

# OR Accreditation

## Example: Associate Fellow

### Application Form Part 1

#### Data Protection Act

Information entered in this form will be used for the purposes of assessing your application and may then be retained to assist the Accreditation Panel in maintaining consistent standards. Information entered in the 'Personal and professional details' section may also be used for membership administration. The contents of the form will be made available to the referees you nominate. Information entered or amended in fields marked # will also be displayed in your home page in the Members' Enclosure at theorsociety.com, unless you check the boxes provided in order to hide the information.

#### Membership Qualification

Accreditation is restricted to fully paid-up members of The OR Society. Please check the box to certify that you are a member and that your subscription is paid up to date.

#### Application

I apply for admission to the category of Associate /Associate Fellow / Fellow and agree to pay the application fee.

#### Personal and Professional Details

Family Name*	Green	Salutation*	Ms
Forename*	Wilma	Date of birth* (dd/mm/yyyy)	
Job Title	Senior OR Analyst		
Work Place Name	Department for Business, Innovation and Skills		

#### Qualifications at first degree and above, including degree title, class (if applicable), subject, institution and year

BA in Mathematics II(i) 2007, University of Oxbridge

MSc in OR (Pass with Merit) 2008, London University

#### Memberships, conferring letters after the name, of any professional bodies. Please state date of award

AORS

Associate of the Operational Research Society, April 2005

#### Curriculum Vitae

Curriculum vitae in reverse chronological order going back to first job, giving for each position start and end dates, employer / self-employed, job title, responsibilities and brief details of work undertaken

1 January 2012 to date

Export Credits Guarantee Department

Operational Research Analyst (HSO until November 2012 then SSO)

Modelling costs of options to prepay loans early

Modelling value of fixed rate loan book

Assisting in the setting up of a Risk Assessment Unit

Providing analytical support to project finance cases

01 Oct 2008 to 31 Dec 2011  
Department of Trade & Industry  
Operational Research Analyst (SO until 01 Aug 2010 then HSO)  
Performance analysis for Trade Partners UK  
Pay bill modelling  
Forecasting redundancy payments  
Text analysis of consultation exercise

## Application Form Part 2

### Achievements

Concisely describe your achievements under all of the following headings, entering any information that will support your case. Enter 'none' where that is the case. Please refer to the guidelines before completing this section.

### Practice Criteria

#### Contributions to improved performance or well-being, directly or indirectly, through OR applications in public, private or voluntary organisations, or in the community (Field 1)

Contributed to improved performance measurement process for Trade Partners UK. Developed the reporting system so that evaluation of events could be made available quickly throughout the organisation. The incorporation of customer comments to the reporting process gave organisers more to act on in planning future events/ developing services. Produced summary information to enable comparison of groups to encourage dissemination of best practice and flag up areas of concern.

Conducted a text analysis of the responses to a DTI review. This enabled focused interrogation of a large volume of information. Was able to flag up issues of concern and provide a commentary on key areas. It allowed distinction between different groups of stakeholders. This exercise drew attention to areas working successfully and where there were opportunities for improvement, taken forward in the redesign of the department.

Ad hoc support of groups attempting to improve their performance measurement through advice on measurement routes, survey design and interrogation of results.

Assisted in the development of a forecasting tool looking at potential staff levels and draws on the National Insurance Fund for the Redundancy Payments Service.

Provided information to support hedging of options to prepay loans. This was to aid decisions on which areas to prioritise in offsetting risk. Flagged up issues of data quality and worked on reducing the risk associated with this. Developed a system to enable reliable updating of data to provide ongoing support. Developed systems for modelling and reporting the value of prepayment optimality and progress it mitigating the associated risks. Worked with the management board to develop these so that the risks could be more readily communicated.

Assisted in the project planning for developing a risk assessment unit in DBIS so that the processes are more streamlined and the information provided to decision makers is more co-ordinated. This included documenting processes to help maintain consistency of approach. This project is ongoing.

#### Management of significant O.R budgets, staff or facilities (including in education) and promotion of O.R. in the organisation and/or senior non-O.R. management role(s) (Field 2)

Took part in a presentation introducing AHP to the Economics & Statistics Directorate of DTI. The positive response to it helped to raise our profile.

Actively sought involvement in the review of the DTI. This resulted in the Operational Research Unit gaining access to a high profile project. My subsequent involvement in the project involved text analysis of the consultation of stakeholders. Although this was well received the real value was added by enabling some of my colleagues to demonstrate process mapping and other skills. Our involvement in this project helped to contribute to our later positioning in the Strategy Unit of the redesigned DTI and increased recognition of the usefulness of OR professionals. My role was what got the ball rolling and was an opportunity that might otherwise have been missed.

#### OR project management and supervision, including practice-based student projects (Field 3)

Managed Trade Partners UK performance measurement process.

Managed pay bill modelling for the Insolvency Service.

Introduced a new colleague to the performance management processes for Trade Partners UK. Supervised their early involvement in the project to enable them to take over as project manager. Also supervised administrative support for project.

Given responsibility for managing the development of reporting systems for Fixed Rate Export Finance Optimality. Have managed the introduction of new members of staff to this project area and the associated models. Also managed the process of handing over some of the reporting responsibilities.

Managed a sandwich course student in the construction of a reconciliation tool between two key information systems. This included providing the necessary training and support in the development and handover of the tool to the end users. Subsequently managed the next sandwich course student in taking over the support of this model and making required modifications.

Took over the supervision of an OR MSc student when their supervisor moved on and in the following year managed another student through the duration of their project looking at validating a model and looking at sensitivities to a key driver. This included initiating the project and recruitment of the student.

#### Authorship of written or oral reports, conference and workshop presentations, and case studies which contribute to the practice of O.R. (Field 4)

Produced various written summaries of DTI review consultation exercise aimed at different audiences.

Wrote presentations to introduce new forecasting methodology to the Redundancy Payments Service, including presentation for YOR16.

Produced various notes on aspects of the costing of options to prepay loans. These covered issues such as volatilities of credit spreads, cumulative totals, grouping types of cases and splitting the loss/ gain between different parties involved. Also wrote documentation covering reporting procedures.

Presented on valuing prepayment optimality at the GORS 2009 conference. This covered an overview of the collaboration involved across the department to integrate a model of the economic benefits of prepaying with more qualitative factors. Key to this was integrating legal opinion on break funding clauses which would limit losses that ECGD might be exposed to.

Presented work on implementing a linear programming model looking at supply, demand and transportation costs in a sector of interest to project finance to the rest of the OR group.

#### Contributions to the development, maintenance and implementation of innovative O.R. systems through academic / practitioner collaboration (Field 5)

None

#### Successful creation of own business in O.R. consultancy (Field 6)

None

#### Theoretical developments that have led directly and demonstrably to improved practice (Field 7)

None

## Application Form Part 2 - continued

### Education, Training and Development Criteria

#### Management & development of OR courses, including in-company training or MSc course director. (Field 8)

I regularly take part in my team's Experience Share events and have trained two junior OR staff on the techniques used in pay bill modelling.

#### Substantial introduction of new OR courses, teaching methods or curriculum developments (Field 9)

None

#### Delivering effective OR teaching or training, including mentoring and coaching, whether in a business or educational environment. (Field 10)

Basic familiarisation training for new recruits and placement students including Excel, Access, VBA and survey scanning software to enable early involvement in important aspects of OR projects. Did introductory presentation at GORS induction conference.

#### Active development of your own knowledge and professional skills. (Field 11)

Took responsibility for organising an introductory course to VBA for members of GORS. This was so popularly subscribed to that I set up another 2 in short succession.

Have sought areas where MSc students could contribute to project work.

Am currently doing a correspondence course in Finance with the Edinburgh Business School so that I can better understand the field in which I am currently applying my OR skills.

Attended Introduction to Econometrics LSE Summer School to improve professional skills. Actively sought involvement in forecasting project to develop skills.

Contributed to a GORS Spreadsheet Best Practice seminar by presenting on Pivot tables and related health warnings.

Have looked for opportunities to apply softer skills as my natural strengths are in hard OR.

#### Participation in, and contribution to, the organisation of ORS conferences, workshops, seminars, regional societies, study groups, the management of The OR Society, and similar participation in EURO or IFORS (Field 12)

Programme chair of YOR17, intending to present on current work and potentially accreditation. Have written articles for the Newsletter in relation to this.

I am a national member of the ORS Council.

Programme chair of YOR16, also presenting and assisting in workshops.

Member of LASEORS committee, organising talks and writing the Xmas quiz.

Was secretary to the YOR committee of the ORS.

#### Contribution to academic / practice collaboration leading to improved education and training (Field 13)

Replaced supervisor of OR MSc student in 2010 and was lead supervisor of an LSE OR MSc student in 2009. Actively sought opportunities to make this happen.

Supplied contacts and introduced managers to academic contacts to facilitate in house training of both OR professionals and clients.

Invited academics to do workshops at the 2011 GORS Conference.

Introduced academic OR professor to Invariants, the Maths Society of the University of Oxbridge, to give a talk.

A record of work placed in the public domain (Field 14)

Presentations at GORS and YOR conferences as well as to colleagues.

Success in contributing to collaborative research projects and / or in obtaining research grants. (Field 15)

None

Acting as external examiner (Field 16)

None

Refereeing and editing for JORS, EJIS, KMRP, OR Insight, and other relevant publications (Field 17)

Experience limited to contributing to ORS Newsletter and GOVORN (the newsletter of GORS).