

Pro Bono OR Volunteer Handbook

Welcome

Welcome to the Pro Bono OR scheme. Thank you for joining our pool of volunteers interested in Pro Bono OR projects. As a Pro Bono OR volunteer, you are willing to give your time, energy and skills to support third sector organisations. This handbook aims to answer your questions about volunteering with Pro Bono OR and give you all the information you need to volunteer with confidence. This is one of three useful documents, the other two are:

- a general volunteer handbook for people volunteering for The OR Society (<https://www.theorsociety.com/media/6280/ors-volunteer-handbook-july-21-v1.pdf>);
- and a volunteer guidance document for when you are ready to start on an actual project (<https://www.theorsociety.com/media/6473/guidance-pack-for-volunteers-2021v1.pdf>).

If you have any queries, your contact at The OR Society will be the Pro Bono OR Manager.

Email: ProBonoOR@theorsociety.com

Tel: 0121 233 9300

Web: www.theorsociety.com/ProBonoOR

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Volunteering with Pro Bono OR

The Pro Bono OR scheme aims to:

- Help third sector organisations to do a better job, improve outcomes and build capacity by using the skills of volunteer OR analysts and consultants.
- Promote awareness and understanding of the benefits of OR across the third sector and to wider audiences.
- Give OR analysts an opportunity to practise in a wider arena and develop their knowledge and skills.

Who is this handbook for?

This handbook is intended for those interested in volunteering with the Pro Bono OR scheme. It outlines the principles on which the relationship is based and provides some information on volunteering with us. Volunteers support Pro Bono OR by giving their time to work with third sector organisations on behalf of The OR Society. The volunteering relationship is based on trust and does not involve the obligations associated with employment. No payment is made by The OR Society to volunteers.

Recruitment

The variety of skills, knowledge and experience that volunteers can bring to Pro Bono OR is one of the scheme's strongest assets. Anyone with experience studying or working in the field of OR (and related disciplines) can be a valuable member of our community. The OR Society is committed to promoting diversity and as such we seek to ensure there are no unnecessary barriers to volunteering.

Equal opportunities and diversity

The OR Society is committed to respecting equality and diversity in all aspects of our work. We value the contributions of those with diverse backgrounds and experiences and do not tolerate discrimination on grounds of age, gender, race, disability, religious belief or sexual orientation.

Responsibilities and expectations

We want you to have a satisfying experience 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.



PRO BONO OPERATIONAL RESEARCH

- To provide information about the Pro Bono OR scheme and all relevant policies.
- To offer appropriate support for your role, including access to the Pro Bono OR Manager who will support and advise you.
- To respect all our volunteers and encourage two-way communication.
- To celebrate success and recognise the commitment made by volunteers.

Seymour House, 12 Edward Street, Birmingham, B1 2RX

◆ +44(0)121 233 9300 ◆ email@theorsociety.com ◆ www.theorsociety.com

Our expectations of you as a volunteer

- To behave in a rigorous, inclusive, proactive, and supportive manner, in accordance with our values.
- To act in accordance with our [Ethical Principles](#).
- To aim for high standards of efficiency, reliability and quality in your volunteering.
- To support, respect and adhere to our policies and guidelines (and those of the third sector organisation that you work with).
- To keep the Pro Bono OR Manager up to date on project progress and respond promptly to requests for updates and feedback.
- 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 know if you are no longer able to volunteer.

Time commitment

We understand that your time is valuable. As such, you are welcome to volunteer as little or as often as you can. Projects can vary in length and you can decide how long you can commit to a project. For example: the shortest projects may require just a day of your time, to talk things through and help the client understand their situation better; the longest may invite your involvement for several weeks or even longer. Most projects are spread over a long elapsed time, so they need not take you away from the day job for more than a few hours at a time. Usually, long projects can be ‘chunked’ into parts of 5 days or less, so you need only take on the number of chunks you can manage.

What do Pro Bono OR volunteers do?

Pro Bono OR volunteers use their skills to make a real difference to third sector organisations, and to practice in a wider arena. The scheme allows you to improve your knowledge of the third sector whilst cultivating your own skills. You can see examples of past projects on our [case studies](#) page of the website.

The role of the volunteer

The role of the volunteer is to help third sector organisations benefit from OR in tackling their challenges or improving their outcomes. You can work as an individual or as part of a team to complete a project. Each project is initiated by a member of the Pro Bono OR steering group who drafts the project brief used to create the project advert. The project is advertised through social media and via email to the Pro Bono OR volunteer group. If you apply and are selected to work on a project, you will then work with the client organisation to draft a project proposal to specify the aims, activities, outcomes and success measures for the project. You will keep in touch with the Pro Bono OR Manager on a regular basis (usually monthly) to

provide updates and then notify of project completion. You will then be asked to provide feedback on your experience and draft a case study (if appropriate).

The Project Process

To give you an idea about how a typical pro bono project might run, we have created a step by step look at the [Pro Bono OR project process](#).

Managing a Pro Bono OR project

After an initial meeting, you should draw up a project proposal, using and adapting the [specimen project proposal form](#); and agree this with the client.

Project proposals are agreed based on the time you have available. Projects experience delays due to many reasons and as such, we regularly monitor the progress to catch any issues and manage expectations.

Project management is a very important aspect of running a pro bono project. Find out more about how to manage Pro Bono OR projects, including some of our pointers for project success [here](#).

When preparing for a project, volunteers can access a collection of [resources](#) that they may find useful.

Pro Bono OR volunteers can:

- Work with potential third sector clients to draft project briefs.
- Undertake projects, either individually or in teams.
- Write up and/or present work, wherever appropriate.
- Mentor junior volunteers who need help.
- Provide project management support.

Information about the charity sector

If this is your first time working with a charity or third sector organisation you may benefit from reading our [information about the UK's Charity Sector](#).

Your volunteering

Health and safety

When volunteering for The OR Society, you have a duty to take care of yourself and others around you. If you are visiting an organisation in person, please take care to follow any Health and Safety policies and regulations in place, including fire procedures. You should be given information about what to do and where to go in case of a fire or emergency.

Safeguarding

The OR Society is committed to ensuring the welfare of volunteers, staff members and other individuals who take part in The OR Society's activities. As a Pro Bono OR volunteer working with an external third sector organisation, you will need to be aware of that organisation's safeguarding policy. If you have any questions or concerns, you can raise these with the Pro Bono OR Manager.

Expenses

A Pro Bono OR volunteer is engaged in work directly with the third sector organisation. Therefore, The OR Society does not cover travel expenses but requires that reasonable travel expenses will be paid by the third sector organisation. This is addressed when drafting the project proposal and should be agreed in advance of any expenses being incurred.

Insurance

The OR Society has appropriate insurance in place to cover Pro Bono OR volunteers, including employers' liability insurance, professional indemnity insurance and public liability insurance. Our insurance does not cover volunteers' personal belongings. The OR Society does not provide motor insurance for volunteers who drive to a location to undertake volunteering. Most insurers class volunteering as 'social, domestic and pleasure', which is included in car insurance as standard. However, it is recommended that you double check with your insurer that you have the cover you require.

Resolving concerns

We work hard to ensure that third sector organisations and volunteers engaging in the Pro Bono OR scheme have a positive and rewarding experience. If you have any problems or concerns about your volunteering, please notify the Pro Bono OR Manager, who will make every reasonable effort to resolve the issue. The OR Society would like all volunteers to feel confident when working on and delivering pro bono projects. You can contact the Pro Bono OR Manager for further support or guidance.

Data protection & confidentiality

Volunteers are asked to maintain confidentiality while volunteering. If you are given confidential information there is usually a legal obligation to keep it confidential. Some organisations may ask you to sign a Non-Disclosure Agreement when accessing and working with their data for the purposes of the pro bono project. When a volunteer completes a Pro Bono OR project, all information held by the volunteer should be given back to the organisation and all personal copies destroyed.

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, gain to your employer/business, 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.

Whistleblowing

The OR Society is committed to ensuring the highest possible standards of public service. We have a whistleblowing policy to help volunteers who have concerns over wrongdoing within The OR Society. Any concerns over wrongdoing within an external organisation should be raised initially with the Pro Bono OR Manager. The Pro Bono OR Manager will help you identify the appropriate course of action, which could include following the external organisation's own whistleblowing procedure.

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. You can contact the Pro Bono OR Manager for further information.

Thank you

Pro Bono OR volunteers allow third sector organisations to benefit from OR projects that they might otherwise not be able to access. The efforts of Pro Bono OR volunteers make a huge difference, both to individual organisations and their service users. None of this is possible without the hard work and dedication of volunteers like you. **Thank you.**