

Guidance for Volunteers Starting a Pro Bono OR Project

Introduction

Thank you for volunteering to work on a Pro Bono OR project.

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.

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

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Responsibilities and expectations

We want you to have a great 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.
- 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 maintain regular (monthly) contact with the volunteer and client organisation.
- To respect all our volunteers and encourage two-way communication.
- To celebrate success and recognise the commitment made by volunteers.
- To make necessary arrangements to ensure your health, safety and welfare as a volunteer.

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 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 and the client organisation's policies and guidelines, including all aspects of safeguarding, health and safety and equal opportunities.
- To maintain regular (monthly) contact with the Pro Bono OR Manager.
- 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 and the client organisation know if you become unwell or are no longer able to volunteer.

Time commitment

The actual project time commitment will be agreed between yourself and the organisation when completing the detailed project proposal.

Project management

The project description in the advert is not intended to be definitive. We expect you to agree full details with the organisation.

Following introductions made by the Pro Bono OR Manager, you should liaise with the client to agree with them what the project should cover. This will consider the more detailed information you will be able to get from discussions with them, 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 description in the advert).

You will take the lead on drafting a project proposal, using the specimen project proposal form provided by the Pro Bono OR Manager, adapted as necessary; and agree this with the client. The clearer and more explicit the obligations of everyone involved are the better. 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 to the Pro Bono OR Manager within one month of the project starting.

If the project is expected to last longer than six weeks, the Pro Bono OR Manager will check in with you and the organisation monthly 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.

Resources and help 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. These include resources for project support and information about the third sector. The Pro Bono OR Manager is always ready to help if you encounter any problems. For example: we can find additional volunteers if you need more time, more expertise or some mentoring support; or if the organisation is not responding to you, the Pro



Bono OR Manager will be able to step in. So, 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.

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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. 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.**

Upon completion of the project

At the end of the project the volunteer should inform the Pro Bono OR Manager that the project is complete. The Pro Bono OR Manager will ensure that you receive feedback from the client regarding your work.

Post-project feedback

In order to evaluate the work carried out, and help to fulfil The OR Society's charitable aims, the volunteer and the client are required to provide feedback to The OR Society. This will be conducted initially through a virtual meeting or a call to discuss what went well and what could be improved, and then formally collected via a feedback form. The feedback from yourself and the client help us to monitor the Pro Bono OR scheme and make improvements where necessary.

Publicity

To help publicise the work of the Pro Bono OR scheme, we ask you to complete a case study summary, 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.

Thank you

Pro Bono OR volunteers allow third sector organisations to benefit from OR projects that they might otherwise no 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.**