Statistics Without Borders Volunteer Handbook

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Section 1: Introduction

Welcome to Statistics Without Borders (SWB)! SWB provides statistical help to those in need across the world. We advocate objective, impartial, and sound decision making using best statistical practices, and provide analytical services through client projects for public benefit that support goals that are nonreligious, nonpolitical, and non-personal, with a focus on developing countries. Our work is entirely dependent on the skilled contributions of volunteers like you.

We hope you will find your time with SWB to be a fulfilling experience.

Section 2: About This Handbook

This Handbook will help you learn more about how SWB works as well as the rights and responsibilities of SWB volunteers. Please take the time to read through all sections to learn about SWB, our mission, and the expectations of SWB volunteers. If you have any questions about this handbook, please contact SWB Volunteer Management at statisticswithoutborders@gmail.com.

Sections 1 and 2 above cover the Introduction and About this Handbook. Section 3 describes SWB's mission and purpose. Section 4 details the SWB volunteer policies. Section 5 contains a description of SWB's organization. Section 6 discusses how volunteers contribute to SWB projects. Section 7 describes SWB's complaints procedure.

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Section 3: What is SWB?

SWB provides statistical expertise to groups who either do not have access to it or cannot afford it, or both. Some projects involve analyses in crisis situations while others deal with less pressing and more long-term situations. SWB works on projects that are of public benefit and that promote the health and welfare of populations and organizations. While our clients are from all parts of the world; our focus is on helping non-denominational and apolitical organizations without adequate statistical resources. We strive to make a difference in the world by applying our statistical expertise.

SWB Mission and Charter

SWB is a volunteer outreach group of the American Statistical Association (ASA) that provides pro bono services in statistics and data science. SWB aims to improve decision making and knowledge in efforts that promote welfare through the proper application of statistical principles and best practices, where access to such resources is limited.

- SWB advocates objective, impartial, and sound decision making using best statistical practices.
- SWB provides analytical services through client projects for public benefit that support goals that are nonreligious, nonpolitical, and non-personal, with a focus on developing countries.
- SWB assists organizations outside of the for-profit sector, with priorities given to organizations with limited access to statistical resources.
- SWB strengthens its clients and their communities by helping them build their capacities in statistics, data science and analytics, and promotes best practices in these areas.

The SWB charter is available here.

SWB was founded in 2008 and has worked on over 140 projects since then.

SWB arose from the excitement generated by a topic-contributed panel entitled "Statisticians: Speaking Out and Reaching Out on Global Health" at the 2008 Joint Statistical Meetings (JSM) in Denver, Colorado. There was already strong interest in "pro bono statistics" within the ASA, and SWB was established as an effort within the ASA's Special Interest Group (SIG) on Volunteerism. As part of the SIG on Volunteerism, SWB focused on global health.

In 2008, SWB started off with a handful of members. By 2010, membership stood at 130 members, and has grown to over 1000 members in October 2019. SWB's scope also broadened during this time to include animal welfare and other aspects of human development and well-being such as education and the environment as well as the need to build statistical capacity globally. SWB's vision was and continues to be to achieve and implement the best statistical practice in the service of others. After drafting its charter, SWB officially became an Outreach Group of the ASA in 2010.

Section 4: SWB Organizational Policies for Volunteers

By deciding to become a SWB volunteer you are making a commitment to SWB and SWB is making a commitment to you. We appreciate your willingness to volunteer your time and skills in our projects. We will always work to make the volunteer experience as smooth, organized, and rewarding as possible.

What you can expect from SWB:

(1) The opportunity to work as part of a team and contribute towards the welfare of the community that's beyond geographical boundaries.

(2) An opportunity to mentor others or learn and evolve in the process of volunteering on projects with a team.

(3) Communication: Project and Client Consultants (PCM) will be in timely contact about projects and the Operations team (Ops) will contact volunteers about SWB matters such as policy updates and volunteer requests.

(4) Supervision: A Project and Client Consultant will supervise every SWB project, will explain the standards we expect for work done on a project and will support you to achieve that standard. Others involved in this endeavor are the Statistical Consultant (SC) and Delivery Quality Assurance (DQA) volunteer.

(5) Expenses and Insurance: SWB cannot provide any form of payment or remuneration for any volunteer work and does not provide insurance for any volunteer's travel as part of an SWB project.

(6) Problems: we will try to resolve any problems or complaints fairly and in a timely manner arising from volunteering with SWB. In the event of an unresolved problem, we will follow the steps set out in the Complaints Procedure (Section 7).

What SWB expects from you:

(1) Commitment and timeline. You will be working as part of a team, for a client, and therefore volunteering means that others depend on you doing your work. If you are not able to follow through on your commitment, it will directly impact other volunteers and clients. Make sure you understand the time commitment and timeline before you agree to work on a project. Saying no to a project now will not mean you cannot be considered for future projects!

(2) Honor client and project confidentiality. See the SWB [Data Privacy/Security and Client Confidentiality policy](#) for more details.

(3) If you have any questions or concerns, please discuss them with your SWB team lead. Discussing it with clients is a breach of confidentiality.

(4) Skills and tools. Please make sure you have the requisite skill set and meet other project requirements. If a specific skill and/or tool is required for a project, we recommend that you take the time to study it to take care of the initial learning curve outside of a project and wait for the next volunteer call for the same skill/tool. This will help you feel more confident and reduce the chances of having a negative impact on projects or clients.

(5) Some projects may involve travel. This will be stated upfront in the call for volunteers. Make sure you are available to travel if you volunteer for this type of project. If your circumstances change it is your responsibility to notify your Project and Client Consultant as soon as possible.

SWB Volunteer Policies

SWB volunteers must abide by all SWB policies, including the SWB Volunteer Code of Conduct, Client Confidentiality and Data Security and Privacy policies (listed here), and the American Statistical Association (ASA) Code of Ethics (https://www.amstat.org/ASA/Your-Career/Ethical-Guidelines-for-Statistical-Practice.aspx). You should have received copies of all these documents when signing up with SWB. If you do not have copies all the codes and policies, please read them on the website (pdf versions are available by scrolling down on our "About SWB" page: here) or contact SWB Volunteer Management at statisticswithoutborders@gmail.com.

Who can be an SWB volunteer?

Anyone with statistical knowledge! We have over 1,000 volunteers from over 30 countries. SWB members have a diverse background in finance, healthcare and medicine, education, life sciences, policy, and social sciences. Our members' wide range of knowledge helps us compose teams with relevant skills for all of our projects.

Who is on an SWB project team?

All SWB project teams are composed of SWB members. A project team is headed by one or more Project and Client Consultants (PCM). PCMs are SWB members who are the project leaders for each project. SWB members are not limited to only being PCMs – a member may be a PCM for one project and a project volunteer for another project. While the makeup of each project team is dependent on the project requirements, a team will always have a PCM who will run the project.

Project Information

New projects are announced through email. Please ensure that your email address and volunteer information is kept up to date in your SWB volunteer profile, so you do not miss out on projects. Announcements may be tailored to volunteers with specific skill sets based on project needs, so if your profile is not complete and up-to-date you may miss out on projects that are of interest to you.

Project-level commitment varies widely. You may volunteer for as many or as few projects as you would like. In addition, there are other opportunities to contribute outside of client projects, such as helping with tasks internal to SWB; the time commitment can vary from a few hours over a day or two to an ongoing commitment of several hours per week.

The software and programming languages used in SWB projects vary from project to project. There is no software or programming language requirement to be an SWB volunteer. Note that SWB cannot provide access to any software.

Volunteering for a Project

Each project will be announced via email to all potential volunteer candidates. You will be able to decide for yourself whether or not you wish to take on any particular project. When considering a role, please be realistic about your availability and experience. If you have concerns about your ability to meet project deadlines or criteria you can always discuss these with the Project and Client Consultant before formally committing to the project. By volunteering, you are committing not only to SWB, but also to the client and to other volunteers on the project team.

You may be interested in a project which already has several interested volunteer candidates. In these cases, SWB has many different selection criteria, not all of which are related to experience level and technical qualifications of the volunteer. We often give preference to volunteers who have not had much experience working on SWB projects to give more volunteers an opportunity to participate in SWB projects. We also do our best to assign volunteers to a project so that there is a mix of experience levels amongst the volunteers. There may also be specific requirements and needs from the client for a project, such as fluency in a specific language.

Our goal when selecting teams for specific projects is to create the best combination of volunteers for that team.

Please be sure to address all information requests when responding to a call for volunteers. If you do not provide all the relevant information, including up to date contact information, you will not be eligible for team selection.

There is no limit on how many SWB projects a volunteer can work on as long as all commitments can be met. However, we also try to spread the projects around to different volunteers to give others the opportunity to work on projects, so you may not be selected even if you are qualified.

Code of Conduct, Ethics, and Behavior

While you are volunteering for SWB and interacting with clients you are representing SWB and the ASA. We expect all volunteers to follow the SWB Code of Conduct (https://www.statisticswithoutborders.org/policies/) and the ASA Code of Ethics (https://www.amstat.org/ASA/Your-Career/Ethical-Guidelines-for-Statistical-Practice.aspx). This includes timely communication, professional-level reports, and adhering to confidentiality agreements. Behavior which does not meet SWB and ASA professional standards will not be tolerated.

Coordination and Communication

It is important to remember that volunteering is a commitment to the client as well as to your project team and committee members. Please be respectful of others by observing proper and timely communication practices.

The unexpected can happen and circumstances change. If you suddenly become unavailable unexpectedly (temporarily or long-term), it is important to coordinate with others on your team. Please notify your Project and Client Consultant (if you are on a project team) or your committee lead (if you are a committee member) as soon as possible to minimize disruption to your team and project.

Please do not assume that your responsibilities are concluded without confirmation from your Project and Client Consultant or committee lead. Due to the nature of our projects, clients may sometimes not be able to communicate with us and this may occasionally draw out the project closing process. If you are no longer available during such a period, please let the Project and Client Consultant or committee lead know so that proper arrangements can be made.

Prompt communication is key in all phases of volunteering where others depend on you as much as you depend on others. Please do your best to respond to emails and other communication items within 24 hours of receipt if your response is requested or required.

Policy Violations

SWB expects volunteers to adhere to all of our volunteer policies and rules. A policy violation may include but is not limited to: acting in an unprofessional manner, accepting remuneration or payment of any kind, breaking a confidentiality agreement, dishonest or biased reporting and communication with a client, and any other violation of SWB policies and rules. Volunteers should review all volunteer policy documents. Volunteers found to be in violation or repeated violations of SWB policies may face disciplinary action. Please contact SWB Volunteer Management at statisticswithoutborders@gmail.com with any questions or concerns about SWB volunteer policies and rules.

Payment and Remuneration

SWB does not accept payments of any kind from clients. SWB volunteers cannot accept recompense of any kind for any work performed on SWB projects, including payment in kind.

If you have questions about accepting offers from an SWB client, even once your SWB volunteer project is finished, please contact the Project and Client Consultant of the project or SWB Volunteer Management at statisticswithoutborders@gmail.com if your Project and Client Consultant is unavailable.

Publication, Affiliation Statement, and Logo Usage

We encourage publication of work performed as part of an SWB project as it helps to demonstrate our capabilities and provides an opportunity for volunteers to add to their project portfolio. Journal articles and white papers have been published by SWB volunteers, including publications in collaboration with clients. If you are interested in publishing your work, please contact the Project and Client Consultant for that project. Permission from the client is generally required to publish as they generally own the project data**. Please ensure that you have obtained client permission before presenting or publishing material that deals with an SWB project.**

To list a specific project on your CV, please contact your project's Project and Client Manager to obtain permission from the client to make sure that there are no disclosure issues. The general suggested format is to list the project with the client name, dates, a brief description of the project and your role, the skills/methodologies used, and an assessment of how the project results aided the client.

Volunteers may identify SWB as their affiliation in non-SWB projects or publications, provided that the following statement is included: '*This paper was prepared or accomplished by the author in his/her personal capacity. The opinions expressed in this article are the author's own and do not reflect the view of the Statistics without Borders*.'

SWB gives permission for its logo to be used in material to identify it as a volunteer or partner organization with which previous work has been performed, in material for informational purposes, or in marketing material presented by SWB volunteers such as talks, presentations, resumes, etc.

SWB requests that its logo should not be used in any context other than for informational or comparative purposes without seeking further permission. Please contact the SWB Marketing Communications director at statisticswithoutborders@gmail.com for more information on logo usage.

Membership Information

SWB collects certain information from our volunteers during the sign-up process. This information is necessary for determining volunteer team compositions. All membership information is kept strictly confidential within SWB and never shared with anyone outside the organization.

Please keep your profile up to date. Volunteers with out of date information are unlikely to be selected for projects! You can update your profile through our volunteer webpage (https://www.statisticswithoutborders.org/). Sign in with your username and password and update any information that is out of date or incorrect in your member profile. Your email address can be updated through this website.

Ending Your SWB Membership

SWB volunteers are not removed from our database unless specifically requested to be removed. If you would like to officially end your SWB membership, please contact SWB Volunteer Management at statisticswithoutborders@gmail.com.

Section 5: SWB Structure

SWB is organized into three main branches: Engagement, Marketing Communications (MarComm), and Operations. Engagement manages client engagements (projects and new client acquisition), MarComm runs all the internal and external communications (including the SWB website and social media), and Operations is responsible for back-office support to ensure that SWB runs smoothly.
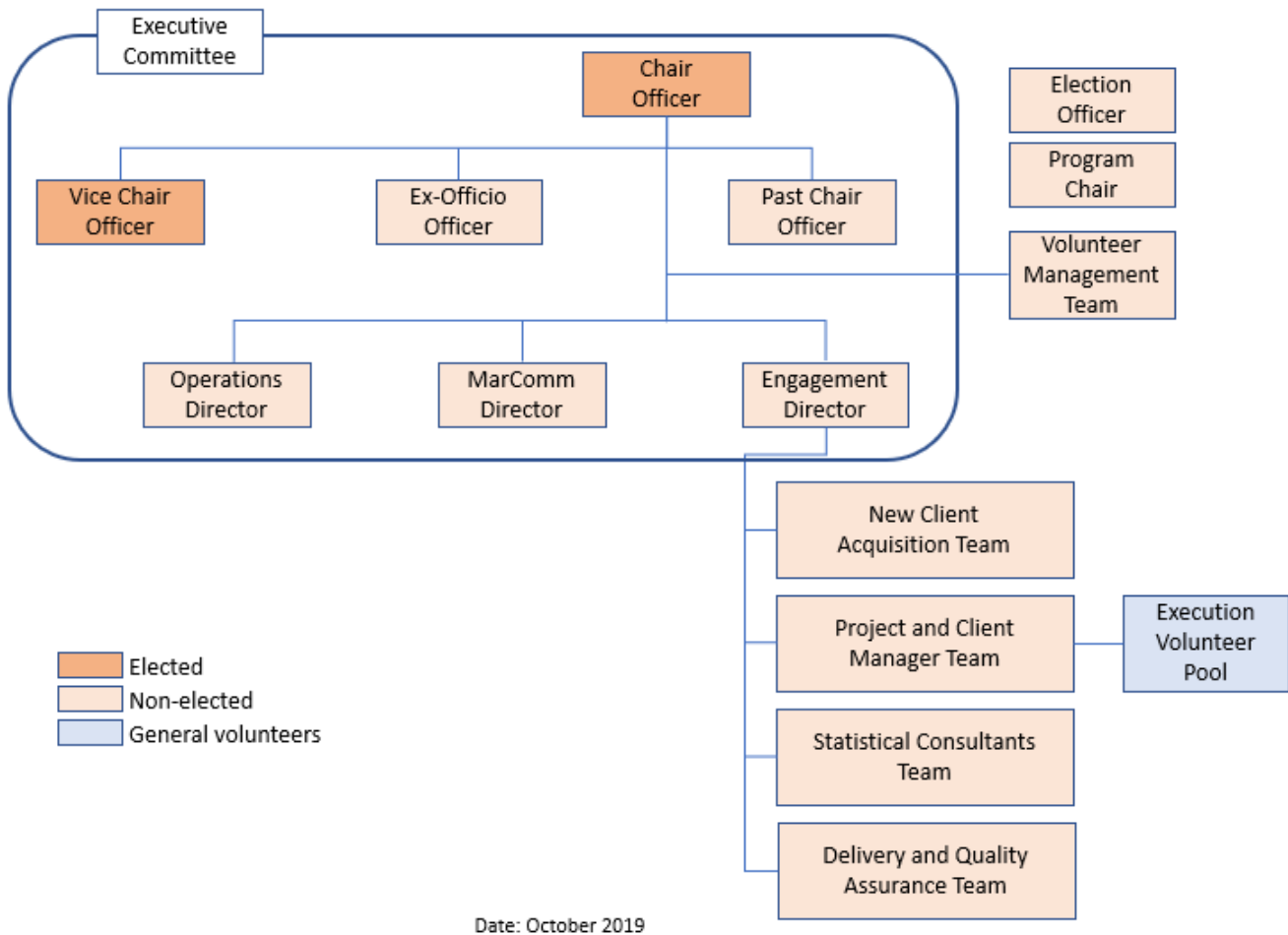

Figure 1: the SWB organizational structure

Section 6: How are SWB projects organized?

An SWB project consists of four phases:

1. **Discovery**: an opportunity for a project is discovered with a new or existing client.
2. **Inception**: the project participants are identified, and the project is defined.
3. **Execution**: the project is carried out according to the project definition, along with DQA activities as applicable.
4. **Close**: the project is brought to an official close through internal debriefing and client satisfaction survey.

The usual SWB project team structure consists of project team members (volunteers), Project and Client Consultant, Statistical Consultant and Delivery Quality Assurance.
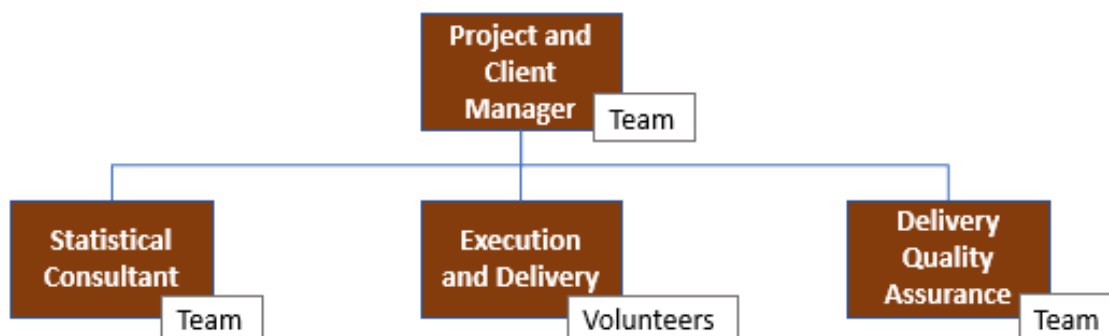
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Figure 2: The general SWB project team structure

The Project and Client Consultant Committee members are responsible for:

- Maintaining the overall relationship with assigned existing and new clients
- Maintaining regular communications with the client, in and out of projects
- Ensuring clients and projects meet SWB Engagement policies, and escalating as appropriate
- Identifying and designing projects
- Selecting project teams
- Leading project teams, while not necessarily performing project tasks or analyses
- Serving as the point of contact and face of the project team to clients
- Ensuring successful completion of projects

The Statistical Consultant Committee members are responsible for:

- Providing subject-matter expertise based on specific project needs throughout projects
- Peer-reviewing project designs to ensure methodology and other project details are appropriate
- Executing parts of projects as needed

- Supporting new client acquisition efforts as needed

The Delivery and Quality Assurance Committee members are responsible for:

- Ensuring that projects are delivered in accordance with the agreed-upon designs, and ensuring that all statistical and analytic decisions have been justified without suggesting large-scale changes to projects
- Performing an arm's length audit of projects by checking what was done during projects against project intent without being a direct member of project teams

Execution and delivery of a project are performed by volunteers who make up a project team. The volunteers execute the statistical and analytic details of a project in accordance with the agreed-upon project design and scope.

Section 7: Complaints Procedure

Our goal is to make working on an SWB project a positive experience for everyone involved. However, it may be the case that an issue arises that becomes a problem for you. We have an established procedure in place to ensure that problems are fairly resolved. The procedure set out below explains how we would like you to deal with any problems that arise during the course of your work with SWB.

SWB Complaints Procedure

1. If you have a complaint relating to another member, you should talk to them first to try to sort out the problem informally.
2. If this not appropriate or possible, then you should discuss your concerns with either the project's Project and Client Consultant or with SWB Volunteer Management at statisticswithoutborders@gmail.com if the concern does not have to do with working on a project. If appropriate, your complaint can be made in writing.
3. The Project and Client Consultant or Volunteer Manager dealing with the complaint will investigate the problem, discuss the issue with all parties involved, and seek a resolution. If all parties agree to the proposed resolution, the matter will be considered closed.

   Where possible and appropriate, all parties involved in the dispute will receive written confirmation of the outcome within five (5) working days of the agreement.

4. If one or all of the parties involved cannot agree with the proposed resolution or if the Project and Client Consultant or Volunteer Manager dealing with the complaint is unable to handle the matter, then the complaint will be referred to the Engagement Director. Wherever possible, any referral will take place within five (5) working days of the original complaint or the proposals in the proposed resolution being put forward.
5. The decision of the Engagement Director will be final.

Every step of the process will be recorded and kept confidential to the parties involved.