

# Pro Bono OR

## Project Proposal Form

**Prepared for:**

**Prepared by:**

**Date:**

**Email:**

### 1. Introduction

- 1.1 This is a summary proposal outlining work which is to be undertaken by **«Name of OR Volunteer»** from The OR Society for **«Name of Organisation»**
- 1.2 The proposal is to **«brief outline of project»**
- 1.3 The objective of the work is **« explain the overall aims related to client purpose, and the benefits the client seeks to achieve from the work »**

### 2. Scope of the work

- 2.1 The analysts will:
  - **«bullet points here»**
- 2.2 The key deliverables requested by the organisation are **«brief outline (could be report/presentation/spreadsheet, model/database etc)»** which will cover:
  - **«bullet points here»**



2.3 The scope of the project will be:

- «list what we will include and exclude»

2.4 The project will be agreed to be successfully completed when the following have been achieved:

- «bullet points here»

### 3. Working method

3.1 The work will be undertaken starting on «**Start date**», with the report and presentation delivered «**End date**»

3.2 To complete the project deliverables the analyst(s) will require access to and co-operation of «**Names of people**»; access to «**details of what data**»; access to «**details of what documentaion**»; access to «**details of what systems**»

3.3 The OR volunteer(s) is/are working pro bono. However, reasonable travel expenses will be paid by «**Name of Organisation**».

### 4. Quality Assurance

4.1 Quality assurance/peer review/cross checking etc. of work is considered best practice. It enables errors to be identified and corrected, and therefore reduces risk before the outcomes of the work are relied on or otherwise acted on. Using quality assurance is not a reflection on the skills or abilities of the person(s) undertaking the work.

Quality assurance can be done by the organisation which intends to rely on the work, or arranged by the person(s) undertaking the work. If working in a team, volunteers can peer review one another's work. If working alone, a volunteer can ask a colleague to peer review their work, or ask the Pro Bono OR Manager to identify a suitable reviewer.

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

If, as a result of this project, analysis/report/recommendations are provided to «**Name of Organisation**» the piece of work should be quality assured and/or peer reviewed.

Is it expected that recommendations will be made arising directly from the OR work?

**Yes/No** (Please delete as applicable)

- If yes, who be undertaking the quality assurance/review of the recommendations?



## 5. Evaluation

- 5.1 OR volunteers are committed to delivering a high standard of service. As part of this proposal The OR Society will seek feedback about our performance, and ask that both the organisation and the volunteer participate in the evaluation process. Additionally The OR Society would like to be able to use this project as a case study showcasing OR in the Third Sector, and asks for your co-operation in this.

## 6. Confidentiality

- 6.1 The Volunteer(s) agree not to disclose any confidential information not generally available to the public disclosed to them in connection with the project by the Organisation or its staff, volunteers or clients, unless instructed by a competent legal authority to disclose it or unless its disclosure is required under law or unless given prior consent in writing by the Organisation. If disclosure is required, the volunteer will discuss with the Organisation the necessary minimum level of information needed before making a disclosure. The Volunteer shall use confidential information solely for the purposes of carrying out this project and for no other purpose. No licence to use any party's confidential information is given under this agreement except the rights specifically described above. The volunteer(s) will destroy any confidential information at the end of the project.

## 7. Conflict of interest

- 7.1 A conflict of interest arises where the commitments of the volunteer, are likely to be compromised, or may appear to be compromised, by that person's personal gain, or gain to immediate family (or a person with whom the person has 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 Project Manager immediately.
- 7.2 The Volunteer(s) agree not to conduct themselves in such a way that promotes financial gain as a result of this project. The organisation must report any such activity to the Pro Bono OR Project Manager.

## 8. Project approval

I confirm that I have reviewed the information contained in this Project Proposal and agree:

Name	Role	Signature	Date (MM/DD/YY)
«Name of person in organisation»			
«Name of OR volunteer»			
«Name of any other person/(s) involved»			

The signatures above indicate an understanding of the purpose and content of this document by those signing it. By signing this document, they agree to this as the formal Project Proposal.

If you wish to discuss any aspect of this proposal, or the services that OR analysts can provide, please contact «**Name of volunteer**» or [ProBonoOR@theorsociety.com](mailto:ProBonoOR@theorsociety.com).