



## Pro Bono OR – Guidance pack for volunteers

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## Introduction

**Thank you** for agreeing to become a volunteer for Pro Bono OR.

Although a pro bono project for a third sector organisation is a voluntary activity, it is still an OR project and should be treated with all the commitment, rigour and professionalism that such a project requires. These guidelines have been produced to help ensure the project goes as smoothly as possible.

You may be the first OR person that the organisation has ever worked with, so as well as – we hope – deriving satisfaction from your role, you are an ambassador for the whole profession. So do get in touch if you have any doubts, problems, or successes you want to share. In any case, we hope you enjoy the experience, and look forward to receiving your feedback.

**Our Aims.** We are here to:

- help third sector organisations build their impact and achieve their desired outcomes;
- promote awareness and understanding of the benefits of OR across the third sector and to wider audiences;
- give OR professionals an opportunity to practise in a wider arena and to develop their experience.

**Our Values.** We aim to be:

- open and welcoming:
  - working inclusively;
  - building relationships;
  - treating people with respect;
  - embracing diversity;
  - sharing knowledge;
  - being transparent in our dealings;
- helpful, serving customers without seeking personal gain;
- trustworthy;
- rooted in evidence and rational analysis:
  - rigorous;
  - objective;
  - learning.

**Our Service.** We will:

- advertise potential projects to all who have expressed an interest in volunteering, and share qualifying responses with the relevant third sector organisation;
- oversee the project with a light touch: checking that it has an agreed scope and deliverables, that it is progressing as planned and being on hand to help with problems;
- support the ending of the project and request feedback to evaluate our service;
- publicise the project if suitable, and by agreement;
- follow our Pro Bono Process and adhere to The OR Society's Statement of Ethical Principles.



## Responsibilities and expectations

We want you to have a fantastic time as a Pro Bono OR volunteer, so we take our responsibilities towards you seriously. As a Pro Bono OR volunteer, you will be a representative of The OR Society and as such, we ask that you act appropriately.

### The OR Society's responsibilities

To act in accordance with our values; to behave in a rigorous, inclusive, proactive and supportive manner.

- To offer equal opportunities to everyone who wants to volunteer;
- To offer appropriate support for your role, including access to the Pro Bono OR Manager who will support and advise you;
- To celebrate success, and recognise loyalty and dedication;
- To respect all our volunteers and encourage two-way communication;
- To provide information about Pro Bono OR outreach work and relevant policies and procedures;
- To make necessary arrangements to ensure your health, safety and welfare as a volunteer;
- To encourage a positive and friendly atmosphere.

### Our expectations of you as a volunteer

- To act in accordance with our values; to behave in a rigorous, inclusive, proactive and supportive manner;
- To aim for high standards of efficiency, reliability and quality in your volunteering;
- To support, respect and adhere to our and our client organisation's policies and guidelines, including all aspects of safeguarding, health and safety and equal opportunities;
- To let the Pro Bono OR Manager know if you have any problems so that we can find a solution together;
- To let the Pro Bono OR Manager and the client organisation know if you become unwell or are no longer able to volunteer;
- To have the best possible experience by getting involved and enjoying yourself.

## Time commitment

The OR Society understands that your time is valuable. As such, you are welcome to choose a Pro Bono project to suit your availability and can volunteer for as many or as few projects as you like.

## Project management

The project description in the advert is not intended to be definitive. We expect the volunteer on the ground – you – to agree full details with the organisation. You should:

- Liaise with the client to agree with them what the project should cover. This will take into account the more detailed information you will be able to get, as the volunteer on the ground, compared with the 'project scoper'; and relate to your own understanding



and expertise, your own time available, and the latest thinking of the client (which may have developed since the first scoping).

- draw up a project proposal, using the specimen [project proposal form](#), adapted as necessary; and agree this with the client. The clearer and more explicit the obligations of everyone involved are the better. So try to make sure that the agreement covers the essentials. Whilst some of this may have already been covered on the registration form, you will be providing an updated version which both you and the client can commit to. It should include:
  - *what the organisation is expected to do and what the volunteer and any other parties are expected to do;*
  - *within what time periods;*
  - *a description of the problem and the boundaries or limits of the volunteer's involvement;*
  - *the goals or aims of the intervention;*
  - *how the problem will be tackled, the kind of data that will be needed, the data collection methods that will be used;*
  - *how progress will be reviewed and how the intervention can be evaluated;*
  - *how the project will be quality assured (for projects where any analysis/report/recommendations are made);*
  - *the nature of the final report or other outcome;*
  - *follow-up activities that may be required;*
  - *how and when feedback will be given to the volunteer after the intervention.*

You must return the project proposal form to the Pro Bono OR Manager within **one month** of the project starting.

The Pro Bono OR Manager will check in with you and the organisation once a month to ensure the project is still on track. You may of course change the project details as the project proceeds, but we ask you to keep the project proposal updated, and to let the Pro Bono OR Manager know if the timescale or deliverables change significantly.



## Process Overview

An organisation registers an interest in receiving Pro Bono OR support by completing a registration form and returning it to the Pro Bono OR Manager.



The Pro Bono OR Manager will arrange for a member of the Pro Bono OR Steering Group (who are specialists in OR) to contact the organisation to discuss whether there is a potential OR project.



The Steering Group member will complete the project scoping form. Once this has been approved by the organisation, it will be sent to the Pro Bono OR Manager.



The Pro Bono OR Manager sends a project advert to the registered OR volunteers. OR volunteers have two weeks to send in an application form and CV.



The Pro Bono OR Manager sends the OR volunteer applications to the organisation who will then select who they would like to work with.



The Pro Bono OR Manager informs all the OR volunteers of the outcome and puts the successful OR volunteer(s) and the organisation in touch.



The organisation is required to complete a pre project survey and the detailed project proposal form is completed with the OR volunteer(s).



The project commences.



If the project has a duration longer than 6 weeks, the OR volunteer and organisation are contacted on a monthly basis by the Pro Bono OR Manager to ensure that no problems have arisen.

## Upon completion of the project

At the end of the project, the OR volunteer(s) and the organisation are required to provide feedback to The OR Society. The organisation is required to complete post-project surveys immediately afterwards, 6 months and 12 months after completion of the project to assess the benefits achieved. The OR volunteer(s) will be asked to produce a case study slide which will be published across The OR Society's media platforms.

## Help from the Pro Bono OR team

The Pro Bono OR team is always ready to help if you encounter any problems. For example:

- we can find additional analysts if you need more time, more expertise or some mentoring support;
- if the charity is not responding to you, the Pro Bono OR Manager will be able to step in.

So please, if anything is going wrong with the project or your relationship with the organisation, please contact the Pro Bono OR Manager who will be able to help.



## Quality assurance

Pro Bono OR recommends using the [Quality Assurance tools and guidance](#) provided on GOV.UK when quality assessing any work.

## Conflict of interest

A conflict of interest arises where your commitments as a volunteer, are likely to be compromised, or may appear to be compromised, by your personal gain, or gain to immediate family (or a person with whom you have a close personal relationship) whether financial or otherwise.

If you think you may have a conflict of interest please speak to the Pro Bono OR Manager immediately.

You must not take on a project with the intention of trying to gain paid work. Pro Bono OR is free support arranged on behalf of The OR Society and must not result in any financial gain to the volunteer. That said, there is no bar on you subsequently undertaking paid work for the organisation if this is agreed to be suitable to all concerned. **If the organisation proposes this within 12 months of the completion of your Pro Bono engagement, you must declare it to the Pro Bono OR Manager.**

## Post-project feedback and publicity

In order to evaluate the work carried out on behalf of The OR Society and help to fulfil The OR Society's charitable aims, both the organisation and you should complete feedback forms at the end of the project and return these to the Pro Bono OR Manager at The OR Society.

In order to help publicise the work, we ask you to complete a case study summary using [this template](#), in consultation with your client. We also encourage you to consider writing up your experience for *Inside OR*, proposing your project as an *Impact* article if it has led to implementation and change at the organisation, and presenting at conferences, to your local Regional Group or at a Third Sector Special Interest Group meeting. All of this will be of benefit to the Pro Bono OR scheme and the wider OR community and third sector; as well as to you and your career, and your client.

## Resources available

The OR Society would like all volunteers to feel confident in delivering high quality OR projects. When preparing for a project, volunteers can access a collection of resources on the volunteer resources page of the Pro Bono OR website including:

- [a list of free software](#)
- [links to resources on 'measuring impact'](#)
- ['hints and tips' for a successful project](#)
- [an introduction to the charity sector](#)



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# Pro Bono OR

providing support to the third sector

## Further Information

The OR Society takes the valuable contributions of Pro Bono OR volunteers seriously. This is reflected in the policies and procedures we have that cover both volunteers and staff as set out in our [Volunteer Handbook](#).

## Thank you

The Pro Bono OR scheme would not be possible without the hard work of volunteers like you.