Pro Bono Analytics: Volunteer Guidelines for Project Success

Michael P. Johnson

December 18, 2020

The purpose of Pro Bono Analytics volunteers is to help nonprofit organizations solve operational and strategic problems that involve data and knowledge that can result in improved services to the communities they represent and serve. To ensure successful collaborations, our relationships should be mutually respectful and enable co-learning and capacity-building. This document proposes ways that volunteers can contribute to successful projects through productive relationships with nonprofit clients.

A project is initiated through a conversation between a Pro Bono Analytics committee member and a nonprofit client. The client will conduct interviews with prospective volunteers and select one or more volunteers to execute the project. At the start of the project, there will typically be a kick-off meeting between the client, volunteers and the Pro Bono Analytics committee member. At this meeting, volunteers will share their perspectives on how their skills and interests align with the specific project goals, and the client will set expectations for volunteer roles, timeline and project deliverables. It is important that the volunteers show familiarity with the client organization's mission, goals and operations.

In particular, volunteers should understand the challenges and constraints that nonprofit organizations face in solving problems related to analytics. Nonprofit organizations' missions often include helping vulnerable, underserved and marginalized communities thrive in the midst of many challenges. Their goals include community engagement, empowerment and capacity-building, and individual success in taking advantage of opportunities, overcoming barriers and achieving life goals. If volunteers can learn with nonprofit professionals the challenges they face in serving clients and strengthening communities, the likelihood of successful engagements can increase.

To gain familiarity with client organizations, volunteers should visit the client organization's website, read annual reports and descriptions of current activities. They should have a conversation with the client before the kick-off meeting to ensure that there is a strong match between volunteer and client expectations. It may be useful for volunteers to acquaint themselves with the professional environment of the client organization: community development, education, arts and culture, human services, family support and the like. One source for such information is practitioner-focused magazines that feature stories about problems and solutions. For example, in the community development space, useful resources include:

Next City (https://nextcity.org/)

Nonprofit Quarterly (https://nonprofitquarterly.org/)

Shelterforce (https://shelterforce.org/)

As the project proceeds, volunteers should set aside adequate time to complete project tasks. This may require anywhere from 2 – 5 hours per week for data collection, model-building, solution design and solution implementation. Successful projects usually entail periodic meetings between volunteers and clients. In our experience, volunteers should expect to meet with clients at least once per month.

Volunteers may wish to consult with their employer to determine if they can use any regular work time for the project. It may be useful for volunteers to let their supervisors know of their Pro Bono Analytics work; some employers have policies that encourage community volunteering on company time, even using employer resources for a volunteer engagement.

Volunteers should expect to develop a realistic project timeline with the client. As the Pro Bono Analytics committee wishes to be respectful of volunteers' time, we ask that you be respectful of clients' time. Therefore, we suggest you plan for a time commitment of three to six months for a project. If it appears that the scope of the project will require a longer time commitment, the volunteer may consider working with the client to break a particularly ambitious project into smaller, more feasible projects with clearly-defined deliverables.

Volunteers should consult with the client to determine what technologies and analytic methods will be most appropriate for the project. Some projects may require only widely-available technologies such as Microsoft Office. Other projects may require more-specialized software for modeling, simulation, data visualization and the like. If the project will require specialized software, volunteers should determine if they will need to purchase such software on their own, or if they can use software licenses that the client will provide, or if they may use their employer's software. Similarly, volunteers should determine at the outset if they may use other resources provided by their employer for the project (laptop, Internet access, networks) or whether they will have to secure such resources on their own.

Volunteers should also consult with the client to determine if the project will result in any specific intellectual property: programs, applications, algorithms and the like. The client and the volunteer may need to sign an intellectual property agreement to clarify ownership of products and knowledge arising from the project.

As the project is coming to a close, volunteers should offer to work with the client and the Pro Bono Analytics committee member supervising the project to create a project summary suitable for public distribution, say on the Pro Bono Analytics website or through the client organization's networks, or for public presentation at an INFORMS conference.

If the volunteer has any questions about process, outcomes or ethics related to the project, they should consult first with the Pro Bono Analytics committee member handling the project.