**Some practical pointers for success**

This document has been out together in order to give you some information that might be helpful to consider before undertaking a Pro Bono OR project.

The Third Sector - including charities, social enterprises, mutual and indeed any organisations that are not part of the private or state sectors - is different. And doing OR as a volunteer rather than as a paid person or student is also different. But does that mean that you need to approach the project differently?

Table 1 below outlines success factors that you need to get right in order for a project to be successful and also key issues for Pro Bono volunteers related to those factors.

Other issues to consider:

* The project almost always takes longer than you would expect:
* Clients’ time is hard to get: Board level people are generally part-time volunteers committed to only a few hours a month, and people in operational roles (including CEO) are generally overworked
* Overrun is frequently a cost-free risk to the client
* The ‘and another thing’ syndrome
* Clients can be relatively naïve, especially ‘SME’-equivalent clients, because OR is so unusual in the sector
* There is usually something else underlying the presented problem
* The stakeholder landscape is generally complex
* Small charities are almost always very vulnerable to adverse environmental change, and the consultant needs to be sensitive to this

*Table 1: Success factors and pro bono issues (Ruth Kaufman Sept 2014)*

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| **Success factors**  | **Issues for pro bono** |
| Appearing to be professional and confident |  |
| Good listening to client (including probing for underlying issues) |  |
| Consultant has done their prior research  | This should include sector understanding |
| Client engagement  |  |
| Good communication and trust  | Need to use appropriate language (see ‘prior research’) |
| Clients (and the right people at the client) have time to give information  | Understand clients’ time constraints (especially an issue for trustees, or for small delivery-focused charities) |
| At some point before it is too late, there is an agreed product/ToR/timing/scope/report/plan  | a) Greater flexibility may be necessary because of clients’ relative inexperienceb) Danger of project drift as a result of client inexperience and consultant emotional involvementc) Commitment to timings should be as rigorous as paid external consultant; don’t think, or allow client to think, that because it is unpaid, standards can be lowered mid-project |
| Having empathy (i) with organisations objectives, (ii) with organisation’s way of working  | a) Need client to believe in your empathyb) but mustn’t allow it to override your professional judgement andc) must be willing to challenge |
| Technically competent consultant (includes ability to put self in client’s shoes) | a) Emotional or social drive to do something for the charity may override professional judgement on own competence; b) Need to be willing to pull out if necessary, but also need to consider what would be most helpful for the charity, and adapt practice to meet their needs;c) Need to be willing to agree different product if necessary |
| Understanding and clarifying risks |  |
| Identifying key stakeholders | Bear in mind particular structure of sector, including respective roles of volunteers, trustees and paid staff |
| Suitable client expectations, well-managed | Bear in mind possible relative inexperience |
| Being able to think on your feet |  |
| Not scaring client off | Bear in mind possible relative inexperience |