking “How much volunteering did you do during the past season?” ask respondents if they carried out specific activities, and if so, when, how often, and for how long (see below).
- Take a neutral stance—avoid using emotive terms that might arouse unduly positive or negative feelings in respondents. This is particularly desirable when asking about activities that some may view as controversial, such as helping excluded people (e.g., people living with HIV/AIDS, refugees, or unpopular minorities). Reassure interviewees that their responses are confidential and will not be revealed to anyone; if there is any indication that they are falsifying their responses, probe for more details.
- If possible, use trained interviewers over postal surveys. The superior quality of the information gathered definitely justifies the extra cost. It is a good idea to mobilize volunteer interviewers locally—for example, from youth organizations and women’s clubs—and have them trained and managed by a professional researcher.
- Work hard to win the trust of the respondents; for example, ask prominent local people—community leaders, activists, teachers, clergy, etc.—to introduce the interviewers to the community and explain the purpose of the survey.
- If the unit of observation is the household or the organization, ask the interviewers to verify, if possible, the information they have obtained with another representative of that organization or household. They should also inspect any written records that are available.

## IV. PROBLEMS OF VALIDITY CAUSED BY AMBIGUITY OVER WHAT CONSTITUTES VOLUNTEERING

Different people have different ideas about what volunteering is—and their ideas might be different from those of the researcher. For example, some respondents may regard giving blood as volunteering, whereas others may not. Moreover, the researcher may not know what specific activities respondents have in mind when they report on their volunteering. This may lead to a situation where researchers are measuring something rather different from what they think they are measuring

As already mentioned, one way to minimize this type of problem is to use a definition of volunteering that will be meaningful to all the respondents in an entire country; it is to be hoped that in those countries with an International Year of Volunteers committee, a working definition might emerge during 2001. Even so, users need to find ways of eliminating, or at least reducing, situations where the responses are of dubious validity because respondents are simply uncertain about what kind of information is being sought.

What is needed is a technique that relieves respondents of the responsibility of guessing what kind of behavior they are supposed to be reporting. Instead, the questionnaire should list various clearly defined types of behavior that are relevant to the survey, and then ask the respondents whether they have engaged in these forms of behavior and, if so, for how long.

In other words, users should avoid using the word “volunteering” or similar terms in the survey. Instead, they should list activities that might be considered as volunteering, ask the respondents to say whether they have engaged in these activities, and then record their responses without classifying them as “volunteering” or not. In this way, the decision about whether a particular activity should be regarded as volunteering lies with the user of the survey findings, not with the respondent.

For this approach to be effective, there are two key requirements:

1. First, the types of behavior on the list must cover the entire range of what could possibly be considered as volunteering within the area under study. That includes activities where there may be some debate about whether they are volunteering or not.
2. Second, the forms of behavior must be described neither too generally nor too specifically. Too much detail would make the survey instrument long and cumbersome. Too little detail creates ambiguity and invites the respondent to engage in guesswork, which defeats the object of this approach.

For example, users should not ask, “Have you distributed meals or blankets to the victims of the last volcanic eruption?” or “Have you guarded your own and your neighbor’s cattle from being attacked by predators?” Nor should they ask, “Have you helped those less fortunate than yourself?” or “Have you defended your community from harm?” Instead they should ask, “Have you helped the victims of a disaster by providing them with the resources they need?” or “Have you tried to protect people and animals in your community from danger?”

A comprehensive list of suggested questions about behavior that researchers could ask is given in Appendix I. Additional follow-up questions may concern the social circumstances of each type of activity specified in the inventory and the respondent’s motives for getting involved (see below).

### **Testing for validity**

Once the list of relevant activities and follow-up questions has been compiled, users should test the survey instrument for validity. This test must answer two questions:

1. Is the list comprehensive? That is, does it list all the relevant forms of volunteering in the area under study?
2. Will the respondents find the definitions clear and unambiguous?

The first question can be answered by consulting people who are knowledgeable about the forms of volunteering in the area concerned: for example, the

staff of volunteer-involving organizations, community leaders, government officials, academics, and leaders of community-based organizations. There are two ways of carrying out these consultations: individual and collaborative. In individual consultations, the people concerned are simply presented with a list of types of volunteering and asked to comment on the completeness of that list and the clarity of the descriptions it contains. A collaborative consultation can take the form of the so-called “Delphi method” or a focus group. In the Delphi method, each individual is presented with the comments of the other people consulted and has a chance to react to those comments, but can only do this through a facilitator. In a focus group, the people being consulted are brought together in the same room and can interact directly.

The Delphi method is preferable in situations where a quick turnaround is required, or where direct interaction may generate conflict. The focus group is preferable in situations where group interaction (e.g., “brainstorming”) is more likely to be successful in breaking an impasse or generating an innovative solution. For the purpose of testing the validity of a survey instrument, the Delphi method is sufficient and in most circumstances less costly.

To test the clarity of the descriptions, users should try to involve a sample of actual respondents, from a range of social and educational backgrounds. The purpose of this testing is to find the correct wording for each description and to include clearly understood examples. This could, for example, be done by setting up a focus group in which respondents are presented with descriptions of volunteering and are asked what they understand each description to mean. This will indicate whether the description fits the actual forms of behavior in question, whether there are cultural or personal barriers to reporting particular forms of behavior, whether there are cultural or personal incentives to provide distorted answers, etc. Users should revise those descriptions about which doubts persist.

## V. RECORDING THE SUBJECTIVE ASPECTS OF VOLUNTEERING

Solving the above-mentioned problems of reliability and validity should enable users to compile a survey instrument that will provide the minimum information needed to assess the amount of volunteering in the area under study.

That information can be augmented by the following material:

- Sociodemographic information, such as the respondent's age, sex, ethnicity, level of education, income group, place of residence, religious affiliation, etc.
- The social setting of volunteering, such as when the respondent began volunteering, who the people who volunteer alongside them are, how people are usually introduced to volunteering in the respondent's community, the obstacles to volunteering in the respondent's community, the forms of volunteering in the respondent's community, etc.
- The respondent's attitudes toward volunteering: their motivations for getting involved, the rewards they derive from volunteering, its significance in their life
- Key social/political issues, such as the respondent's political orientation and political participation, their views about civil society, social justice, and religiosity

Users should aim to include sociodemographic information about the respondent in every survey. If the survey is of the "omnibus" type organized either by a government agency or by a private research firm (that is, if a block of questions about volunteering is being added to questions about other topics), questions about standard sociodemographic variables will almost certainly be included in the instrument already, and the information will be available to everyone who has inserted questions in the omnibus. But if the survey is designed specifically to measure volunteering and is not combined with any other instrument, users should add some sociodemographic questions, preferably after the questions about volunteering behavior. These

sociodemographic questions should follow the standard format used in surveys in the area concerned.

Knowing the social circumstances of volunteering and the respondent's attitudes toward it can add important dimensions to one's understanding of the subject. For example, this information can be very helpful when developing public policies designed to promote volunteering and to direct it toward the provision of the services most in demand. Therefore, users are advised to include questions about social settings and personal attitudes in any survey measuring the extent of volunteering. The problem is that these questions will add considerably to the length of the instrument, thus making it more demanding to complete. The researcher should therefore carefully balance the benefits expected from these additional questions against the added cost of including them.

These questions about attitudes and social setting should be phrased so that they make sense in the local context. Users are not advised to include standard questions as used in other surveys, as they may simply be inappropriate for local conditions. Having said that, the questions should still be able to provide the information needed to answer some of the most basic research questions about volunteering, such as:

- How important are social networks—family, work contacts, friendships, religious affiliations, participation in social events—in mobilizing people to volunteer?
- How important are social networks in sustaining voluntary action?
- What social attitudes are associated with volunteering? (e.g., trust, altruism, empathy toward fellow human beings, tolerance, a sense of obligation, peer pressure, the desire for credentials)
- What social behaviors are associated with volunteering? (e.g., voting, political activism, entrepreneurship)
- What political attitudes are associated with voluntary action? (e.g., liberalism, conservatism, concepts of social and economic justice)
- What religious attitudes are associated with voluntary action?
- What cultural attitudes are associated with voluntary action?

Asking questions about these subjective aspects of volunteering, however, does not necessarily require a very large survey. Users can employ more modest means, such as in-depth interviews or focus groups with selected individuals; in fact, these usually provide more usable information about these aspects of volunteering than large surveys.

Therefore, when planning a survey, users should distinguish between two major objectives: (1) measuring the amount of volunteering in an area and (2) measuring the subjective dimensions of volunteering. These objectives call for different methodologies, respectively (1) an area-wide survey based on a sufficiently large representative sample and (2) targeted interviews and focus groups with selected representatives. This is not to suggest that the subjective aspects should be ignored entirely in surveys. If questions on these matters can be included relatively easily, they can provide useful information. But if only a limited number of questions can be included in a survey, as is the case with government-sponsored or commercial omnibus surveys, questions about the objective dimensions of volunteering (its extent and distribution) should take priority over the subjective aspects. There are other ways of measuring the subjective aspects, but not the objective dimensions.

The advice given in this chapter should enable users to design a survey instrument that is as valid and reliable as possible under the circumstances. The next task is to carry out the actual survey and to process the results. This is the subject of the next chapter of this toolkit.

# Chapter 4: Collecting, processing, and disseminating the information

## I. COLLECTING THE INFORMATION

If users' questions about volunteering are to be attached to an omnibus survey, the agency in charge will usually have a well-established strategy for conducting surveys. In such cases, the agency will simply deliver the findings of the survey to the reader, accompanied by a short description of how the sample was selected and the survey was conducted. However, if users plan to conduct the volunteering survey independently, the following suggestions may be useful.

There are two main methods available for conducting a survey:

1. By mail
2. By trained interviewers, either in person or over the telephone

A third option is a diary in which respondents record their daily participation in specified activities over a certain period of time. Although diaries can sometimes supplement other methods, they are expensive and subjective and can often present logistical problems.

To avoid the problems of reliability and validity described in Chapter 3, interviews conducted by trained interviewers, either face to face or over the telephone, are the most effective. They offer the best chance of attracting a high rate of response and preventing the misinterpretation of information. Again, this method is expensive, but the quality of the information it obtains fully justifies the expense. Users can reduce the cost by using the direct entry method to process it (see below).

The team of interviewers should ideally be local people acting in a voluntary capacity, mobilized from, say, youth organizations and women's clubs and given training in research techniques. This will ensure a sense of local ownership of the survey, and thus reinforce its validity. As far as the size of the team is concerned,

users should bear in mind the cost of training a large group of interviewers and the problems of consistency of approach that may arise. It is important that the team be trained and managed by a professional researcher.

### Ensuring a high rate of return

Users should plan the conducting of the survey so that seasonal variations or mistrust and incomprehension among respondents have the minimum effect on the quality of the findings. A low rate of return can result in findings that give an inflated idea of how much volunteering goes on.

*Timing.* Conduct the survey at a time when it will be possible to contact the largest number of respondents. This means avoiding major religious festivals; periods when people have increased workloads, such as harvest time; and the season of floods, hurricanes, etc. If there are major seasonal variations in volunteering activity, schedule the survey for the period immediately following the peak season, when respondents are more likely to be able to recollect their activities with some accuracy.

Be realistic about how long it will take to conduct the survey. Do not fix a publication date for the survey report that allows insufficient time for collecting and analyzing the information.

*Trust.* Train the interviewers to win the trust of the respondents. If necessary, brief the interviewers about local customs—although this will not be required if local people have been mobilized. Enlist support for the survey among community leaders or religious leaders: A word from a respected local figure can do much to persuade people to take part in the survey.

*Understanding.* Make sure that the respondents understand fully what the purpose of the survey is. The interviewers should reassure them that strict confidentiality will be observed. After the survey findings have been published, organize workshops to enable local people to discuss them.

## II. PROCESSING THE INFORMATION

There are currently two main methods by which survey information can be collected by the interviewer and processed.

The traditional method involves two steps:

1. The interviewer writes down the information given by respondents on specially designed response sheets.
2. The information is entered into a computer file.

The disadvantages of this method are the potential for error when transferring the information from the response sheet to the computer, and the cost of hiring clerical staff to enter the information and verify it.

However, interviewers can now avoid these problems by using a personal digital assistant (PDA) such as a Palm Pilot, Mobilon, or Psion; these are often known colloquially as “palmtop computers.” Instead of writing the answers on a printed form, interviewers can key them directly into a simple spreadsheet installed in the palmtop. The information can then be transferred electronically to a computer file at minimal cost and with little risk of clerical error. Palmtops cost US\$300–500 each, but they do offer considerable advantages over the traditional method of data collection described above.

### The data matrix and the code book

Once users have assembled the information from the survey, they must convert it into a form suitable for analysis; in practice, this means the data should be computer-readable. The standard data format is a rectangular matrix, in which each respondent’s answers are entered as a single row. Each answer is recorded as a number, which is assigned a fixed position in that row. The first position in the row is usually assigned to a unique number or code that identifies each respondent individually.

The entries made in the data matrix are codes representing responses to survey questions. To enable these codes to be understood and interpreted properly, they need to be described fully. Such a description is typically included in a code book that must accompany

the data matrix. The code book lists all the “variables”—that is, questions—used in the questionnaire, all the possible responses to the variables, and how individual questionnaires are coded.

The code book should contain the following information:

- The exact wording of the variables and the range of expected responses
- How the information from the respondents was entered into the computer file and the links between the variables and the responses on the file
- How refusals to answer questions, as well as any other type of missing information, were recorded and coded
- A description of any irregularities in the administration of the survey, and their sources
- A brief description of the methodology of data collection

The usual procedure is to treat each respondent as a separate unit of observation and to give them a unique identification number. This number should be permanently recorded on the sheet containing the respondent’s answers, and also in the electronic data matrix. This enables an easy match to be made between the written records and their electronic copies, which is very helpful in data cleaning.

### Data cleaning

Users who employ the traditional method of data entry—the manual transfer of information from the response sheets to a computer file—will have to “clean” the data. This involves checking for internal inconsistencies, responses outside the range of the question, incomplete answers, missing information, misplaced responses, etc. This should be done before entering the information into the computer and then again after it has been entered.

Users can greatly simplify the cleaning of data if they employ the direct entry method described above. This method requires a data entry editor, a computer application that accepts information from the user and stores it in a matrix format. The simplest data entry editor currently available is in Pocket Access, a database program supplied with palmtops that use a Windows CE operating system. To use the editor, the interviewer must first create a table and then define all the variables

that are to be entered. As each entry is made, the data entry editor will store that information in the file and proceed to the next variable. After all the variables have been entered, the editor will advance to the next respondent. Using this method, data cleaning is greatly simplified, as the interviewers can check the quality of the information while they are recording it.

### III. DISSEMINATING THE INFORMATION

It is to be hoped that all the survey findings collected with the help of this toolkit will be made freely available, both nationally and internationally. Therefore, as soon as users have completed the survey they will need to draw up a dissemination strategy. The range of potential audiences for information about volunteering is wide—including, for example, government agencies, the research community, volunteer-involving organizations, schools, youth clubs, women’s organizations, religious bodies, and the media—and different dissemination methods will be needed to reach each of these audiences. It is good practice to offer a range of products that go into greater or lesser detail: For example, in addition to the full survey report, an executive summary should be published.

The dissemination methods available fall into three main types: computer files (e.g., on CD or on a website), printed documents (e.g., report, executive summary) and special events (e.g., seminars, press conferences, community workshops).

#### Computer files

Users should transfer the data from the survey to a computer file that is accessible to researchers and other users anywhere in the world. For this reason it is important to make the “microdata” available, microdata being all the individual responses, not processed in any way.

Here are some general guidelines on how to prepare the survey findings for public distribution:

- The data should be cleaned and arranged into a commonly accepted matrix format, where the rows represent individual respondents and the columns represent the variables.
- The electronic data file should be stored using a commonly available format such as ASCII (either

“fixed format,” where each variable has a fixed position in a row, or “delimited,” where variables are separated by a special character such as a tab or a comma), DataBase, Access, Excel, or the format used by a standard statistical package such as SPSS or SAS. These packages allow researchers to store the definitions of variables and the labels for values on individual variables, and to define missing values.

- If users do not employ a statistical package, they should make sure that the data file is accompanied by a file containing the code book, the definitions of the variables, and the value labels.

Data files can be distributed in a variety of ways:

- By posting them on specially designed web pages for downloading
- By copying them to compact discs that can be distributed with research reports or ordered by mail
- By contributing the file to “data banks” that collect and distribute statistical information

#### Printed documents

A report based on the findings of the survey should now be prepared. The advisory committee, and if possible national and international experts, should be asked to comment on the draft report.

Here is a suggested format for the survey report:

- Summary of key findings
- Introduction: what users hoped to learn from the survey; the importance to governments of measuring volunteering; details of past national attempts to measure volunteering; local implications
- Guidelines on how to use the report
- Examples of the different types of information collected
- Examples of different research methods
- Definition of volunteering
- Boxed case studies
- Specific guidelines on measuring unmanaged volunteering
- Useful contacts
- Glossary of terms

In addition, an executive summary of the findings should be prepared.

## Special events

If users have had the foresight to invite representatives of the press and the broadcast media to sit on the advisory committee, they will have made the task of publicizing the findings of the survey much easier. If this is not the case, they should now ask journalists to help them present the findings in a topical and newsworthy manner, preferably at a press conference.

Users should also organize workshops based on the findings, with the aim of generating debate among volunteer-involving organizations, researchers, and the wider community. These could be timed to coincide with national days, such as UN International Volunteers Day (December 5), or any event where social development is being debated. A topic that could be usefully discussed at these workshops would be how to measure the impact of the survey, not only on government policy (Did the findings inspire a national campaign to promote volunteering?) but also on volunteer-involving organizations (Did the findings lead to improved practice in the mobilizing, selection, placement, support, training, etc. of people who volunteer?). Another interesting topic might be what would have happened if the survey had *not* been carried out.

## IV. THE SUMMING-UP

The advice in this toolkit about carrying out a survey of volunteering can be summarized under the following ten points:

1. Define the aims of the survey and its “products” carefully so that they meet the needs of the target audiences.
2. Enlist public support for the survey by using local resources: Set up an advisory committee and invite respected local figures to become members; involve local people in planning, carrying out, and publicizing the research.
3. Do not reinvent the wheel: Use existing information to the maximum possible extent.
4. Use scarce resources judiciously. Make a clear distinction between the objective and subjective

aspects of volunteering and use appropriate methods (national survey or interviews/focus groups) to study them.

5. If possible, leave the complex task of choosing a representative national sample to a specialist agency—or commission a trained statistician.
6. Think about alternatives to the individual respondent as the unit of observation: for example, households, organizations, and geographic communities.
7. Beware of ambiguity. When designing the survey instrument, do not put the respondents in the position of having to guess what they should report. Ask about specific types of behavior and record the answers. Let the data users decide which of these types qualify as “volunteering.”
8. Do not use the word “volunteering” or any similarly value-laden term in your questionnaire. Simple descriptive language will produce the most reliable results
9. Do not assume that everyone thinks the same way about volunteering as you do. Test your research instrument before launching the survey. Make sure that your questions are easily understood.
10. Make sure that your data, methodology, and results can be easily understood by other people, especially researchers from outside your geographical area who might not be familiar with local conditions. Provide ample documentation of all your methods and of any circumstances that may help others to interpret your data correctly.

# Appendix I:

## Sample inventory of volunteering activities

This appendix reproduces a survey instrument that can be used for measuring the extent and distribution of volunteering. It is not put forward as a definitive instrument that will be suitable for all settings, but rather as a general indication of the type of questions researchers could usefully ask. Those who wish to use this type of instrument will need to adapt it to local conditions, rejecting some questions as inappropriate and perhaps adding new ones. There are likely to be particularly wide differences of opinion among countries about whether working on behalf of religious bodies or political parties can be considered volunteering.

The instrument is not based on any preconceived notion of volunteering, either on the part of the researchers or of the respondents. Instead, it proposes a list of activities that different people have associated with volunteering and asks the respondents if they have engaged in these activities. Their responses are reported in the microdata file in “raw” form, not labeled as “volunteering.” The decision to include certain activities within the definition of volunteering while excluding others rests with those who use the data generated by the instrument described here.

Subsection I describes the format of the core part of the instrument and gives instructions for the interviewers administering it.

Subsection II is an inventory of the suggested basic activities that might be included in a survey instrument, grouped under different fields. *These items have not been tested for validity.* Users employing an instrument of this type are encouraged to carry out such tests in the context of the area where they propose to carry out the survey.

This appendix does not contain standard sociodemographic items, which are routinely included in most omnibus surveys.

### I. FORMAT AND INSTRUCTIONS

The table below illustrates the organization of the sample survey instrument and the order of questions to be asked by the interviewer. It should be used as a reference for the instructions that follow it.

| ACTIVITY<br><i>(Read each activity to respondent: If “Yes,” ask questions; if “No,” ask about next activity.)</i> | QUESTIONS   |  |  |  |
|---|---|--|--|--|
|   | Did you engage in this activity in the past ___ months? | Who sponsored the activity? Check all that apply.  | For each type of organization you identified, how many hours of time did you give?   | Was any activity you identified performed in an area threatened by a disaster or armed conflict?<br>1 = disaster<br>2 = conflict |
| 1. Did you help to . . .<br><i>[description of the first activity]?</i>   | 1. Yes<br>2. No   | 1. Government agency<br>2. Nonprofit organization<br>3. School—private/public<br>4. Hospital/clinic—private/public<br>5. Trade union<br>6. Political party/organization<br>7. Church/religious organization<br>8. Cooperative<br>9. Business firm<br>10. Spontaneous action of friends, neighbors, colleagues<br>11. Other (specify) | 1. ___ hrs<br>2. ___ hrs<br>3. ___ hrs<br>4. ___ hrs<br>5. ___ hrs<br>6. ___ hrs<br>7. ___ hrs<br>8. ___ hrs<br>9. ___ hrs<br>10. ___ hrs<br>11. ___ hrs | 1. ___<br>2. ___<br>3. ___<br>4. ___<br>5. ___<br>6. ___<br>7. ___<br>8. ___<br>9. ___<br>10. ___<br>11. ___                     |
| 2. Did you participate in . . .<br><i>[description of the next activity, and so on]?</i>                          | As above  | As above   | As above   | As above   |

## Instructions

*Interviewer:* Read the following instruction to the respondent.

People often do things to help others or to solve some problems in their community without being paid to do so or being required to do so by the authorities. I will read you a list of such activities. Please tell me, if during the past \_\_\_ months, you personally did any of the activities on the list. Report only those activities that required you to do something without being ordered to do it or without being rewarded for it. Do you have any questions before I start?

*Interviewer:* After making sure that the respondent understands the request, read the activities from the first column of the table. For each activity identified by the respondent, ask the following questions:

1. Did that require you to carry out some task or other? (*Probe for details if unclear, e.g., "What exactly did you do?"*)
2. Did you carry out that task as a part of your employment or by order of the authorities?
3. Did you carry out that task because someone offered you a reward, or because you asked for or expected to receive such a reward? (*Note: Symbolic prizes or the reimbursement of expenses incurred while doing the task do not count as "reward" for this purpose.*)

*Interviewer:* If the respondent's answer to all three questions is "No," mark the answer "Yes" in the second column of the table and proceed to the next question. After you have read all the questions listed in the table, go back to the first question marked "Yes" in column two and say:

I see that you did [*read the description of the activity*] during the past \_\_\_ months. Did you do that activity only once, or on several separate occasions?

*Interviewer:* If the respondent did the activity only once, ask the following questions in the specified order:

Was that activity sponsored or organized by an organization?

*Interviewer:* If so, ask:

What kind of organization? Was it a government, a school, a clinic or hospital, a non-governmental organization, a political party, a trade union or work-related association, a cooperative, or a business firm?

*Interviewer:* If not, ask:

Who then sponsored or organized that activity? Was it your family, friends, a group of neighbors, any other group of people?

*Interviewer:* Enter the appropriate answer in the third column, and ask:

Can you tell me about how many hours you spent performing that activity?

*Interviewer:* Enter the answer in the fourth column, and ask:

Did you do that activity in an area where there was armed conflict or a natural disaster (flooding, hurricane, fire, extreme weather)?

*Interviewer:* Record the answer in the last column. If the respondent performed this kind of activity on several separate occasions, go through the same set of questions for each separate occasion when the activity was performed.

After recording all answers, proceed to the next item marked "Yes" and ask the same questions. Make sure that the respondent does not report the same activity more than once under different items. If this occurs, ask for specific details to determine exactly where the activity should be reported.

## II. INVENTORY OF CORE QUESTIONS

The following inventory lists activities that are associated with volunteering in many cultures. These can be used as the basis for designing a survey instrument. However, the list is unlikely to have covered all the possible forms of activity associated with volunteering in a particular culture, and therefore the researcher may need to add additional items. Care should be taken to describe these additions in the same way as the existing items, by focusing on behavior.

When asking questions, make sure that the respondent does not report a single activity more than once.

## **Community activity**

Did you help to bring in supplies and resources that are vital for your community, such as the harvest, building materials, animals, machinery, etc.?

Did you remove trash or debris from the public areas of your community?

Did you help to make improvements to the public areas of your community, such as roads, bridges, buildings, water supplies, electricity, public utilities, or green areas—for example, by planting trees, restoring historical sites, etc.?

Did you help to organize others or set up a program to solve a problem affecting your community or the broader natural environment—that is, did you tell others about the nature of the problem, call or host meetings to discuss the problem, or draw the authorities' attention to the problem?

Did you participate in an action to draw public attention to a problem faced by your community or the broader natural environment—for example, by a public demonstration, vigil or march, or writing letters to public authorities?

## **Emergency response**

Did you help to prepare for a natural disaster or to eliminate the effects of such a disaster—for example, by building dykes, protecting buildings and other structures, extinguishing fires, removing debris, or undergoing first aid training?

Did you help to save victims of a natural disaster from immediate danger—for example, by evacuating flood or fire victims, removing the bodies of people who were killed by a disaster, searching for people trapped in the disaster areas, or searching for people lost in the wilderness, mountains, or at sea?

Did you help to provide comfort to victims of a natural disaster—for example, medical care, counseling, food, or shelter?

Did you help to organize a response to a disaster—for example, by disseminating information, hosting or participating in meetings to discuss the potential for disaster and the responses, or developing emergency preparedness plans?

## **Community peacekeeping**

Did you help to organize members of your community or a social group to maintain order in the community—for example, by patrolling public areas, keeping vigil to deter illegal activities, or defending members of your community from being victimized?

Did you take part in any direct action, such as a vigil, surveillance, citizen's arrest, or other direct intervention to investigate or prevent an activity that is illegal or otherwise detrimental to your community?

Did you directly participate in any activity aimed at preventing an armed attack on your community?

Did you participate in any training activities to acquire the skills required to protect your community or group from criminal activity?

Did you help to resolve a dispute between your group or community and other groups or communities?

Did you help to set up or manage a program or organization designed to resolve conflicts between groups, factions, communities, or nations?

## **Social assistance**

Did you help to provide immediate assistance to people who are elderly, disabled, destitute, ill, or have behavioral problems (such as substance abuse or delinquency) by preparing food, shelter, medical assistance, training, or counseling?

Did you help to build structures designed to house or help people who are elderly, disabled, destitute, ill, homeless, or have behavioral problems—for example, temporary shelters, housing, health care centers, and utilities?

Did you set up or manage a program or organization designed to provide or coordinate

social assistance for people who are elderly, disabled, destitute, ill, homeless, or have behavioral problems?

### **Personal assistance**

Did you provide help, counseling, emotional comfort, or advice to someone you know, such as a friend, colleague, neighbor, or relative (other than an immediate family member)?

Did you help to provide basic necessities of life, such as food, personal mobility, and personal hygiene, to someone you know (such as a friend, neighbor, colleague, or relative)?

### **Children and youth**

Did you help to set up or manage programs that tackle problems affecting children or young people, such as juvenile delinquency; the neglect, abuse, or exploitation of children; homelessness; or the lack of education or a nurturing environment?

Did you help to provide services to children and young people, such as training, counseling, the prevention or correction of delinquency, rehabilitation, or emotional support?

Did you help to set up or organize a day-care program for the children of working parents?

Did you take care of children while their parents or guardians were working?

### **Human rights, advocacy, and politics**

Did you contact and organize people to advance their political interests, such as the right to political representation, religious freedom, encouraging people to participate in elections, or helping political candidates?

Did you participate in a direct action, such as a public demonstration, vigil or march, or writing letters to public officials, to bring public attention to a social and political issue, such as human rights abuses, discrimination, or the destruction of the environment?

Did you help to elect a candidate to a political office?

Did you help to set up or manage elections—for example, through disseminating information,

clerical work, monitoring, or maintaining order during the election?

Did you set up or manage a party or organization whose main purpose is to influence the political process or to elect a candidate to a political office?

### **Economic justice**

Did you help to organize people to advance or protect their economic interests, such as by setting up a union or a public campaign to address issues of wages or work safety?

Did you participate in a direct action, such as a strike, to advance the economic interests of working people or to protest against unfair labor practices?

### **Religious volunteering**

Did you help to organize a special event to celebrate a religious holiday or to worship or venerate a religious figure (a god, a prophet, a saint, a martyr, a patron, etc.)? Do not include simple participation in such an event, but special contributions, such as preparing the grounds, erecting signs and structures, providing or distributing supplies or information, maintaining order, cleaning up after the event, etc.

Did you disseminate information about religious faith or values, or to promote such faith or values among the general public?

Did you participate in a direct action, such as a public demonstration, vigil or march, or writing letters to public officials, to bring public attention to a matter of religious significance, such as religious intolerance or the desecration of religious objects or values, or to promote a religious point of view?

Did you help to set up or manage a church or other religious body?

Did you help to organize a funeral?

### **Education**

Did you teach or train others to acquire new skills, such as reading and writing, job qualifications, or proficiency in foreign languages?

Did you help to set up or manage educational institutions (schools, vocational training centers, libraries), or did you help their professional or administrative staff to train others or provide access to information or education?

## Health care

Did you help to disseminate information, consult others, or organize a program addressing the problems of health, disease prevention, medical treatment, personal hygiene, reproductive health, or healthy diet and lifestyles?

Did you help to provide support services to health care institutions (hospitals, clinics, mental health centers, immunization/disease prevention centers), or did you help their professional or administrative staff to deliver health care or rehabilitation?

Did you provide direct health care or mental or physical rehabilitation services to people who need them? (Do not report services provided as part of a response to a natural disaster or armed conflict here—go to emergency response items instead.)

Did you donate blood or other biological material such as bone marrow or organs?

Did you set up or manage a program designed to provide health care or treatment, or to disseminate knowledge about health, disease, reproductive health, personal hygiene, or healthy lifestyles?

## Environment

Did you campaign against threats to the environment, such as the building of dams or the destruction of forests?

Did you campaign on behalf of indigenous peoples who are endangered?

## Data collection

Did you collect specimens in the outdoors, read scientific instruments or observe weather or the natural environment for the purpose of recording information for emergency warning, research, or science?

Did you observe, visit, videotape, or interview other people for the purpose of recording information to be used for research or science?

Did you consult archives, newspapers, broadcasts, books, and other records for the purpose of recording information to be used for research or science?

Did you set up or manage a program or organization designed to collect data or monitor the environment for public information?

## Promotion of knowledge

Did you popularize knowledge or professional skills—for example, giving public lectures, writing articles, editing or reviewing professional journals, or serving on boards of professional associations?

Did you help to organize a public event aimed at popularizing knowledge or professional skills, such as a public lecture, professional conference, seminar, discussion forum, workshop, etc.?

Did you set up or manage an organization aimed at representing professional interests, facilitating communication among members of a profession, or disseminating information about a profession?

## Promotion of commerce

Did you help to improve or promote a particular method of production, producer organization, the exchange of good or services, product safety, etc.?

Did you set up or manage a program or organization designed to promote production, commerce, product safety, etc.?

## Law and legal services

Did you provide legal advice or legal representation to anyone on a *pro bono* basis?

Did you help to promote a general understanding of the law and legal rights, or the idea of equal and fair access to the law?

Did you set up or manage a program intended to provide legal advice or representation on a

*pro bono* basis, or to enhance understanding of the law?

## **Culture**

Did you help to plan, set up, advertise, manage, provide technical assistance at, maintain order at, or clean up after a cultural event for public entertainment, such as a musical concert, singing, dance or theatrical performance, lecture, poetry reading, film, re-enactment of a historical event, or display of works of art or crafts?

Did you act, perform music, sing, dance, read poetry, lecture, or contribute or display your writing, work of art, or craft at a cultural event for public entertainment? Do not report activities undertaken exclusively for your own enjoyment that were not intended to be shown to the public.

## **Recreation**

Did you help to plan, set up, advertise, manage, provide technical assistance at, maintain order at, or clean up after a sporting or recreational event for public entertainment, such as a competitive game (football, baseball, tennis, etc.), chess tournament, bingo, sightseeing tours, animal show, fair, or festival?

Did you take part as a player, contestant, team member, or participant in any of the events identified in the preceding question whose main purpose was to serve a public cause, such as raising funds for medical research, helping victims of natural disasters or human rights abuses, promoting peace, human rights, civic virtues, or social justice? Do not report activities that were undertaken exclusively for your own enjoyment and were not intended to serve any public purpose.

# Appendix II:

## Useful resources on volunteering

### **Action Without Borders, Inc.**

350 Fifth Avenue, Suite 6614

New York, NY 10118

USA

Telephone: (212) 843-3973; Fax: (212) 564-3377

Web: [www.Idealist.org](http://www.Idealist.org)

Action Without Borders is a global coalition of individuals and organizations working to build a world where all people can live free, dignified and productive lives.

### **Association for Volunteer Administration**

P.O. Box 32092

Richmond, VA 23294

USA

Telephone: (804) 346-2266; Fax: (804) 346-3318

Web: [www.avaintl.org](http://www.avaintl.org)

The Association for Volunteer Administration (AVA) is a professional membership association whose mission is to enhance the competence of its members and strengthen the profession of volunteer resources management.

### **Canadian Centre for Philanthropy**

*Le Centre canadien de philanthropie*

425 University Avenue, 7th Floor

Toronto, ON

Canada M5G 1T6

Telephone: (416) 597-2293; Fax: (416) 597-2294

Web: [www.ccp.ca](http://www.ccp.ca)

Provides comprehensive research based on data from the National Survey of Giving, Volunteering, and Participating. Reports the key statistical information on the charitable giving and volunteering behaviors of Canadians.

### **Center for Civil Society Studies**

Institute for Policy Studies

Johns Hopkins University

3400 N. Charles Street

Baltimore, MD 21218

USA

Telephone: (410) 516-4523; Fax: (410) 516-7818

Web: [www.jhu.edu/~ccss](http://www.jhu.edu/~ccss)

The Center for Civil Society Studies conducts collaborative research on the nonprofit sector, volunteering, and philanthropy in the US and around

the world. It also provides training toward nonprofit capacity building.

### **Corporation for National Service**

1201 New York Avenue, NW

Washington, D.C. 20525

USA

Telephone: (202) 606-5000

Web: [www.cns.gov](http://www.cns.gov)

The Corporation for National Service works with governor-appointed state commissions, nonprofits, faith-based groups, schools, and other civic organizations to provide opportunities for Americans of all ages to serve their communities.

### **Helping.org**

c/o The AOL Foundation

22000 AOL Way

Dulles, VA 20166

USA

Telephone: (703) 265-1342

Web: [www.Helping.org](http://www.Helping.org)

Helping.org is designed to help people find volunteer and giving opportunities in their own communities and beyond.

### **INDEPENDENT SECTOR Research Program**

1200 Eighteenth Street, NW

Suite 200

Washington, DC 20036

USA

Telephone: (202) 467-6100; Fax: (202) 467-6101

Email: [info@IndependentSector.org](mailto:info@IndependentSector.org)

Web: [www.IndependentSector.org](http://www.IndependentSector.org)

The goal of the IS Research Program is to produce a body of knowledge necessary to accurately define, chart, and understand the US nonprofit sector and how it can be of greatest service to society. Its activities include research, publications, events, and a major website for researchers and practitioners: NonProfit Pathfinder ([www.NonProfitPathfinder.org](http://www.NonProfitPathfinder.org)). Research over 20 years includes administering and analyzing national household giving and volunteering surveys in the United States, offering technical advice to researchers and practitioners on giving and volunteering in more than 40 countries.

### **Institute for Volunteering Research**

Regent's Wharf, 8 All Saints Street  
London N1 9RL  
United Kingdom  
Telephone: +44 (0)20 7520 8900  
Fax: +44 (0)20 7520 8910  
Email: Instvolres@aol.com  
Web: www.ivr.org.uk

The Institute for Volunteering Research aims to develop knowledge and understanding of volunteering and the context in which it operates, with particular reference to policy and practice. Its activities include strategic research, action research, organizational consultancy, program evaluation, research reviews, seminars, publications, and the journal *Voluntary Action*.

### **International Association for Volunteer Effort**

1400 I Street, NW  
Suite 800  
Washington, DC 20005  
USA

Telephone: (202) 729-8250; Fax: (202) 729-8102  
Web: www.iave.org

The International Association for Volunteer Effort was one of the original sources of the ideas that came together as the International Year of Volunteers. Working in close cooperation with the United Nations Volunteers throughout 1997, IAVE built support among its members and their governments for the resolution offered by the government of Japan which resulted in the General Assembly's declaration of the year 2001. IAVE gives leadership to the planning and celebration of the International Year of Volunteers.

### **The Points of Light Foundation**

1400 I Street, NW  
Suite 800  
Washington, DC 20005  
USA

Telephone: (202) 729-8000; Fax: (202) 729-8100  
Web: www.PointsofLight.org

The mission of the Points of Light Foundation is to engage more people more effectively in volunteer community service to help solve serious social problems. Major areas of the Foundation's work include assisting employers in developing workplace volunteer programs, providing products and services to volunteer management professionals, and aiding and encouraging the growth of the family volunteering concept.

### **United Nations Volunteers**

Postfach 260 111  
Bonn, Germany  
Telephone: +49 228 815 2000; Fax: +49 228 815 2001  
Email: rona@unv.org  
Web: www.unv.org

The United Nations Volunteers is the UN organization that supports sustainable human development globally through the promotion of volunteerism and the mobilization of volunteers. It serves the causes of peace and development through enhancing opportunities for participation by all peoples. It is universal, inclusive, and embraces volunteer action in all its diversity. It values free will, commitment, engagement, and solidarity, which are the foundations of volunteerism.

### **Volunteer Canada**

430 Gilmour Street  
Ottawa, ON  
Canada K2P 0R8  
Telephone: (800) 670-0401; Fax: (613) 231-6725  
Web: www.volunteer.ca

Volunteer Canada actively engages in research, training, and other national initiatives designed to increase community participation across the country. Volunteer Canada provides leadership on issues and trends in the Canadian volunteer movement.

### **Volunteer Match/Impact Online**

ImpactOnline, Inc.  
385 Grove Street  
San Francisco, CA 94102  
USA  
Telephone: (415) 241-6872; Fax: (415) 241-6869  
Web: www.volunteermatch.org  
ImpactOnline is a nonprofit organization investing in the development of public interest Internet applications.

### **Youth Service America**

1101 15<sup>th</sup> Street, NW, Suite 200  
Washington, DC 20005  
USA  
Telephone: (202) 296-2992; Fax: (202) 296-4030  
Web: www.servenet.org

Youth Service America is a resource center and the premier alliance of more than 200 organizations committed to increasing the quantity and quality of opportunities for young Americans to serve locally, nationally, or globally.





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Web: [www.IndependentSector.org](http://www.IndependentSector.org)



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Telephone: +49 228 815 2000  
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Email: [rona@unv.org](mailto:rona@unv.org)  
Web: [www.unv.org](http://www.unv.org)